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Social policy and the production of age norms for later life: The case of ageing policies in Chile

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Abstract

Social policies have been recognised as guiding narratives that promote and legitimise certain models of ageing. This finding, however, has been achieved by studies focussed on the reality of developed countries. Furthermore, little is known about how social policies promote age norms for later life in the context of developing countries. This research addresses this knowledge gap and focusses on the Chilean case, paying particular attention to what age norms are promoted by the two national ageing policies implemented by this country in 1996 and 2012. A critical discourse analysis method was used to identify the ways in which each policy conceptualises ageing as a social problem and the prescriptive behaviours and expectations that each policy promotes regarding old age. Results indicate that a rhetorical evolution can be observed in the analysed period, as each policy promotes different later life depictions and social norms.

Keywords: ageing, age norms, Chile social policy.

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Introduction

Since 1950, an increased life expectancy in Chile has produced a rapidly ageing demographic within Chilean society (Gobierno de Chile 2012). Late life[1] has become the longest phase of the life course in Chile and is also the phase in which most of the Chilean population is living (Huenchuan et al. 2007). The accelerated ageing process took place over a period of 50 years, which is very short compared to the period of time in which these transformations took place in developed countries (Meza 2003). Considering these data, ageing is currently a relevant topic in the Chilean public debate; however, most of the discussion has been undertaken around the pressure it creates on the pensions system. Chile is recognised as a liberal welfare regime, and the social care and social security policies are strongly constructed over a principle of individual responsibility. This means the quality of life of the Chilean population and, specifically, of the older adults, mainly depends on their socioeconomic background. As a consequence of this, the discussion about ageing has been strongly framed from a reductionist perspective that reduces population ageing to its economic consequences.

This means cultural changes and social expectations affecting the older adults' life that come with population ageing remain unexplored for the Chilean context. Despite this, the Chilean government has designed and implemented two ageing policies over a period of 16 years (1996–2012), which have an important role in defining what ageing well means in Chile. From a public policy perspective, these policies represent normative social discourses about ageing and are interesting resources to be analysed.

Social discourses regarding later life contribute to the production of age norms, that is "expectations regarding age-appropriate behaviours (…) that dictate what roles, timing of life events and social interactions are expected from individuals according to their age" (Chung & Jung 2013: 1336). In the case of old age, age norms fulfil the role of legitimising particular ways in which individuals should age, promoting certain social roles, activities and social environments through which older adults are expected to construct a mature identity and remain integrated into society.

[1] From the age of 60 years onwards a person is considered an older adult in Chile.

Older adults, however, have historically experienced the challenge of ageing in line with shifting social expectations. The public discourse about ageing has experienced a significant change of direction in recent decades (Chapman 2005; Moulaert & Biggs 2013). This discourse has evolved from one that called for excluding older adults from productive activities and encouraging them to retire, to one in which older adults are asked to remain active and autonomous, and contribute to society for as long as possible (Fealy et al. 2012).

The active role of international organisations in producing this shift in public discourses regarding old age reflects that social policy is a fertile ground for the production of age norms. Most of the research in the field, however, has been focussed on the internalisation of certain age norms by older adults rather than on their production and promotion by public discourses.

There is plenty of research focussed on what behaviours, activities, dispositions and social roles are perceived by older adults as contributing to "successful ageing" (Chung & Yung 2013; Fernández-Ballesteros et al. 2010; Sousa et al. 2004; Tate et al. 2003). In contrast, only a few studies have explored the role of social policies in producing age norms for later life (Biggs 2001; Biggs & Powell 2001; Moulaert & Biggs 2013; Powell 2005; Raymond & Grenier 2013). Nevertheless, all of these studies have the remarkable limitation that they are mostly focussed on the reality of developed countries.

Considering this gap, this paper focusses on the age norms promoted by social policies in Chile between 1996 and 2012. This paper understands social policies as normative narratives that define what social expectations older Chilean adults have to cope with regarding the behaviours they are expected to show, the social roles they are expected to fulfil and the spaces in which they are expected to be.

Literature review

Age norms

Age norms have been conventionally defined as age-related social expectations regarding the behaviour of individuals (Chung & Yung 2013; Neugarten et al. 1965; Settersen 2003). These norms shape expectations about the roles, activities and transitions that individuals should perform across their lives (Chung & Yung 2013). Settersen (2003) operationalises the concept and suggests that age norms are (a) prescriptive and proscriptive rules; (b) based on social consensus; (c) and enforced by social sanctions. These sanctions can not only assume formal expressions in the form of political, legal or economic regulations but can also appear through informal ways such as ostracism, ridicule or gossip. Thereby, age norms encourage and restrict certain behaviours, and in cases where individuals choose courses of action that do not fit with these expectations, they may lose important formal or informal supports and be sanctioned by society.

The idea of age norms has been widely used in the life course approach, which understands life as a sequence of age-related transitions and status passages (Heinz, Huinink & Weymann 2009; Mortimer & Shanahan 2003). As individuals become aware of these transitions and the challenges that come with them, they start to develop certain age-related expectations about how and when people should move through these passages. In that way, age norms contribute to the construction and reinforcement of a normative life course (Chung & Yung 2013; Elder 1975; Settersen 2003).

Considering that this research is focussed on old age, age norms will be understood as normative expectations that define what the appropriate behaviours for older adults are. It must be recognised that the aforementioned components of age norms, such as the social consensus underpinning them or the attached social sanctions through which they are reinforced, exceed the scope of this article. Considering this, the study will be mainly focussed on identifying the *prescriptions for* or *proscriptions against* certain behaviours, which are embedded in Chilean ageing policies.

Empirical research: age norms in later life

Assuming that age norms are internalised and put into practice by individuals (Settersen 2003), exploring expectations that individuals have regarding certain phases of the life course can give us a more precise understanding of which age norms are constraining each phase of life. In this sense, identifying those factors that older adults declare as contributing to "good ageing" reflects the current social expectations about later life. There is plenty of research in this field, and it is characterised by a lack of consensus regarding what concept should be used to refer to a normatively constructed "good ageing process" (Nosraty et al. 2015). Concepts such as "positive ageing," "successful ageing," "healthy ageing," "ageing well," among others, are normally found in these studies (Fernández-Ballesteros et al. 2010; Nosraty et al. 2015).

Despite the confusion that the use of diverse terms might produce, all of these studies aim to identify those factors that older adults associate with a "good ageing process." Although some studies suggest that the perception of age norms can vary among different age groups (Chung & Jung 2013), some evidence suggest that there is minimum variability in the expectations about late life across cultures and age groups (Fernández-Ballesteros et al. 2010; Nosraty et al. 2015). Among revised studies, four main factors are normally stressed as contributors to "good ageing." These factors are "good health," "independence," "social interaction" and "subjective well-being."

In terms of health, "absence of chronic disease" (Hsu 2007; Phelan et al. 2004; Rozanova et al. 2014); "healthy habits" (Rozanova et al. 2014; Tate et al. 2003); "adequate cognitive and physical capacity" (Nosraty et al. 2015; Von Faber et al. 2001); and "adopting healthy life styles" (Sousa et al. 2004) were mentioned as the key components to the pursuit of "good ageing." Regarding independence, "being independent" (Hsu 2007); "being able to take care of myself" (Fernández-Ballesteros et al. 2010; Phelan et al. 2004) and "financial independence and decision-making" (Nosraty et al. 2015; Tam 2013) were recognised as important factors. Social interaction was mainly composed of "adequate family relationships" (Fernández-Ballesteros et al. 2010; Hilton et al. 2012; Tate et al. 2003) and "social roles and activity" (Bowling 2007; Sousa et al. 2004). Finally, subjective well-being is mainly composed of indicators such as "accepting change" (Knight & Ricciardelli 2003; Ryff 1989; Von Faber et al. 2001) and "having goals, interest and projects" (Fernández-Ballesteros et al. 2010; Tate et al. 2003).

The production of age norms for later life in the academic discourse

Some authors stressed that gerontological theory has been a fertile ground for the production of age norms. Chapman (2005) uses the concept of "ageing well" to address how different gerontological theories produced prescriptions for how individuals should age and others, such as Fernández-Ballesteros et al. (2010) and Nosraty et al. (2015), state that those factors that older adults identify as contributing to "good ageing" tend to coincide with those suggested by gerontological theories. Therefore, it is possible to state that gerontological academic discourse creates a "professional gaze," which helps to "shape legitimate forms that ageing might take" (Estes et al. 2003: 64).

For seminal gerontological approaches such as the activity (Cavan et al. 1949; Havighurst & Albrecht 1953) and disengagement theories (Cumming & Henry 1961), adult ageing brings with it the challenge of finding a new role after retirement. This argument is reinforced by a narrative claiming that ageing comes with a process of physical, cognitive and social decay. For the disengagement theory, older adults become less equipped to fulfil productive roles as a consequence of this decay, whilst for activity theory they experience an increasing sense of maladjustment to society as they are required to retire from productive roles.

From this negative diagnosis, these theories state that a re-adaptation between individual and society is required in later life. The disengagement theory suggests a mutual withdrawal between older adults and society, and consequently the former are expected to find a new role in the private sphere, restricting their social interaction to close family and friends. From a different stance, activity theory states that older adults should maintain high levels of activity, conserving and adapting non-productive activities from midlife in their old age. It can be observed that both theories clearly define expected courses of action for older adults, and also particular social spaces in which a new identity should be adopted during later life.

A second group of approaches is composed by the continuity theory (Atchley 1989, 1999; Costa et al. 1980) and the selective optimisation with compensation model (SOC) (Baltes & Baltes 1993), among others. These approaches focus on the subjective challenges that ageing raises for older adults. In opposition to the seminal theories, these approaches conceptualise ageing as a phase of the life course that entails gains and losses. In this scenario, individuals are encouraged to optimise these gains and losses, keeping a positive self-concept during old age. For the continuity theory, this can be reached if older adults are able to develop a subjective perception in which changes experienced during old age are coherent with significant past experiences, preferences, social relations and environments. Older adults are expected to retain certain activities and social relations that were significant for them in the past. These activities work as a means to construct a perceived inner structure which brings sense to the present.

In the SOC model, older adults are expected to put personal strategies into practice to maximise the gains and minimise the losses that come with ageing. This model states that these strategies should articulate three processes. The first process is selection, which entails prioritisation of particular activities and relations above others. The second process is optimisation; here older adults invest time and energy to maximise the benefits that come from selected objects or social relations. The third process is compensation, through which individuals adjust their capacities to their context to obtain the maximum benefits of particular activities and relationships. As older adults are successful in articulating these processes, they harmonise their personal resources with the context.

Finally, a third group of approaches, such as successful ageing, active ageing and productive ageing (Butler et al. 1990; Estes et al. 2003; Morrow-Howell et al. 2001; World Health Organization 2002), assume a pragmatic perspective in which ageing, from a structural perspective, is conceptualised as a waste of human resources. In these views, ageing challenges individuals to remain "useful for society." This implies that older adults are expected to be autonomous and active, and also that work or work-related activities are promoted as ideal spaces to construct an identity and to maintain them integrated in society.

Social policies and the production of age norms in later life

Considering that this research aims to understand how social policies in Chile construct age norms for later life, it is important to understand how this has been studied in different contexts. Surprisingly, only five key studies specifically focussed on this area were found (Biggs 2001; Biggs & Powell 2001; Moulaert & Biggs 2013; Powell 2005; Raymond & Grenier 2013). The first group are those studies conducted by Biggs and Powell (2001) and Biggs (2001), which have two aspects in common. Both are focussed on social policies implemented in the United Kingdom, and point out that changes in policy models are accompanied by changes in narratives about adult ageing.

Biggs and Powell (2001) assume an historical perspective to analyse how two different narratives regarding adult ageing were displayed in the United Kingdom during the post-war period and during the marketisation of social services. According to these authors, during the post-war period, welfare policies depicted older adults as inactive and dependent. In this narrative, the dependence of public care in areas such as health and pensions provided a relatively firm ground to build a mature identity. In contrast, during the marketisation of social services, older adults were conceptualised as active consumers, being encouraged to make choices among different life styles and social service providers. This transition reflects how dependency first, and individual responsibility later, were defined as the expected behaviour for older adults in two different sociopolitical contexts.

From a similar perspective, Biggs (2001) uses a narrative approach to analyse the "positive ageing" policies implemented in the United Kingdom during the late 1990s. His findings concluded that "positive ageing" policies entailed a turn of direction in the United Kingdom from perceiving older adults as consumers and dependents, to recognising them as active participants in society. In doing so, certain expected behaviours in later life were promoted, depicting older adults as "autonomous older people, actively involved in their communities, achieving joy through the return of work and voluntary activities" (Biggs 2001: 13). The author suggests, however, that the idea of "civic participation" promoted by this narrative was reduced to a claim for work and near-work situations as the only legitimate space to construct an identity in old age.

In contrast with the aforementioned studies, Moulaert and Biggs (2013) focussed on the international policy level, aiming to trace the origin of the concept of "active ageing." The authors suggest that "active ageing" policies were promoted internationally between 1994 and 2006, to produce normative prescriptions about what it is to "age-well." In line with Biggs (2001), Moulaert and Biggs (2013) suggest that, under the promise that multiple contributions to society could be made during later life, active ageing policies tend to encourage a longer working life. The authors go further to suggest that active ageing policies act as a "conduct of conduct" (Foucault 1994), making individuals aware that they are responsible for dealing with the negative and positive consequences that come with a longer life such as poverty, unemployment or illness. Therefore, active ageing policies have produced a new narrative of later life, in which autonomy, self-determination, empowerment and productive contribution are raised as expected behaviours.

Finally, studies conducted by Powell (2005) and Raymond and Grenier (2013) analyse how different models for ageing are promoted in certain policy domains. Powell (2005) focussed on family and ageing policies implemented in the United Kingdom during the late 1990s, when the idea of "grandparenting" was strongly promoted. Through these initiatives, older adults were encouraged to become mentors and offer their experience to their family or to other families by acting as grandparents. The author suggests that these policies create a rhetoric in which older adults are encouraged to be active citizens and construct an ageing identity based on the role of social contributors.

In a similar approach, Raymond and Grenier (2013) analysed three policies of senior participation implemented in Canada between 2005 and 2011, paying special attention to the extent that these policies promote norms and expectations of older adult participation. In their findings, the authors state that these policies have given a new meaning to participation, re-interpreting it as social contribution and individual responsibility. They point out that this new definition has consequences for older adults, as they are now expected to be actively involved in local decision-making.

All of these studies reflect that social policies have the capacity to promote certain social discourses, which constrain the life of older adults and define social expectations regarding their behaviour and the spaces in which they are expected to construct and perform an identity. It also can be noted that these studies suggest that social policies have created a narrative in which activity, autonomy and contribution in later life are increasingly promoted.

Methods and design

Research question

This research aims to answer the question: *Which age norms have been promoted by the Chilean ageing policies between 1996 and 2012?* By considering that age norms are social expectations regarding later life, it is possible to assume that they are produced as social discourses in the domain of language. In line with this idea, social policies were considered as narratives, and a qualitative approach was selected as the most suitable answer to the research question.

Sample

By following a theoretical sample strategy (Creswell 2012), two key documents were selected as the study sample. The first document is the "National Policy for Older Adults" (Gobierno de Chile 1996) which is referenced in this study as "Policy A." This was the first ageing policy implemented in Chile and was the result of a technical commission established during a left-wing government led by the political coalition called "Concertación." The second selected document is the "National Policy for Positive Ageing 2012–2025" (Gobierno de Chile 2012) which is referenced in this study as "Policy B." It was designed during the right-wing government in 2012, and it is the current national ageing policy in Chile. These policies were the only ageing policies that have been implemented by 2016.

Data analysis strategy

These policies were analysed through a critical discourse analysis. This technique is characterised by providing an analytical tool that takes ideologies, social relations and political context into account (Fairclough 1995; Van Dijk 2011). With this technique, language is considered a social practice and we focus on how power is enacted and reproduced by the text (Van Dijk 2011). This means that attention is put not only on what these policies state but also on the underlying assumptions underpinning these statements.

Coding

Taking into consideration those aspects stressed in the literature review, the coding process aimed to cover two main dimensions of analysis. The first is the way in which each policy conceptualises ageing as a

Table 1. List of codes

Ageing as a social problem	Age norms
- Poverty	- Autonomy
- Increased dependency	- Individual responsibility
- Positive aspects of ageing	- Association
- Ageing as a social challenge	- Activity
- Intergenerational solidarity	- Contribution to society
- Debt with the past	- Social interaction
- Respect and dignity	- Civic participation
- Prevention	- Family
- Cultural change is required	- Subjective well-being
- Social adjustment is required	- Knowledge
- Idealisation of older adults	- Good health
- Making ageing visible	- Social integration
- Abuse	- Functional capacity
- Social exclusion	- Economic security
	- Leisure activities
	- Self-care

social problem. The second focusses on which age norms are promoted by each policy. Therefore, both policies were codified twice in order to identify how, through the language used, they construct particular understandings of ageing as a problematic phase of life, and how they legitimise certain modes in which individuals should manage the ageing process. A total of 81 pages were analysed and 30 codes emerged from this analysis (see Table 1), and the information contained by them was analysed in a second stage to identify the dominant discourses underlying each policy. The data were analysed using the software NVivo version 10.

Results

It has to be considered that the analysed policies were delivered in different moments of the Chilean history. Policy A was delivered in 1996 during the government of Eduardo Frei Ruiz-Tagle (1994–2000), which was the second democratic government after the era of dictatorship (between 1973 and 1990). Despite President Frei being a leader of the left-wing coalition called "Concertación," he was a militant of the Christian Democratic Party, which represents a conservative view close to the Catholic Church. On the other hand, Policy B delivered in 2012 was designed under the right-wing government of Sebastian Piñera (2010–2014) and accordingly was produced under a liberal ideology that considers individual responsibility as a foundational principle of the Chilean welfare regime. These different viewpoints entail different assumptions that can be noted in the narratives constructed in both policies.

How do Chilean ageing policies conceptualise ageing as a social problem?

Policy A (1996): The need for a cultural change

There is a dominant rhetoric in Policy A, which states that population ageing is not a problem in itself, but the problem is how Chilean society perceives later life. As can be observed in the following excerpt, the social imaginary regarding later life is dominated by negative attributes such as decline and passivity. From this recognition, a narrative addressing the necessity of changing this perception is constructed throughout the whole document.

"[Chilean society perceives later life] as a phase of inactivity, illness, decrepitude and, in general, passivity." (p. 5)

Policy A constructs two main discourses to support the idea that a cultural change regarding the way later life is perceived is required. The first introduces the idea of "intergenerational debt," by arguing that the political, social, economic and cultural situation in Chile in 1996 was a product of the work of older generations. Thereby, ideas such as intergenerational solidarity and retribution are raised by this discourse. Chilean society should recognise the contribution that past generations have made to the country.

"What Chilean society is currently, in regard to social, economic, political and cultural development is the heritage that older adults have given to the next generations. The younger generations have a debt with older adults." (p. 2)

The second discourse aims to contest the idea of older adults being social and economic burdens, and depicts them as a type of living heritage that should be appreciated by the Chilean society. This is a discourse that overemphasises certain positive attributes conventionally associated with old age, suggesting that they are intrinsic features of the mature subject. Thereby, this discourse tends to promote an excessive idealisation of older adults, depicting them as transcendent subjects.

"Chilean society should learn to perceive and value the moral heritage, experience and spiritual and cultural richness that older adults carry." (p. 5)

Altogether, the discourse of intergenerational debt and that of idealisation support the necessity for changing the social perception of older adults within Chilean society. This need is addressed in the general objective of this policy, which is stated as follows:

"[it is necessary] to achieve a cultural change in the population's perception of older adults and the treatment given to them, which entails a different perception of the ageing process itself, and also implies providing better levels of quality of life for older adults." (p. 5)

As it can be noted, the underlying assumption of this general objective is that a positive perception of older adults by the Chilean society will have a direct impact on their quality of life. This rationale produces an oversimplification of the problem of ageing, reducing it to issues such as discrimination and stigmatisation. By this rationale the problem is not the ageing population, but ageism. In addition, it can be noted that this rationale depicts older adults as passive subjects, by suggesting that society should integrate older adults, rather than older adults themselves assuming an active position to remain engaged in society. Older adults become secondary observers in solving the social and cultural challenges that ageing brings to the Chilean society. This is contradictory as passivity was initially identified in this policy as a factor constituting the negative perception of old age that, in theory, this policy declares to contest.

Policy A suggests that to "make ageing visible" is the first step to encourage a positive perception of older adults. During the late 1990s, there was no public institution exclusively focussed on ageing and aged care in Chile. The policy points out the necessity of creating an institution centred on ageing affairs focussed on two major tasks. First, to create social awareness about the importance of population ageing. Second, to promote a positive image of older adults.

"It is a requirement to create a public department to coordinate, guide and monitor public policies focused on ageing (...) This department should also encourage awareness among social organizations about the importance of ageing (…) It will be impossible to change the negative social perception of older adults without the support of a public department leading this task." (p. 8)

The narrative goes beyond the problem of the lack of public institutions to deal with an aged population and produces a rhetoric that stresses the fact that population ageing is not exclusively a challenge to the Chilean State. As can be observed in the next excerpt, this policy produces a rhetoric aimed at engaging the Chilean society as a whole with the issue of adult ageing. Later life is not depicted as an individual problem nor as a political problem, but as an issue concerning community.

"It is necessary to stress that the problems experienced by older adults cannot be solved only by the action of the State. Instead, to a large extent, the problems that come with ageing should be solved by the community itself". (p. 5)

Overall, this policy is actually weak in proposing concrete measures to deal with an aged population. Only a few measures are proposed in this document, such as increased services and human resources to respond to the needs of an aged population and creating a public department focussed on these issues. This means that, rather than being an actual plan of action, this policy pretends to be a guiding narrative that states certain values and principles as those which have to lead a change of perception regarding older adults in the 1990s.

Policy B (2012): Ageing as phase of decline and vulnerability

Policy A idealises older adults, conceiving them as "living heritage" and disregards the concrete problems they experience in later life. In contrast, Policy B recognises that ageing is a phase of the life course that entails gains and losses. Starting from this recognition, this policy addresses the practical challenges that emerge in later life, and states that ageing becomes a social problem because the Chilean society should be able to provide a good quality of life to an increasing number of older adults.

"Being an older adult is an ambivalent experience, which is characterised by positive factors such as expectations of remaining active and leaving behind duties and responsibilities, but also by negative aspects such as health problems and the fear of becoming dependent on others."(p. 8).

Policy B mainly focusses on identifying the negative aspects of later life to then propose certain ways to cope with these aspects. In fact, no positive aspects of ageing are mentioned across the document. It produces a narrative that conceptualises older adults as vulnerable subjects, by using a medical discourse which depicts later life as stage characterised by the prevalence of health problems.

"older adults in Chile are experiencing health problems such as hypertension and diabetes (…) Three in ten older adults suffer arterial hypertension, one in ten suffers diabetes and almost all of them are sedentary." (p. 16).

This idea is then used by this policy to address the need to implement strategies to increase protective factors among older Chilean adults. This discourse goes further and states what would be the most undesirable condition for older adults; that is, losing their autonomy and becoming dependent of others. Therefore, risk factors and health problems are stressed as central components of later life in this narrative. Ageing is matched with physiological decline, and the older adult is depicted as a frail body.

"The combination of chronic illness with risk factors (…) will bring an increased risk that older adults experience decline in their functional health, requiring support of others to fulfil basic tasks such as walking, sitting or going to bed." (p. 16)

There is a second discourse contributing to the conceptualisation of older adults as vulnerable subjects, but this is based on social issues. This discourse is drawn upon the idea of social exclusion, and stresses that as the individual ages, he/she becomes more likely to be excluded by society in multiple domains. This is reflected by the following excerpts, in which social exclusion assumes different expressions such as abuse, economic exclusion and isolation.

"The social integration of older adults is inadequate (…) There are studies suggesting that one out of three older adults are experiencing some type of abuse." (p. 20)

"There are currently five economically active people for each older adult, but in 2025 there will be only three economically active contributors for each older adult. Consequently, older adults will have less economic support from other people, and also they will have to deal with a longer period of retirement due to the increase in life expectancy." (p. 21)

"Later life is a phase of life in which people experience changes in their identity (…) This raises the risk of becoming isolated." (p. 46)

Similar excerpts can be observed across the document, reflecting that vulnerability in later life is also conceptualised as being composed of social factors. Therefore, the older adult is not only depicted as a vulnerable body in this policy but also as an individual facing the risk of losing his/her rights, dignity and his/her role as a social actor.

Which age norms for later life have been promoted by Chilean ageing policies?

Policy A (1996): finding new spaces of social recognition

The age norms promoted by this policy are consistent with the way in which ageing is conceptualised as a social problem, that is, a cultural problem involving a negative perception of older adults that leads to their social exclusion. As this policy focusses on the cultural adaptation required for an ageing society, it produces a narrative in which age groups that are not older adults are targeted.

"The whole population, through the family, the educational system and social media, should receive adequate education regarding their own ageing process, and also information about adequate ways to establish social relations with older adults." (p. 7)

According to this policy, later life is essentially the moment when older adults are expected to find new spaces of positive social recognition in non-productive roles. In this sense, it legitimises certain social spaces as the most suitable ones in which to find this recognition and construct a mature identity. Family is promoted as the "natural" place to undertake this task. In this narrative, family is expected to provide older adults with the positive recognition which they do not receive in the public sphere, and it is accordingly conceived as the main channel of social integration in later life.

"Family is the social space in which the human being finds affection, positive recognition and love. There, one satisfies his/her basic needs required for his/her development (…) Family assumes a greater importance for older adults. The normal situation is one in which older adults find in their adult children, brothers and sisters and grandchildren, a strong material, spiritual and emotional support." (p.7)

Family is also depicted as the most suitable space to encourage the principle of intergenerational solidarity, which is a foundation of this policy. The policy assumes that kinship relationships provide a fertile ground to encourage this solidarity. This view is drawn upon a normative assumption that considers family as the elemental unity of society, which has a main role in producing social change.

"It is convenient to point out that solidarity is based on mutual love and recognition, thereby, the natural space where this solidarity is produced is family. Here, this solidarity is materialized through relationships between parents, children and grandparents." (p. 3)

"If intergenerational solidarity is strengthened within family, then it will be possible to promote a better treatment of the aged in the public domain." (p. 3)

Participation in older adult organisations is recommended as other suitable spaces for older adults; however, it is recognised as a second-level objective in this policy. This aims to foster the agency of older adults, by recognising them as autonomous and able to contribute to society. It is possible, however, to identify an internal contradiction regarding the social expectations that this policy constructs regarding later life. On the one hand, older adults are encouraged to find recognition in their private life, particularly in their family, but on the other hand they are encouraged to assume a protagonist's role in the public sphere.

"Participating in older adult organizations, older adults find spaces for their self-development and satisfaction (…) By participating in these organizations they become legitimate interlocutors to inform local and national authorities of their problems and also to offer their contribution to the community (…) Participation transforms older adults into protagonists and allow them to fulfil public roles which are recognized by Chilean society. Thus, participation allows older adults to remain integrated in society." (p. 8)

In addition, this policy encourages the use of time in "meaningful ways" during later life. Here, "meaningful" means to focus on activities that contribute to maintaining a good health condition. This policy promotes the idea that late life is a phase of "preservation" rather than one in which individuals pursue new goals. In doing so, the future is not considered a meaningful dimension in older adults' lives, and the present becomes the most important principle in organising life during old age. Older adults are neither expected to assume active roles in domains such as politics or work, nor are they expected to be active contributors within their families, for instance, through supporting childcare tasks. This idea is supported by a depiction of later life as phase of contemplation and leisure:

"It is necessary to encourage the use of free-time in activities that contribute to personal development, and physical and psychological health of older adults." (p. 7).

"This period [later life] is of special importance, recreation activities such as tourism, artistic expression and physical care (…) Those activities are important for maintaining good health and they are also a right of everyone." (p. 7)

Policy B (2012): vulnerable subjects require surveillance

Policy B conceptualises later life as a phase dominated by risks and vulnerability, and therefore it aims to promote a model of ageing that prescribes certain courses of actions to deal with these issues. This policy produces a discourse in which autonomy, understood as the capacity of "solving by oneself the obstacles that the interaction with the environment raises" (p. 16), is constructed as the legitimate way to cope with challenges that ageing brings.

"Good ageing is strongly associated with autonomy, that is, the capacity for older adults to extend, optimise and use favourable health conditions (…) to achieve a good quality of life during later life." (p. 8)

By this rationale, "ageing well" is reduced to having an adequate physical capacity to interact with the social environment, and avoiding the undesirable condition of becoming dependent on others. It can be observed, however, that this policy promotes a limited conceptualisation of autonomy, which reduces it to a physiological condition, ignoring social and political dimensions of autonomy such as decision-making capacity and self-determination.

Once physiological autonomy is established as the normative goal in later life, this policy advocates for certain mechanisms to achieve this goal. Overall, it was found that these mechanisms are organised around a general principle. This principle states that later life is a phase of the life course requiring *surveillance*, that is, a phase of life that should be monitored to prevent older adults from losing their physical autonomy. Departing from this general principle, the policy produces two narratives. The first encourages older adults to undertake self-surveillance over their bodies. The second states that an external observer is required to monitor the older adult's physiological condition.

The narrative of self-surveillance promotes an ethic of self-care, in which older adults are expected to assume an active role in maintaining their physical autonomy for as long as possible by cultivating certain behaviours. This discourse aims to create awareness of the importance of healthy habits to keep physical autonomy and aims to place them as organising principles of behaviour in later life.

"Self-care entails healthy habits such as a nutritious diet, good personal hygiene, adequate resting and cognitive stimulation." (p. 20)

At a second level, the narrative of surveillance legitimises the process of the State monitoring the aged body. This can be observed in the prevalence of a great diversity of medical controls designed to monitor older adults' health status and prevent a decline in their autonomy. Multiple mechanisms are mentioned throughout the document to undertake this surveillance. Some of them focus on detecting physical decline, whilst others aim to monitor cognitive problems such as depression or dementia. These mechanisms aim to minimise the risks of becoming dependent and, when it is required, to define strategies of intervention in order to increase or maintain the older adult's autonomy.

"It is proposed that a Model of Integral Care for Older Adults is implemented, which aims to identify risk factors associated with dependency and loss of cognitive capacity." (p. 18);

"The National Plan of Dementia aims to identify (…) the extent of damage of the cognitive faculties, in order to ascertain if it is low, moderate or high and then define what measures are required to intervene in this situation." (p. 38)

Despite the evident importance attributed to the State in undertaking surveillance over older adults' bodies, it has to be stressed that the narrative of individual responsibility becomes dominant across this policy.

"(…) Active participation of older adults is required [to achieve positive ageing] (…) They have to assume the role of active subjects in the construction of their own destiny." (p. 3)

This discourse is reinforced by the fact that family, community and the State are expected to fulfil a secondary role in providing support during later life. Community, family and the State assume an active role in supporting older adults only after they have made the transition from being autonomous to being dependent. Furthermore, this policy makes older adults responsible for delaying the transition from autonomy to irreversible dependency for as long as possible.

"Autonomous older adults can live independently or with their family, but as they lose their autonomy, their family are to be encouraged to assume an active role in providing them adequate care." (p. 18)

"[When a high mental damage is identified] it is necessary to strengthen familiar and communitarian mechanisms of support" (p. 18); "[When the level of physical dependence increases] placing older adults in rehabilitation program in day care centres, or providing care to them in public care institutions (ELEAM) needs to be considered." (p. 18)

Finally, Policy B also creates new expectations regarding later life as it encourages older adults to assume roles that have been ignored by Policy A. This is observed in a new interest for depicting longer working lives as a solution to reduce the economic vulnerability associated with later life. This new interest for encouraging older adults to remain economically active reinforces the preference for an individual management of social risks during old age, and is functional to a narrative that justifies a weak role of the Chilean State in providing welfare to older adults.

"It is necessary to promote the participation of older adults in the labour market. To do so, it is necessary to make economic incentives to encourage companies to employ older adults; to prohibit age discrimination and forced retirement; and implement public campaigns to promote the individual capacities of older adults and replace negative stereotypes constructed about them." (p. 48)

Discussion

This study found that Chilean ageing policies have promoted shifting age norms between 1996 and 2012. In line with Chapman (2005), it was found that different ways of defining ageing as a social problem led to completely different prescriptions regarding the ways in which individuals should age. In Policy A (1996), the underlying question is: *What is required to change the way in which older adults are perceived by the Chilean society?* In response to this question, a narrative calling for a positive perception and recognition of older adults was constructed. Family was positioned as the legitimate space to achieve this recognition, and accordingly older adults were encouraged to find refuge, as well as to construct and perform a mature identity in this space. Family is in that way legitimised as the natural place to be positioned later in life. This idea was in line with the seminal gerontological theories, which depicted older adults as passive and unproductive subjects, and claimed for restricted social interaction during later life (Cavan et al. 1949; Cumming & Henry 1961; Havighurst & Albrecht 1953).

The underlying question in Policy B (2012) is: *what is required to make older adults less vulnerable subjects?* A dominant narrative aimed to regulate the older adult's conduct was found as a response to this question. This policy produces a discourse that fosters self-surveillance and legitimises public surveillance over the aged subject. It is argued in this policy that surveillance is required to prevent older adults' physical and social decline, and to keep them autonomous and active for as long as possible. Therefore, this policy promotes the ethic of self-care and the public monitoring of the health status as critical factors contributing to "ageing well." These findings are in line with research conducted by Moulaert and Biggs (2013), Katz (2000), Laliberte Rudman (2006) and Raymond and Grenier (2013) among others, who stressed a current tendency to promote the stereotype of the "active and healthy subject" as the ideal older adult. In addition, these findings reflect that approaches such as active (World Health Organization 2002) and productive ageing (Morrow-Howell et al. 2001) have had a significant influence on the way Chilean ageing policies have evolved.

The observed evolution between Policy A (1996) and Policy B (2012) indicates that the Chilean policy discourse transited from a narrative focussed on the macro-social level (Policy A) to one focussed on the micro-social level (Policy B). In the first, family and community have an important role in encouraging a positive perception and providing care to older adults, whilst in the second, older adults themselves are encouraged to assume the responsibility of dealing with the positive and negative changes that come with ageing. This transit to an increase in individual responsibility in later life has been observed by previous research (Biggs & Powell 2001; Moulaert & Biggs 2013) and is in line with the structural tendency to the individualisation of life trajectories and responsibilisation of risks, which have been addressed as dominant processes affecting Western societies (Beck 2002). It is necessary, however, to think about the consequences that these processes may have on individuals in a society such as Chile.

The responsibilisation of risks in later life transforms ageing into a problem of self-care, which can become an excessively complex duty for individuals if they do not have enough material and social resources to deal with this responsibility. This task can be particularly challenging in the Chilean context, where high levels of social and economic inequality (Davis-Hamel 2012); the commodification of social services such as health care and pensions (Riesco 2009); and the low levels of citizens' association observed among the Chilean population (United Nations Development Program 2004, 2010) shape a scenario in which a great number of Chileans become extremely vulnerable to social risks. This reality is no different for older adults, because they are one of the most vulnerable groups in Chile (Thumala et al. 2010).

A large number of older Chilean adults receive minimum pensions (Fundación SOL 2015) and are affiliated to the public health care system (Servicio Nacional del Adulto Mayor 2009: 91), which only provides health care for a restricted number of pathologies (Dannreuther & Gideon 2008). Considering this scenario, it should be said that the current Chilean policy in later life reproduces the dominant discourse promoted by international organisations. That is, one that encourages individuals to be autonomous and assumes the responsibility of acquiring material and social resources to "age-well." This rationale, however, has been unreflexively promoted, disregarding the economic, cultural and social aspects that define the Chilean context and the way in which these aspects constrain the older adults' lives.

The study also found that the promotion of individual responsibility and autonomy in later life works as a mechanism to construct internal boundaries within old age. Through this mechanism, the idea that there is a significant social transition that happens in later life is stated. This is the transition from being physically autonomous to being physically dependent. Policy B (2012) contributes to create a social imaginary in which old age is no more associated with decline, impairment and social disengagement. Those characteristics are now specifically associated with later phases of old age, to be precise, with those "close to death" stages of life. This finding is in line with the proposals of Gilleard and Higgs (2010), who state that a residual phase of later life characterised by irreversible decline and decrepitude defined as "fourth age" is increasingly prevalent in the social imaginary of ageing. Consequently, the stage of life in which older adults show a good performance in physical, mental and social domains is now labelled as "third age."

The split of later life between "third age" and "fourth age" has important consequences. On the one hand, "fourth age" now embraces all the negative attributes normally associated with later life, and "third age" receives an intrinsically positive connotation, being associated with attributes such as healthiness, activity, social engagement, etc. This may be positive as it promotes positive stereotypes of older adults. However, it has been stressed that this discourse is also favourable to policy narratives claiming for longer working lives (Moulaert & Biggs 2013), and also to those in favour of reducing public investment in provision of adult care and health care (Ervik & Lindén 2013). On the other hand, the emergence of a phase of life labelled as "fourth age" makes identifying differentiators – distinct from the chronological age – to define the boundary between middle age and "third age" more difficult.

In addition, it was found that age norms promoted by Chilean policies in later life do not coincide with those aspects that older adults recognise as contributing to "ageing well." According to the gerontological literature, older adults identify "good health," "independence," "social interaction" and "subjective well-being" as the main factors contributing to "good ageing" (Fernández-Ballesteros et al. 2010; Nosraty et al. 2015). "Good health" is addressed by both analysed policies as contributing to good ageing, although this aspect is more relevant in Policy B. "Independence" was absent as a component of good ageing in Policy A (1996) and is, to some extent, addressed in Policy B under the concept of "autonomy." The latter policy, however, promotes a limited conceptualisation of autonomy, which reduces the concept to its physiological dimension and does not consider social domains such as decision-making capacity and political participation.

"Social interaction" is promoted in Policy A, which encouraged the participation in seniors' organisations and stresses the importance of intergenerational relationships. This was, however, a secondary component in this policy. In contrast, this dimension is not contained in Policy B, which focusses on the individual level and ignores the interactional domain.

"Subjective well-being" was not mentioned in Policy A, and even though it is stated as an objective in Policy B, it is not clear how this concept is defined and what factors contribute to its achievement. In summary, Chilean ageing policies have promoted a restrictive narrative of later life, which first was reduced to the necessity of being recognised and then to a normative expectation for remaining autonomous for as long as possible. In so doing, Chilean policies overlooked most of the elements that older adults themselves identify as contributing to "good ageing."

Finally, it has to be stressed that as this study considered social policies as discourses that promote certain age norms, what is not found in these discourses is also relevant. Gott and Hinchliff (2003) state that policies foster stereotypes of older adults, as they do not make reference to certain topics. This means that making certain issues invisible contributes to the belief they are irrelevant for older adults. For instance, the words "sex" or "sexuality" are not mentioned in any of the analysed policies, although there is plenty of research suggesting that this is an important issue for older adults (Gott & Hinchliff 2003; Hurd Clarke 2006; Katz & Marshall 2003).

The word "death" is not mentioned in Policy A, and it is only mentioned once in Policy B, even though Nosraty et al. (2015) suggest that a "good death" has become a relevant component of "good ageing" from the perspective of older adults. This attempt of avoiding the topic of death is in line with a wider tendency that was found in both policies. This tendency depicts later life as a phase dominated by present time, in which future becomes an irrelevant dimension. The "active senior" is depicted as one focussed on present, on finding spaces of recognition and on the preservation of his/her autonomy. This narrative is problematic if we consider that older adults themselves state that "to have projects and goals" – that is, to have some sense of a future – is an important aspect of "ageing well" (Tate et al. 2003). These issues show that Chilean ageing policies promote certain ideas at the same time that they hide others. This should make us aware that the current discourse about later life in Chile is one of multiple possible narratives about the same issue. Nothing can ensure us that this narrative could change again in the future.

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Making ends meet in financial scarcity in old age

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Abstract

The purpose of this paper is to explore qualitatively how older people (aged 69–85 years) living in relative poverty experience their daily life and how they make ends meet (N = 16). The empirical analysis shows that despite deprivations, the interviewees are mostly satisfied, and in order to analytically understand this satisfaction I draw on three individual and structural aspects: (1) The Danish welfare state ensures the interviewees' basic ontological safety. (2) As the interviewees lived in financial scarcity during other phases of their lives, they are familiar with being thrifty, and they have a practical sense of making ends meet. (3) Although none of the interviewees had saved up for their retirement, some had saved up social capital, which enables them to modify or take a break from financial scarcity. Thus, although the interviewees' financial capabilities are similar, their actual daily lives are very different from each other.

Keywords: aging, daily life, financial scarcity, poverty, state pension.

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Introduction

Approximately one in six Danish state pensioners live entirely or primarily on a social state pension,[1] which provides a disposable income close to 60% of the median income in Denmark, making them objectively at risk of experiencing relative poverty, according to the official European Union (EU) definition.[2] The 1990's pension reforms in most European countries decreased the ability of the systems to prevent and reduce poverty in old age (Grech 2012; Schwartz 2006). Thus, relative poverty in old age remains an issue. In quantitative studies, low income in old age has been linked to a series of poor outcomes, such as lower life expectancy (Baadsgaard & Brønnum-Hansen 2012), lower general well-being (Golden et al. 2009), social exclusion (Mood & Jonsson 2016), and psychological distress and worry (Keith 1993; Litwin & Meir 2013; Litwin & Sapir 2009). Such studies on income poverty are important, as they provide information about the individual's consumption power and how many individuals are above or below the poverty threshold (Andersen et al. 2013). However, studies on income poverty do not inform us about what standard of living, or daily life, is possible within these financial frames, or how living within these financial frames is experienced. Several studies showed that there is not necessarily a direct link between objective living conditions and the economy on one hand and an individual's subjective life satisfaction on the other hand (Allardt 1975; Leeson 1999; Longva 1993). To understand how old age poverty is experienced and managed, we need knowledge of older people's daily lives. Therefore, focusing on subjective experiences, I investigate how state pensioners living in financial scarcity experience and manage their daily lives.

Background

Stjernø (1985) characterized modern poverty as a tyranny of financial scarcity because poor people struggle to make ends meet and participate in activities in which other people participate. However, if poor people

1 Defined as disposable income, in addition to the social state pension, at a maximum of 100 Euro per person/month.
2 Sixty percent of the median income in Denmark is DKK 128.400 (2014).

refrain from spending money in other domains, they are able to create opportunities to participate to some extent in a life that is considered normal in the social context. Thus, to obtain a small bite of the wealth evident among those in the surrounding society, modern poverty requires careful prioritizing, saving, and renunciation. However, modern poverty leads to feelings of humiliation and shame, creates a dependence on limited welfare benefits, and often forces individuals to accept presents or handouts from family members (Stjernø 1985).

Because old age is socially constructed as a phase of retirement (i.e. outside the labor market), older people have only a few actual possibilities of changing their financial situation (Phillipson 2013). Thus, poverty in old age differs from poverty in other phases of life because it is often persistent (Gabriel et al. 2015). In contrast, younger people for whom the primary cause of poverty is unemployment have the possibility of taking on a job and actively moving out of poverty. However, individuals who are unable to work due to poor health, a lack of qualifications, and/or a lack of connection to the labor market do not have the same actual possibilities of improving their financial situation (Ejrnæs et al. 2015). As is the case with the younger people who for different reasons are unable to work, older people in poverty have very limited possibilities for improving their financial situation. Taking on a (part time) job in order to earn more money is not necessarily a solution, primarily because of poor health. Second, because income from work will be set off in the pension payments, that is, any income exceeding DKK 20,500 (USD 3272) for singles, and DKK 40,600 (USD 6479) for married couples/cohabitants causes offsetting in the state pension.[3] Thus, older people's only actual possibility is to accept and adjust to a life in financial scarcity (Brünner & Andersen 2018).

Nevertheless, only a few studies have examined how older people living in financial scarcity actually experience and manage their daily lives. These studies have shown that older people living in financial scarcity apply various savings strategies to make ends meet (Dominy & Kempson 2006; Finch & Elam 1995), and that old people tend to experience a life in financial scarcity differently from younger people. For example, older

3 Exchange rate = 626.60.

people would rather do without than incur debt, and they experience less subjective deprivation compared to younger people in the same financial conditions (McKay 2004; Price 2010; Scharf et al. 2006). Older people living in financial scarcity often underestimate the severity of their financial scarcity because they lower their expectations and, thus, accept that they cannot afford certain things (McKay 2004). Therefore, the oldest of the old (80+) worry less than the youngest of the old, and this is an important empirical point to keep in mind when studying financial scarcity in old age (Litwin & Sapir 2009). Dominy and Kempson's (2006) study suggested that to understand older people's experience of deprivations, it is essential to consider age and poor health, family support, and lifetime income and standard of living (Dominy & Kempson 2006). A qualitative study on female state pensioners living in financial scarcity in Denmark also showed that different aspects of the individual life course are important when trying to understand how older people in financial scarcity cope with the situation and why they do this in different ways. The women in the study perceived their current life phase in old age as representing freedom due to an absence of duties, such as taking care of the household and childcare, which they dealt with during previous phases of life. Thus, despite financial scarcity, many experienced a good old age (Due 1994).

Studies in the field of old age and financial scarcity have documented some of the challenges and risks that are prevalent among this population, and they have indicated the importance of considering the individual's life course, social relations, and the societal context when examining poverty in old age. However, we know only little about how everyday life near the EU's official poverty threshold is actually experienced and managed by the old people themselves, thus we need more information on subjective everyday life and how this is affected by individual and structural factors. Therefore, to close the knowledge gap between the objective financial living conditions and the subjective experience, the following research question guided this study: How do Danish state pensioners living in financial scarcity experience and manage their everyday life?

Based on empirical findings, this study combines individual and structural explanations. Thus, in order to understand the everyday life it takes into account the significance of both the welfare state context and experiences in the individual life course. The study is theoretically founded in Bourdieu's concept of practical sense, which has some implications regarding the levels of explanation included. Thus, focus is not only on the interviewees' current life but also on experiences (of financial scarcity) in previous life phases, and how these factors shaped the way the current life is experienced and managed.

Everyday Life in Light of Habitus and Practical Sense

The analysis combines an everyday life perspective with the Bourdieu (1990) perspective of habitus and practical sense to understand the everyday lives of older people living in financial scarcity in the societal context. To understand how the interviewees experience old age in financial scarcity, an everyday life perspective is applied. However, a crucial assumption in this paper is that older people's ways of understanding their everyday lives are not just individual or arbitrary and might be a pre-reflexive product of their habitus and practical sense. Therefore, this paper also aims to understand why the interviewees perceive their everyday lives in the way they do.

An everyday life perspective is applied as an overall theoretical framework: This perspective comprises a field of meanings centered on how people experience, interpret, and discern what it is like to grow older and be old. The everyday life perspective centers on subjective meanings that might appear to the individual as objective facts but inform us about older people's feelings, thoughts, and methods of understanding their world, that is, a focus on the simple and regular rhythms that constitute everyday life. Through the everyday life perspective, the focus is to understand how the poorest state pensioners interpret and manage the financial scarcity of their daily lives. If we fail to listen to the voices of older people, we risk that the societal negative stereotypes regarding older people dominate. For example, an 80-year-old person might not necessarily first identify himself or herself as an old person, although his or her social surroundings and society would not hesitate to define him or her as old. The everyday lives of older people are actually founded on universal human aspects, such as friendships, caring for loved ones, getting by in daily life, moving considerations, and so on (Gubrium & Holstein 2000). Thus, the aim of applying an everyday life perspective to the empirical data in this study is to gain knowledge of how they experience and handle the part of their everyday life consisting of their financial situation.

In contrast, Bourdieu offers a framework to explain *why* the natural and taken-for-granted world is created in terms of habitus and practical sense. Bourdieu (1990, 1993, 2000) emphasizes the importance of acknowledging the wider social context and structural factors, and his concept of habitus bridges the individual and collective experiences because the habitus is simultaneously individual, collective, and societal. In addition, Bourdieu (1990) defines habitus as the pre-reflexive dispositions inscribed in the individual, while ensuring that the individual's inner aspirations and actual possibilities correlate. Therefore, the most improbable things are excluded as unthinkable by a submission to make a virtue of necessity. Past experiences are actively present in the habitus, and they are manifested through schemes of perception, thought, and action, thus ensuring a "correctness" (Bourdieu 1990:54) of practices over time with much more accuracy than can explicit norms – that is, the inner system of dispositions functions like an internal law making sure that the external norms are constantly exerted and reproduced. This system of dispositions is a kind of present past, which perpetuates into the future. Thus, habitus is the generator transforming the characteristics of one's social position into one's overall lifestyle (Bourdieu 1990).

An individual's habitual choices in everyday life are guided by practical sense. Bourdieu (1990) describes practical sense as a *feel for the game*, which is founded in the social field in which the individual is socialized; the individual, thus, has impressive internalized knowledge of how to act in the specific field. Practical sense offers a way of relating to the world in a natural way, without having to reflect on how to act. Because native membership in a field implies a feel for the game, everything that takes place in the game seems sensible – full of sense and objectivity (Bourdieu 1990).

Social Capital

Social capital involves social obligations or connections accumulated through membership and provides members with the backing of collectively owned capital, a credential that entitles them to receive different kinds of credit. Through a social network, the individual has access to and can draw on different kinds of actual or potential resources available. Thus, the volume of an individual's social capital depends on the size of the social network of connections that he or she can mobilize and on the volume of capital (economic, cultural, or symbolic) possessed by those to whom the individual is socially connected. Therefore, to some extent, social capital depends on economic and cultural capital because it exerts a multiplier effect on the capital an individual possesses. Social network relationships result from investment strategies (individual or collective) aimed (consciously or unconsciously) at creating or reproducing usable social relationships, for example, through family relations, and these relationships are reproduced endlessly. The exchange of things between members is a symbol of recognition that reproduces the group's membership (Bourdieu 1986).

Methods and Data

This paper draws on life story interviews with 16 Danish state pensioners living in financial scarcity on the margins of relative poverty. The interviewees' financial scarcity is illustrated by the large inequalities in their disposable income compared with an average Danish state pensioner. The average disposable equated income for a Danish state pensioner in 2016 was DKK 17,512 (USD 2795) a month (private calculations from Statistics Denmark 2018), while the state pensioners included in this study receive approximately between DKK 9500 and 10,600 (USD 1532–1692) a month from state pension (basic amount and supplement) and ATP.[4]

This study is empirically founded in qualitative interviews with a vulnerable social group, thus ethical considerations are crucial. The study was registered and approved by the Danish Data Protection Agency, as legally required in Denmark. Further, I have followed ethical guidelines as provided by Brinkmann (2015). Prior to the interviews, I have obtained an informed consent from the participants. All interviews are anonymized, for example, original names of persons, places, and recognizable details in their life stories are blurred.

The participants were 3 men and 13 women living in rural and urban areas in Denmark, aged between 69 and 85 years. Three participants

[4] ATP is a Danish abbreviation, which in English means "The labour market's additional pension." It is a lifelong pension paid out every month.

have been disability pensioners for all or most of their adult lives, seven interviewees had held skilled positions (i.e. office assistant, dental technician, glazier, art school teacher, yoga teacher, bus driver, and hair dresser), and the rest primarily held unskilled employment (i.e. cashier at a grocery shop, factory worker, cleaning lady, and working at a pub). All live in private homes, except for one who lives in a nursing home. Only four cohabit with a partner. They all live entirely or primarily on social state pensions.

All of the interviews were conducted and digitally recorded in the interviewees' homes. The interviews were semi-structured and centered on issues such as the subjective experience of the financial situation, their actual budget, deprivations, health, life stories, daily lives, and social relations. During the interviews, I purposefully avoided using the term poverty to allow the interviewees to define their situations. All of the interviews were transcribed verbatim and coded in NVivo.

The recruitment strategy was based on two criteria: (1) The interviewees' income consists of primarily or entirely a state pension, appendixes and ATP, and (2) the interviewees are state pensioners. The participants were recruited for this study through different channels. Most of the participants – 14 out of 16 – were recruited through my personal or professional network. Five people were recruited through my personal network and, thus, are friends and family members of my friends and family. Nine were recruited through my professional network with an organization either because they receive formal visits from a professional care worker from community care (six) or because they are volunteer visit friends for other older adults (three), and two participants were recruited through a senior club, where I attended a social afternoon meeting. I did not know any of the interviewees before they were recruited.

Financial capacity is often considered a private matter. However, to recruit interviewees for this study I had to verbalize this private subject. When recruiting, I carefully avoided using normative terms such as poor, financial scarcity, and the like; instead, I verbalized the study using more neutral and open terms. Thus, I explained that I was conducting a study of the everyday on a social state pension, and that the object was to get insight into and knowledge of what everyday life for state pensioners living primarily or entirely on a state pension looks like.

The Interview Context

It is important to take into account the specific context of the interview as this affects the outcome. Thus, the meaning created in an interview situation also reflects the social positioning of the interviewee and the interviewer (Schultz 2005). Therefore, age, gender, social class, race, and other social categorizations affect the interview situation and, thus, the knowledge production. If the interviewer and the interviewee belong to different social categories, this difference might enhance the impact of the social categories because of the social distance in the interview situation (Miller & Glassner 2011). The primary social positionings at stake in the interview situation are the distinction between young(er) and old(er) and between rich(er) and poor(er). It is impossible to account for the impact these categorizations may have had in the specific interview settings. However, the categorizations might have caused the interviewees (consciously or unconsciously) to attempt to downplay the severity of their financial scarcity, which might have been enhanced by the stigma associated with poverty (Lister 2004).

Nevertheless, I find that the knowledge produced in an interview should not be seen as only a product of the interaction and positionings in the specific interview context. Valid knowledge of the social world is also produced when the researcher lets the research object appear, that is, being loyal to the actual character, letting him or her define his or her own lifeworld, and letting him or her ask questions using his or her own words, not the researcher's words (Kvale & Brinkmann 2015). Thus, when I recruited and interviewed the participants and analyzed the empirical data, I made sure not to define financial situation and daily life, to invite the interviewees to define the terms using their own words. Further, I focused on letting the empirical material speak for itself, thus, for example, not "drowning" the voices of everyday life in overshadowing theory, to ensure loyalty toward the empirical material.

The Analytical Approach

The object of the everyday life perspective is to let the interviewees define the financial aspect and what this means for their everyday lives. The themes in the analysis are based on the empirical findings. However, assuming that social structures play a crucial role in determining which lifestyle an individual takes for granted and is adapted to, Bourdieu's (1990) perspective of habitus and the logic of practice are applied. The aim of the analysis is to understand the interviewees' individual everyday lives and to establish how their (seemingly) individual life stories are connected through a shared practical sense with a social origin. Thus, the use of life story interviews serves two purposes: (1) obtaining a nuanced and detailed insight into how state pensioners in financial scarcity experience their everyday lives and (2) determining how social relations play a part in their everyday lives. Bourdieu's (1986) concept of social capital is applied to analyze how the interviewees experience social capital and establish the kinds of help they receive in their everyday lives.

A life story represents an individual's self-presentation of life that is wrapped in external cultural factors and internalized social rules, codes, and values that the individual has accumulated through life (Hoff 2006). Therefore, it is possible to improve our understanding of how older people experience their everyday lives if we also know something about their past. Despite being unique, each life story also reflects dispositions of habitus shared by people with similar social backgrounds as a collective habitus, and, thus, inform us about a shared social world. This shared world means that an individual's experiences of his or her everyday life are not purely of individual origin or a matter of coincidence but also reflect the pre-reflexive habitus and the wider social context in which the individual is situated.

Results

Satisfaction with Everyday Life

I did not explicitly ask the interviewees if they were satisfied with their financial situation, or with their life in general. Nevertheless, a general feeling of contentment runs through the interviews. To exemplify I present an extract from the interview with 75-year-old Johanne:

> Now that I'm in my – well, it must be called "old age", when you're 75, right, I don't know – I reflect. I think about, and I make sure that I take care of the days, and that I enjoy them. That how it must be. When you go to the library and see the great supply, it's unbelievable. I like reading. I ride my bike up there, have a cup of coffee, it's 20 DKK [USD 3.00] with cake. And I read those magazines and newspapers I feel like reading, and afterwards, I go upstairs and find a DVD and some music and whatever I feel like reading. Isn't that a luxury?

She captures the general feeling of satisfaction with everyday life in financial scarcity, which I find in the interviews. This general feeling of satisfaction is motivating the empirical analysis as it raises the question of *Why? – Why are they satisfied with a life in financial scarcity?* In the next section, I present the analysis of how the interviewees manage their scarce everyday lives, which is crucial in order to understand this overall satisfaction. Thus, in the analysis, I link this feeling of satisfaction to their ways of managing their financial scarcity.

The Importance of Being Anchored in Social Networks

The participants' experiences of everyday life in financial scarcity heavily depend on what kind of help is available to them through their social networks. However, the interviewees have remarkably different resources available through their social capital. For example, 70-year-old Margret, who has an impressive social network, noted, "It [life in financial scarcity] depends very much on what kind of helpers you have in your life."

In contrast, 79-year-old Wilfred exemplifies poor social capital: Wilfred suffers from heart trouble, kidney failure, inflammation of the nerves, and posttraumatic stress disorder, and he lives alone in a run-down one-room apartment. He has no children or other family members, and no friends with whom he socializes at home; thus, his social network is very limited. He goes to dialysis 3 days a week, and he spends his afternoons on the other days at the local pensioner's club playing cards. A professional care worker from community care also visits him for 1 hour every second week. These visits are precious to him because they are his only source of practical help and emotional support. At the end of the interview, when asked if he wants to add anything to what has been discussed, he explains (once again) that he really misses having someone around to help him with practical things:

> Well, as I've told you several times, I miss having a person to help me with small things. You know what, I'll give you an example. When I first moved in here, the moving boxes were all over the place for months. But then I did manage to get help to move them; otherwise, I wasn't able to sleep. But they have been here until now. It [the apartment] was without illumination, it was all dark in here. I tried to install lights with a small ladder. But the ladder fell, it was very unfortunate… One reads so many splendid things about handymen from the municipality coming to help with that sort of thing… The janitor says that he doesn't have the time for it… (from interview with Wilfred)

Wilfred is alone in the world, and the social capital available to him for emotional, practical, or financial help is limited or nonexistent.

By comparison, the majority of the interviewees have more resources in their social network because of their children, which they draw upon when necessary. For example, some reported receiving help with practical matters, such as writing applications or other kinds of communication with the municipality, moving, cleaning the windows, or being picked up and brought back home after social family gatherings. Others receive help related to financial/material matters, such as inheriting their children's electronic devices; receiving a new TV, coffee machine, or glasses when the old ones break; or receiving spending money when needed. Seventy-four-year-old Inga explained that her son is always there for her, and he recently helped her by paying for her new glasses because he wanted to repay her for all the times she helped him earlier in his life:

Interviewer:	What if your television breaks?
Inga:	Then I'll die! … Then my son is going to bring me a television right away.
Interviewer:	He sometimes helps you financially?
Inga:	Yes. Also, there was one year, which was last year, that I needed new glasses. But I had to wait for the elderly check.[5] Then the day after he called me and said, "Let's go for a ride!" We went to the optician, and he said, "Go inside and buy yourself some new glasses. Now!" And then he went inside and paid for them. When I received the elderly check, I said to him, "Here you are!" "No! How many times have I received from you during my entire life?! Now you are getting something from me," he said.

Seventy-year-old Margret is a widower and lives alone in an apartment in a Danish city. She lived most of her adult life in the countryside with her husband and three children, and although she was educated as a librarian, she never worked as one. Instead, she taught yoga classes and created art, which she sold from time to time. She never had a high income, but

[5] The elderly check is a lump sum paid out once a year to economically disadvantaged elderly.

she is used to drawing upon a barter economy and her large social network that consists of people rich in different forms of capital. For example, sometimes they would buy an entire deer from the local hunter for only DKK 400 (USD 60), and they could often get pheasants almost for free. Thus, she and her husband were able to throw large parties in the summer and invite their yoga students and many other friends. Margret continues this way of life in her old age, although she now receives more than she contributes. She sums up this theme in her life as follows:

> When Michael [one of her younger friends who imports wine and owns several prominent restaurants] said, "Well, do you want to join some French winegrowers on a tour this Saturday?" I texted him back, "But I don't speak French?" Then I bumped into him at the station, and he said, "But, you know, other people are paying for this!"
>
> […]
>
> And then we sailed, from one gourmet restaurant to the next, Saturday mid-morning, and with a wineglass on the boat, all the time filled with wine, and then a winegrower presented this wine, and then we drank, and then we made land and entered some fancy restaurant, and they made a course, and we had some other wine there, which one of them presented, and then we went back to the boat again […]: This is pretty much my life because I know an unbelievable number of people, and because Conrad [her deceased husband] did so many things for many of those people and they think that we have been friendly and welcoming to them; thus, they do something for me now. (from interview with Margret)

Margret socializes regularly with her children and many friends. Throughout their lives, Margret and her husband managed to create a large social network consisting of many different people, and the capital they accumulated in their social network is now paying off in various ways.

A consistent theme throughout the interviews is that many of the participants receive help from their social network today because in earlier phases of their lives, they were always there when their friends and family needed help. Therefore, although none of the participants had saved up for their old age financially, those who saved up social capital are now being repaid through access to the capital available in their social networks. Social networks have a value that goes beyond the immediate value of being together. Thus, by participating in social relations, individuals can access resources possessed by other individuals in their social network. Social capital (alongside other forms of capital) is also defined as accumulated labor that is immanent in relationships between individuals and can be transmitted through time (Bourdieu 1986). Therefore, social capital functions as a kind of investment made during earlier phases of life, which pays off later when needed. The social anchorage has a crucial impact on everyday lives of the interviewees who have social capital available, because it enables them to modify or take a break from the otherwise overpowering financial scarcity by allowing them to access capital that would otherwise be out of reach due to their financial conditions. However, as described, social capital is not available to all of the interviewees and, thus, represents a crucial difference regarding their experience with and possibilities of making ends meet in financial scarcity in old age.

The next section analyzes how the interviewees – regardless of their social capital – manage to get by in their everyday lives of financial scarcity. Although the analysis of social capital reveals large *differences* between the interviewees, the focal point of the subsequent analysis is the significant *similarities* in how they experience and manage the scarcity of their everyday lives.

Ensuring Ontological Safety

The interviewees explain that they have little knowledge or interest in managing their budgets (except for spending their disposable amount after paying fixed expenses). Thus, the responsibility for managing their budgets is outsourced to the bank, which pays all fixed expenses automatically. The interviewees are spared the worry of financial uncertainty, leaving them with a small fixed amount for groceries and pocket money, which they can spend as they please every month.

As the majority of the interviewees live in elderly senior apartments rented through the municipality, the rent and housing subsidy are automatically deducted from their state pension; thus, paying rent is not a concern. For those living in privately owned apartments or houses the housing costs are not automatically deducted from the state pension. Nevertheless, they are not concerned about the rent either, because not paying rent is unthinkable. When I ask Violet if she has ever failed to pay her rent on time, she replies:

Violet: No, no, no, never! That might be the last thing happening on Earth. I'll tell you that! No, that doesn't happen for me. In fact, it never happened for anyone in my family that I know of […]. But I do support the homeless people as well….

Interviewer: Okay?

Violet: I must admit that. And I buy their paper every time I pass by, and every month. I don't buy two issues of the same paper, but I pay them more than the 20 DKK [USD 3.2] it costs; I might give them 30 DKK [USD 4.8]

Interviewer: How generous of you to do that!

Violet: Well, I get to eat every day; they don't, right?

This extract captures the interviewees' general viewpoint that always paying rent is natural and taken for granted. It is unthinkable to postpone paying it because they are aware that it is crucial to avoid homelessness, and by prioritizing their rent payments, their basic ontological safety of having a home is secured. Violet also illustrates the relativity of financial scarcity; that is, she helps homeless people because she realizes that she is in a better situation than they are. Therefore, despite not having much, approximately half of the participants share their awareness that other people are in worse situations, which illustrates the interviewees' appreciation of their own basic security.

Expenses for medicine, dental care, and other health-related issues also are not a concern or unrealistic expense for the interviewees because the Danish welfare state provides an important safety net in this regard: Financially disadvantaged state pensioners can apply for a *health allowance* (all the interviewees in this study are included in this group). The health allowance is a continual benefit that is automatically renewed every year if the person is still entitled financially, and the health allowance ensures that 85% of the expenses for medicine and dental care are automatically covered by the municipality. Further, the *extended health allowance* covers other health-related lump sum benefits, such as dental prostheses, glasses, and regular foot care. To receive benefits from the extended health allowance, citizens are required to apply for coverage before buying or ordering a product (borger.dk 2018). The interviewees consider this welfare state benefit essential because otherwise they might not be able to afford necessary medicine.

This section shows that the basic ontological safety is ensured at two levels. First, the welfare state provides a financial safety net by providing a housing subsidy, deducting the rent from the state pension, and minimizing health expenses through the health allowances for financially disadvantaged pensioners. Second, the interviewees have a habitual capacity to ensure their ontological safety; thus, they have arrangements with the bank to ensure that fixed expenses are paid, leaving them with a disposable amount to spend on groceries and other daily necessities. However, ensuring that the monthly budget for non-fixed expenses actually suffices requires hardline frugality and thriftiness, as is discussed in the following section.

Careful and Thrifty Spenders

Most of the interviewees admit that they need to be thrifty and practice restraint to make sure that the money lasts for the entire month. Several interviewees explain how they split their monthly food budget into four weekly portions. Inga (74 years old) stated:

> Then I saw this thing on a TV show about putting the money in envelopes and hiding them and taking one every week. I thought, "I'm going to do that!" Because it cannot be true that when we get to the 27th I have nothing left for the rest of the month. I don't want that anymore; that's why I did it like that. So, every Friday I put 500 DKK [USD 80] in my pocket for cigarettes and groceries.

Their everyday lives are largely structured by their financial scarcity, which requires them to apply thriftiness to get by, and financial thoughts and worries play a crucial role in their everyday lives. The interviewees save money on groceries by frequenting the cheapest discount stores, searching for food at reduced prices, and traveling to supermarkets at the other end of town[6] to save a few coins on a loaf of bread or a bag of coffee (and making sure they buy extra to store for later). Eighty-year-old Magda explains that she happily travels through town to obtain good deals, and she always takes her shopping cart to ensure she does not miss out on a great deal because something is too heavy to carry home:

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[6] Another way in which the welfare state provides help for state pensioners is by providing them with a pensioners' pass for public transportation. With this pass, state pensioners and disability pensioners can travel on public transportation at significantly reduced prices, for example, 3 months in greater Copenhagen for DKK 460 (USD 73). The regular price is DKK 1575 (USD 252). Thus, the cost of public transportation is not a concern.

Interviewer:	And perhaps you have become an expert at finding cheap groceries in the supermarket?
Magda:	Yes, yes, indeed. I go all the way to Rema 1000 if they have cheap coffee or something else – I can do that – and I *like* doing that. To Aldi and Lidl, or other supermarkets, I do that….
Interviewer:	Wherever there is a good deal?
Magda:	Yes, indeed; that's really important. Rema 1000 has amazing deals, but it is far away. But then I have this little wagon I bring there […]. The worst thing is large bottles of soda or glasses with pickled gherkins or beetroot, they are so heavy....

The interviewees also try to make their groceries last as long as possible. For example, Tulle admits that sometimes she skips a meal to make the groceries in her fridge last a bit longer. Although none of the other interviewees admit to skipping meals for economic reasons, they put considerable thought into making their food last. For example, 75-year-old Johanne buys minced meat at a reduced price – due to a nearing expiration date – which she splits into four portions and adds a lot of beans and lentils to create many cheap meals.

When it comes to buying clothes and shoes, the interviewees apply the same carefulness and frugality. They consistently point out that they do not need many new clothes or shoes because they have accumulated a sufficient number during their lifetime and do not wear them out often anymore. Thus, there is no need to buy anything new. Nevertheless, when they do require new clothes or shoes, they save up for them or buy them on sale or secondhand. Eighty-one-year-old Ruth explains that although the amount of money is small, she does not miss out on anything because she buys only cheap clothes:

> But see how little [money] is left. But I don't miss out on anything. Clothes and the like I don't miss because I use a lot of secondhand clothes, and buy them when they are cheap or on sale. I never buy clothes for [more than] several hundred DKK [USD 30–40]. (from interview with Ruth)

Getting a good deal on clothes and regular shoes is not difficult for the interviewees. However, some have problems with their feet, requiring new, sensible shoes, or even specially made footwear. Several explain that they often cannot afford to buy new shoes when needed, so they wear old shoes that are worn out. This situation is exemplified by 79-year-old Wilfred:

Interviewer:	How about footwear? [Wilfred shows me his feet with sensible-looking, foot-shaped Ecco shoes.]
Interviewer:	Those are some sensible shoes you've got there.
Wilfred:	But look here… [He points at the very thin and skewed worn sole of his shoes.]
Interviewer:	Indeed, you're right! It is not easy finding footwear secondhand.
Wilfred:	Oh, you know what? One may not use that. You know, I have nerve inflammation in my feet; it would be a disaster to me. But clothes, I can use those. For example, when it gets cold, I buy warmer things.

The interviewees are good at making ends meet because they are frugal and thrifty. Nevertheless, they reveal that they experience material and subjective deprivations in their daily lives. Some cannot afford to buy specific groceries and household items, such as fresh fruit, roast beef, psyllium (to counteract the negative effects medicine may have on the stomach), new clothes, footwear, or stronger prescription glasses when needed. Others manage to afford such items by saving money on electricity and heat; therefore, they live in apartments that are (too) sparsely lit and heated. The majority of the interviewees also claimed that they cannot always afford to invite guests for meals in their home, go on vacations, or buy presents for grandchildren and other family members. Some have been forced to cut down on birthday and Christmas presents, and others have stopped giving presents at all, but they expressed feelings of shame about doing so. Their experience of deprivation underlines the severity of their financial condition. However, they retain a feeling of satisfaction, and they continue to make ends meet but *not* because they have plenty of money.

Despite (or because of) their overall hardline thrift and austerity and the experience of deprivation, the interviewees are able to afford a little extra something in their everyday lives that is not essential to their physical survival. The majority of the interviewees explain that they manage to save up a little money to spend on small pleasures, such as buying coffee and cake while reading the free magazines at the library; enjoying a glass of wine at an art exhibition; going to the public swimming pool, a fitness class, or the gym; buying presents for their family; eating lunch at a café; or going on a small excursion. In the following extract, 74-year-old Inga captures this pleasure:

> If I am going to spend money on pleasure, then I don't know… See that ashtray next to you, it has a lot of small coins, I put those in a bottle, and on the first of December and June, I empty it, and then I can allow myself other things. I like going to flea markets, where you can find cheap blouses and that sort of thing, right. That's my pleasure. Or out of the blue, I say to my son, "Let's go out to eat a Wiener Schnitzel!" He does that on his birthday, and so do I. But it is expensive if you are to pay 500 DKK [USD 80] for two persons to eat out on your own. One can barely afford that…

Buying presents for grandchildren and other family members is an important topic for most of the interviewees. Many of Tulle's family live in another part of the country, and although the train ticket is expensive, she managed to save up, not just for the train ticket but also for Christmas presents. However, she has reluctantly cut down recently, as she can no longer afford the expense.

The analysis has shown that the interviewees manage to make ends meet in their financially scarce everyday lives due to the thriftiness they apply. Their everyday lives in modern poverty are dominated by their continuous carefulness and frugality, and they carefully control how much money they spend. When it comes to money, nothing happens by coincidence. However, despite their constant thriftiness, they continue to experience deprivations. Therefore, the interviewees implement strict saving strategies, so that they can afford to do some of the small things they enjoy.

This section has provided an understanding of how the interviewees manage their everyday lives. The following section aims to understand how they experience their everyday lives in financial scarcity by linking it to their habitual practical sense.

The Sense of Financial Scarcity

Tulle:	Well, there are lots of things that you would like, that you nonetheless have to do without, right?
Interviewer:	Do you have any specific examples?
Tulle:	No, actually not […] yes; I would like a really nice roast (laughs). But no – I don't know – because I'm used to writing a shopping list, and I know what I need and what I'm used to. So, one might say that my way of shopping is monotonous. Well, I do live very monotonously, I believe.

When asked if there was anything in the supermarket she refrains from buying, Tulle finds it difficult to think of something, and when she *does* come up with one thing (a nice roast), she immediately dismisses it, referring to her habit of writing – and sticking to – her shopping list. In addition, when I asked Ruth how she hypothetically thinks her life would have turned out if she had had more money, she finds it a somewhat ridiculous question.

Although the interviewees always have to be thrifty and mindful of how they spend their money, they do not consider it a struggle. Everyday life in financial scarcity appears to the interviewees as the only real way of living, and being thrifty is a natural part of their daily existence. Thus, they do not reflect upon how to be frugal – they just are frugal. In addition, when they cannot afford to buy something, such as clothes, they make a virtue of necessity by underlining that they do not really need it.

Everyday life in financial scarcity is not unfamiliar. Most of the interviewees have lived in restricted financial conditions for their entire lives.[7] For example, 85-year-old Karen grew up in financial scarcity during the Second World War, and after her father died, her mother provided for the family by selling cow's milk to the dairy and eggs to the local shop,

[7] Unlike the rest of the interviewees, Wilfred, Mary, and Inga did not live in financial scarcity when they were employed. However, they experienced financial scarcity in their childhood, which may explain why the adjustment to the financial scarcity in their retirement does not appear to them as a big deal.

and by digging peat. Later, when Karen got married and had six children, she never had much money, either. In other words, thriftiness is the only way of life with which she has ever been familiar:

Interviewer:	How was your financial situation earlier in your life, in your childhood and…?
Karen:	Well, it wasn't that good. I never made a lot of money, as I only had that cleaning job at the school, and it was only a couple of hours every day, so it hasn't been much, really. And for several years, I wasn't in the labor market at all. But back then I didn't really … I mean, it was my own money. But no, we never had more money than we could spend, or more money than we needed.
Interviewer:	Perhaps you have become good at knowing how to….
Karen:	Yes, and I think that you have to prioritize, I mean, think about how you spend your money, and whether you can do without this or that – you might as well do it like that. I think we have been quite good at that, if I may say so. Certainly, it all turned out fine.
	[…]
Karen:	But I've never been used to spending a lot of money. No. Well, but I guess that we got used to this from the beginning. Yes, I believe so.

Karen characterizes her adult life as a life in financial scarcity and explains how this taught her to prioritize, to do without, and to think through how she spends her money. Similar to Karen, the majority of the interviewees' childhoods and adult lives were dominated by financial scarcity. In addition, as mentioned, owing to their current phase of life being outside the labor market, their financial situation is unchangeable. Thus, they have no way to actively change the situation, for example, by getting a job, and their only real option is to accept and adapt to their situation. However, because of their shared practical sense of the game of financial scarcity, they know how to make ends meet, and they do not feel that they miss out on anything. Several interviewees explain that their current life might be *less* scarce, more financially predictable, and filled with fewer financial worries compared to their younger days when they had to care for small children.

When the Financially Scarce Lifestyle is Challenged by the Societal Context

Having a practical sense of the game of financial scarcity ensures that the interviewees do not have to logically control or reflect on how to make ends meet; thus, in general, they are quite satisfied. Nevertheless, frustrations occur, as some of the interviewees admit to experiencing feelings of embarrassment, shame, and jealousy because they are aware that most others (family, friends, and society in general) have more money, and therefore, are able to afford larger or better presents for grandchildren, costlier homes, and fancy things, and to travel. In some of the interviews, these frustrations appear from time to time as small notions, which are not elaborated further. In other interviews, however, specifically with Tulle, the frustrations are described directly: Tulle worked as a cleaning lady at a school, and she reveals that she is jealous of her former colleagues because they have more money than her, and they can afford nice houses and cars.

Tulle: Sometimes people ask me if I get a pension from my [deceased] husband; no, I don't. And we hadn't saved up anything. You know, my husband was not paid much in his job, so we didn't think that there was anything to save up with; we didn't think so, so no, I don't have any pension after him. Some of my friends have pensions from their husbands; that's why they can afford to go out for dinner [laughs] […] I'm still in contact with some of the teachers from the school, we have created a pensioner's club, and we meet three or four times a year. Last week, we visited one of them, and I got a ride with my old school inspector, so it was free. But I can see that they have their large pensions; they can afford it all, they have a house and a car and all that, right, so they can afford it all [her voice became very shrill].

Interviewer: What do you think about that?

Tulle: I'm jealous of course! [Fake laugh], but one shouldn't be! Well, that's just how it is. My old school inspector, she owns a large house, and that's just how it is, right. And the secretary, she is also doing damn well.

Though the other interviewees are not all as direct as Tulle in admitting any jealousy, the feelings of jealousy or shame are evident in most interviews to varying degrees. Bourdieu's (2008) concept of a cleft habitus might be useful for understanding the opposites of the practical sense of the game of financial scarcity on the one hand, and feelings of jealousy and shame on the other. A person might experience a cleft habitus when torn between two contrasting worlds, when the individual's habitus does not correspond to the structures of the social world in which he or she lives (Bourdieu 2008). The individual is caught in contradictions, which may result in a sense of insecurity and self-doubt (Bourdieu 2000: 163). The interviewees' habitus, enabling them to manage their daily lives of financial scarcity does not correspond to the current relatively rich Danish society, in which they have less money than most; thus, their possibilities of taking part in what's considered normal in society are diminished compared to others. Although the interviewees manage to make ends meet, their reflexivity and awareness of their financial situation compared to others give rise to the cleft in their habitus.

Concluding Remarks

The everyday life of state pensioners living in relative and modern poverty in Denmark is characterized by financial scarcity, and by a frugal and thrifty approach. Despite their ongoing thriftiness, they experience social and material deprivations. However, a general feeling of satisfaction is characteristic of the interviewees' experience of life in financial scarcity, and the empirical analysis suggests several interpretations of this satisfaction on the individual and structural levels. In the analysis, I link the general feeling of satisfaction to the fact that they actually manage to get by.

First, the interviewees' general satisfaction can be linked to the basic safety net provided by the welfare state. For example, state pensioners are ensured a certain minimum income, a housing subsidy, a health allowance for medical expenses, and for those living in senior apartments rented through the municipality, automatic deduction of the rent and housing subsidy. This setup allows them a sense of freedom and financial flexibility, albeit on a somewhat smaller scale than the rest of society. Second, the interviewees' general satisfaction can be linked to their shared habitual disposition, providing them with a pre-reflexive practical sense of the game of financial scarcity, which is well-known and natural to them. Their habitual disposition has given them a sense of the paramount importance of paying the rent on time to ensure their basic safety, and with a natural sense of being frugal and thrifty. In addition, their thriftiness and frugality allow them to afford small things in life that are not necessary for their physical existence but are crucial to their experience of satisfaction with everyday life, such as buying a glass of wine or a cup of coffee and purchasing presents for grandchildren. The interviewees' shared habitus and practical sense reveal the societal aspects. The individual ways of experiencing and managing everyday life are not purely individual; they also connect the individual to the wider societal context of their current and previous lives. Although frugality and thriftiness are natural and taken for granted, the majority of the interviewees revealed feelings of shame and jealousy, not because their daily life is rough but because they are aware that other people in society have more money and more possibilities than they do.

However, although all the interviewees benefit from the resources enabling them to lead a satisfying life, *some* also benefit from resources in their social networks. Some have no or small social networks, and others have large social networks from which to obtain pocket money, inherit electronic devices, and obtain practical help, which they otherwise might have to do without. This aspect of social capital explains some of the crucial differences between the everyday lives of the interviewees because although they all have similar financial conditions, some have *saved up* social capital, which provides them with the opportunity to modify or enjoy breaks from the otherwise overpowering financial scarcity.

This paper makes an empirical contribution to the literature on financial scarcity in old age because the study illustrates the subjective experiences of and actual ways of making ends meet in financial scarcity in old age at individual and structural levels. The results show how similar financial conditions can hide different daily lives ranging from poor to more "normal" lives in the context of the rich modern society.

Further, this paper offers a rich insight into what kind of life people who are currently old might be satisfied with; however, future generations of old people may not have the same practical sense of financial scarcity and may not be adapted to such an austere lifestyle, thus making a reasonable living from the current state pension harder than it is today. In addition, Danish welfare services currently provide an important contribution to ensure the basic safety and life satisfaction of old people. However, ongoing demographic changes might prevent the welfare state from providing the same quality of welfare services as today.

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Exploring teacher–student communication in senior-education contexts in Taiwan: A communication accommodation approach

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Abstract

This study investigated the language-accommodation strategies used by Taiwanese teachers when communicating with older adults in senior-education contexts. First, the interview phase identified various communication strategies and their underlying rationales; second, the survey phase verified the degree to which the identified communication strategies were used, as well as their associations with teachers' age differences. The identified communication strategies were divided into four broad categories: secondary baby talk, mitigation of references to death or illness, politeness strategies and code selection (use of the dialect preferred by older students). The underlying considerations included older students' perceived age-related physical or cognitive decrements, their social backgrounds and socio-psychological needs, as well as the teachers' self-determined relational positioning or priority in the communication process. Young and middle-aged teachers were more likely to experience a deep-rooted conflict and power struggle arising from the fact that a teacher in Taiwan is traditionally endowed with greater power than his or her

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students, whereas younger people are expected to show respect to their elders. Hence, they frequently chose to address older students using forms that implied intergenerational relationships and to use code-switching to converge their own communication with their older students' preferred dialects. Implications for older-adult education and possible directions for further research are discussed in the conclusion.

Keywords: communication accommodation theory, older learners, senior education, Taiwan, teacher-student communication.

Introduction and Background

Continuing Education for Older Adults

The provision of continuing education for older adults has become a policy interest worldwide, notably in Canada, Japan (Hori & Cusack 2006), Australia (Swindell 1991), Finland (Yenerall 2003), the UK (Huang 2006) and also Taiwan (Huang 2005). Taiwan is a rapidly ageing country, and to enhance the quality of life of its older population, its government has been promoting senior-education and lifelong-learning programmes at educational institutions including universities and community-based learning centres.

The *White Paper on Senior Education Policy* published by Taiwan's Ministry of Education (Hsiao et al. 2014) has made clear that the purposes of senior-education programmes are to promote successful ageing, slow down ageing, reduce the social isolation of older people and cultivate positive attitudes towards ageing. The expected outcomes of providing continuing-education programmes or lifelong-learning activities for older learners generally include assisting them to remain active socially or increasing their psychological well-being and quality of life (Hammond 2004).

Some scholarship has proposed an association between participation in lifelong-learning activities in later life and successful ageing. Jenkins's (2011) UK-based survey, for example, revealed that older adults' participation in music, art and evening classes was strongly correlated to improvements in their life quality, well-being and life satisfaction. Lamb and Brady (2005) reported that older learners perceived four categories of benefits of lifelong learning: intellectual stimulation, experiencing a nurturing and supportive community, enhancing self-esteem and having opportunities for spiritual renewal. Escuder-Mollon (2012) observed that, although senior learners were not motivated to continue learning for career purposes, they wished to improve their capacity to keep up with changes in society. It is also widely believed that elderly people's participation in lifelong-learning activities can help them take on new roles after retirement; enhance their physical, psychological and social functions; and eventually obtain opportunities to assess their life experiences (Moody 1976) during a life stage termed the "third age" (Laslett 1989).

Given that continuing education for older people appears to be a key to productive and successful ageing (Friedan 1993), it is important to investigate (1) the reasons for their participation, along with (2) what teaching practices teachers perceive as appropriate or necessary to a satisfying learning environment. Nevertheless, research on the roles language and communication play in the provision of high-quality senior education has been sparse.

A number of studies have examined the reasons older people participate in learning (for reviews, see Boulton-Lewis 2010; Ostiguy et al. 1998). Taken as a whole, it is indicated that the drivers of such participation include intellectual stimulation, acquisition of new knowledge, meeting new people and increasing opportunities to socialise or travel (see Knowlton 1977; Romaniuk & Romaniuk 1982), as well as self-fulfilment in a more general sense (Pincas 2007). These reasons reflect older people's expectations about what learning processes can be satisfying and provide various insights into what teachers can and should do differently for older, as compared to traditional, learners in the classroom.

Teaching Older Students: Considerations and Recommendations

As suggested by Pincas (2007), before designing any programme of teaching aimed at older learners, a teacher should consider several issues, for example, teacher–student relationships, older learners' *a priori* knowledge and competencies, the potential impact of the organisational or social contexts on learning, their motives for studying, or the perceptions about their own competence.

Villar et al. (2010) explored the adaptations teachers made for teaching older students at third-age universities in Spain, and they included fostering a more relaxing and less rigid environment; giving students more control over the learning process; and playing a role as an organiser in class rather than just an instructor. Simplifying instruction for seniors was also recommend as a form of teaching adaptation because of the perceived changes in older learners' physical and cognitive abilities associated with ageing (Glass 1996; Jones & Bayen 1998; Twitchell et al. 1996). It seems that teachers of older students confront the inherent ambiguity of their role, that is, whether they are primarily educators or entertainers (Brady et al. 2003). Yet the relationships of this complex array of relational and role positions to such teachers' styles of communication with their older students have never been examined in detail.

Another important aspect of teaching practices in senior-education contexts is the persistence of discredited negative stereotypes about older learners (Baldi 1997; Broady et al. 2010; Githens 2007), especially given the countervailing image of third agers (Laslett 1989): retired individuals who use their new-found free time to pursue their personal ambitions and growth. Still socially active and physically fit, third agers now comprise the fastest-growing segment of older learners (see for instance Kim & Merriam 2004; Schneider 2003; Williamson 2000), making it even more urgent to avoid curriculum designs, teaching practices and teacher–student communication rooted in negative ageist stereotypes – although researchers have largely ignored how this might be achieved.

In short, the existing literature has hardly focused any attention on questions related to the roles played by language in the delivery of high-quality senior education, despite it being the medium through which all social practices are made possible. Moreover, as noted in a review by Fisher (1998), the major streams of research on older-adult learning have traditionally addressed topics such as older adults' levels of participation in educational activities, their preferences for or reflections on instructional approaches, and the limits of their cognitive capabilities. In Taiwan, research on ageing and education has also mostly adopted a pedagogical orientation, exploring topics such as older adults' learning needs and motivations, adaptation to later life and social engagement, as well as course designs for older-adult learning (Yao 2014). Nevertheless, language and communication research with a focus on senior-education contexts is almost absent from the existing literature, with Lucas (2006) representing an important exception to the rule. The aforementioned research gap necessarily makes this present study's attempt to understand contextually specific communication patterns involving older adult learners a preliminary one. The following section reviews the prior literature on the importance of language and communication in educational contexts, as further justification of the need to fill the identified research gap.

The Importance of Language and Communication in Educational Contexts

Effective teachers strive to enhance students' learning motivation, satisfaction and active engagement in class and thus enable them to achieve the desired educational outcomes. It would be unreasonable to propose that such an approach could succeed in the absence of effective teacher–student communication; and indeed, a number of studies have highlighted the importance of language and communication in relation to students' learning behaviours (Goodboy & Myers 2008; Lin et al. 2017; Mazer & Hunt 2008; Myers 2002; Myers et al. 2014; Rocca 2004; Roorda et al. 2011; Witt et al. 2004). The studies reviewed in the following have focused on certain predetermined communicative features or qualities (i.e. aggressiveness, confirmation, immediacy, clarity, humour, or cool communication) and their associations with students' motivation levels, learning outcomes and learning satisfaction.

Myers (2002) found a positive correlation between instructor aggressiveness (a compound of argumentativeness and verbal aggressiveness) and students' self-reported state of motivation, affective learning, cognitive learning and satisfaction. Goodboy and Myers (2008) focused on teacher confirmation and identified the same pattern. Teachers' rhetorical (clarity and humour) and relational (immediacy, confirmation and caring) communication behaviours were also found to have positive impacts on students' learning and communication satisfaction (Myers et al. 2014). Lin et al. (2017), however, reported that instructors' argumentativeness and verbal aggressiveness were related to students' perceptions of the classroom communication climate and hence increased their learning anxiety; others have noted that students' appreciation of instructors' communication styles is essential not only to their learning satisfaction but also to positive teacher–student relationships (Allen et al. 2008; Roorda et al. 2011). One way for teachers to enhance their classroom communication is to use styles that students can identify with, such as positive slang, a form of cool communication (Mazer & Hunt 2008). To a certain extent, Mazer and Hunt's finding approaches language accommodation as a means of building rapport with students.

Research Purpose

The studies reviewed in the preceding two sections were conducted mainly on the effects of teachers' communication styles on students and tended to ignore teachers' own views on the impact of their language and communication styles. No study has yet painted a comprehensive picture of what communication strategies and styles are considered appropriate by teachers, as well as what scenarios or conditions certain communication strategies are employed for. Likewise, there has been no empirical or systematic investigation of teacher–student communication in senior-education contexts. The main research purpose of the present study is to elicit Taiwanese senior-education teachers' views of the communication strategies or styles they adopt for teaching. This present study was also conducted to explore whether the reported communication strategies are used to fulfil their students' learning expectations or to satisfy other needs relevant to the delivery of teaching and learning.

What follows is a review of the theoretical framework in this study, communication accommodation theory (CAT), including themes such as *language, communication and ageist stereotypes* and *communication-accommodation strategies and adult education*, followed by a short discussion on teacher–student communication and Confucian influence in Taiwan.

Theoretical Framework

Communication Accommodation Theory

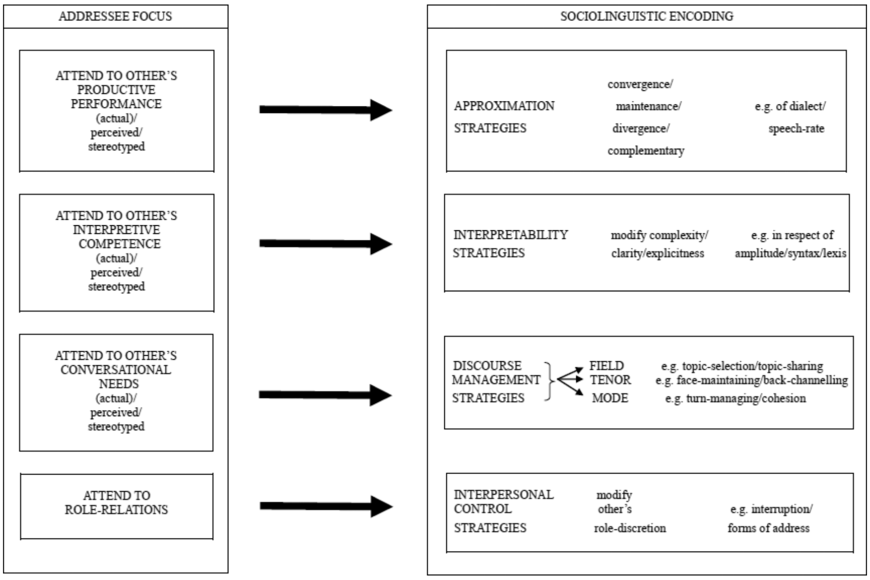
CAT (Giles 1973; Giles et al. 2007) provides a useful framework for the exploration of teachers' communication strategies for teaching older adult learners because it enables the description and explanation of why people modify their communication styles because of various contextual and interactional conditions. Beginning in the 1970s, Giles and colleagues developed speech accommodation theory, rooted in the concepts of convergence, divergence and maintenance – each of which will be explained in more detail later. Via the steps set forth in Giles (2016), this theory evolved into CAT, which has since been applied in multidisciplinary research on a wide range of topics, including communication and ageing (Harwood et al. 1993), intergenerational communication (Giles & Gasiorek 2011) with a focus on under- and over-accommodative moves (Coupland et al. 1991), and classroom communication (Mazer & Hunt 2008). CAT is also considered a useful theoretical framework for the study of intergroup accommodation in relation to social identities or social categories (for a review, see Palomares et al. 2016).

According to Coupland (2010: 19), "accommodation theory accounts for diverse contextual processes that impinge on the selection of sociolinguistic codes, styles and strategies and their interactional consequences." CAT was developed as a socio-psychological model illustrating the social and cognitive processes that mediate speakers' perceptions about their addressees and the modifications of their speech styles (Giles et al. 1987; Giles & Powesland 1975).

As shown in Figure 1 (Coupland et al. 1988: 28), speakers decide to converge, diverge, or maintain their speech styles when communicating with members of other social groups. Speech convergence refers to speakers changing their speech styles to be more similar to those of their hearers, so as to gain their approval or build identification. Divergence refers to speakers' attempts to disassociate themselves from their hearers in intergroup communication, by accentuating the speech differences between them. In comparison to these other two strategies, speech maintenance may sound rather neutral, but dissociative intentions can still be detected in it, given that "a general tendency to accommodate is operative in pro-social interpersonal interaction" (Coupland 2010: 23); in other words, simply deciding against convergence may reveal similar motives to active divergence.

Because communicative convergence can enable speakers to "seek approval, affiliation and/or interpersonal similarity as a manner of reducing social distance," it is perceived to be more efficient as well as more cooperative than the other two strategies (Soliz & Giles 2014: 108). Convergence is therefore the aspect of CAT of greatest interest in the present study, as

Figure 1. An extended model of sociolinguistic processes in communication accommodation theory
Source: Coupland et al. 1988: 28, also cited in Coupland et al. 1991: 29



it is assumed that teachers will use various communication-convergence strategies to accommodate older learners' needs. To the extent that such an approach succeeds, it can be expected to lead to the approval of older students and to stronger teacher–student relationships.

The communication-accommodation model proposed by Coupland et al. (1988: 26; see also Coupland et al. 1991; Figure 1), though not the most up-to-date version of CAT (see Ethala et al. 2016; Palomares et al. 2016), has been selected as the present study's guiding theoretical framework because it was developed in the context of research probing communication accommodation to older people: a scenario shared by the present study. Moreover, Coupland et al.'s (1988) version of CAT proposes a number of potential sociolinguistic processes by which communication accommodation may occur, and this allows the researcher to conceptualise teachers' self-reported accommodation strategies in a more textured way. Specifically, as shown in Figure 1, this model of CAT offers four directions for the exploration of communication-accommodation strategies (see also Dragojevic et al. 2016). First, when a speaker's attention is on his or her partner's productive-language competence, he or she can employ *approximation strategies*, such as adjusting verbal or nonverbal communicative styles to converge or diverge from the interlocutor's. Second, if the accommodation is made based on the hearer's language-comprehension abilities, the speaker can employ *interpretability strategies*, such as decreasing the complexity of vocabulary, simplifying syntax and/or speaking louder to increase clarity and enhance comprehension. Third, to meet one's conversational partner's macro-conversational needs, one can employ *discourse-management strategies*, including topic selection and actions aimed at maintaining face. And fourth, interlocutors may rely on *interpersonal control strategies*, that is, the use of interruptions or various forms of address based on their perceived or actual relationships and statuses.

For Coupland (2010: 24), discursive accommodation includes "regulating how interpretable our talk is, and is designed to be, for our hearers." However, Coupland et al.'s (1988) CAT model's delineation of the potential scope of various accommodation strategies was based on research in universities in the UK and the United States and has not yet been empirically verified in other cultural or communicative contexts. In senior-education contexts in Taiwan, for example, details of the relative prevalence and specific content of approximation strategies, interpretability strategies, discourse-management strategies and interpersonal control strategies are simply unknown; nor can we be certain of the absence of additional strategies that are culturally or contextually specific to Taiwan or to senior education. These issues will be explored in the present study.

Language, Communication and Ageist Stereotypes

The preceding discussion has pointed out that accommodation strategies can be adopted in response to perceptions of one's conversational partner's language-reception and language-expression abilities. The existing literature has offered some insights into the expressive and receptive linguistic features associated with older individuals, but it must be borne in mind that such work can reinforce stereotypes, and should be challenged given that language accommodation based on stereotypical expectations of older people's language comprehension and processing abilities can lead to over-accommodative and patronising communicative moves.

In terms of language production, Shadden's (1997) review of studies on discourse performance in normal older adults revealed that the synthetic length and complexity of sentences produced by older people were mostly lower than those produced by younger ones; the old-old, meanwhile, produced less information via greater verbal output than the young-old did. Even though older individuals' conversational skills tend to be preserved relatively well, more language problems are still reported to exist in older adults than in younger ones (Hummert et al. 1995; Shadden 1997). In addition to verbosity (Gold, Arbuckle & Andres 1994), older people's distinctive conversational styles have been found to include disclosing their ages (Coupland et al. 1989); focusing on troubles such as illness, family problems, or bereavement (Coupland et al. 1990); and frequently interrupting (Chen 2017) or requesting clarification (Kemper et al. 1998).

In terms of receptive-communication competence, older people tend to process information more slowly (Birren et al. 1980; Lima et al. 1991). This might be the result of a number of physical changes that come with ageing. For example, decline in memory as experienced in older age (Hess 2005; Wingfield et al. 1985) and decreasing hearing acuity (Hayes 1981; Orchik 1981) can influence older people's ability to retrieve information in conversations (cf. Hupet et al. 1993).

A number of terms have been coined for the communication styles adopted in conversations with older adults, including "patronising talk" (Ryan et al. 1995), "secondary baby talk" (Caporael 1981; Caporael et al. 1983) and "elderspeak" (Cohen & Faulkner 1986; Kemper 1994). In Kemper et al.'s (1998) study on the form and effects of practising elderspeak in a referential-communication task, it was noted that younger adults' instructions to older adults became shorter, simpler, slower and more repetitious. Other verbal characteristics of elderspeak may include more frequent pauses between utterances, lowered propositional density (Kemper et al. 1996), increased use of diminutive and endearment terms (Brown & Draper 2003), tag questions (Herman & Williams 2009), higher pitch, exaggerated intonation (Caporael 1981) and more interrogatives or imperatives (Ashburn & Gordon 1981). Collective plural pronouns like "us" appear to be commonly deployed to build a sense of solidarity between a speaker and an older addressee (Makoni & Grainger 2002; Sachweh 1998). Furthermore, Hummert (1999) argued that negative age stereotypes are related to patronising communication with older people, and the defining strategies of patronising talk include simplification, clarification, demeaning emotional tone and low quality of talk (see also Hummert & Ryan 1996; Ryan et al. 1995).

It should be noted here that these communication styles tend to be triggered by negative stereotypes of older adults rather than by their actual communicative needs: that is, elderspeak, secondary baby talk and patronising talk are addressed not only to cognitively impaired older individuals but also to healthy ones. This can have distinctly problematic consequences. For instance, Kemper et al. (1998) found that, while the use of elderspeak did not actually help older adults comprehend better or more accurately, it could lower their self-evaluations of their communicative competence. Similarly, Ryan et al.'s (1986) model of the communication predicament of aging (CPA) explored a negative communicative feedback cycle rooted in over-accommodation to older adults' presumed deficiencies in communicative competence. Potential consequences of CPA include constrained opportunities for older adults to communicate (Harwood et al. 1997; La Tourette & Meeks 2000; Ryan et al. 1994), a sense of loss of personal control and self-esteem (O'Connor & Rigby 1996), lessened social interaction, or even reduced psychological activity (Baltes & Wahl 1996). As mentioned earlier, people's primary motivations for pursuing learning activities in later life are to seek self-fulfillment and become more socially active. Therefore, the aforementioned negative consequences of elderspeak must be carefully avoided in communication between teachers and older adult students.

Communication-Accommodation Strategies and Adult Education

A few prior studies have examined the application of language accommodation – mainly convergence strategies – in adult-education contexts, and the findings could shed some light on what teachers might need to consider when communicating with older adult learners. As pointed out by Mottet et al. (2004), adult students tend to feel more motivated to communicate with their instructors if the latter are using communication-accommodation strategies. Convergent accommodation in such contexts can be encouraged and realised through various specific strategies: for example, allowing adult students to reflect on their own learning and views by building open communication environments (Wulff & Wulff 2004). The quality of teacher-–adult student communication can be enhanced by allowing adult students to maintain their own communication styles in class and by helping them feel comfortable and safe in class (Lucas 2006). Also, older adult students exhibit stronger needs than younger ones to be treated as equals, meaning that their teachers might need to be more sensitive to the impact of power or status differences on their communication (Lucas 2006).

It has also been found that communicative accommodation is more likely to be initiated by those who perceive themselves to be lower in status or less powerful (Gregory et al. 2000). This phenomenon is particularly important to consider when studying teacher–student communication in Chinese societies, because – as further discussed in the following section – age differences between teachers of senior education and their older students can engender power-asymmetry issues in communication. Giles and Dorjee (2004) have also pointed out that when teachers are much younger than their students, it can lead the former to adopt over-accommodative communication (i.e. patronising talk). Given that many teachers in senior-education contexts are much younger than their students, the present research will explore whether this pattern is replicated in Taiwanese data.

Teacher–Student Communication and Confucian Influence in Taiwan

It should be noted that the studies of language, communication and education reviewed were mainly conducted in Western societies and therefore are not necessarily generalisable to Taiwan, where teaching at all age levels is strongly circumscribed by Confucian doctrines. As observed by Pratt et al. (1998), the teacher–learner relationship in the Confucian tradition is likened to that of father and son or daughter. In other words, teachers in Chinese societies are expected to behave like fathers, exercising authority over their students; and this goes a long way toward explaining the power asymmetry that typifies Taiwanese teacher–student communication (Lu & Ung 2007) as well as Taiwanese teachers' extensive use of direct commands and an authoritative tone (Gao 1998). According to Huang (2005), because of Confucianism's influence on Taiwan's education system and society more generally, older Taiwanese people spent their schooldays in a highly authoritarian learning environment and are accustomed to instructor-centred lectures, which remain the most common instructional practice in Taiwan's universities for older adults.

This picture is complicated, however, by filial piety: an important Confucian code of intergenerational relationship that endows older people with greater power and higher status than their juniors. Because senior-education teachers are very likely to be younger than their students, the dynamics of their communication in Taiwan may be particularly complicated and age-sensitive. It is therefore predicted that teachers in Taiwan may experience conflicts or difficulties in positioning themselves in relation to their older adult students in the process of classroom communication, because the Confucian tradition endows older people with greater power and higher status. Hence, when power is potentially derived both from the teacher's role and from the students' advanced age, which is greater? To further understand this issue, the choices of communication strategies in association with teachers' ages need to be investigated.

Research Questions

In sum, despite evidence that teachers' communication accommodation is linked to students' learning outcomes and satisfaction, hardly any exploration of such links in senior-education contexts has hitherto taken place. To understand the communication-accommodation strategies employed by Taiwanese teachers of older learners and the reasons to employ the strategies, this study will use Coupland et al.'s (1988) extended model of sociolinguistic processes in CAT as its theoretical framework and utilise its findings to create an extended CAT model specific to communication involving teachers and older adult students in Taiwan. The present work is divided into two studies, each guided by two research questions. Study 1, which is primarily interview-based, seeks to answer the following:

RQ1: What communication-accommodation strategies do teachers of older adult students in Taiwan report using in teacher–student communication?

RQ2: What are these teachers' rationales for adopting their reported communication-accommodation strategies?

Study 2, carried out by a survey, is guided by two additional questions. Firstly:

RQ3: What is the relative salience of the various communication-accommodation strategies identified by Study 1?

As discussed above in the theoretical framework section, age differences between teachers and their older adult students could influence their communicative interactions in class, perhaps in a patronising direction, because of age-based power asymmetry and/or social norms regarding showing respect towards older people in Taiwan. Thus:

RQ4: How are teachers' age ranges associated with the patterning of communication-accommodation strategies identified by RQ3?

Study 1 Design and Data

In order to answer RQ1 and RQ2, qualitative interviews were conducted to elicit more culturally and contextually specific accounts of the communication processes under study. As explained earlier, Coupland et al.'s (1988) extended CAT model provides a useful conceptual framework for this study, insofar as it explains teachers' choices of communication strategies in relation to at least four addressee or hearer-focused dimensions ("attend to others' productive performance"; "attend to others' interpretive competence"; "attend to others' conversational needs"; "attend to role relations"). In addition, teachers' self-reported communication-accommodation strategies can potentially realise one or more of four sociolinguistic dimensions, including approximation strategies (i.e. convergence vs. divergence), interpretability strategies (e.g. simplification of content), discourse-management strategies (e.g. choosing or avoiding particular topics) and interpersonal control strategies (e.g. choosing particular forms of address).

The total of eight addressee-focused and sociolinguistic dimensions mentioned were used as the starting point for the development of Study 1's semi-structured interview questions (see Appendix A). All were open-ended questions, allowing the interviewees to express their views about how best to communicate with older adult students and their rationales for such views. The questions covered which communication strategies were used by the interviewees (sociolinguistic encodings of communication-accommodation strategies); how they perceived their roles in class or relationships with older adult students (attendance to role-relations); how they perceived older adult students' expressive and receptive language abilities (attendance to productive performance and interpretive competence); and how these perceptions influenced their communication with older students, as well as what communicative or conversational needs they perceived older adult students to have and how such perceptions influenced their teacher–student communication (attendance to conversational needs).

However, as this research also intends to extend Coupland et al.'s (1988) CAT model, the Study 1 interviewees were encouraged to provide other dimensions and considerations beyond the existing model to explain their communication-accommodation choices. Their age data were also collected at this time.

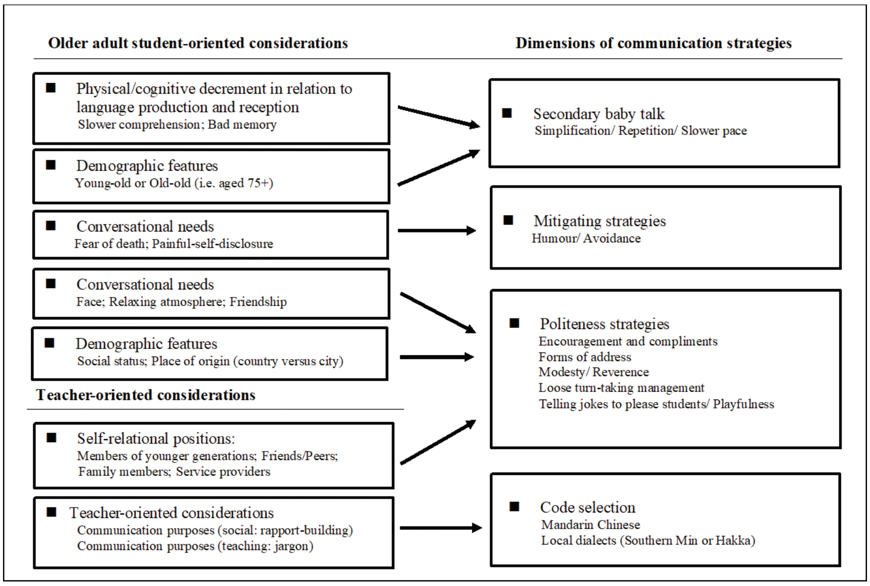
Nine female and six male participants (aged between 40 and 70) were invited to participate in the interview phase. The interviews, conducted from September to December 2014, yielded approximately 25 h of audio-recorded data in total. The author of this paper, acting as the interviewer, targeted six senior-education institutions, which can be categorised into three main distinct types of lifelong-learning sites in Taiwan, including three community-based activity centres (in Chia-Yi and Nantou), two universities for older adults (in Pingtung and Tainan) and a lifelong-learning organisation (in Kaohsiung). Four of the six sites were located in cities and two in the countryside. The recruited interviewees were a mixture of researcher's acquaintances and teachers who volunteered to take part in this study, following contact between the researcher and the heads or managers of the targeted senior-education sites.

Consent forms were signed by the interviewees before the interviews commenced. It is worthwhile to note that the research processes as presented in this paper were reviewed by the National Cheng Kung University Human Research Ethics Committee, which issued an approval statement (Reference No. 103–286) indicating that the operation of the research followed the ethical guidelines required by Ministry of Science and Technology, Taiwan (the main body providing research funding to Taiwanese scholars).

The interview data were transcribed into Chinese for further analysis, and the transcripts were coded according to the main categories of communication strategies reported by the participants. Some codes were created in line with relevant concepts as found in existing literature, for instance, secondary baby talk. Other codes were created to reflect the functions of the interviewees' chosen communication strategies, such as mitigation of certain unpleasant topics or demonstration of politeness to older students. In addition, the category of "code-selection" was utilised to explain the selection of language codes by teachers of older students, for reasons that will be discussed later.

What follows ("Study 1 Findings") presents the answers to RQ1 and RQ2. Figure 2 illustrates the relations between various dimensions of communication-accommodation strategies and the rationales the interviewees gave for adopting them, with the latter group further subdivided into student-orientated and teacher-orientated considerations.

Figure 2. Teachers' communication accommodation to older adult students in Taiwan: Considerations and strategies



Study 1 Findings

Secondary Baby Talk

The first category of communication-accommodation styles identified in the Study 1 data was named "secondary baby talk," because it exhibited certain conversational features characteristic of such talk. As suggested in prior literature, secondary baby talk features include simplification, repetition and slow-paced speech. The interviewees who used these communication techniques did so mainly because they perceived older adult students as having physical obstacles to language production and reception: for example, as comprehending concepts – especially theoretical ones – more slowly, and as having bad memories (see the category *physical/cognitive decrement in relation to language production and reception* in Figure 2). According to participants T2 (T stands for "teacher") and T13:

> Older adult students understand difficult concepts rather slowly. Therefore, I would avoid using jargon and prefer simpler and colloquial language. (T2, aged 50, female)

> Older adult students forget what they have learned very easily, so I just have to teach them the same thing again and again. (T13, aged 70, female)

Teachers' choices of the above communication strategies also seemed to depend on older adult students' chronological age ranges. The older they were, the more likely they were to become receivers of secondary baby talk styles. For example, as T4 explained:

> I need to pay more attention to older adult students aged over 75 or 80 to help them understand what I teach by repeating or simplifying the content. This is because their reactions and learning progress are rather slow. They are very elderly so their brains do not function as well as those older students who are a bit younger. However, apart from those aged 75 or 80, most older adult students I teach have very quick comprehension and learning abilities, not worse than youngsters. (T4, aged 69, male)

To sum up, communication accommodation featuring secondary baby talk could be categorised as one of Coupland et al.'s (1998) interpretability strategies (see Figure 1). That is, Taiwanese teachers modified the complexity of the language they used for teaching older adult students because of older-age-related decrements in language abilities (as addressee-focused considerations).

Mitigating Strategies

There were certain painful topics, especially death, serious illness and bereavement, that the teacher participants tended to avoid in communication with older students. If avoidance of such topics was not possible, they would often use humour as a communication strategy. As T1 and T5 reported:

> We don't talk about death because it is pointless, given that my students are still healthy […]. The priority of engaging in lifelong learning activities is to look for happiness [… and] being happy can keep sickness away […]; we should avoid triggering negative thoughts. (T1, aged 65, male)

> If I really have to talk about death-related topics, I will tell jokes or present death in a humorous way, which makes older adult students feel amused and not afraid. (T5, aged 64, male)

During the interviews, the avoidance of death-related topics as an important aspect of teacher–student communication was raised by interviewees without being prompted by the interviewer through any direct questions such as "Do you avoid mentioning death in class?" or "What could be a taboo in class?" Rather, it arose naturally in the interview processes, implying these teachers' strong awareness of death as a taboo and of how referring to it without mitigation could compromise older learners' satisfaction with the learning climate.

Similar mitigation strategies were also applied in situations where older adult students disclosed painful experiences. For example, according to T11:

> If my students mention sad things, I divert their attention to something else, more interesting and amusing [….] stopping them from thinking about troubles [… and] replacing them with topics that are more bright and positive […]. I do not want to experience the sadness with them. (T11, aged 55, male)

In short, the observed avoidance strategy and use of humour, which could be categorised into Coupland et al.'s (1988) discourse-management strategies, functioned to mitigate the impact of raising topics stereotypically perceived to be difficult for older students and hence named as mitigating strategies in this present study (see Figure 2). Such communication-accommodation choices were made based on the teachers' perceived addressee-oriented conversational needs to allow older students to experience happiness and satisfaction via communication processes that were free of unpleasant topics and did not provoke fears of death.

Politeness Strategies

The majority of the reported communication strategies in this study were related to the concept of politeness (see Figure 2). Politeness, according to Brown and Levinson (1987), can be positive or negative, respectively intended to appeal to a person's positive and negative face. According to Brown and Levinson (1987), positive face is a person's desire to be liked, appreciated and respected by others, while negative face describes his or her right to be free from imposition and desire to claim the freedom to take autonomous action as a competent and independent adult. Hence, in the present study, those communication strategies used to make older adult students feel appreciated and liked were perceived as positive politeness strategies, while those employed to prevent older adult students from feeling forced or controlled by teachers were regarded as negative politeness strategies. The various forms of politeness strategies are discussed later.

The current findings indicate that the teachers' use of positive politeness strategies included the giving of frequent encouragement and compliments to older adult students even when they had made little learning progress, verbal demonstrations of modesty or reverence, or telling jokes with the expressed aim of pleasing them. As to negative politeness strategies, they were in the form of avoiding strict control of turn-taking. Notably, the teachers presumed that these positive and negative face-enhancing strategies not only helped them build good relationships with their older students but also positively influenced the students' learning motivations. For example, T5 maintained that a teacher:

> needs to keep encouraging and praising older students to make them feel like they are gaining face. Otherwise, they might give up when failing to remember the lessons or feel coerced when being asked to follow teaching instructions. (T5, aged 64, male)

Many of the interviewees prioritised face-maintenance in the process of teaching and were also aware of older students' desire to experience class as a relaxing communicative environment. One way of fostering such an environment was to tell jokes to please older students; as T4 commented:

> I think the priority in communication involving teaching older adult students should be happiness rather than learning efficiency. They should not be made to sit still listening to the lecture, but allowed to have fun in a relaxing atmosphere. Therefore, it is good to tell jokes occasionally in class. (T4, aged 69, male)

Most interviewees also reported that they had been able to foster relaxing learning environments via loose turn-taking management: specifically, avoiding taking control of who was allowed to talk in class and when for the purpose of appealing to older students' negative face. This was markedly different from traditional teacher–student interaction in Chinese societies. As T4 argued:

> Some older adult students come to the class only for making friends. That is why I do not stop them from chatting in class [… where] they should feel relaxed and carefree. (T4, aged 69, male)

The aforementioned communication-accommodation behaviours (i.e. encouragement and compliments, loose turn-taking management and telling jokes to please students) all fall into the discourse-management strategies category of Coupland et al.'s (1988) CAT model and are associated with the speaker's focus on the addressee's conversational needs including face maintenance and/or seeking a relaxing communicative atmosphere that will facilitate friendship development (see Figure 2).

In addition to these considerations reflecting older adult students' conversational needs, some of their demographic features – for instance, their social status and urban vs. rural origins – could have influenced the senior-education teachers' employment of politeness strategies. As T3 explained:

> After teaching many older adult students in urban areas, I learned that they seem to be more sensitive and have more expectations of respect from others […] since their social statuses tend to be higher. Unlike those in the cities, older adult students in the countryside are more passionate, pure and friendly. I would be more alert and careful when talking to those older adults who are considered elites and had well-regarded occupations before retirement. I need to pay attention to showing reverence and modesty to a greater extent and try not to offend them. (T3, aged 40, female)

For these reasons, T3 recommended that teachers tell more jokes and exhibit more "playfulness" in class when teaching in the countryside. T4 said that he provided more positive feedback and paid more respect to those older students with higher social status, such as those who used to be former teachers, military officers and civil service workers:

> Because they are very intelligent, as their teacher, I need to make sure that I sound more modest and polite. To demonstrate modesty, I need to avoid giving my students, especially those with higher social status, direct correction of mistakes. (T4, aged 69, male)

It was found that senior-education teachers perceived themselves as having a dynamic and complex range of different roles and relationships with older adult students, and that the teachers' self-role positioning was not particularly straightforward. For example, as T3 put it:

> Sometimes, I encounter a dilemma in defining my roles in class, and so do my students. I do not want to portray myself as a teacher; but if I simply interact with my students as someone younger, it is difficult for me to provide professional advice as an expert. (T3, aged 40, female)

Instead of categorising role-relations as a dimension of addressee-oriented considerations (as in Coupland et al.'s CAT model; see Figure 1), this study regards teachers' personal accounts of who they are to the older adult students as a teacher-oriented dimension (see Figure 2). The reason is that it is up to the teachers to decide what kinds of communication purposes they would like to prioritise, which later is associated with the types of relational roles (not the prescribed teacher–student one) they would like to take on as a consequence.

During communication with older adult students, the teacher participants – in addition to maintaining their prescribed institutional roles as teachers – would position themselves in one or more of the following four ways: as people from younger generations; as friends or peers; as family members; or as service providers. The teachers accommodated their communication styles to the personal choices they had made regarding which of these roles or relational positions they wanted to adopt. They also chose different forms of address to indicate these various relational positions to their older adult students (as will be discussed further in Study 2). Sometimes, the teachers' role-choices also functioned to appeal to older students' positive face, and hence have been categorised as a form of politeness strategy in Figure 2. For example, as T7 mentioned:

> I want to show intimacy and closeness to my students, so when I address them, I want them to feel like they are my relatives. That is why I call them grandmother/grandfather or uncle/aunty. (T7, aged 40, male)

T6 also supported the use of certain forms of address to indicate closeness:

> Even though my students always call me teacher, I instead address them as sisters or brothers to make them feel close to me. (T6, aged 50, female)

In cases where a younger teacher felt a strong need to show respect to older students, or simply perceived his or her role as a service provider or someone younger, certain corresponding politeness strategies came to the fore: for example, giving high praise to students even when only little learning progress had been made. Again, the participants recommended the use of playful language and advised against serious or authoritative communication styles. For example, as T1 maintained:

> I am much younger than my students and some of them can be as old as my father or grandfather. Therefore, when talking to them, I have to be polite and cannot treat them from the position as a teacher. Besides, teachers in senior education are like service providers, enabling older students to feel happy and relaxed in the process of learning, so my responsibility is to use playful language, like telling jokes or being humorous, instead of taking an authoritative tone, to teach them. Furthermore, it is important to keep giving compliments to older students when they make progress in learning, and even if they don't perform well, you still have to praise them. (T1, aged 65, male)

In a nutshell, the teacher participants reported using a number of communicative styles for the purpose of showing politeness to older adult students. These included encouragement and compliments; the use of various address forms (grandmother/grandfather, brother/sister, uncle/auntie) to indicate closeness; expressions of modesty and reverence; avoidance of strict turn-taking management in class; and the use of playful and humorous language. These communication accommodations enacted the sociolinguistic dimension of discourse-management strategies in Coupland et al.'s (1988) CAT model. The corresponding rationales reflected certain addressee-focused as well as speaker-focused considerations, including the older adult students' conversational needs (face, relaxing atmosphere, friendship-seeking) and demographic features (social status, place of origin) as well as teachers' perceptions of their own roles in relation to older students.

Prioritised Communication Purposes and Code-Selection

Two teacher-oriented considerations, claiming an expert identity and prioritising teaching rather than rapport-building, were found to be associated with code-selection, another dimension of teachers' choices of communication strategies. In Taiwan, Mandarin Chinese is the official language, but two local dialects, Southern Min and Hakka, are spoken by the ethnic groups that correspond to their names. The former dialect is more prevalent and can be understood by Hakka people as well, whereas Hakka tends not to be comprehended by non-Hakka individuals. The interview data revealed that Chinese was considered more appropriate for presenting jargon or theory (see "Communication purposes (teaching: Jargon)" in Figure 2), while Southern Min was spoken mainly for social purposes and the provision of secondary examples to elaborate theories that had proved difficult to understand. The teacher participants would therefore code-switch between Chinese and Southern Min to fulfil one or both of the two communication purposes, specifically, teaching jargon and building rapport with older students. As T6 put it:

> Generally, Chinese is spoken when talking about academic theories while Southern Min is used for chatting or giving examples to the theories. Basically, Southern Min sounds more friendly and easily accessible. (T6, aged 50, female)

T2 also supported the use of Southern Min for social purposes:

> Chinese is used for serious purposes, while Southern Min is to give older adult students a break or to elicit small talk. (T2, aged 50, female)

Considered as a form of communicative convergence, code-switching can also indicate teachers' intention to show solidarity with their older adult students. As stated by T10:

> When I teach older adults in a Hakka village, I force myself to learn some Hakka words from my Hakka students and speak some simple Hakka words with them even though I don't speak Hakka and usually use Chinese for teaching. (T10, aged 50, female)

In the case of convergence to Southern Min, as mentioned by T12:

> I usually speak Chinese for teaching but older adult students in Tainan City really like to speak Southern Min. Hence, in order to increase closeness with my students there, I would switch to Southern Min. (T12, aged 60, female)

In other words, teachers' choices of which language to speak when communicating with their older adult students were based on one or both of the two main communication purposes: that is, maintaining the use of Chinese for teaching and converging with the local dialects preferred by the communities where the teaching was delivered. These communication-accommodation strategies were both congruent with the approximation-strategy dimension of Coupland et al.'s (1988) CAT model.

Study 1 Conclusions

The findings of Study 1 can be summed up in the following 10 statements.

1. Taiwanese teachers of older adults accommodate their communication styles to secondary baby talk (repetition, simplification and slow-paced speech) because of their perceptions that their students, especially those aged over 75, have low language-reception and language-expression abilities.
2. Mitigating strategies characterised by avoidance or humour are employed by these teachers to accommodate their older adult students' perceived communication or conversational needs arising from the fear of death, as well as their painful self-disclosures.
3. Teachers use encouragement and compliments as politeness strategies to accommodate older adult students' conversational needs for face maintenance.
4. Loose control of turn-taking in class is used as a communication strategy to accommodate older adult students' desire for a relaxing environment for both learning and friendship development.
5. Showing modesty and reverence in language is employed as a communication strategy particularly to accommodate older adult students who have high social status or are from cities. One expression of this strategy is the avoidance of direct correction of mistakes in class.

6. Telling jokes or showing playfulness in teaching language is a communication strategy used by teachers not only to accommodate older students' need to learn in a relaxing atmosphere but also those who are from the countryside.
7. Teachers choose various forms of address to reflect their own choices of role positions in relation to their older students or to demonstrate their politeness, reverence, or closeness.
8. When teachers are much younger than their students, it is more difficult for the former to activate their professional identities, and this leads them to rely instead on age identity during teacher–student communication. The corresponding communication-accommodation behaviour is aimed at emphasising politeness.
9. Senior-education teachers often see themselves as service providers, which triggers their use of an encouraging, positive and playful tone in their teaching language, as part of providing a pleasant and satisfying learning environment for older students.
10. Code-switching is used for both teaching and social purposes, and teachers of older students decide which of these functions to prioritise.

Study 1's qualitative data shed considerable light on the nature of teachers' communication-accommodation choices when teaching older students, as well as on the considerations that underpin such choices. Nevertheless, this data by itself cannot indicate the patterning and relative salience of each identified strategy. It is not clear, for instance, whether the potentially ageist strategy of secondary baby talk was endorsed or used by the majority of the teacher participants. Likewise, Study 1's findings provide only limited information about how their own and their students' ages influence teachers' approaches to teacher–student communication. Therefore, more exploration regarding this issue is needed; for instance, a quantitative exploration of the communication strategies identified in Study 1 might clarify whether younger teachers are more likely than their older counterparts to adopt patronising communication styles, as suggested in the prior literature, and/or whether teachers of differing ages use different forms of address to imply their age-relevant preferences regarding their relational positions when communicating with older students. Study 2, based on a quantitative survey approach, addresses these issues.

Study 2 Design and Data

To obtain the answers to RQ3 and RQ4, the Study 2 questionnaire survey was conducted in April 2015 to elicit information about the extent to which the four main categories of communication strategies identified in Study 1 were used by a larger pool of teacher participants, as well as the associations between teacher participants' age ranges – young, middle-aged, or older – and their use (or not) of each strategy.

Because Study 2 was conducted to add depth to the Study 1 data, its survey questions were created mainly in accordance with those asked in Study 1, slightly paraphrased. This was done to maintain a high degree of consistency between the communication phenomena under study in the two phases. The survey questions were all designed as categorical variables (see Appendix B). The age ranges for the three teacher participant age groups were 39 and below for the "young" category, 40–60 for the "middle-aged" category and 61+ for the "older" category.

RQ3 is an umbrella question, comprising five subquestions about (1) the choices of six main forms of address for older adult students; (2) the use of patronising communication strategies or secondary baby talk; (3) the use of politeness strategies; (4) the mitigation of death-related topics; and (5) code-selection. The six reported modes of address for older students included first name, "older brother" or "older sister," "student," "handsome guy" or "beauty," "grandpa" or "grandma," and "uncle" or "auntie." The subcategories of secondary baby talk consisted of avoidance of jargon and theories (i.e. simplification), slower pace of speaking and repetition. As to mitigating strategies, the questionnaire asked whether death-related topics were avoided or replaced with light-hearted subjects (humour). The group of politeness strategies consisted of four subcategories: avoidance of direct correction of mistakes; loose turn-taking management; giving encouragement and compliments; and telling jokes and being humorous to please students. The question regarding code-selection was phrased as "using the language older students prefer."

Of the 300 questionnaires distributed, 213 (71%) were completed. The author distributed and collected them in person from four study sites (all different from those targeted in Study 1) in central and southern parts of Taiwan, where senior-education teachers (including those from northern parts of Taiwan) were gathered to receive professional training required by the government. These occasions provided the best opportunities for the researcher to approach senior-education teachers of various subjects, of different ages, and from different areas of Taiwan. Each respondent was given a convenience store voucher as compensation, along with a consent form.

Of the 213 respondents, one-third were young (31%; aged <39), half were middle-aged (53%, aged 40–60) and less than 2 in 10 were older (16%; aged 61+). Chi-square tests were conducted for the analysis of RQ4, and the results relating to both RQ3 and RQ4 are presented as follows.

Study 2 Findings

Choices of Forms of Address

As shown in Table 1, six alternatives for address forms could be chosen by the 213 respondents. The least common choices for the participants were to address their students as "uncle" or "auntie" (n = 31), "handsome guy" or "beauty" (n = 32) and "student" (n = 34). By far the most popular address forms were "grandpa" or "grandma" (n = 108) and "older brother" or "older sister" (n = 104). This suggested that, in this senior-education context, Taiwanese teachers tended not to position themselves in line with their professional roles but were likely to take the positions indicative of age differences (i.e. "grandpa" or "grandma") or respect (older students

Table 1. Modes of addressing older students, by teachers' ages (N = 213)

Forms of address	Teachers' ages			n	Chi-square
	Young (<39)	Middle-aged (40–60)	Older (61+)		
"Grandpa" or "grandma"	46%	48%	6%	108	$p < 0.001$
"Older brother" or "older sister"	16%	67%	17%	104	$p < 0.001$
First name	28%	53%	19%	43	Ns
"Student"	9%	59%	32%	34	$p < 0.01$
"Handsome guy" or "beauty"	16%	50%	34%	32	$p < 0.01$
"Uncle" or "auntie"	13%	81%	6%	31	$p < 0.01$

do not actually have to be older to be addressed as "older brother" or "older sister").

Chi-square tests revealed that the associations between forms of address and teachers' ages were significant in almost all cases, with the exception being the use of students' first names. Specifically, more middle-aged and older teachers chose to address their older adult students as "student" (59% and 32%) or as "handsome guy" or "beauty" (50% and 34%). In the case of addressing older students as "older brother" or "older sister," it was as common among the young (16%) as among the older (17%). Young and middle-aged teachers, on the other hand, preferred terms that implied intergenerational relationships, such as "grandpa" or "grandma" (46% and 48%) and "uncle" or "auntie" (13% and 81%).

Use of Patronising Communication Styles

The results of Study 1 revealed that Taiwanese teachers used patronising communication styles or features of secondary baby talk when talking with their older adult students, while Study 2 confirmed that three types of such communication strategies were adopted by the majority of the 213 survey participants. The adopted patronising communication styles consisted of "slower pace of speaking" (n = 166), "repetition" (n = 166) and "avoidance of jargon and theories" (n = 136).

As shown in Table 2, chi-square tests indicated that the associations between teachers' use of secondary baby talk and their own ages were

Table 2. Use of patronising communication styles, by teachers' ages (N = 213)

Patronising communication	Teachers' ages			n	Chi-square
	Young (<39)	Middle-aged (40–60)	Older (61+)		
Slower pace of speaking	34%	49%	17%	166	ns
Repetition	34%	48%	18%	166	p = 0.05
Avoidance of jargon and theories	38%	46%	16%	136	p < 0.05

ns, not significant

significant in all cases except the use of a slower speaking pace. It was found that young and (especially) middle-aged teachers were more likely to employ all the reported patronising communication styles than older teachers.

Use of Politeness Strategies

Table 3 shows the extent to which the survey participants employed the four studied politeness strategies when communicating with their older adult students. The majority of the teachers reported using all four. The most commonly chosen politeness strategy was giving encouragement and compliments (n = 205), followed by using humour to please students (n = 180), avoiding direct correction of students' mistakes (n = 161), and adopting loose turn-taking management (n = 154).

There were no statistically significant associations between the teachers' ages and their use of any of the four politeness strategies, implying that these strategies were considered appropriate and necessary by teachers of all ages.

Code-Selection and Mitigation of Death-Related Topics

The last set of strategies, shown in Table 4, included the extent to which the teacher participants avoided dealing with death-related topics in class

Table 3. Use of politeness strategies, by teachers' ages (N = 213)

Politeness strategies	Teachers' ages			n	Chi-square
	Young (<39)	Middle-aged (40–60)	Older (61+)		
Giving encouragement and compliments	32%	52%	16%	205	ns
Telling jokes and being humorous to please students	29%	53%	18%	180	ns
Avoidance of direct correction of mistakes	29%	55%	16%	161	ns
Loose turn-taking management	51%	51%	18%	154	ns

Table 4. Code-selection and mitigation of death-related topics (N = 213)

Strategies	Teachers' ages			n	Chi-square
	Young (<39)	Middle-aged (40–60)	Older (61+)		
Using the language code older students prefer for communication	34%	49%	17%	166	$p < 0.05$
Avoidance of death-related topics or replacing them with light-hearted subjects	35%	52%	13%	85	ns

and how much accommodation they would make to the language codes or dialects preferred by their students. Less than half of the participants replaced death-related topics with light-hearted subjects (n = 85), while a vast majority reported using language codes preferred by older students (n = 166).

There was significant association between teachers' ages and code-switching as a form of convergent communication accommodations. Table 4 shows that in comparison with older teachers (17%), it was more common among young (34%) and middle-aged (49%) ones to accommodate to a language code preferred by older students.

Study 2 Conclusions

The answers to RQ3 can be summed up as follows:

1. The most frequently chosen forms of address for older students were "grandpa" or "grandma," or "older brother" or "older sister," rather than "student."
2. The use of patronising communication styles was prevalent among the majority of teachers of older students, especially "slower pace of speaking" and "repetition."
3. The use of politeness strategies was commonplace among the respondent teachers, especially "giving encouragement and compliments" and "telling jokes and being humorous to please students."

4. Death-related topics were avoided in communication with older students by two-fifths of the respondents.
5. Choosing the language code preferred by older students in class was considered appropriate by most of the respondents.

The answers to RQ4 can be summed up as follows:

1. Teachers in the two younger age groups tended to address older students in class in ways that reflected intergenerational identities. Younger teachers were the least likely of the three groups to adopt a professional identity in the classroom.
2. Middle-aged teachers were the most likely to use patronising communication styles while older teachers were the least likely to do so.
3. No significant association was found between teachers' ages and their use of politeness strategies.
4. No significant association was found between teachers' ages and their avoidance of death-related topics in communication with older students.
5. Middle-aged teachers were the most likely to use code-switching for communication with older students, while older teachers were the least likely to do so.

The following section presents a synthesis of the results derived from Study 1 and Study 2, along with discussion of their contributions, implications, limitations and potential directions for future research on this topic.

Discussion and Conclusion

Contributions

The present study is believed to be the first to systematically explain and describe teacher–student communication processes in senior-education contexts in Taiwan using a communication-accommodation framework. Another important contribution made by this study is its development of the context-specific language-accommodation model (illustrated in Figure 2), which extends Coupland et al.'s (1988) CAT model by including more dimensions of teacher rationales for their language-accommodation decisions when talking with and teaching older adult students.

These newly identified considerations include the older-student addressees' demographic features (i.e. social status and rural vs. urban origin) and speaker-oriented considerations (i.e. what teachers prioritise within teacher–student communication and the relational positions that they subjectively perceive). The communication strategies discussed in this study add considerable depth to our understanding of how and why certain sociolinguistic encodings in Coupland et al.'s (1988) CAT model (e.g. politeness as a discourse-management strategy and secondary baby talk as an interpretability strategy) may be enacted in teacher–student communication in Asian senior-education contexts.

This study's revelation of interactional nuances that went beyond its research model implies that teacher–student communication in senior-education contexts cannot be meaningfully categorised based solely on either party's chronological age. The complexities of the students' other social and demographic background characteristics clearly can render teachers' communication-accommodation decisions difficult to make. For instance, teacher–student communication in Taiwanese senior-education contexts can be intergroup communication between two ethnic groups, leading to teachers' convergent code-switching to individual students' preferred dialects in class, even where they do not really speak those dialects themselves. Teacher–student communication can also vary strongly along with individual teachers' perceptions of which communicative function they want to prioritise, for example, teaching or rapport-building. When communication is mainly for teaching rather than for social purposes, teachers appear more likely to maintain their own language code (usually Mandarin Chinese), even if it might not be preferred by older students in a particular class.

Teachers normally experience pressure to promote themselves to attract older students to choose their courses from a large pool of learning programmes. This interteacher or interclass competition factor has the effect of turning teachers from educators into service providers or marketers, which indirectly drives teachers in both the countryside and urban areas to notice differences in local older students' preferred communication styles. Hence, Taiwanese senior-education teachers demonstrate an ability to flexibly accommodate their communication to fit their students' conversational preferences – which are not determined by the latter's age alone, but by their places of origin, among other factors.

Communication Strategies Compromising Benefits of Senior Education

Arguably, the ways in which the current study's participant teachers chose to accommodate their conversational styles to fit their own perceptions of older adults' needs were grounded in negative stereotypes of later life (e.g. physical or cognitive decrement in relation to language production and reception). This should be a cause for concern to practitioners, because such negative perceptions about ageing could lead to over-accommodation (Ryan et al. 1986) and patronising communication. Those older students who are still fit and capable may not appreciate. Likewise, when teachers employ language styles featuring secondary baby talk, the effects of such communication – for instance, a sense of loss of personal control and self-esteem (O'Connor & Rigby 1996) – run directly counter to the senior-education ideal of promoting healthy and satisfying ageing.

It is noteworthy that the use of secondary baby talk was more prevalent among younger and middle-aged teachers. This seems consistent with prior research that indicated younger adults tend to perceive features of secondary baby talk as positive, that is, as conveying affection (Caporael 1981). Younger teachers might similarly regard communication strategies such as simplification, slower pace, or repetition as ways of conveying care and nurturing affection or perhaps as an aspect of the reverence towards older adults that is expected under Confucian norms. However, such findings may also imply that younger teachers, as compared to older ones, have lower expectations of older adult students and hence are more likely to consider secondary baby talk styles appropriate and effective. Though this may be true in some cases, many older students remain fully capable of learning, and over the long term teachers' lower expectations of their abilities could reinforce negative stereotypes of older age and hinder the possibilities of combating ageism and promoting positive ageing through the teaching process. Similar concerns could also apply to the use of other communication strategies, such as avoiding death-related topics.

Interestingly, avoidance of the topic of death was a common communication strategy among the sampled senior-education teachers, though it was practised only by two-fifths of the participants. Death is an inevitable consequence of ageing, and even though it is not exclusively experienced by older people, it is still a very important topic to deal with in later life.

As such, teachers' alienation from death could imply a social attitude of stigmatising ageing or older people.

Communication Strategies Enhancing Benefits of Senior Education

The participants broadly agreed with the idea that the use of appropriate language and communication strategies can enable them to build learning climates matching older students' various needs and hence facilitate the achievement of the expected goals of senior education. Arguably, the language used in the communication process between teachers and older students in Taiwan serves more affective purposes (i.e. satisfying older learners' negative and positive face) than instrumental functions (i.e. teaching effectively). This is evident in teachers' accounts of older students' social-psychological needs, which prioritise strong positive face, conversational needs and the students' expectations of a relaxing communication environment that will help enhance their social connections with others.

The use of politeness strategies by teachers of all ages indicates a common ideology that older students' social needs take priority over their learning needs. As part of this, teachers actively avoid correcting students' mistakes in senior-education contexts, give compliments and encourage them even when little progress has been made. Potentially, this can satisfy older learners' need to experience a sense of achievement. Furthermore, their feelings of being respected and endorsed by teachers could enhance their psychological well-being.

From the present Taiwanese sample, teacher–older student communications appeared to be more intergenerational than institutional in nature. This perspective was particularly notable among teachers in the younger and middle-aged groups, whose choices of address forms positioned them in terms of generational and age differences from their older students, whereas older teachers treated themselves more clearly as teachers. This finding points out a distinctive feature or complexity of classroom communication in senior educational contexts, at least in Taiwan. That is, as discussed earlier, power asymmetry between younger teachers and their older adult students can be expected because of the influence of Confucianism. It is recommended that, in practice, teachers in Chinese cultures may need to be trained to deal better with intergenerational communication, in addition to how to create learning activities suitable to older learners' learning needs. This study, by taking language and communication into account, has revealed that students' gratifications obtained from participating in senior-education activities were derived not merely from educational efficiency but also from whether classroom communication facilitated the building of student–teacher or even interstudent rapport and the extension of social networks.

Implications for Practice

Based on the results as found in Study 1 and Study 2, a number of recommendations are given as follows for senior education practitioners to consider:

1. Teachers should be given more training aimed at building their awareness of potentially ageist communication styles that may be perceived by them as nurturing and polite but as patronising by older students, especially those who have not suffered any marked decrement in their physical or cognitive abilities.
2. Teachers' diverse self-positioning as family members, friends, or brothers or sisters of their students can be an effective communicative strategy for downplaying the power asymmetry in interactions between teachers and students, or between two generations, and thus to successfully foster closeness and rapport between older students and their teachers.
3. Senior-education teachers do not need to play the authoritative roles that are normally expected of teachers in Confucian societies. The multiple hats they wear – as marketers, service providers and educators – allow them to adopt communication strategies such as humour and playfulness that enable them to convey learning content in a more pleasant and accessible way.
4. Older students' social and psychological needs surrounding learning should be prioritised over teachers' needs to accomplish their

teaching goals or complete their curricula. This tends to explain why most of the considerations self-reported by the sampled senior-education teachers were student-oriented.

5. Showing politeness to older students is a fundamental norm in teacher–student communication in Taiwanese senior-education contexts, and not merely among the younger teachers, who in the context of Confucianism are assumed to experience the greatest pressure to demonstrate it. Teachers can use various strategies to demonstrate their respect to older students in class, such as encouragement, loose control of students' in-class discussions, non-correction of mistakes, being modest and using playful language.
6. The theme of death can be integrated into senior-education programmes to help older students deal with it when it approaches. This is not to suggest, however, that it is a subject to be dealt with *only* by older students or that it should only be associated with ageing. Teachers of all ages need to be given more training on how to raise this topic in a more neutral manner while talking with older students, or at least be reminded that merely mentioning it is unlikely to upset or offend older students, whereas distancing classroom discourse from this topic can do nothing to cultivate positive ageing.

Limitations and Suggestions for Future Research

This study has several limitations that must be noted. First, the data only represent one side of the teacher–student communication processes. Teachers' self-reported accounts of their communication-accommodation behaviours may accurately reflect what they believe their older students expect, but this study did not directly investigate such students' actual preferences for or against the discussed communication strategies. Future research should therefore explore the level of consistency between the communication behaviours perceived as appropriate by teachers and older students' needs and expectations and should assess whether the communication strategies reported in the present study would, in practice, be regarded as under-accommodative or over-accommodative by older students in Taiwan. It would also be worthwhile to investigate older adult students' rankings of the satisfaction they obtained from receiving the various kinds of communication strategies identified in this research, to further verify such strategies' relative levels of effectiveness.

It should also be noted that teacher–student communication processes do not simply consist of the accommodations teachers make to students but also those made by students to their teachers, for a variety of reasons. This issue has not been examined in the present work. Future research should therefore seek to capture communication-accommodation strategies from the older learners' side and to understand what interactional norms such learners perceive as appropriate for communication with teachers of various ages.

Lastly, the interview data examined in this research reflected teachers' perceptions and its self-reported nature means that its exact relationship to real classroom interactions is less than clear. Future research could incorporate video-recording of teachers' communication with older students to obtain, for instance, nonverbal features of their communication-accommodation behaviours. Discourse analysis could also be used as an alternative approach to studying transcribed teacher–student conversations and might reveal the conversational mechanisms negotiated by the participants, as opposed to those predetermined by social norms in senior-education contexts.

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Appendix A. Interview Questions

1. How old are you?
2. What communication strategies would you consider when communicating with older adult students?
3. How do you perceive your roles in class and your relationships with older adult students in the process of communication with them?
4. How do you perceive older adults' expressive and receptive language abilities? Are they in any way related to how you communicate with them in class?
5. Do you think older adult students have certain conversational or communicative needs that influence how you communicate with them?
6. Are there any other considerations, in addition to those mentioned above, related to how you communicate with older adult students in class?

Appendix B. Questionnaire Questions

1. How old are you? ☐ young (39 and younger) ☐ middle-aged (40–60) ☐ older (61+)
2. Which of the following forms of address do you use for older adult students?

Form of address	Yes	No
First name	☐	☐
Older brother/older sister	☐	☐
Student	☐	☐
Handsome guy/beauty	☐	☐
Grandpa/grandma	☐	☐
Uncle/auntie	☐	☐

3. Do you use any of the following communication strategies in your teaching of older adult students?

Communication strategies	Yes	No
1. Secondary baby talk		
Avoidance of jargon and theories	☐	☐
Slower pace of speaking	☐	☐
Repetition	☐	☐
2. Mitigating strategies		
Avoiding death-related topics or replacing them with light-hearted subjects	☐	☐
3. Politeness strategies		
Avoidance of direct correction of mistakes	☐	☐
Loose turn-taking management	☐	☐
Giving encouragement and compliments	☐	☐
Telling jokes and being humorous to please students	☐	☐
4. Code-selection		
Using the language older students prefer	☐	☐

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"Who would take a 90-year-old?" Community-dwelling nonagenarians' perceptions of social relationships

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Abstract

This article aims to deepen understanding of the informal social relationships of the oldest old by applying qualitative methods. It considers ideas of the fourth age, socioemotional selectivity theory, and gerotranscendence theory from the viewpoint of Finnish community-dwelling nonagenarians. Qualitative life-story interviews were analyzed using qualitative content analysis. Nonagenarians described the significance of social relationships but also social restrictions and loneliness. In addition, the interviewees described the company and help their social relationships provided, and the pleasant and unpleasant emotions they experienced in their existing and past relationships. Our findings indicate that social relationships can contribute to the ability of nonagenarians to live a good life in old age, and that nonagenarians' successful aging is not necessarily related to voluntary disengagement from social relationships, as suggested by some theories. Rather, our findings indicate a pursuit of engagement with other people to be important for the good aging of the oldest old.

Keywords: the oldest old, nonagenarian, community-dwelling, social relationships, qualitative research.

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Introduction

Despite the fact that the populations of Finland and most developed countries are aging rapidly (Eurostat 2018; National Institute of Health and Welfare 2018), our knowledge about the social relationships of the oldest old is limited. There is strong evidence that social relationships are important for older individuals' health and well-being (Berg-Warman & Brodsky 2006; Borgloh & Westerheide 2012; Yang & Stark 2010), yet our understanding of the social relationships of the oldest old from their own viewpoint is almost nonexistent. Consequently, our existing knowledge about social relationships in very old age is strongly based on quantitative research.

Previous studies have shown, for instance, that social engagement remains an important determinant of physical health in old age (Cherry et al. 2011); that social relationships can have a protective effect against mortality (Giles et al. 2005); and that social relationships are associated with cognitive performance (Gow et al. 2013), life satisfaction (Berg et al. 2006; Okabayashia & Hougham 2014), attachment to life (Jopp et al. 2008), and self-perceptions of disability (Kelley-Moore et al. 2006). Furthermore, social relationships have been found to be one of the most important aspects for the well-being and successful aging of the oldest old (Nosraty et al. 2012, 2015; von Faber et al. 2001). Numerous quantitative studies have shown that social relationships play an essential role in the lives of older and the oldest old people.

The qualitative approach is also needed to reveal new aspects of the factors perceived to be important for the well-being of older people. This is essential in order to promote the health and well-being of the older population, as quantitative measures are not always able to capture the essence of the studied subject, as the study by von Faber et al. (2001) demonstrates. They studied successful aging using both quantitative and qualitative methods, and found a considerable difference in their findings: the quantitative findings showed a very low proportion of successfully aged people, whereas the proportion of those perceiving themselves as successfully aged in the qualitative findings was significantly higher. Interestingly, when the older people were able to offer their own perceptions of successful aging, it turned out that it was not a matter of objectively measured physical functions but of successful adaptation to physical limitations. Thus, when the opportunity was given to older people to give their own views on the matter in their own words, a whole new perspective to the studied subject was found, one that could not have been detected using only quantitative methods. Similarly, as with the case of von Faber et al. (2001), the quantitative studies mentioned above emphasizing the advantages of an active social life cannot say much about the personal meanings that older people give to social relationships.

The primary focus of this study is on acquiring information about the informal social relationships of community-dwelling nonagenarians, also referred to as the "oldest old." The secondary aim is to consider some well-known ideas about the quality of life in old age – namely, the fourth age, socioemotional selectivity theory (SST), and gerotranscendence theory (GT) – from the viewpoint of these nonagenarians. This will be done by using life-story interview data, which are analyzed using qualitative content analysis. This study provides diverse information about the social relationships of the oldest old, including knowledge about the perceived limitations for – and the significance of – social relationships in the lives of the oldest old, and the valued aspects of social relationships in very old age. Thus, this study provides new knowledge about the social world of the oldest old, which is needed to promote their health and well-being.

Theoretical Background

The theoretical background of this study arises from the conception of affiliation, as outlined by the philosopher Nussbaum (2011: 34, 39–40). Nussbaum considers affiliation to be one of the most important human capabilities. Firstly, affiliation entails "being able to live with and toward others, to recognize and show concern for other human beings, to engage in various forms of social interaction, and to be able to imagine the situation of another" (Nussbaum 2011: 34). Therefore, community-dwelling nonagenarians should indeed be able to feel like members of a community, living "with and toward" others. Secondly, affiliation is about "having the social bases of self-respect and non-humiliation and being able to be treated as a dignified being whose worth is equal to that of others" (Nussbaum 2011: 34). This second precondition of affiliation presupposes that community-dwelling nonagenarians should not be in a disadvantageous position compared to others due to their advanced age and limited capabilities.

However, due to the various functional, social, and psychological challenges that very old individuals experience – such as reduced physical health and the loss of well-liked activities and family and friends (Jopp et al. 2016) – their social relationships, which are important for Nussbaum's (2011: 34) first precondition of affiliation, tend to decrease. Therefore, it is important to study qualitatively the nature of the social networks of people aged 90+ who are still living in well-established homes. In addition, reaching very old age may result in different forms of social and cultural stigma (Gilleard & Higgs 2010; Nussbaum & Levmore 2017), hampering nonagenarians' chances for Nussbaum's (2011: 34) second precondition – namely, to be treated as dignified beings whose worth is equal to that of others. In the next section, we will enter into these sociocultural challenges.

The Fourth Age and Successful Aging

Now that people are living longer, our perceptions of old age have become more multidisciplinary and diverse. Furthermore, it can be argued that old age cannot be studied without considering the life experiences and social context of individuals' lives. The fact that people are living longer has also resulted in the division of old age into ever smaller and more distinguishable life stages (Degnen 2007; Heikkinen 2004).

A well-acknowledged division is the one between the third and the fourth age (Laslett 1989). The distinction between and the definitions of the third and fourth age are not straightforward. Based on one definition, the fourth age can begin at very different ages, ranging from 60 to 90 years (Baltes & Smith 2003), which would make our interviewees (aged 90+) fourth agers. The third age is often referred to as the good news of old age, whereas fourth age is the bad news. Hence, the third age refers to the ability of older people to be effective and productive members of society, while the fourth age refers to a high prevalence of dysfunction, a reduced potential to recover functionality, and to loss of identity, autonomy and a sense of control which are threatening the features of the human mind and the chance to live and die with dignity (Baltes & Smith 2003). However, the shift from the third to the fourth age is not necessarily tied to the chronological age or life stage of the person; it can be a state of "unbecoming" (Higgs & Gilleard 2014) characterized by a lack of agency. A person becomes a subject of the fourth age when others determine him or her to be no longer able to manage everyday life (Gilleard & Higgs 2010). This study will provide new knowledge on whether people aged 90+ who still live in their well-established homes closer match the definition of third or fourth agers.

Considering the issues raised above, one could ask whether successful aging is at all possible for the oldest old who are often classified as fourth agers. What is considered successful aging depends on the definition used. Successful aging has been approached from three different perspectives: biomedical theories, psychological approaches, and lay views (Bowling & Dieppe 2005). Therefore, one could emphasize successful aging as the absence of disease and disability (Rowe & Kahn 1997); as consisting of life satisfaction, social participation, and functioning (e.g. Carstensen et al. 1999; Freund & Baltes 1998); or as consisting of manifold lay definitions that are only partly captured by theoretical models (Bowling & Dieppe 2005).

The concept of successful aging is problematic, and it has been criticized for creating unrealistic expectations. It implies that older people must stay active and be productive members of society, and that one can choose to age successfully (Dillaway & Byrnes 2009). Furthermore, the shortcomings of the theoretical conceptualizations of successful aging are related to their very limited opportunities to represent a wide range of older people's experiences of aging, rather than only a select group (Bowling & Dieppe 2005; Dillaway & Byrnes 2009). Thus, Dillaway and Byrnes (2009) argue that the definitions of successful aging provided by older people themselves can be more appropriate than external definitions. In addition, as Bowling and Dieppe (2005) argue, lay views are important for testing the validity of existing models and measures.

Indeed, studies conducted among the oldest old people suggest that the viewpoint of successful aging being merely the absence of disease and disability is problematic, as it would exclude most older people (e.g. Nosraty et al. 2012; von Faber et al. 2001). Although differing results can be found (Cherry et al. 2013), many studies instead point to the importance of social relationships in the successful aging of the oldest old people, even when studying older people's own perceptions (Jopp et al. 2008; Nosraty et al. 2012, 2015; von Faber et al. 2001).

The meaning of social relationships for successful aging has been theorized by SST and GT. SST suggests that as people get older, they become more present-oriented instead of future-oriented, focusing on experiences occurring in the moment. Therefore, they are likely to pursue goals related to emotional meaning and emotional satisfaction. This would also lead to the preference for familiar social partners in order to ensure the predictability and positivity of emotions and the emotional quality of social interaction. SST argues that reduced social contact in old age is not due to age-related losses or emotional withdrawal from social life but due to older people themselves being active agents, constructing their social worlds to match their social goals (Carstensen et al. 1999).

GT, on the other hand, suggests that the very process of living into old age is characterized by a general potential toward gerotranscendence, which means that as people age, they encounter changes in the way they perceive themselves, others, and the world. As a natural consequence, the social relationships of older people change from wider and more superficial to narrower and more profound (Tornstam 2011). However, there is a troubling inconsistency between these approaches and previous studies emphasizing the importance of social relationships in old age.

In this study, we aim to shed light on the social relationships of community-dwelling nonagenarians while bearing in mind Nussbaum's (2011: 34) view of affiliation in addition to the theory of the fourth age, SST, and GT (Carstensen et al. 1999; Tornstam 2011). We aim to determine whether our informants achieve affiliation as Nussbaum (2011) defines it, and whether SST and GT still hold up for nonagenarians. In addition, we aim to clarify whether cultural definitions of the third and fourth ages match the reality of our informants, and whether our informants can be seen as successful agers.

Data and Methods

The data used in this study originate from the Vitality 90+ study carried out in the city of Tampere in southern Finland. It is a multidisciplinary study focusing on longevity and the oldest old. This study utilizes life-story interview data from 2012. Every fifth community-dwelling woman and man living in Tampere (born between the years 1921 and 1922, thus aged 90–91 at the time) was sent a request to participate in the interview. The request was sent to 99 women and 41 men, of whom 25 and 20, respectively, gave a positive answer. The response rate was 25% for women and 48% for men. The collection of the data was approved by the ethics committee of the local hospital district.

Along with the interview request, a short questionnaire was sent to the participants asking about marital status, living arrangements, need for help, and self-rated health. Information about the participants' characteristics can be found in Table 1. As can be seen, the majority of the participants were widowed, lived alone, had no need for help, and rated their health as average.

The interviews were conducted by three researchers who were experts in the field of aging studies and two medical students trained to conduct interviews. The participants were interviewed in their homes. The shortest interview took 34 min and the longest 3 h and 20 min. There were nine interviews which took less than an hour, 24 interviews that took 1–2 h, ten interviews which took over 2 h, and two interviews lasting over 3 h. All 45 interviews were tape-recorded and transcribed into 1073 text pages. The interviewers had also documented short details of the interview situation and their personal observations about the

Table 1. Characteristics of participants in the interviews (n = 45)

Number of participants	Men (n) 20	Women (n) 25	Total (n) 45
Marital status			
Married	9	3	12
Widowed	11	17	28
Unmarried	1	4	5
Living arrangements			
Alone	11	23	34
With spouse	9	2	11
Need for help			
None	12	12	24
Sometimes	6	8	14
Daily	3	4	7
Health			
Good/fairly good	8	6	14
Average	12	16	28
Poor	1	2	3

interviewees, which helped the authors to delve deeply into the interview material, despite not having conducted the interviews themselves.

The same interview framework was used in all of the interviews; the participants were first asked to tell their life story from childhood to the present day. If necessary, additional questions were asked about school and studies, working life, marriage and children, wartime, and the death of loved ones. After that, questions about various topics, such as health, hobbies, everyday life, social relationships, a good old age, and longevity were asked.

The data were analyzed using the inductive approach of qualitative content analysis (Elo & Kyngäs 2008). Qualitative content analysis can be defined as a "research method for the subjective interpretation of the content of text data through the systematic classification process of coding and identifying themes or patterns" (Hsieh & Shannon 2005: 1278). This method of analysis was chosen because it allowed us to concentrate on a special viewpoint in the vast amount of text data, and thus it allowed a detailed identification of descriptions related to social relationships.

As the authors were not familiar with the interviews beforehand, the first phase of the analysis included a thorough familiarization with the data, ensuring an understanding of the data as a whole. In the next phase, by looking for descriptions of informal social relationships, the transcribed interviews were coded and short notes about the codes written. After that, the coded sections were read multiple times in order to recognize differences and similarities between the codes. In that way, an understanding of different descriptions of social relationships was created. Based on the observations made in this phase, codes identified as similar were grouped and preliminary categories were thus created. By observing the content of the preliminary categories created, similar categories were combined to create subcategories. Then, subcategories were observed in a similar way and combined in order to create general categories and, finally, the main categories.

The coding and the grouping of the codes into preliminary categories and the combining of the preliminary categories into subcategories were done by the first author. After that, the second author examined the codes in each category and presented his own observations. Together, the categories were revised and the generic categories and main categories formulated. The grouping of the categories is presented in Table 2. In the next section, these categories are presented and their content described.

Table 2. Categories created in the analysis process

The main category	General-level descriptions		Particular-level descriptions		
Generic category	The significance of social relationships		The nature of social relationships		
Sub-category	Restrictions and loneliness	Appreciation of social relationships	Company	Help	Emotional activity
Preliminary category	Death of friends and relatives	Being social	Visits	Receiving help	Feelings of joy
	Poor health	Having people around	Neighbors	Helping others	Unpleasant feelings
	Busy lives of relatives	Having family and friends	Telephone	Independence	Impact of childhood family
	Relatives living far away	Harmony of social relationships	Association activities		

Results

Based on the analysis, community-dwelling nonagenarians talked about their social relationships on both the general and particular level. The general level consisted of articulations about the significance of relationships and associated ideas of social restriction and loneliness. On the particular level, the participants described the nature of their existing social relations. We identified these levels as "the significance of social relationships" and "the nature of social relationships." The findings are illustrated below by extracts from the interview data. The extracts were translated from Finnish into English by the authors. The names of people and places appearing in the extracts are pseudonyms, and the letter R in front of a quotation refers to the researcher.

The Significance of Social Relationships

People reaching very old age are likely to encounter changes in their social surroundings. The participants talked about factors in their life that limited their opportunities to gain, maintain, and enjoy social relationships. Poor eyesight, deteriorating functional abilities, and increasing health problems resulted in fewer trips outside the home. The ever poorer condition of friends of the same age was mentioned as a social restriction as well. Anna explains how poor hearing became a reason for her to avoid conversations:

Anna: This hearing of mine harms me so much, because I can't hear. A lady was talking to me in an Ostrobothnian dialect, it's strange to me, and I couldn't hear. Sometimes I can't understand a word and it's so awkward. I can't take part in conversations… I can't hear questions, I can't hear answers, only when they burst out laughing. And I don't get to be part of it. (Female, living alone)

Anna felt awkward in social situations due to her impaired hearing. The phrase "I don't get to be part of it" reveals that she feels like an outsider. She feels worse off compared to others, which may have negative effects on her affiliation. In addition, one's own age as such was experienced as an obstacle to social relationships. Maria noted that in old age one cannot find a new partner.

R: How has life been on your own?
Maria: It's been okay. I've thought many times, that it would be nice to have a gentleman friend, but when you're old you can't find one anymore.
R: Why not?
Maria: No, who would take a 90-year-old? I'm in good shape though, I could manage just fine. But still. (Female, living alone)

Maria suspects that no one would take a 90-year-old lady friend. She believes that nonagenarians lose desirability in the eyes of others. Bearing in mind Nussbaum's (2011) definition of affiliation, Maria's dignity and equal worth to others seem threatened.

When relatives and friends lived far away, communication was naturally restricted. Moving to another area, away from old friends and acquaintances, had also caused feelings of loneliness in one participant. Some also felt that relatives did not have time to visit them because they are busy with work and hobbies.

Helena: But that's how it is, my relatives, they have so many of their own activities… They don't have time, these youngsters. I understand that they have their own hurries. (Female, living alone)

Helena felt that "these youngsters" had no time for her anymore, indicating she felt like an outsider in relation to her family. However, Helena, like many other interviewees, considered her relatives' busy lives natural, and expressed this in an understanding tone.

When interviewing 90-year-old people, death was a common theme. The interviewees talked about the deaths of several friends and relatives. Sometimes they had outlived all their friends. Amanda was asked whether she had any close friends.

Amanda: Not anymore. I've had a huge circle of friends, since I've had so many hobbies and been involved in everything. But everybody dies. When I look at those pictures… I counted the other day, when I was there tidying up and looking at those pictures. That one is dead, that one is dead. Everybody is dead, but the only one alive was me. Then I had those bosom friends, there might be 6–7 of them even. We always visited one another, drank coffee and so on, but all of them are already dead. There's none of them left. (Female, living alone)

Amanda shed light on an interesting angle of social relationships in very old age. Due to living to a very old age, she had lost her primary social circle to death, which is a distinctive phenomenon for this age group. The death of loved ones was also related to loneliness. For example, the death of a spouse meant that one no longer had anyone to talk to at home.

R: What is most unfortunate in this old age?
Erik: It would be nice to sometimes talk in here, sometimes when you wake up. When you're not completely conscious, you can almost feel that your wife is lying next to you. That you ought to talk, but then you realize that you're all alone here. Indeed, there's no one else here. (Male, living alone)

Erik pictured loneliness that seemed almost existential, yet the death of loved ones was not always experienced necessarily as a purely bad thing, but rather as a natural situation. Then again, losing loved ones could result in the loss of interest in social life altogether. This would not, however, mean that one could not be content with life and all the other things that make life good in the moment.

Amanda: When all your friends and all loved ones are gone, you don't even have much interest in those things, or in life outside. I can be happy, when I have a good house and I feel good. (Female, living alone)

As the excerpt above shows, being alone was not necessarily experienced as a bad thing as such, and it was not synonymous with being lonely. The ability to control being alone, by going where one wants or by calling someone, was a reason why some participants mentioned that although they were alone, they did not feel lonely.

Elsa: I have gotten to know people in this building, but this is the kind of place where you don't really have any collective events. I don't know, we are all just in our own boxes here.

R: Do you feel lonely then?

Elsa: No, I have never really felt like that. If I do, then I grab my phone and call my friend or my sister. (Female, living alone in an assisted living residence)

Indeed, as Elsa puts it, it was not being alone but loneliness that was considered unfortunate. Sometimes loneliness entirely preoccupied a person, as Emil explains:

Emil: I must say that although I still have much left in me, this loneliness, it imprisons you in a certain way. And when it imprisons you, it cuts down your way of thinking in some way very powerfully. It doesn't mean that one wouldn't understand, but the flight of thoughts… You can't get that kind of inspiration. (Male, living alone)

For Emil, loneliness seemed to be an overwhelming experience of emptiness that made him feel excluded, even imprisoned. Loneliness not only isolated him from other people but also from his own "flight of thoughts."

All these restrictions on social relationships and feelings of loneliness made social relations valuable to the participants. In particular, the importance of children, grandchildren, and the spouse was highlighted, as were social relationships in general. In addition, being social – talking to other people, being surrounded by people, and getting along with others – was highly appreciated. Mikael was asked what would make old age good:

Mikael: I can't think of anything else than having loved ones. To have someone who takes care of you or is interested in you. But they are quite rare in this busy crowd. (Male, living alone in an assisted living residence)

Mikael aptly sums up the significance of social relationships to our interviewees; in very old age, you need people to take care of you and take an interest in you. As we have seen, the absence of these other people may even result in existential loneliness and feelings of imprisonment.

Nature of Social Relationships

Despite all the restrictions regarding social relationships described above, the participants enjoyed the various kinds of relationships with their children and grandchildren, other relatives, friends, and neighbors. Based on the analysis, we arrived at three categories, which we named "company," "help," and "emotional activity." The content of these categories is outlined below.

Company

In the interviews, it was common that children and grandchildren visited the nonagenarians' homes; it was rarely the other way around. Meeting other relatives or friends was not very common, and again, it was more common that the other person would be the person doing the visiting. Nevertheless, some also described going outside to meet friends or occasionally going out to eat with children and grandchildren.

Neighbors seemed to be an important social contact for community-dwelling nonagenarians, as the participants described meeting and spending time with them. Neighbors were met and chatted to in the garden of the housing cooperative, and they could also be company for activities, such as taking walks, drinking coffee, or playing cards. Neighbors were a good source of company, because they were close by and usually present, as Eeva explains:

Eeva: If you want to be alone, you can be alone. But when you go out there, you are always surrounded by friends. (Female, living alone in an assisted living residence)

The telephone was important for the maintenance of social relationships, as friends and relatives were often reached specifically by phone. The telephone was a means to bring friends and relatives living further away closer. Calling was a way of maintaining the relationship when it otherwise would be too hard or even impossible, as Hilda describes:

Hilda: I have a friendship of 80 years with this friend of mine, but she lives in a different city. We have been friends since we were 10 years old – and we still are. She has lost quite a lot of her memory, but I call her quite often. That's a long friendship. (Female, living alone)

Taking part in association activities, such as veteran associations and spiritual clubs, was described as a way to meet people and make friends. Some described having made lifelong friendships in association activities earlier in their lives, but taking part in associations was also a way to meet new people and enjoy interesting events, such as presentations and trips. Sometimes associations could even act as a social safety net. Liisa gave an apt example when she was asked what kind of features belong to a good old age.

Liisa: One has to have friends. Or some kind of a safety net, like that of my sister's mission circle… Good friends are left behind when you leave a place. Then you have to learn all that again and make friends. My sister's friends have now become my friends, so I'm sort of an associate member in their mission circle. (Female, living alone)

As the previous excerpt demonstrates, being part of an association provides one with company, which also offers security. In addition, all kinds of company may have positive effects on nonagenarians' affiliation.

Help

Giving and receiving help was a frequent theme in the interviews. Help seemed to play an important role in nonagenarians' lives, as help given in everyday chores by relatives, neighbors, and friends was a common theme raised by the interviewees.

Relatives, usually children and grandchildren, helped nonagenarians with all kinds of everyday chores, such as cooking, cleaning, shopping, and paying invoices. Some also mentioned that their children and grandchildren helped them with everything that they needed. Besides describing getting concrete help, nonagenarians also noted that children and grandchildren took care of them, for example, by calling or visiting often just to make sure everything was all right. Friends also helped them in everyday life by taking them shopping, for example. Neighbors mostly helped with outdoor chores such as plowing the snow in winter and tidying up the garden, but some also said that their neighbors took care of them more comprehensively, as Erik relates:

Erik: I haven't had any worries about those outdoor chores. And with all those other things as well, like I said, that neighbor of mine really gets it done. And helps me with everything I need. I've never had a situation where I would have been left helpless, thinking on my own, "what am I going to do?" (Male, living alone)

The nonagenarians were not only receivers of help, they also helped others. Amanda describes helping others as an important value in her life:

Amanda: To me, the most important thing in this life has been adjusting to everything and helping in general. I've always been like that, I want to help those worse off. (Female, living alone)

Few of the nonagenarians described helping the children from whom they themselves received a lot of help. Rather, they mentioned helping other elderly people who were in poorer state of health than they themselves were. Helping was also related to the experience of being needed, and it boosted the nonagenarians' self-esteem, as Ida explains:

Ida: Think about it, even at this age I'm able to do something. It's darned good for my self-esteem that I'm necessary to someone. And I can still do things, I'm not totally empty-headed. (Female, living alone)

Some interviewees were – or had been at some point – a carer for their spouse. They often stated that taking care of a spouse at home was natural. Being able to take care of the spouse at home – thus avoiding transfer to a nursing home – sometimes seemed to be a matter of principle. Taking care of a sick spouse at home was not necessarily easy, but it could be even more important than one's own well-being.

Alma: Many people say that I should put him [sick husband] in some institution. But the way I see it, I won't put him out, for this is our shared home. I couldn't tolerate it if he would end up in some place. I don't bother about myself so much. For sure, it would be much easier for me, because this is not an easy life for me. It's been easier sometimes, but I will bear it as long as I bear this life. (Female, living with a spouse)

The three previous excerpts are important regarding Nussbaum's (2011) affiliation, encompassing "being able to recognize and show concern for other human beings." As Ida puts it, being necessary to someone boosted the nonagenarians' self-esteem.

Being able to make one's own decisions and rule one's own life was described as an important way to stay independent and not be patronized. On the other hand, a few nonagenarians also mentioned how the lack of social relationships forced them to be independent. Therefore, independence was not always a choice.

Emma: I've known how to ask and demand all kinds of care for myself so that I would be able to manage on my own, because I don't have a single relative in this city. And all my acquaintances, my age group, are already gone or in the same condition as I am, so there's not much help. (Female, living alone)

Although the ethos of managing on one's own is strong in older generations (Jolanki 2009; Pirhonen et al. 2016), nonagenarians highly appreciated help received from other people. Emma's account of her situation reveals that her independence was reluctant. Thus, for some independence is a choice, whereas for others it is a necessity, a forced independence.

Emotional activity

The participants described how their social relationships brought joy and enrichment to their lives.

Leo: Well, certainly our retirement has been enriched by our grandchildren; we have 11 of them. And there was some care when our daughters quite readily brought them to us to be looked after. But somehow, it was a richness… When my grandson was little, he once said to me, "Grandpa, now I am leaving, you must feel so bored as you'll have nothing to do." Yes, that was about right. (Male, living with a spouse)

Nevertheless, unfortunate issues related to social relationships were also described. The illness and death of a child and the disappointment caused by one's own child were among the issues causing grief. In addition, a few nonagenarians felt sad that their relatives did not really remember or keep in contact with them, feeling that no one really cared about them anymore. Other peoples' wrongdoings were also described by some, for example, experiences of injustice and mistreatment in childhood.

Erik: And well, then began that gloomy time. My father was a very quarrelsome man. Practically never did I hear a friendly word coming out of his mouth, he was always so bossy… That idea grew in my mind, when I always heard my father, he was the one who put it in there. When they [mother and father] were fighting, I could clearly hear those words: "You are crazy." And at school age I started to wonder if I really am crazy. Is there something wrong with me when they always say that again and again? (male, living alone)

However, some nonagenarians also described their family's positive impact on their lives. Some described having learned or "inherited" their parents' sportiness or healthy lifestyle. For example, some described how their parents' abstinence from alcohol resulted in them being teetotalers their whole life too. Memories of happy childhoods and loving parents still made participants feel happy in very old age. A couple of nonagenarians also raised the importance of their grandmothers in their lives because of what they taught them about religiosity and attitudes toward death. Social relationships, both past and present, seemed to work as a kind of emotional depository one could access spiritually when physical activity was restricted.

Discussion

Community-dwelling nonagenarians talked about social life on both the general and the particular level. On the general level, nonagenarians talked about the significance of social relationships. This was not only related to the great appreciation of social relationships in the first place but also to the social restrictions and loneliness the nonagenarians encountered in their lives. We found that the interviewees' deteriorating health, advanced age, distance from friends and relatives, limited opportunities to see loved ones due to time pressures, and the death of friends and relatives were experienced as restrictions to social relationships. Due to these restrictions, some nonagenarians also felt lonely. However, the restrictions and loss of social life were also experienced as natural phenomena in old age, and being alone and being lonely were not synonymous. For example, if one could control being alone by popping out or calling someone, it prevented one from being lonely, even while being mainly alone.

On the particular level, nonagenarians described the nature of their existing social relationships with their children, grandchildren, other relatives, friends, and neighbors. Social relationships were described as a source of company, as having them meant having someone who visits, someone to spend time with, and someone to talk to on the telephone. In addition, taking part in association activities was described as a way to meet friends, and even as a social safety net. Nonagenarians also described receiving help from their relatives, neighbors, and friends with all kinds of everyday chores. However, being able to help others was important to nonagenarians as well, and they mostly helped other older persons or acted as carers to their spouses. Despite receiving help from others, nonagenarians also wanted to be independent. However, independence was a choice for some; for others, it was a necessity due to a lack of social relations. Thus, while some struggle with not being dependent on loved ones despite their very old age, others struggle with the necessity of being independent because of their very old age, as they have no other choice. The latter we call "forced independence."

Considering the features of the social lives of the nonagenarians, certain special characteristics can be found based on our results. One distinctive feature of the social life of the oldest old seems to be what we call "place-bound sociality." By this, we mean that the social life of the oldest old seems to be bound to the place of their residence. As the nonagenarians described, they were usually visited by others; they tended not to go on visits themselves. In addition, neighbors – that is, those who lived near them – were described as an important source of company and help. The telephone was an important means of communication and brought friends and family living further away closer to the nonagenarians. Therefore, it seems that the place of residence plays a particularly important part in the social life of the oldest old people.

An interesting feature in the descriptions of the nonagenarians was the significance not only of their existing social relationships but also of the social relationships in their past. Both existing and past relationships were a source of pleasant and unpleasant feelings. The participants explained that their way of life, life choices, and attitude toward life had been influenced by the social relationships of their past, reaching as far back as their childhood. Furthermore, the nonagenarians noted that happy memories of past relationships made them feel happy in the present. This would suggest that a life-course perspective (Dannefer & Settersten 2010) – that is, taking into account the whole life experiences of an individual – should be adopted when attempting to understand the lives of the oldest old. Our participants used memories of other people during their life course as an emotional depository they could access to avoid feelings of loneliness.

Based on their age and life stage, the nonagenarians in this study can be said to be living the fourth age. However, the idea of the fourth age as a phase of frailty and dependency (Baltes & Smith 2003) or complete lack of agency (Higgs & Gilleard 2014) is not supported by the findings of our study. Although the social life of nonagenarians was limited by a variety of factors and they were in need of help to some extent, they also described having and enjoying various social relationships. As Tanner (2016) suggests, the fourth age should be seen not only through the various limitations encountered in very old age but also through the opportunities the oldest old people still have. As was found by Lloyd et al. (2014) and Tanner (2016), the meaning and support social relationships bring to life may enable the oldest old to live meaningfully and maintain their identity, dignity, and autonomy in the fourth age.

Therefore, despite the limitations the nonagenarians in this study experienced, it seems their meaningful social relationships have contributed to their ability to continue living a good life even in very old age, and they thus do not meet the criteria for being fourth agers. In accordance with the findings of Pirhonen et al. (2016), this study indicates that the socially determined category of the fourth age does not apply to the level of individual experience. We argue that belonging to the fourth age cannot be determined by considering solely the individual's characteristics, the characteristics of the individual's social surroundings must be considered as well. Indeed, these social surroundings can enable a good life despite the challenges encountered in very old age.

Our findings indicate that social relationships play an important role in the lives of the oldest old people and that social relationships are important and valued by them. In particular, family – one's own children and grandchildren – played an important part in the nonagenarians' lives. According to SST (Carstensen et al. 1999), by emphasizing close and satisfactory relationships, our interviewees had successfully adapted their social worlds to match their social goals. Therefore, they could be considered successfully aged. It is noteworthy, however, that there is no indication in the findings of this study about the willingness of the oldest old people to disengage from their social relationships, although both SST (Carstensen et al. 1999) and GT (Tornstam 2011) suggest it to be important for older people. Indeed, although in some studies, some of the oldest old people have emphasized solitariness over social relationships (Cherry et al. 2013; Ness et al. 2014), our interviewees found being alone undesirable, and their valuation of peace and the absence of negative emotions was reflected in their desire for a certain kind of social relationships, not in the desire to live a solitary life.

Furthermore, we found that the experienced limitations in social relationships and the narrowing down of the social network did not occur due to the active or voluntary efforts of our interviewees themselves, but rather due to circumstances they could not influence themselves. Thus, the oldest old were not able to choose to reduce their social relationships; this reduction instead happened due to factors beyond their control. Consequently, voluntary and active disengagement from social relationships as a means of pursuing successful aging was not relevant to them at all.

Indeed, based on these findings, we argue that it is not necessarily the voluntary disengagement that is significant for the successful aging or good old age of the nonagenarians, but rather the pursuit of engagement despite the many kinds of limitations encountered in very old age. Thus, in accordance with the findings of von Faber et al. (2001), a different perspective was found by giving the oldest old opportunities to offer their own views on what is important for their good aging. Our findings indicate that being able to maintain meaningful social relationships in very old age seems to be something that could enable successful aging for the nonagenarians. Conversely, disengaging from and not having social relationships could lead to undesirable feelings of loneliness.

Nussbaum's (2011) bipartite definition of affiliation,[1] together with our findings, add to our knowledge of how to improve the life satisfaction of the oldest old people. The ability of community-dwelling nonagenarians to live with and toward others was found to be problematic. Deteriorating functional abilities and the loss of friends and relatives caused loneliness – in other words, loneliness arose from restricted opportunities to live with and toward others. Therefore, these people would benefit from services that make it easy for them to go out on the one hand, and services that make socializing possible in their own home on the other hand. Both social and technological innovations are needed. For example, well-organized volunteer work and transport services could bring nonagenarians together, while different kinds of telepresence technologies to provide company are already being developed for older people (Frennert et al. 2013; Mitzner et al. 2014). In addition, in line with Nussbaum's (2011) definition, showing concern for other human beings was also highlighted, as our interviewees' self-esteem was partly based on helping others even in very old age. Thus, there is a need for social innovations that would provide nonagenarians with a sense of reciprocity.

The latter part of Nussbaum's (2011: 24) definition – being able to be treated as a dignified being whose worth is equal to that of others – was also found to be problematic for community-dwelling nonagenarians. In many cases, nonagenarians stated that their children did not have time for them, although they said so in an understanding tone. Some also felt that their relatives had forgotten about them. One interviewee, Maria, suspected that nobody would want her as a lady friend anymore because of her age, which is perfectly in line with the previous theories of the fourth age as a life stage that is socially defined (Gilleard & Higgs 2010; Higgs & Gilleard 2014). Therefore, nonagenarians' generational equality could be strengthened by affecting public representations of old age and the oldest old people. Nussbaum's (2011) bipartite definition of affiliation reminds us that older people need both concrete social relationships and societal and cultural respect. Qualitative studies highlighting the individuality

[1] Being able to live with and toward others, showing concern for other human beings, and being able to be treated as a dignified being whose worth is equal to that of others.

and diversity of nonagenarians would help to break stereotypes and make them visible and accepted as the people they are.

Conclusions

By conducting a qualitative study using extensive life-story interviews, we were able to take into account the in-depth and varied descriptions provided by nonagenarians with different backgrounds and life situations. Thus, we were able to consider multiple perspectives in this study, which led to the recognition of different aspects of social life in very old age. We argue that in order to better understand very old age in its complexity, various – and also divergent – perspectives need to be acknowledged. This can best be accomplished by qualitative studies, which allow the oldest old to reveal their perceptions in their own words. Consequently, more studies using a qualitative approach are needed to capture the multiple aspects of social life in the oldest old people.

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Marta Cerezo Moreno and Nieves Pascual Soler (eds.) (2016). *Traces of Aging. Old Age and Memory in Contemporary Narrative*. Bielefeld: Transcript Verlag, 191 pp. ISBN 978 3 8376 3439 6 (paperback)

*Reviewed by Raquel Medina**

Traces of Aging: Old Age and Memory in Contemporary Narrative is the first comprehensive approach to literary and filmic texts from Paul Ricouer's concept of *narrative identity*, which is the key concept and common thread connecting the eight essays contributing to this volume. Against the popular perception and representation of aging and old age as decline or as a narrative foreclosure, the eight essays explore fiction as a space in which life can be created and therefore the fear of death diluted if not completely abolished. The editors of the volume, Marta Cerezo Moreno and Nieves Pascual Soler, explain that the essays of this volume encompass a notion of "the function memory processes, of recollection and forgetting, of the retracing of the past" (p. 11). In addition, the eight contributions to the volume conceive old age as "the decisive moment of narrative identity" (p. 12), propose new approaches to the experience of later life, and confirm Ricouer's belief in the ethics of reading; that is, narrative as place of moral judgment. Only by communicating to the other the positive experience of

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fully embracing growing old can the fear of aging and the discourses of aging as decline be eradicated.

The eight essays included in this volume explore Ricouer's important ideas and notions about aging and death in a wide array of literary texts written by three Canadian authors (Margaret Atwood, Alice Munro, and Saul Bellow), two British (Doris Lessing and Daphne du Maurier), one American (John Barth), and one German (W.G. Sebald). These literary texts are complemented with an essay on a Canadian film from 2013, *Still Mine*, written and directed by Michael McGowan. The balance regarding the gender of the authors under study is opportune and appreciated, as it demonstrates the important contribution that women writers have made to the discussion of aging and old age. For instance, Simone de Beauvoir, a contemporary to some of the female writers included in the volume, explicitly detailed in *The Coming of Age* (1972) the social discrimination suffered by women after menopause.

Paul Ricoeur considered that the reality of the historical past subsists in the "traces" left in testimonies, documents, and in the memories of individuals. The trace is the persistence of the past through its remnants in the present. MacDonald's essay on W.G. Sebalds' *Austerlitz* (2001) illustrates the persistence of the remembered past in the present and the future through its traces. Drawing on Ricouer's concept of living traces, the author describes Austerlitz's rebirth as the encounter with traces that bring the past back to life. Austerlitz travels back to his past by visiting sites that become places of memory. Through his journey back in time, he is able to recount his experiences and reflections to the narrator, thus overcoming the idea of demise usually attached to old age. Teresa Gibert's enlightening essay analyzes Atwood's *The Blind Assassin* from Ricouer's idea that it is through narration that memory can shape identity. The protagonist's continuous comments about her forthcoming death, as well as her constant forgetting, drive her to revisit the past through the writing of her memoirs. This process underscores the multiple identities taking part in the writing process: her *remembering self* and her *remembered selves*.

Ricouer's concept of "points of anchorage" constitutes Miquel-Baldellou's point of departure to explore Daphne du Maurier's short story *Don't Look Now* in which her concealed homosexuality becomes one of the driving forces behind the plot. In fact, Miquel-Baldellou argues that it is through the writing process of the short story that du Maurier comes to terms with her sexual identity. Rahel Rivera Godoy-Benesh examines the stories of Tim Manning (*The Development* 2008), an older character experiencing early symptoms of Alzheimer's disease. This essay aims to demonstrate Ricouer's ideas about narrative identity clash with the fixed conventions of autobiography by focusing on two key concepts: aging and agency within autobiography. The merit of this essay is twofold. On the one hand, it cogently explains the mentioned clash between Ricouer's ideas on identity narratives and the convention of autobiography. On the other hand, and more importantly, it sheds light on the negative impact that the current boom of old age autobiographies may have on perceptions and experiences of old age. That is, the separation of old age into the third and fourth ages (Laslett 1989), where the third age includes those still mentally capable of narrating their self and the fourth age describes those whose ailments impede them from narrating their identity and who can only wait for their death. Life-writing is also the main topic of essay on Doris Lessing's fictional narratives by Angeles de la Concha. The author states that Lessing's autobiographical novels are the best media to examine Ricouer's notion of narrative identity and explore the concept of "happy dreams" that in the British fictional autobiographies defies the cultural discourse of aging as decline.

The only essay in the book devoted to film stands out as the best approach to Ricouer's concept of *the grace of insouciance.* Pamela Gravagne's analysis of the Canadian film *Still Mine* (2013) establishes an in-depth dialogue with the ambivalent stance taken by Ricouer: the immediacy of his death does not preclude him from feeling alive. Similarly, this essay establishes the parallels between the narrative deployed in the film and Ricouer's ideas about the new non-chronological temporality that emerge from the narrative.

If confronting the reality of the loved one's forgetting due to dementia is at the center of *Still Mine*, dementia narrative is key to Alice Munro's *The Bear Came Over the Mountain* as it is studied by Sara Strauss. In her essay, Strauss approaches the analysis of Munro's acclaimed short story from the idea that Grant creates a narrative identity when telling the story of his wife's dementia while reflecting on his own past. This does not only shape his identity but elicits an ethical response from the reader.

"Trauma and Postmodern Parody in Saul Bellow's *Henderson the Rain King* (1959)" is an essay by Collado-Rodríguez which defines this novel as postmodernist, and it deconstructs the way it parodies modernist frameworks such as psychoanalysis and the excessive use of symbols. Using narratology as the methodological framework – the story as the narrative content, the narrative or the text itself, and the narrating process produce narrative action (Genette 1980) – the author elaborates the extreme references to traumatic events, the links between horror mortis and the belief in the mythic cycles of nature. Although it is important to acknowledge the complexity of the topics discussed by Collado-Rodríguez, it is necessary to point out that Ricouer's ideas are absent from the essay.

To conclude, *Traces of Aging. Old Age and Memory in Contemporary Narrative* proposes an alternative and original approach to the topics of aging and later life in cultural texts. The readings and analyses that constitute the volume offer a unique dialogue with Paul Ricouer's crucial ideas about history, memory, forgetting, the power of traces, and the experience of later life. This volume makes a significant contribution to the field of aging studies and constitutes an important reference point for future studies.

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Nancy Worth and Irene Hardill (eds.) (2015). *Researching the Lifecourse. Critical Reflections from the Social Sciences*. Bristol: Policy Press, 254 pp. ISBN 978 1 4473 1752 4 (hardcover)

*Reviewed by Carmen García Navarro**

Originated from a series of lectures given at the Association of American Geographers Meeting in New York in 2012, this book was published in 2015. The studies gathered here take the lifecourse concept as a research methodology. Building on Law's proposals to keep a debate on how research methods can capture social life (2004), the editors, Nancy Worth and Irene Hardill, highlight the importance of social science research in understanding that age is not the only variable involved in the lifecourse, but that lifecourse also implies individual and collective trajectories where experiences take place in time and space (Giele & Elder 1998). Spaces and places are part of the environment of people's lives and determine their trajectory, as with notions and perceptions that people have of these experiences.

Theoretical contributions in this book are well balanced with practical developments. This is partly due to the breadth of the discussion and the outstanding academic rigour. The latter is apparent in both its content and approach, and in the specialist language used, which is malleable enough to be accessible to non-scholars interested in the subject. The value of this

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collection lies in that it looks at the lifecourse from the perspectives of age, generation and inter-generation (*generation*), while also relying on the notions of transition/transit and life trajectories (*transition*). The relational aspects of age coexist in these studies with the concept of generation as a means of placing people both in time and in relation to each other, imbricated as they are in the notions of transits and trajectories. These are used to consider the changes that people experience throughout life. Thus, age and employment guide and determine the perceptions that individuals have about their lives. At the same time, especially in the Global North, age serves to structure the lifecourse into phases, such as childhood or youth, and their relation to work or migrations. These earlier segments in the division of the lifecourse have been widely investigated in recent studies, more so than adulthood and the mature stages of life.

The book is structurally and thematically cohesive and is divided into three parts, with four chapters each. This structure is enhanced by the editors' detailed introduction, which includes a list of tables, figures and other documents that serve the research purpose of some of the chapters, and a detailed index. Each part of the book is structured around a variable. The first is *time*. In "Time and the lifecourse: perspectives from qualitative longitudinal research", Bren Neale deals with the different natures and parameters used to research the flows of and over time in people's biographies. Relying on pre-existing data, Rose Lindsay, Elizabeth Metcalfe and Rosalind Edwards discuss in "Time in mixed methods longitudinal research: working across written narratives and large scale panel survey data to investigate attitudes to volunteering" the analytical and methodological challenges of a UK qualitative and quantitative study conducted with volunteers between 1981 and 2012, a period marked by recession and social austerity policies. John Goodwin and Henrietta O'Connor, in turn, stress in their "A restudy of young workers from the 1960s: researching intersections of work and lifecourse in one locality over 50 years", the need to further study the complexity of the intersections between *work, locality and lifecourse*. This part concludes with the article "A method for collecting lifecourse data: assessing the utility of the lifegrid" by Ann Del Bianco, who advocates the use of the *lifegrid*, a versatile and useful instrument for discerning between historical and narrative truths.

Part 2 of the book focuses on the variables of *space* and *place*. Bisola Falola's chapter, entitled "Life geohistories: examining formative experiences and geographies," reflects on life geohistories as a method to explore the way in which places have a specific meaning in the lifecourse of young people, and how they determine their beliefs and actions. The *mapmaking* method was used by Bree Akesson in his study "Using mapmaking to research the geographies of young children affected by political violence." This is a revealing instrument in exploring how children are sources of knowledge about themselves and their lives. Sophie Bowlby's chapter, "Keeping in touch: studying the personal communities of women in their fifties," states that it is essential to study communities of middle-aged women, "a neglected group" (p. 158), and the representation that these women make of their links with other members of their community through their lifecourse. In these links to their past, current and future experiences, the emotional component plays a key role when it comes to understanding and interpreting women's lives. The chapter by Kaisa Schmidt-Thomé, "Triangulation with softGIS in lifecourse research: situated action possibilities and embodied knowledge," discusses the potential of geobiographies as a method for shedding light on the material aspect of people's lives. The researcher uses this method to evoke the past in the present and find reverberations into the future, and sees it as a useful tool for researching learning and ageing processes.

Part 3 of the book deals with different forms of mobilities. In the chapter entitled "Using a life history approach within transnational ethnography: a case study of Korean New Zealander returnees," Jane Yeonjae Lee draws from autoethnography and transnational ethnography, relying on her personal experience as a migrant. Using the life stories technique, she shows the complexity and potential of her research on Korean migrants in New Zealand who returned to their country between 1999 and 2009. Anne Leonora Blaakilde focuses on the interaction and co-construction of knowledge between the researcher and the people in her chapter "Sensing sense and mobility at the end of the lifecourse: a methodology of embodied interaction," presenting a case-study on Nordic migrants in Turkey. In so doing, the researcher relies on the intersubjectivity of those who participate in the research process, above and beyond any ideal of objectivity. Francoise Dureau, Matthieu Giroud and Christopher Imbert study in

"Event history approach to life spaces in French-speaking research" how mobility in different European metropolitan areas affects the day-to-day individual behaviour in these spaces, and in the relationships of people with places and over time. Finally, Melissa Kelly advocates the need to further the theoretical and methodological studies of highly qualified migrants in "Using an intersectional lifecourse approach to understand the migration of the highly skilled." This chapter proposes that it is necessary to make intersectional and multimodal approaches based on social theory that can contribute additional nuances to the study of decisions about the reasons to emigrate. This is intended to gain a better understanding of the phenomenon, without ignoring migrants' subjectivity and agency.

The book is, above all, an interesting and convincing study as well as a carefully edited volume, covering aspects ranging from typography to the colour design of the front and back covers. Undoubtedly, this is a novel important contribution to lifecourse research in the social sciences, which encourages discussion and provides an update of recent progress in the area, while at the same time supporting and serving as a reference for new studies in the field.

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The International Journal of Ageing and Later Life (IJAL) serves an audience interested in social and cultural aspects of ageing and later life development. As such, the Journal welcomes contributions that aim at advancing the conceptual and theoretical debates of relevance on ageing and later life research. Contributions based on empirical work as well as methodologically interested discussions are also welcome, as long as they contribute to the above-mentioned discussions.

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