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"It used to be called an old man's game": Masculinity, ageing embodiment and senior curling participation

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Abstract

The sport of curling, popular among older populations in Canada and conventionally imagined as a sport for older people, offers an important window into what it means to be an older man participating in sport. While researchers have extensively studied expressions of youthful masculinity in sport culture, scholarship about the confluence of gender expression and old age in sport is much rarer. Using Connell and Messerschmidt's (2005) reconfiguration of hegemonic masculinity, and drawing on 19 interviews with older men who curl in mid-sized Canadian towns, we argue that later-life men negotiate complex models of appropriate masculinity that borrow from hegemonic exemplars available in earlier life, deploying certain forms of intellectual, class and gender privilege to do so. At the same time, they disrupt these hegemonies through an emphasis on interdependence, caring relationships and the acceptance of bodily limitations.

Keywords: ageing, Canada, caring, curling, embodiment, hegemony, masculinity, men, sport.

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Given men's potential struggles to meet hegemonic models of masculinity in late(r) life, how do men in midlife and beyond understand and represent themselves as men, particularly in the charged and often hypermasculinised spaces of sport culture? In this article, we consider expressions of masculinity in the sport of curling as a case study of late(r)-life masculinity, exploring the ways that these old(er) men express themselves as men (Hearn 2004; Matthews 2016) through their participation in the sport and its culture. We argue that although some hegemonic standards of masculine expression may be more achievable in earlier life, particularly those linked to the body, late(r)-life men negotiate complex models of appropriate masculinity that both draw from those hegemonic exemplars available in earlier life and disrupt them.

Beginning in the 1970s, critical gender scholars began to explicitly study men and expressions of masculinity (Connell & Messerschmidt 2005). Most significantly, scholars were keen to illuminate the ways that gender, and expressions of masculinity conveyed by men, worked to secure and reproduce men's social power (Whitehead 2002). In this regard, gender scholars have extensively researched expressions of masculinity in youth and early adulthood, examining the intersections of masculinity within the education system, legal system, family and labour force (see Connell & Messerschmidt 2005), while often focusing on so-called problematic expressions of masculinity (Hearn 2019). In spite of this robust field of scholarship, researchers have sometimes overlooked expressions of masculinity throughout the life course (Calasanti 2004; Drummond 2008; Hearn 2019; King & Calasanti 2013; Spector-Mersel 2006), especially expressions of ageing masculinity in cultures of sport and physical activity (Drummond 2008). Academics readily accept that dominant modes of masculinity in the West today are tied to the bodies of younger men, physical competency and one's success in the labour force (Connell & Messerschmidt 2005). This connection between youth and masculinity is particularly evident in sociology of sport scholarship.

In particular, critical sports scholarship (e.g. Atkinson 2011; Gee & Jackson 2017; Messner 1992) has explored sport as a site where normative expressions of masculinity are developed, sustained and celebrated through young men's athletic participation. In spite of the fact that men in late(r) life still engage in sport and athletics in large numbers (e.g. Statistics Canada [n.d.] reports that in 2016 and 2017, approximately 45% of men

aged 65 years and above were physically active for at least 150 minutes a week),[1] scholarship addressing issues associated with ageing, masculinities and sport is rare (Drummond 2008). For example, a search of two of the most prominent sociology of sport journals over the past decade finds extremely limited scholarship in the field, with the *Sociology of Sport Journal* publishing only three articles and the *International Review for the Sociology of Sport* publishing only six. While scholars in ageing studies more frequently take up the experiences of men and physical activity (e.g. Clarke et al. 2018; Phoenix & Smith 2011), it is often from the perspective of health, exercise physiology and psychology, leaving issues associated with late(r)-life masculinities underdeveloped and undertheorised. As Murray Drummond (2008) asserts, "Too often sports and physical activity are championed as being the domain of only the young, and the fit – with virility and increased masculinity often associated with those qualities" (p. 34). Given the significance of sport to young men's understandings of themselves, their masculinity and the gender expressions of others, it is important that we consider both how the construction of hegemonic masculinity stands up in later life and how men understand themselves as men at this stage of the life course. In this regard, the sport of curling provides an interesting venue for investigation.

Curling is a sport that is growing in popularity worldwide. Reuters reporter Alan Baldwin (2018) even declared it the "world's fastest growing winter sport" (para. 1). Curling, which requires teams of players to slide heavy stones down a sheet of ice towards a target at the other end, is an important site of scholarly analysis for a number of reasons. First, sport, in general, is a significant social space for expressing gender and producing exemplars of masculinity (see Connell & Messerschmidt 2005; Messner 2002). Second, curling, in particular, is one of only a few sports that popular culture links to the bodies of older people. The press lauds curling as an activity for those in later life (e.g. "Best Age-Friendly Sports" 2016; Blevings 2014), perhaps, in part, because curling is a sport where older men (and women) can compete at elite levels. Russ Howard, for example, competed at the Olympic Games at 50 years of age, marking him as the all-time oldest Canadian Olympic gold medallist ("Russ Howard" n.d.).

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1 Notably, these numbers are much lower for women, where only 37% are active for 150 minutes a week (Statistics Canada n.d.).

The Scottish curler Robin Welsh, who won gold at the 1924 Olympics at the age of 54, holds the record for being the oldest gold medallist in Olympic history ("Russ Howard" n.d.). Furthermore, as our participants confirm, senior men have a significant role to play in the administrative and physical care of their clubs and their members. It was senior men who managed the clubs we visited, facilitated our research, provided contacts with club members, organised community events and, on more than one occasion, were seen conducting physical maintenance in the curling clubs. At one of our research sites, curlers from the senior men's program took on mentorship roles with adolescent boys from a local high school, teaching them to curl as part of their physical education curriculum. The existence of mid- and late(r)-life men more physically competent than their youthful protégés is yet another unique feature of the curling club, and further makes it an important space for this kind of investigation.

Curling's significance as a site for study goes beyond its association with old(er) adults; historically, it has also celebrated a unique form of sports masculinity (see Allain & Marshall 2018). Beginning in the early modern period, curling and its expressions of masculinity were often tied to the bodies of late(r)-life curling men and their wise, thoughtful and moral expressions of masculinity. The media and public noted that curling men could have stout bodies, instead of the fit, hard bodies of other athletes, but importantly required them to demonstrate a commitment to high moral character (see Mott 1983). One member of the press in the 19th century reported, "It is among the older players … that the present strength of the club lies" (cited by Tate 2011: 54).

Today, curling's somewhat unique gendered standards continue in other forms. For example, men and women curl in both gender-segregated and gender-mixed competitions, with mixed doubles curling joining the Olympic roster in 2018, one of only a handful of mixed-gender Olympic sports. Finally, curling offers an important case study because it uniquely welcomes a wide range of physical abilities. This is evident in the abundance of stick and wheelchair curling leagues present in curling clubs. Stick and wheelchair curling are modified versions of the sport, with slightly different rules, designed to allow those who cannot get into and out of a lunge position to continue curling. Although stick and wheelchair curlers have their own leagues, many stick curlers (and some wheelchair curlers) also compete with, and alongside, those able-bodied curlers who

get down in the hack to throw the curling stone.[2] Because of its accessibility to those of different ages, abilities and gender expressions, curling offers scholars a unique place to investigate expressions of sports masculinity in late(r) life.

In this study, we show how men who curl assert a unique form of late(r)-life sports masculinity that aligns with hegemonic ideals of youthful masculinity while also sometimes articulating alternative expressions of masculinity. We argue that curling culture offers our participants' institutional spaces that celebrate deep care in social relationships among men, where men can spend time discussing their life, their health and, importantly, their ageing bodies. The curling club also provides space for the celebration of people with cognitive disabilities. However, given the nature of hegemony, these counter-hegemonic tendencies are unsurprisingly not total (Demetriou 2001; Donaldson 1993). The curlers we interviewed also used curling as a way to assert a privileged form of masculine expression. This expression, tied less to their ageing bodies and instead linked to their intellectual pursuits, is also variously linked to heteronormativity, the privileging of men's sport practices over women's, the disavowal of certain limits for their ageing bodies and the privileging of particular class positions.

Masculinities and sport

For the past several decades, the sociological examination of masculinities has owed much to the efforts of Raewyn Connell. Connell's development of the concept of hegemonic masculinity produced an analytical tool that attends to the ways gender, specifically masculinity, is "practised" – or the ways it becomes ascendant and maintains power at a given cultural location and time, working to marginalise women and subordinate other expressions of masculinity (Connell & Messerschmidt 2005: 832). Much like the gender analysis conducted by Candace West and Don Zimmerman (1987) and Judith Butler (1990), Connell (1987) asks that researchers consider how people "do gender," stating that gender should be viewed as a "verb" (p. 140).

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2 The hack is an object, similar to a starting block in running, that curlers playing the unmodified game push off of to slide forward and throw the curling stone ("Glossary of Curling" n.d.).

Gender scholars have widely accepted hegemonic masculinity as a conceptual framework for understanding the gendered lives of individuals, cultural representations of gender and ways that various institutional structures reproduce a dominant gender order (see Messner 2002). However, these scholars have also subjected hegemonic masculinity to discussion, reformulation and critique (see Anderson 2008; Messerschmidt et al. 2018; Schippers 2007). Demetrakis Demetriou (2001) and Mike Donaldson (1993), for example, identify potential flaws in the ways scholars have taken up hegemonic masculinity, arguing that the concept requires counter-hegemonic gender expressions, and that hegemony needs to account for these expressions in order to build consensus. Demetriou (2001) asks scholars to be attentive to the ways counter-hegemonic movements originating from men and women, producing internal and external challenges, may impact what becomes hegemonic. In this regard, it is important that examinations of hegemonic masculinity address hegemony directly, looking for the ways that hegemonic gender expressions subsume changing social ideas and norms. Spector-Mersel (2006) argues that research conceptualised through the lens of hegemonic masculinities has ignored how gender changes throughout the life course. She contends that scholars discussing gender hegemony fail to consider what is hegemonic about masculinities in later life. She proposes that scholars take into account the "existence of various hegemonic masculinities *across time*" (p. 71). Despite these critiques, examining masculinities through the lens provided by Connell, while staying alert to counter-hegemonic tendencies, is fruitful for analytic discussions about the ways men, in this case old(er) men, understand themselves and their bodies through their participation in sport.

Sport is an important site for expressing and producing hegemonic exemplars of masculinity, particularly in terms of celebrating the bodies of young, middle-class boys and men (Burstyn 1999; Connell & Messerschmidt 2005; Messner 1992). Although not all sports secure celebrated masculine expressions equally in the bodies of their participants, popular Western representations of most male athletes (especially those who participate in aggressive or violent team sports like hockey, American football, rugby, etc.) include traits linked to dominant expressions of masculinity. In Canada, cultural exemplars of appropriate masculinity

circulate in a number of ways, but men's elite-level ice hockey[3] is an especially important symbol of hegemonic masculinity, especially among middle- and working-class white men (Gruneau & Whitson 1994) – or men frequently occupying the same class positions as Canadian curlers. As will become clear in the analysis below, our participants frequently compared hockey and curling as expressions of sporting masculinity.

Mike Donaldson (1993) reminds us that even the securest positions of masculine expression are fraught and contradictory. Predicting the challenges associated with hegemonic masculinity in old age, he uses the example of an athlete, asking if compromising one's body in service to one's sport is hegemonic if it leaves the athlete disabled in later life (p. 647). In spite of the numerous examinations of men's sports participation and their alignment with dominant masculine gender expression, scholars have often overlooked the gender expressions of old(er) men who participate in sports.

In Murray Drummond's (2008) examination of sport, masculinity and ageing, he argues that although sport is socially produced as a space where young men develop normative expressions of masculinity (especially those gender expressions privileging toughness, physical aggression and force), later-life physical activity also creates an important social space for old(er) men. Lamenting that popular culture views physical activity as solely belonging to the young, he asserts, "Physical activity and sport offer older men the opportunity to affirm their masculinity in addition to making them feel empowered about engaging in health-related behaviors" (p. 34). Given this, our analysis picks up this neglected field of inquiry, examining the experiences of older men who participate in curling, and exploring how curling informs their (sometimes contradictory) expressions of late(r)-life masculinity.

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3 Within Canadian sports culture, elite-level men's hockey is most frequently associated with the nation and its national character (Adams 2006). However, Canada has a long history with the sport of curling. Scottish settlers brought curling to Canada in the 18th century (Wieting & Lamoureux 2001). Although many different nations play the sport, with the World Curling Federation currently ranking the men's curling programs of 60 countries ("World Ranking" n.d.), its popularity in Canada is unmatched. Within Canada, the state, culture makers, and the public often position the sport, like hockey, as a natural outgrowth of the country's status as a northern nation.

Methods

The research for this article comes from a larger project on age and gender representation in Canadian winter sports, part of which explores men's curling. In Canada, it is winter sports that are most widely associated with the nation and national imaginaries. This larger project seeks to understand the place of old(er) Canadians within Canadian national identity formation, and therefore discusses sports like curling, hockey, skiing and ice-skating. Given that curling is the only national sport that openly celebrates the contributions of old(er) athletes, we focused specifically on this sport in the early phases of the project, beginning with media and institutional analysis of the representations of masculinity in curling. During this analysis, we found that both the North American media and curling institutions, such as Curling Canada, had appeared to shift towards an emphasis on more youthful and athletic forms of curling masculinity. The most striking example of this was the institutional, public and media celebration of Canada's Olympic championship men's curling team, Team Brad Jacobs, in 2014 (see Allain 2018; Allain & Marshall 2018). Their rigorous training regime and athleticism had them dubbed the "buff boys" of curling, and the media and many in the curling community celebrated the team for shifting images of curling masculinity to those more closely aligned with other popular expressions of sporting masculinity. To further our understanding of this shift and its implications for old(er) men who curl, we obtained institutional research ethics board approval (St. Thomas University Research Ethics Board #2016-08) to conduct 19 semi-structured interviews with men who participated in senior men's curling, attending to the ways this changing curling culture impacted their gender expressions and understandings of themselves as old(er) men who curl.

The research participants in this study were men enrolled in senior men's curling programs at curling clubs in one of two Canadian midsized cities, one in Ontario and one in Eastern Canada. The authors chose these communities because of their notably large populations of old(er) people. The participants ranged from 57 to 86 years of age, with a mean age of approximately 68 years. Participants' experiences with curling varied. One participant was relatively new to the sport, taking it up in later life, while most (12) had actively participated for decades, learning to play in elementary or high school. The time participants devoted to curling

also varied. Most participants curled multiple times per week, on several teams, both in mixed- and single-gender leagues. A few were involved in competitive curling at some point in their life, four of the curlers had competed at provincial and national curling tournaments, and many travelled for various recreational weekend curling tournaments, better known as bonspiels.

The first author obtained informed consent from all participants before conducting the interviews. The interviews, conducted at times and in locations selected by the participants, took between 45 minutes and 2 hours to complete. Research assistants transcribed the audio recordings verbatim. The researchers then loaded the transcripts into the qualitative data analysis program NVivo. Drawing on Hsieh and Shannon's (2005) work, we conducted a conventional content analysis. Hsieh and Shannon note that this type of content analysis is especially appropriate "when existing theory or research literature on a phenomenon is limited" (p. 1279). To do this, we read the transcripts multiple times, noting our initial impressions and then selecting thematic content to code into "meaningful clusters" (p. 1279). The clusters were as follows: personal involvement with the sport over the life course; institutional and cultural structure of the game; media representations of curling; gender expressions; and ageing and the body. In line with Hsieh and Shannon's (2005) description of conventional content analysis, we moved from these clusters to identify the relationships between the clusters, focusing our analysis here on the ways late(r)-life curlers expressed masculinity through their participation in the sport. We gave the participants pseudonyms in order to protect their anonymity.

"It's a lot harder than it looks" (John [76 years]): maintaining an active body.

The majority of the participants in this study positioned ageing curling masculinity in contrast with a more youthful hockey masculinity, which, as noted above, is one of the most widely celebrated forms of masculine expression in Canada (see Adams 2006). Specifically, many of the men actively rejected dominant Canadian national tropes that linked appropriate expressions of masculinity to the rough, tough and aggressive sport

of ice hockey (see Allain 2008; Robidoux 2002). Instead, they celebrated alternative forms of masculine expression and embodiment, legitimating these as a superior form of ageing masculine identity. For example, Arthur (60 years) stated, "It is just a different mindset. Hockey is very aggressive. The nice thing about curling is it's aggressive in a different way. It is not physically aggressive. It is mentally aggressive." Sam enjoyed how the structure of curling enabled curlers to reach an elite level in an extremely short time, saying, "It is the only sport I know where I can draw you a diagram, and you could become a world champion next year. Because … [with] men's hockey … you have to go through the barriers." The parity that Sam saw in the sport of curling allowed him to imagine (and potentially enact) a competitive sport environment where 80-year-old curlers had the capacity to beat much younger competitors.[4]

Drummond's (2008) argument that "older men do not appear to be as concerned with aesthetic issues associated with the body … [but] are more concerned with the way in which the body functions" (p. 33) rings true in our curlers' critique of old-timers hockey. Although many participants had played hockey earlier in their lives, they did not continue with the sport beyond midlife. Many of these men saw sports like hockey as misaligned with both successful ageing and dominant forms of masculine expression. Participants frequently associated hockey with serious injury, disability and even death. Harry (73 years) bluntly stated, "Well, I don't want to go … to hockey heaven." These curlers felt it necessary to avoid playing hockey, due to the risk it posed to the functionality of the body, potentially leading to head and spinal injuries, heart attacks, backaches and other impairments that would obstruct their ability to engage meaningfully in other active ageing activities. Charlie (78 years) claimed that those who curl do so because they "don't want to get involved in … hockey … a sport where they're going to get hurt." Curling, unlike other more aggressive and physically demanding sports, offered a significant opportunity for its athletes to assert a unique form of late(r)-life

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4 Brooks, Barnes, and Stevens (2017) have argued that the social distance between community and national-level curlers is increasing, with community-level curlers having little or no knowledge of national-level athletes and national-level programs. This study did not support Brooks et al.'s (2017) finding, likely as a result of the age, gender, and experiences of our participants. Almost all curlers had knowledge of the national program and had competed as, with, or against elite-level curlers in their home clubs.

masculine expression. However, one retired medical doctor pointed out that falls in curling could also be deadly, suggesting that there were "a lot safer things to do" (Wayne [76 years]).

As Cheryl Laz (2003) points out, the ways that one "does" ageing are closely linked to the ways that they understand their corporeal body. She states, "As we accomplish age, we draw on the physical resources of the body, but our actions and choices simultaneously shape the corporeal resources available" (p. 508). Laz's work demonstrates that ageing embodiment draws directly on notions of "activity, fitness, and health" (p. 510), where participants are drawn to engage in activities that are "not-too-young [and] not-too-old" (p. 512). While participants in this study generally viewed hockey as an activity for the young, their discussion of modified curling practices such as stick curling, discussed below, suggested a more complex understanding of embodied ageing.

"A kick to the ego" (Wayne): staying in the game

Within the sport of curling, men in middle and late(r) life asserted a normative style of masculinity in various ways. As discussed above, they maintained their sense of normative and often hegemonic masculinity through their critique of sports like hockey. However, they also embraced the functionality of their bodies through both their celebration and rejection of modified curling techniques, specifically stick curling. Some curlers celebrated stick curling as an appropriate modification of the game that allowed either themselves or others to maintain functional fitness and practice active ageing strategies. Many commented that curlers simply needed to "drop their pride" (John) and pick up the stick. As Wayne and others pointed out, the celebration (and destigmatisation) of stick curling allowed old(er) men to embrace a style of play that they may one day need to adopt themselves. Wayne stated that he would never disparage a stick curler "because it may happen to me one day. Oh no, no, no [I] can't go along with that."

Alternately, some curlers used curling to practice boundary work, distinguishing themselves as members of the young-old, or as able-bodied participants who could continue playing the game as they had done in their earlier lives. These men felt that stick curling was not an appropriate or "true" version of the sport. They likened modified curling to shuffleboard, a game they associated with old-old age. However, they

did recognise that curlers who played with a stick could be both aggressive and highly competitive. One stick curler even bragged, "I think I can go out there with my stick and make shots that you see on television" (Jim [86 years]).

Although none of the participants disparaged stick curlers directly, and many explicitly praised this modified version of the game, it was often those who were actually participating in modified curling, or felt that they would have to do so in the near future, who spoke most positively about it. John remarked, "For me, [playing with the stick] is an A-plus factor that allows [older curlers] to keep going … If you … use a stick you can go forever." However, others felt that they should delay moving to stick curling for as long as possible. Larry (67 years) stated, "You know what? I'm not ready for the stick yet and I don't want to be ready for the stick. … For me, I'd prefer not to go there until I absolutely have to." Wayne, who spoke in detail about the importance of his appearance and maintaining a youthful look, commented, "If I have to go to a stick, I won't keep curling. Well, everyone has to cross that bridge when you get to it and see what your ego allows you do." An almost equal number of men celebrated and/or participated in stick curling as those who criticised and/or refused to consider moving to this modified game. Interestingly, it was those in the best physical health who seemed to struggle the most when imagining themselves participating in modified curling. Don (69 years), who had introduced sticks to his club, explained the intersection between a refusal to use the stick and normative expressions of masculinity:

> This was probably a male reaction … [Some men claim,] "If I have to use one of them I am going to quit the fucking game." And I heard that from probably five or six senior male curlers who are quite competitive. So [the curling sticks] sat there for maybe a year, maybe even two. … The ladies started using them the odd day. Then a couple of men started using them on a regular basis. There wasn't the same stigma attached to them [for the women]. … It took a bit of tugging … to get the senior men to buy into it.

In their unique ways, many old(er) men who curled failed to fully let go of hegemonic ideals of masculinity. Many still conceptualised their sporting practice as hegemonically masculine, even in opposition to other sport practices more widely conceptualised as hypermasculine. As ageing men frequently struggle to maintain the corporeal markers of hegemonic masculinity that might have been more achievable in earlier

life, the participants in this study found different ways of asserting hegemonic masculinity, some conditionally accepting diverse or modified expressions of the sport like stick curling. As Dionigi (2015) explains, stereotypes about what ageing bodies can do impact both how those in late(r) life view themselves and how they view others.

"I like the cat and mouse game" (Arthur): thinking it through

In spite of their differing and sometimes contradictory ways of conceptualizing adaptive curling and its position as a legitimate form of the game, many of the men considered curling to require important mental and physical skills. These curlers asserted that the sport demanded a complex physicality that made it different from other kinds of men's team sports. Arthur explained that it was difficult "to slide on one leg and keep your balance and throw the rock, or release with either the inturn or the outturn." Gary (57 years) stressed the elite-level physicality necessary in curling, saying, "Regular Joes don't have the flexibility needed, and balance is number one in curling really. If you don't have the balance, you can't progress." Some curlers even emphasised how curling strained the muscles, leaving inexperienced curlers sore after a match, in much the same ways as other athletic activities. Larry described curling as "more physically demanding than perhaps it appears." Sam even proudly declared that "Sidney Crosby,[5] or some of those other people who do sports on the ice, they would fall down too." While popular culture suggests that curling is a game for "the rest of us" (Applebome 2010: para. 2), old(er) male curlers were eager to assert its status as a physically challenging activity, requiring corporeal skills, including balance and muscle work.

Likewise, participants differentiated curling from other hypermasculine sports due to the intense mental work it demanded. This was one of the most widely supported and robust themes in this study, with curlers consistently speaking about the importance of curling's mental game. As Wayne stated, "It is kind of like a chess game on ice with physical activity." Curlers frequently told lengthy stories about game strategy and complications, including the ice conditions, environmental factors, and

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5 Sidney Crosby is an elite-level Canadian hockey player, widely conceptualized by the press and public as an exemplar, albeit a contested one, of hegemonic masculinity.

the play of their teammates. One curler even noted that at a provincial curling club located near the ocean, the rink closest to the outside wall was unplayable due to the influence of the salt water and ocean tide. These stories helped position the participants, and curlers in general, as intellectual elites. Sam explained:

> I came to [curling] in high school, left-handed with an engineer's brain. … And there is that spatial arrangement of stones, and how you hit that stone and how it rolls into there. … You draw a rock through a port, you know between two other rocks, and it buries and you see it disappear. … If you ask … "What is your background?" you'll find a lot of accountants, engineers, technical people – they love the sport. There is something that appeals to them.

Although there is little doubt that all sport requires a blend of physical proficiency and mental strategy, curlers worked to position themselves as intellectually superior to other athletes who participated in sports widely considered to be more strenuous. Don clarified, "Hockey is a little more physical than curling. Curling is a little more mental." Many participants were also concerned that their intellectual prowess was not fully appreciated by casual fans of the game, especially given new celebrations of curlers and their buff bodies. Wayne explained, "They see the ripped muscles, and you know … athletic-looking shapes and sizes and all that good stuff. I'm not sure that they see the brain power that is really behind it all."

Although hegemonic masculinity is often located in the body (see Bordo 1999; Gill et al. 2005), within white middle-class cultural practice, old(er) men can work to diminish the importance of bodily expressions of masculinity (like muscularity, strength, athletic prowess, etc.) by privileging the mind over the body. In our work here, curling men, who were often white and middle or working class, attempted to maintain their socially hegemonic positions by negotiating embodied gender norms in ways that privileged the mind. Jeff Hearn (2003) has explained that due to shifts in Western labour markets towards service work and away from manufacturing, "Aging does not necessarily reduce the value of labour, and may indeed in some cases increase it until death or close to death" (p. 100). Curling is not part of the labour market, but the ways these men worked to position it against sports involving a physicality of violence and aggression demonstrates their deployment of a kind of intellectual privilege common among ageing (white) men, to maintain (ageing) hegemonic masculinity.

"It is easier for the guys to show off their physical strength" (Max [67 years]): heteronormativity and gender difference

Curlers also sometimes worked to align expressions of ageing hegemonic masculinities with other, more youthful, hegemonically masculine gender expressions. They did this by often emphasizing heteronormativity, dating life and gender differences between men and women. As Connell and Messerschmidt (2005) have argued, heterosexuality is deeply connected to normative expressions of masculinity. Likewise, social actors often produce notions of masculinity and male gender identities by putting them in conversation with various expressions of femininity, or by disavowing the embodied gender expressions of women (Connell & Messerschmidt 2005). Importantly, gender segregation in sport structurally maintains normative gender expressions that are physically embodied and culturally produced (Messner 2002). However, many of these curlers participated in mixed curling, a form of the game that pairs two men with two women on each team. Given that this form of gender integration is rare in the sporting world, it is clear that the physical structure of the game of curling can shape gender expressions in unique ways.

Many of these participants began mixed curling as young men, playing with their wives or intimate partners. Notably, all of the men interviewed for this research were currently married or had been married to women. A few thought curling was an important way of maintaining romantic relationships, especially when parents had young children at home. Jim, for example, stated, "It became a date night. … My wife was working. I was working. We were both very busy. We joined curling. … So you'd go for dinner, maybe a drink afterward." Frank (76 years) mentioned that he met his wife curling, while Sam opined that curling was a great place for men and women to meet, given that curling norms prevent aggressive body contact and even extraneous touching. He explained, "To me it would be a great environment, if you are a shy young woman or young man, to meet other people. … Because again the etiquette is very important, and so with that etiquette there is a certain distance. … It's not like you're making a bold advance by asking to shake my hand." One participant even argued that curling was more conducive to forming heterosexual relationships than hockey, emphatically claiming, "I couldn't have a date night playing hockey" (Larry).

Sam noted that the curling club's culture of communal eating meant that women partners took on an increased burden of labour, stating, "It is [a] blue collar [sport] and the age of the men curlers [means that they] are used to the traditional ways of doing things. So if it's a potluck, you're asking your partner to make a casserole."

Interestingly, discussions of heteronormative dating were not the only times interview participants produced hegemonic understandings of gender difference. When asked about their perceptions of mixed curling, several curlers explained that men were more competitive and more aggressive than women. For example, Don commented that the women were "not near as intense," while Wayne remarked that the women brought "more finesse to the game than some of the men." One curler even chalked this up to biological difference, stating, "Women don't like [yelling on the ice] generally, because men yell more. It's the testosterone [that] is a bit higher" (Sam). Another participant, drawing on both differences in the style of play favoured by men and women, and emotional differences between the competitors, commented, "When men and women curl together, it is the messiest form of curling out there" (John). While Gabriela Spector-Mersel (2006) has noted a tendency among scholars to see those in later life as somehow less gendered, the men in this study drew on gender difference as an important part of their understanding of themselves and others within the field of sport.

Some of the old(er) men perceived differences between men and women as emanating from muscular differences in the bodies of men and women, resulting in strategic differences in game play. Some curlers believed that women were incapable of throwing the curling stones and sweeping in the same aggressive style as the men, imagining that men could throw heavier weights, resulting in more dramatic takeout shots and harder sweeping than female competitors could produce. John argued that with regard to sweeping, "There are physical limitations to what women can do." He concluded, "Those big guys, they have 50% more body mass." Charlie stated, "The women will very seldom throw a take-out." Some curlers also drew on normative understandings of masculinity and femininity, claiming that women's curling was more organised (John; Sam [63 years]), less committed (Larry), less intelligent (Gary) and more emotional (Gary) than the game played by men.

Although most of the curlers believed in normative gender differences, after they listed off many dissimilarities between men and women, they often came around to a more egalitarian and nuanced understanding of these differences. For example, Arthur suggested that those who believed that men were better sweepers than women were being deceived, noting, "It is easier for the guys to show off their physical strength in sweeping, not that female curlers don't have good sweepers because they do. I think it's just the men look more muscular. It's perception." John recounted a story about a mixed provincial curling tournament that saw his team in the semi-finals. In the locker room between matches, he had confided in his male curling partner and friend that he was concerned about the ability of his female teammates. In the end, he laughingly recalled, "I [had] to eat my words. Not any of the four women ever missed a shot in the whole game. … I missed the one shot and that lost the game." Larry hinted at some gender discrimination, claiming, "Frankly, some of the women curlers ought to be skips. … I think it's pretty much fifty-fifty. So you see some rinks that are led by women and some rinks that are led by men. … Nobody really cares one way or the other about that."[6] Unlike most team sports, curling's unique structure, which sometimes involves men and women playing together, may work to cultivate this kind of understanding, although it clearly does not eradicate normative masculine privilege entirely. Contrasted with other team sports, where appropriate gender identities are negotiated in isolation from those of different genders, curling allows for men to come to understand their sports gender identities in conversation with gender difference. We argue that this unsurprisingly does not result in a fully counter-hegemonic masculine identity for old(er) curlers; it does, however, work to challenge the curler's own perceptions of appropriate gendered sports identities, leading to a more equitable understanding of gender difference.

"This is what's keeping this club going … the senior people" (Charlie): interdependence and the curling club

As social and institutional environments shape gender expression, so too does the curling club itself prove to be an important place for facilitating

6 The skip is the leader of a curling team, the person responsible for calling the shots and devising the game strategy.

unique expressions of ageing masculinity. For our participants, the curling club was a space that reaffirmed a normative sense of masculinity through the celebration of heteronormativity, intellectual prowess and functional fitness. However, it also was a space that explicitly facilitated alternatives to dominant sports masculinity, allowing men to celebrate modified sports practices (like stick and wheelchair curling), the achievements of women, and a kind of nurturing not often reported in other men's team sports. Curling's unique culture, cultivated in the spaces of local curling clubs, proved to enable its participants to perform masculinity in unique ways. Importantly, we believe that it is the actual space and culture of the curling club – one encouraging members to spend time with both their teammates and competitors before and after matches, privileging the work of ageing men through their prominent positions in the club, and creating networks of masculinity built on caring and closeness – that really allows for the development of this unique expression of masculinity. Curling etiquette, which emphasises friendliness and good conduct, also reflects this kind of distinctive sports contact. As one research participant remarked, "Etiquette is huge in our sport. Etiquette, sportsmanship, fair play … It's a gentleman's sport" (Gary).[7] This comradery is embedded in the culture of the game and the structure of its rules, and is reflected in a physical space that allows friendship and care to develop. Another participant asserted:

> The men don't usually curl here until 11:00 [a.m.]. The earliest men will probably be here at 9:30 [a.m.]. And from 9:30 through 11:30 you have a steady stream of people, and there are usually two or three tables that you can't get a chair around. There is a big intense conversation about nothing … it could be about curling, it could be about politics, it could be about grandchildren. (Don)

Clubs are frequently constructed with large kitchens and bars and contain ample communal seating at round tables overlooking the playing surface.

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7 Etiquette is an important part of many sport practices, including golf and tennis. Even sports characterized by their toughness and aggression, like men's ice hockey and rugby, align themselves with a particularly gentlemanly etiquette through strict moral codes that dictate off-field conduct, privileging being well mannered. Expressions of curling etiquette are unique in the Canadian context because they strictly sanction aggressive and hostile physicality, and they are connected to a culture of conviviality and friendship forged in curling clubs.

As pointed out by Brooks et al. (2017), the curling club, particularly in Western Canada, was constructed as not only a sporting space but also as a community centre. This structure, one that encourages curlers to linger before and after matches, enjoying coffee or beer (depending on the hour), appears to generate a different kind of sporting culture than other sports spaces. Charlie explained how the availability of an onsite meal was particularly important for him and his wife:

> [My wife and I] curl Friday afternoons. It's called Friday Afternoon League and there's a Friday Evening League too. … We curl and have dinner after here. So the ladies don't have to go home and make dinner. And what they do … they'll put on a special for us. Or we can go down and order from the kitchen. … So the ladies enjoy that, they don't have to go home and cook supper.

Although Charlie's comments evidence a heteronormative perception of the division of labour in the family home that sees wives cooking for their husbands, curling's culture embodies some distinctive celebrations and expressions of masculinity that also appear transgressive.

In this regard, many of the men valued the social time that came with curling culture as a time to reflect, discuss their ageing bodies and to celebrate diverse ways of being older men. Similar to Aske Lassen's (2014) findings about billiards in Denmark, curling allowed these Canadian men to conceptualise new ways of being active community members in later life. Several participants remarked on the oldest members of the curling club, celebrating with awe the achievements of late-life curlers, coming to the club in their 80s and 90s. Many sociologists have troubled celebrations of active ageing, which generally involves a commitment to avoiding the physical markers of ageing (such as ill health, cognitive decline and other age-related health issues) by engaging in constant activity (see Katz 2005; Lamb 2017). Dionigi et al. (2013) found that although some masters-level athletes tended to support active ageing strategies, not all did and those who did often did so in unique ways – such as supporting adaptive sport strategies. They state, "Through sport, participants were seen to avoid, resist, redefine, adapt and/or accept the aging process" (p. 381). Likewise, the sort of active ageing expressed by curlers did not always disavow old-old age. Instead, it often found room to celebrate diverse ways of being active and *actually* ageing. For example, members

from both clubs celebrated teammates who continued to come to the club and curl with cognitive impairments. William (62 years) discussed a teammate who had been diagnosed with dementia. He explained that the man's wife had trained a few curlers to curl with her husband. He commented, "If you curl with him, you know, [you] remind him what colour his rock is." George (63 years) celebrated curling with men of differing abilities and health concerns. He commented, "The first year doing it, they paired me up with someone with Alzheimer's, which was interesting. Now, I am with another guy who's got some health issues. I knew him and we went away to a couple of stick bonspiels, and it was the first time he'd ever done something like that, so he thought it was great!" Don, who was diagnosed with Parkinson's disease several years before our interview, spoke with great pride about the relationship he had with another member of his curling club, one where they could meet in the morning and talk about their health, their medications and how they were doing that day. Echoing the findings in Linda Heuser's (2005) work on old(er) women's experiences in lawn bowling, Don liked the idea that he might be able to continue curling in a wheelchair as his Parkinson's progressed, and came to the curling club for coffee and conversation even on days when his sciatica made curling impossible.

Conclusions

In this article, we have used curlers as a case study to explore the gender expressions associated with late(r)-life masculinity and the various ways that these men enacted particular forms of late(r)-life sports masculinity. Although our case study is marked by a small sample size (19 participants) and its very specific sports context (i.e. Canadian curling), it nonetheless provides important insights about the potential for masculine expressions by men beyond midlife within the context of sport. In this regard, curling is a worthy analytical site for scholars interested in examining the embodied experiences of those in late(r) life, given its immense popularity among old(er) adults and its reputation as a sport for those in late(r) life. Furthermore, an examination of late(r)-life curlers enhances scholarly understandings of how sport can both produce and disrupt dominant expressions of masculinity. Finally, it provides insights into the ways that hegemonic sporting masculinities may change when men move beyond

midlife. Gabriela Spector-Mersel (2006) argues that the absence of examinations of masculinity in late(r) life is likely the result of scholars problematically viewing those in late(r) life as being "ungendered" (p. 74), but this work explicitly challenges that assumption, demonstrating that late(r)-life men express masculinity in ways that are both aligned and misaligned with hegemonic masculine norms that frequently celebrate youthfulness.

As Spector-Mersel (2006) has reminded us, "While in relation to early and middle adulthood, we find clear models of dignified masculinity, these become vague, and even non-existent, when referring to later life" (p. 73). As a result, ways of being an appropriately masculine old(er) man are culturally open, potentially allowing for diverse, contradictory and different ways of expressing masculinity. In this regard, cultural spaces that celebrate the experiences of late(r)-life men, such as the local curling club, have the potential to be important sites of healthier, less aggressive and more supportive sporting masculinity – a notion that the curlers in this project repeatedly expressed. Although these curlers' ageing expressions of masculinity were sometimes tied to the functionality of their bodies, their disavowal of modified curling practices, their difference from women and their intellectual superiority, curlers also expressed expanded notions of hegemonic masculinity. Specifically, many of these curlers expressed counter-hegemonic masculine identities, built on caring, close relationships with other men, the celebration of diverse abilities and interdependence.

Importantly, late(r)-life curlers also began to challenge the culturally pervasive active ageing discourses that reject old-old age, embrace independence and rigorous exercise, and suggest that to age well one must emulate the body styles associated with youthful activity (see Lamb 2017; Timonen 2016). In curling's focus on inclusive physical activity, in its celebration of diverse bodies and, importantly, in the structure of the curling club, which encourages interdependence instead of independence, we might see diverse ways to celebrate both later-life masculinity and ageing.

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Opposite ends: widows' narratives of contemporary late life

*By Paula Vasara**

Abstract

The life course perspective frames this study of contemporary late life. Thematic narrative analysis is employed to analyse the stories of 16 Finnish widows aged 79–89 years (Moving in Old Age: Transitions in Housing and Care research project) in order to explore the experiences related to growing old. The results indicate two kinds of narratives: nostalgic reminiscences about a happy past are typical of the *retiring to solitude* story, characterised by experiences of life nearing its end and of letting go; and those inclined towards the *keeping up* narrative are still seeking new experiences and playing active roles in everyday life. Both kinds of stories encompass well-being, in spite of their apparent differences in outcome. These results indicate that there is no single description of ageing well. Individual experiences of growing old are unique, and are interpreted within the frame of past experiences and understandings acquired over the life course. Therefore, leeway should be given for individual considerations regarding the particularities of life arrangements in advanced age.

Keywords: ageing well, everyday life, narratives, widows.

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Introduction

Finland is considered to be a part of the Nordic group of universalistic welfare countries (Esping-Andersen 1990) and is described to be one of the happiest nations in the world (Helliwell et al. 2019). According to previous studies, people in Finland, including older people, describe themselves as satisfied with their lives, and their subjective health as being at least rather good (Vaarama et al. 2014). Finns are also living in fairly good health for longer than before (Vaarama et al. 2014). In Finland, there is a growing population of more than a million people aged 65 years and over: life expectancy for women is approximately 82 years, and the overall number of 90-year olds is growing fast and expected to double in the next two decades (Official Statistics of Finland (OSF) 2018).

In spite of these positive statements, ageing is often associated with negative images in public discussions. Studies suggest that the age of 75 often marks a watershed, after which illnesses and functional disabilities become more prevalent (Fogelholm et al. 2013: 11).The last years of old age have become associated with inevitable decline, loss and illness (Meisner & Levy 2016). The more positive attributes once associated with old age, such as serenity, wisdom and dignity, have too often given way to images of old age as characterised by dependency and care needs (Bengtson & Settersten 2016; Laslett 1989; Tuomi 2001). Old age is not depicted as a pastoral idyll or an achievement, but rather, a gloomy image is painted in dark brushstrokes (cf. Kaufman 1986: 4–5), particularly regarding older people's care in Finland (Kehusmaa & Hammar 2019; Szebehely & Meagher 2017).

Widowhood and living alone in old age are also worth considering, as bereavement is one of the markers most often associated with negative impacts in life, and spousal bereavement has been associated with many long-term consequences, including loneliness (e.g. Soulsby & Bennett 2015). Losing a spouse inevitably changes one's everyday life, often rather drastically, and loss of companionship may be particularly difficult to compensate for. Women are especially affected by this: since women have longer life expectancy, are usually younger than their husbands and are less inclined to remarry, widowhood is commoner among older women than older men in western societies (Martin-Matthews 2011; Soulsby & Bennett 2015).

It is only by understanding the individual's lived experiences that a society enables, supports and finds ways to facilitate the possibilities to live and age in the manner the individual considers suitable and desirable. Thus, the purpose of this study is to take a closer look at contemporary late life from the perspective of older people themselves through their stories. More particularly, this study aims to canvass the kinds of narrative that are told about growing old in contemporary Finnish society, and to ask how older women portray their aspirations regarding ageing in this specific time and place. The life course perspective (Elder 1994) applied here connects personal stories to historical time and place, and emphasises the linkages among individual lives in time.

Narrative thematic analysis is employed to give voice to the experiences of a sample of older Finnish widows in their eighties. Their stories are individual narratives, but at the same time they portray what is shared in their lived experiences. The narratives are investigated to understand how the women navigate the turmoil of modern times and the contradictory demands placed upon them by society, which at its most extreme either requires older people's full participation or relegates them to the margins (Atchley 1989; Cumming & Henry 1961; Havighurst 1961). Thus, this article explores how these widows view their own everyday lives and the opportunities that lie within them. What comprises good ageing for them? How do they negotiate their own expectations, needs and preferences within the controversy around good ageing (Bengtson & Settersten 2016)?

The Life Course Perspective and the Storied Nature of Lives

The principles of Elder's (1994) life course perspective inform this study of older women's lives. Lives are viewed as ongoing processes that evolve in time and place. Each life course is individual, but it occurs in a certain time and place, which presents certain options as well as constraints on the pathways available. Over a life course there are a number of events, some of which are more meaningful than others, and the timing of these events, in addition to their occurrence, is significant. Moreover, because lives are interdependent, the effect of an event may spread widely across a web of linkages among individual lives, including across time periods and family

members. However, it is important to add that individuals are not merely cast into the world and drifting aimlessly through time. Even if individuals experience interlocking fates and are constrained by spatio-temporal frameworks, they do possess an ability to plan and make choices, that is, they have agency (Elder 1994).

Life courses situated in time and place set one frame but another is derived from the storied nature of our lives. According to Bruner (2004), we are surrounded by stories all our lives. Such stories can be understood as an ongoing and constitutive part of reality. Every individual is an accumulation of past events and experiences, and their varying interpretations, which are moulded into stories. These narrative constructions organise and frame the ways we interpret our experiences, life events and possibilities – they are a means to make sense of the world. In time, they accumulate into a stock of narratives from which individuals can draw to create new stories, which in turn are used as guides to interpret and reinterpret lived experiences (Bruner 1990, 2004; Riessman 2008). These story models also convey shared perceptions and models of ageing, and thus have an effect on what is considered possible, probable, expected or even accepted over the life course and in late life (Hänninen 2003; Hyvärinen 2010; Riessman 2008). They act as horizon against which expectations and experiences are evaluated, interpreted and valued (Jauss 1983; Koselleck 1985).

Analysing Narratives of Late Life

An analysis of narratives is employed to explore how older widows who live alone view their lives, and how they negotiate their needs and preferences into a functioning array of everyday practices. The interviews chosen for this study offer a view of the landscape surrounding older widows, aged 79–89 years, in the contemporary world. The analysis gives voice to the experience of growing old in Finnish society, and how expectations, needs and preferences are negotiated by the individuals chosen for this sample. It also aims to understand how the imageries that are embedded in our society adumbrate the possible and the expected.

Lives are unique, and it is not the purpose of this analysis to make overarching generalisations from the narratives chosen. Nor are these

narratives considered to be transparent windows into people's lives and lived experiences (Kaufman 1986; Riessman1993). The stories are understood more as means to illustrate how widows organise and make sense of events and experiences, and how they make interpretations of events that take place in the present or the future. Each narrative is unique and is always tied to a certain time and place. Nonetheless, at the same time, they communicate something about the culturally shared, as each story is framed and shaped by broader historical and societal contexts that echo in the narrative constructions (Kaufman 1986: 25; Phoenix et al. 2010: 2–3).

Thematic analysis is applied to narratives that evolve in the interviews chosen for this study. The focus of the analysis is on the content of the telling – on what is told, not on how it is told. This kind of analysis is similar to content analysis in its focus on the content, but narrative enquiry differs in that the story is kept intact. Theorisations arise from the case, rather than from categories across cases. The account is not fractured into thematic categories, as it would be in content analysis, but is interpreted as a whole (Riessman 2008: 53–54).

The interviews are worked on one at a time, but as certain characteristics accumulate, it is possible to identify general patterns and to detect underlying assumptions. This kind of analysis results in selected cases that illustrate more general patterns and underlying assumptions, that is, the analysis is case-centred (Riessman 2008: 74–75). Even if the emphasis in thematic narrative analysis is not on the particularities concerning the interview situation, it is worth noting that a telling is always affected by situational factors and the interaction between interviewer and interviewee. Narratives are always intended for some audience, and this always plays a role in the content and form of the narrative (Riessman 2008: 57–61).

Interview Data

The data originated from the MOVAGE Moving in Old Age: Transitions in Housing and Care research project funded by the Academy of Finland (MOVAGE, 2011–2015). A total of 47 interviews were conducted in the winter of 2011–2012 in Central Finland. Everyday life, housing, moving decisions and care arrangements were discussed in the interviews with people aged 75 years or older. All interviews were recorded and transcribed,

and only some minor modifications were made, such as changing names to pseudonyms, and removing repetitions and expletives, in order to ensure anonymity and readability.

The interviews lasted for 79 minutes on average, and covered various issues regarding everyday life. They usually began with talk about the interviewee's experience of living in her current home, and then moved on to her previous life and housing history, and experiences regarding relocation. Family, social networks and leisure activities were also discussed. In addition, possible care needs and the use of various services were explored, and the interview ended with a question about their dream housing.

For the purpose of this study, a subsample of 16 older widows living in Central Finland was chosen from the larger dataset. Men, couples and women who were not living alone as widows were excluded. The purpose of the sampling was to choose women who, on paper, appeared to share similar key events and transitional phases over their life course, and who seemed to lead their lives under conditions shared by many of their contemporaries. Spousal bereavement is a very common life event among women aged above 75 years, and this is reflected in this data set. It is also an event that is often connected to ideas about transitions in social roles and life expectations, even if it is not necessarily regarded as a turning point in the life course.

In short, all these widows belonged to the same generation and shared similar life events and current life circumstances, such as being widowed, living alone and having some age-related problems with instrumental activities of daily living (IADL). The aim was to juxtapose these narratives of individual life courses with the familiar stereotypical images of older widows as a homogeneous group whose present lives and the futures are merely assigned to predetermined roles, preferences, aspirations and related reasonings (Meisner & Levy 2016).

All of these widows were born in the 1920s and 1930s, and they could be described as individuals belonging to the same *generation of reconstruction* (Roos 1987; see below). All had been married only once, and they described having marriages that had lasted for decades. In addition, all of them had children – three on average – but had also participated in work outside the family. Table 1 summarises some key characteristics of the sample.

Table 1. Some key characteristics of the narrators

Narrator	Born	Type of residence*	Years living alone	Number of children	Help and support**
Disengaged: retiring to solitude					
Henriikka	1925–1929	Age-related	10–	3	Inf+F
Inkeri	1920–1924	Ordinary	1–3	1	Inf+F
Karoliina	1925–1929	Ordinary	10–	6	Inf+F
Maria	1930–1934	Age-related	1–3	5	Inf+P
Sanni	1925–1929	Ordinary	10–	3	Inf+F
Sointu	1925–1929	Ordinary	10–	2	Inf+F
Vappu	1925–1929	Ordinary	4–10	3	Inf+P
Verna	1925–1929	Ordinary	10–	3	Inf+P
Engaged: keeping up					
Enni	1920–1924	Age-related	10–	4	F
Lea	1925–1929	Ordinary	4–10	3	Inf
Loviisa	1930–1934	Ordinary	4–10	2	Inf+F+P
Nelli	1930–1934	Ordinary	1–3	2	P
Senja	1930–1934	Ordinary	1–3	4	Inf
Sirkka	1930–1934	Age-related	4–10	4	P
Tuulikki	1925–1929	Ordinary	10–	4	F
Vieno	1930–1934	Ordinary	4–10	3	Inf

*Residence in age-related housing involves some special criteria, that is, age limits or functional disabilities.
**Inf= informal help: children, grandchildren, neighbours. F = formal services: home care, additional services such as transport, meals. P = private services: cleaning, transport, grocery deliveries etc.

In addition to their past life events, the sample's current life circumstances were also similar to a large extent: these widows were aged between 79 and 89 years and were living alone. At the time of the interview, all the widows chosen for this study had experienced bereavement; some had gone through only a year prior to the interview, but most of them had lived alone for about a decade or more. Illness and injury-related to

wartime experiences by some interviewees' husbands were a distinctive feature of the data, and may have resulted in slightly earlier bereavement due to untimely deaths related to wartime injuries. The majority of the women lived in ordinary homes, and received little or no formal help in their everyday lives. However, all had acquired some support due to difficulties in IADL – some only occasionally but some more intensely and from a combination of sources, including family and friends. All the interviewees described having long-term illnesses, but the degree and effect of managing everyday life varied significantly and did not correlate with the interviewees' chronological ages. The majority of interviewees described their health as good or satisfactory.

Situated in Time and Place: Older Women in Finland

Chronological age is often used to group older individuals, while *cohort* is a statistical term used to refer to a group of people born at the same time. It is often implied that older people form a homogeneous group: that they share the same preferences, needs and aspirations in later life, based on the fact that they share the same spatiotemporal and cultural context. To some extent, this claim is legitimate, since it is virtually impossible to step outside the social and cultural environment that shapes our interpretations, or to understand lived experience outside its context.

Mannheim (1952) defines a *generation* as a group of people of approximately the same age who shared a key experience in their youth, at roughly the age of 17–25 years. In this study, the concept of *generation* is better suited than that of *cohort* for the purpose of situating the widows' life stories in time and understanding the meaningful experiences that connect those stories. The aim is to outline some main features of the time and life events these older individuals have lived through. Thus, the concept of *generation* is used here descriptively to refer to a group of people who were born within a certain period, and who are connected by experiences related to time, place and the opportunities those environments presented (cf. Alestalo 2007; Mannheim 1952; Purhonen 2007; Roos 1987; Wass & Torsti 2011).

The usefulness of the concept of *generation* derives from its ability to sum up many of the key aspects and life events that may be considered

meaningful, cultural and shared experiences by a group of individuals born at the same time. However, the focal point of this study is not to generalise but to challenge generic stereotypical assumptions, and to illustrate the uniqueness of each individual's human condition despite their shared aspects. Each narrative constructed to interpret past, present and future experiences is based on individual experiences over the life course, and hence the outcomes, narratives and understandings are diverse.

A common typology concerning Finnish generations places women born in the 1920s and 1930s in the *generation of reconstruction* (Roos 1987). This term is related to Finnish history: Finland became independent in 1917 and took part in the Second World War. This war may be considered a watershed in the life course of people in this generation. They experienced scarcity in their youth, but a new time of prosperity dawned after the war years, and standards of living rose quickly.

Finnish society underwent rapid changes during the 20th century. Instead of people being tied to the land, it became more common for them to acquire some education and find employment in more urban areas. Marriage was important, and starting a family in one's own home was considered an achievement. Many women also worked, but their careers were more fragmentary most often due to multiple pregnancies and their staying home with the children. Even if life did consist of hard work, it was often described as a success story in many ways: there were vast improvements in young people's economic and educational levels, and a secure and stable lifestyle was achieved as a result of these societal changes (Markkola 1997; Roos 1987; Saarenheimo et al. 2014).

The shift from agrarian society to modern service society during the lifetime of people born in the 1920s and 1930s is also significant regarding individual lives. It means that individuals have become more distanced from the land, place and cyclical models, and hence from the idea of a single lifespan development. Gender and chronological age no longer define such clear roles or offer such predictability concerning the timing of life transitions and key events (Bowlby et al. 2010; Heikkinen & Tuomi 2001; Roos 1987: 48–49).

Now in their eighties in the 21st century, older people often live alone, many of them as widows. Previous studies have suggested that they are freer to reach beyond their immediate family and close surroundings,

and to pursue their own life goals (Haapola et al. 2013). With better financial resources and health, new opportunities to stay active open up, which in turn have an effect on the expectations, interpretations and demands set for individual lives. Longer life expectancy means that there are more peers of both sexes, and there are more generations alive at the same time (Karisto et al. 2013b: 41; Komp & Johansson 2015). This has an effect on social networks and everyday lives, as it offers opportunities for new kinds of reciprocity and encounters with kin and peers.

Findings: Narratives of Retiring and Keeping Up

The narratives of 16 widows chosen for this study shed light on what it is like to live as an old woman in contemporary Finnish society, and what a good everyday life comprises in these individual narratives. Surprisingly, there were two kinds of stories that dominated these older widows' narratives. They were not separate but rather located on a continuum of attachment regarding their lives. It was not a question of an either-or dichotomy, but more a matter of vocabulary and emphasis on certain types of shared interpretation assigned to events over the life course. The two narratives discernible in the stories told by these interviewees as *retiring to solitude* and *keeping up with the world*.

The interviewees' narratives about everyday practices and understandings concerning good ageing varied quite drastically. In spite of the differences, however, they did share some common characteristics. Some kept to the basic storyline more firmly than others, but with both storylines – *retiring to solitude* and *keeping up with the world* – they were able to keep the narratives intact. At the end, the same overall image of contentment and peace of mind was conveyed by both narratives.

Retiring to Solitude

The role reserved for an older widow in the *retiring to solitude* story type was that of a bystander. According to the lines of this plot, old age paved the way for gradually disengaging oneself from the hassles of everyday life. Eight narrators – Henriikka, Inkeri, Karoliina, Maria, Sanni, Sointu, Vappu and Verna – employed this storyline of voluntary withdrawal

from the fast-paced world. The *retiring to solitude* story type was characterised by key expressions such as *not anymore* and *not for long*. A vocabulary containing words such as *withdrawal*, *loss*, *acceptance*, *old*, *reminiscence*, *decline* and *end* commonly arose in these narratives. Their wishes were for peace, quiet and stability, with no hassles. The basic plot was nostalgic reminiscence: their past life had been full and happy, but now it was time to let go.

These narratives usually focused more on past experiences: for many, their past family life with a husband and children was formative for their later years. The fact that this period was already past was constructed as natural: there had been a transition into old age and widowhood since then, with the accompanying loss of roles. Marriage was looked upon with gentle nostalgia, and discord only rarely was referred to in passing. Children's successes in life were viewed as achievements of good parenting, and the years of shared nuclear family life as something that could be looked back upon with pride. Life appeared to have slowed down.

Karoliina's life had been very full: she had married rather young, and they had six children. She loved to be around children, and she worked with children all her adult life. In addition, she had been a young wife when she moved to her current apartment building, which had been full of young families, and very strong social ties were formed between women. She had been living in her family apartment of over 50 years and kept in touch with other women of her building, their health permitting. She remarked on the change in herself as follows:

> *Karoliina*: You get like, that's what they say, those other grannies too, that there, well this, you would not want to go to any place any more. Is this then giving up on life, all this? That you have spent your life running around and doing stuff, and [...] and now it's quiet.

Life had slowed down for another informant, Maria, as well. She did not feel bored: her time was well spent reading and knitting, and she considered her slower life to be something of a natural progression. She was contented: she had lived most of her life in a house with only cold water and no central heating, and it was only a few years ago, after her husband had fallen terminally ill, that he had agreed to move into a more modern apartment. Now, Maria was enjoying her easy life.

> *Maria*: Well, I don't have anything else, I have become so lazy, to go to any place, to go with the others, to the pensioners' meetings and activities, I have not been there once. Once, when I was still working, I was keen on going, and interested in things, but now I have become so idle.

The idea of already having done their share was a common line of thought among the interviewees who employed this *retiring to solitude* narrative. They did not describe themselves as having been cast aside, but they considered themselves entitled to step back from the busyness of the past. They valued easier everyday practices, and they were not willing to take on extra duties. Continuing regular contact with the children was presented as evidence of their happy family life together, but there was a clear distinction between this stage of life and the previous one: the years of family life and reciprocal care were mostly considered belonging to the past.

Karoliina, like other older widows, considered herself to have passed beyond the years of active parenting and grandparenting; the phase of minding the children and maintaining an active involvement in their lives was over. Even though her adult children acted as almost her sole social network, contact was kept at arm's length. Photographs of the grandchildren adorned the walls, and they were welcomed for occasional visits, but they were not overly encouraged, as Karoliina considered this to be too much hassle. In addition, some older widows saw it as their legitimate right to decline to attend family functions on account of their advanced age, particularly if any health issues were involved. For instance, Karoliina had made up her mind not to attend her granddaughter's wedding, regardless of her family members' pleas.

All in all, the social networks of these women were rather limited. Some, such as Karoliina, had good friends outside their immediate family, but many were more likely to have lost important peers, and these ties were never replaced. In part, this was due to the tragic fact that they had outlived most of their contemporaries, and no company of their own age for social activities was actually attainable. Moreover, a lack of initiative and interest appeared to accompany their everyday activities: what was considered absolutely necessary was taken care of, and everything else was 'extra' and left aside. This included even previously valued hobbies such as reading, knitting, attending theatre or a choir, and so on.

Some had age-related medical conditions such as cataracts or arthritis which hindered their activities, but lack of interest was described as the main reason for giving up these activities.

It is important to note, however, that the narratives most often described a specifically voluntary solitude. These narrators did not usually depict themselves as lonely. Although they did not deny the meaning of social networks, they considered their withdrawal a preferred lifestyle choice at this stage of life.

> *Vappu*: I have all the company I need. And all in all, I don't need to, I enjoy my time alone. But that is because I had to keep up and smile during my years in working life, so now I know how to enjoy my solitude.

Vappu had worked for long hours, and she had been very active socially in her years as a hairdresser. It appeared that work, along with her husband, had constituted her social network. After retiring and losing her spouse, she felt that she had had enough. Now was the time to enjoy her right to spend her last remaining years in solitude.

Their past lives also appeared to justify a lack of interest in the home: only necessary maintenance was taken care of. Vappu, for example, had sold her family home to her son and moved into an apartment that her other children had furnished for her. Also, doing chores involved private negotiations over what was considered necessary. For example, Sointu, who lived in a very big house, stated: "Well, yes, if you just forgive yourself a little. But I don't even try to keep up with a perfect house anymore."

However, even if taking care of one's current dwelling did not have much appeal and often involved making compromises, relocation was only mentioned as a necessary evil, in cases where it might be impossible to avoid. One's relationship with the home was important, because the retrospective view of one's happy past was often physically located in the home. In that sense, preserving the family home was valued. In addition to these affectionate feelings, another reason not to move appeared to be more a question of not wanting to be bothered with it: their current home would suffice for the little time they had left. Living and housing arrangements focused on making everyday life as carefree as possible.

These narrators appeared to be comfortable talking about approaching death. Their own age and death were often referred to explicitly, sometimes even in pejorative terms. As ageing was understood as an inevitable loss, struggle was constructed as futile – which in turn sometimes led them to disregard caring for themselves, particularly through regular healthcare and exercise. Inkeri had sought home help, but she was advised to try to manage on her own for as long as she could in order to maintain her functional abilities. She did not quite see the point of this struggle.

> *Inkeri*: One must, the doctor said that my back likes the exercise, and that I should try to do it. But then, I won't live for very long any more, I am going to be 89 next month.

The motivation for daily exercise appeared to be hard to find, particularly in difficult weather conditions during winter. It is worth noting that this may be related to the fact that these women from the older generation, like Inkeri, had not been accustomed to taking part in organised indoor sports activities such as going to a gym, but had preferred outdoor activities and functional exercise (Zacheus 2008). Nowadays, Inkeri attended a nearby day centre and participated in its activities, including physical ones, but she did so more for the companionship. Also, these widows' anticipation of decline, and of death catching up with them sooner rather than later, had resulted in unfortunate encounters with medical staff. In a medicalised society that is also facing financial challenges, older people's rehabilitation, and their possible refusal to have surgery in addition to regular healthcare, is a subject of debate (see, for instance, discussions from the viewpoint of critical gerontology).

However, it is worth noting that a lack of enthusiasm and vigour by no means equated with a depressive state of mind. On the contrary, almost all had come to terms with changes they considered a natural part of the life course, and they had adapted their everyday behaviour and activities accordingly, each in their unique way. Sanni described how she had been active previously and had participated in several outings with a pensioners' association, but now she could not even think of attending. She noted: "One is forced to adapt. There's nothing you can do." Once this stage of

acceptance had been reached, they felt contented as long as equilibrium was maintained. Once peace of mind had been achieved, life as a quest for experience was over for these narrators.

Keeping Up

At the opposite end of the continuum between attachment and withdrawal, there were eight widowed female informants – Enni, Lea, Loviisa, Nelli, Senja, Sirkka, Tuulikki and Vieno – with a firm grip on life. They refused to give in to the aches and pains of old age, and they saw themselves as the equals of anyone. Compared with the stories constructed by the older widows who utilised the *retiring to solitude* plot line, these women's narratives were strikingly different, even in the vocabulary they used: their narrations comprised words such as *still*, *not yet*, *if*. Their stories indicated present engagements, not merely remembered activities of the past. Even though they had had their ups and downs over the life course, they were by no means bowing out: there was still much to do, and many things to look forward to.

Common to all narrators, including those who employed the *retiring to solitude* storyline, was a feeling of contentment with their overall story. But these *keeping up* narrators in particular, even with their aches and pains, losses and struggles, shared a striving for the future and a desire to look forward in anticipation of new things. Their attitude towards life could be described as optimistic and welcoming. Enni was one of those sunny personalities that can light up a room. She had moved to an assisted living facility, which she considered a very lucky turn of events. Previously, she had lived in her fifth-floor family apartment – without an elevator, which had made things challenging with her walking frame. However, she joked about her reasons for moving, and claimed that the home care nurses had encouraged her to move only because they were too lazy to climb the stairs to reach her home.

> *Enni*: I don't know what I have, I have all sorts of ailments. But it's okay, just as long as I can manage. And I'm really happy with my life.

Enni was nearing 90 years of age, and she chuckled that *this is quite a nice age*. She wondered somewhat mischievously whether she was *a bit of a fool*,

as she considered herself very happy with the way things were going on. With relocation she had found new friends, and she described how *life felt pretty good* at the time.

These narrators accommodated changes to housing arrangements in their stories. They considered moving to be a possibility, and some had taken action, relocating in their old age. Some retirees experienced moving as a necessary evil, but these narrators tended to focus on moving as means to gain something. For some, like Loviisa, supported living enabled them to continue to have an independent life. For others it may have been a lifestyle choice that enabled them to continue lifelong habits such as attending the theatre or going to the library without help. For some, it was a question of fulfilling a lifelong dream.

One of the discernible features of this narrative was that these women did not talk much about the end of life. Death was only referred to in passing, and with serene images of peace rather than relief from worldly sufferings. Nelli had recently lost her husband, and had fallen out with her stepchildren. In addition, she had become seriously ill. But as she sought for words to describe her circumstances, she did not opt for negative terms, despite her recent adversities; she chose to depict herself as *sad*, but not as having been *cast aside*.

> *Nelli*: Seventy-nine years old, it is a lot of years. And sometimes you have to think that this is not forever, but for me, up until now, life has been kind of light all the way. And every day is a good day.

These types of positive references have recurred within these narratives, and these women, such as Enni and Nelli, tended to remark on their own great age with pride. They acknowledged changes in their lives, but they appeared to perceive no particular transition to the margins. The ability to adapt to changing circumstances and a more open attitude towards the future seemed to give them strength to carry on, despite their misfortunes.

This openness to possible futures did not translate into self-deception: an awareness of her increasing years was present in Senja's narrative as well, but she was still able to see potential in herself. One demonstration of this desire to continue living actively was the loud demand for rehabilitative services. Senja was a perfect example of

not giving into health issues: she had broken her leg very badly, but instead of giving up in her eighties, she demanded physical therapy, and she intended to dance the polka again. Her somewhat frugal nature also came into play in a delightful manner, as she spoke about not wasting things.

> *Senja*: I told the doctor last winter, I said that I had bought a new pair of skis, skis and ski boots, modern ones, and I have to be able to ski again.

The narrators who were inclined towards the *keeping up* narrative tended to present themselves as more extrovert, and to describe wider social networks beyond their adult children and other kin in their narratives. They also depicted themselves as more engaged in various activities outside the home. For instance, Senja picked berries and sold them to her acquaintances for extra income, and took part in all sorts of associations, while Enni continued her membership of seven organisations. Nelli had made a career in banking, and now after her retirement she had plans to attend the University of the Third Age. She considered attending lectures, and she was looking forward to getting well again and being able to get around more. This also included making new friends in her new place of residence.

> *Nelli*: I am really rather happy and satisfied with everything, considering that I am old and alone. […] When I get this heart condition back in order, I am hoping that I can get around more.

However, there were also some narrators who had felt compelled to give up their social activities for health reasons. Even so, for example, Loviisa had been able to keep her spirits up most of the time, despite some disgruntled feelings associated with her condition and her confinement to her home. She had severe difficulty with walking, and she used a walking frame at all times, but her spirits were usually high.

> *Loviisa*: Yes, it's nothing, even if you cannot or aren't able to stand, you can do things sitting down, because there is no rush, you just take your time. […] There is no problem, if you don't try to hurry. And you can move so much with these [walking frames], and you really, really take your time, and take it easy, there is no problem, no other problem except that everything gets done more slowly.

The ability to bounce back in a resilient way appeared to be connected to their overall attitude towards life: they persevered because of their desire to find a way to make things happen, and their ability to negotiate their way around obstacles – if not in a literal sense then in a modified and acceptable manner at least.

Some, like Vieno, remarked how lucky they had been in their lives, with good health, a secured income and a nice home; but these women were also more likely to mention clear obstacles in their path. For instance, Tuulikki had been an active traveller around the world, but she had recently lost her eyesight almost completely. Still, she was able to look at the future and the past with contentment. She noted that *I have lived a colourful and good life, even if there were illnesses*, and at the time of the interview she praised herself for having had the courage to do things. The past was present, not forgotten or undervalued. But aside from the past, these women were taking a step towards the future. Their life stories were told as ongoing narratives of things already done and things still to come. Life was not over yet.

Discussion

There is something very human in making sense of the world by creating stories. Stories encompass the individual as well as the shared – our past, present and future experiences. Narratives guide us in our everyday lives, as they set the horizon of expectations against which we evaluate and interpret our own experiences and aspirations over the life course.

Each story is unique, but the narratives of the older women chosen for this study shed light on contemporary late life. In spite of sharing a cultural context, and even similar life events and transitions, the life stories of these Finnish women, and the attitudes towards ageing and life itself expressed in these narratives, were strikingly diverse. These stories paint very different landscapes for us to view, and they offer various standpoints from which we might choose to view our own ageing.

Those who leaned more on narratives of *retiring to solitude* had a darker tone, with more emphasis on loss and letting go, but they were by no means despairing. Even if the story was coming to an end, these narrators were able to highlight interesting twists and turns in their lives, and there were good memories to look back on. For these women, it was

time to bow out graciously, without regret. On the other hand, those more inclined towards the *keeping up* narrative were still peering around corners and unveiling possible routes. Some of them had chosen to continue on a familiar path, but there were others whose life stories were still in the making, still unfolding before the eyes of those whose lives brushed against theirs. For them, it was not yet time to head for the finale; it was time to move forward.

These narratives remind us of classical theories of ageing (Bengtson & Settersten 2016). The *retiring to solitude* narrative appears to reflect the image of ageing well according to the disengagement theory developed by Cumming and Henry (1961). According to this theory, ageing itself is the factor that causes inevitable withdrawal from interaction. Thus, the ageing process is considered successful when one disengages voluntarily from active life and is able to accept this disengagement gracefully. This appeared to be the case for some of these narrators. On the other hand, the *keeping up* narrative resembles more of Havighurst's (1961) activity theory, which focuses on active participation and views successful ageing as a continuation of activity levels established during earlier years. Traces of Atchley's (1989) continuity theory could also be seen in the stories of these older women in terms of the focus on adaptation to change and on consistency in lifestyle over the life course.

Changes in socio-economic factors are worth considering regarding these findings, and they might offer some explanation for the diversity observed. Studies indicate that, in general, life often appears to narrow down in later life (e.g. Karisto et al. 2013a). Social participation tends to decrease, even if one is in rather good health, has a good education and financial resources, and has access to all kinds of possibility (Karisto et al. 2013b). As for family ties, they seem to gain in significance, and they are commonly considered a great source of joy (Haapola et al. 2013; Karisto et al. 2013b).

One's experienced health might also play a role in narrations of late life. All the widows in this data set described having certain health issues, and almost all suffered from chronic disease. Nevertheless, the mere prevalence of illnesses and accompanying functional impairments was not sufficient to explain the differences in attitude towards life and ageing. However, it should be noted that those inclined to disengage were slightly older. Chronological age is a rather poor variable regarding experiences

of individual ageing, but it might tempt us to ponder whether there are some changes that are more likely to take place after a certain age. This line of thought recalls Laslett's (1989) famous distinction between the third and fourth ages, or Neugarten's (1974) insights into the categories of *young-old* and *old-old*, which have been considered as explanations for variations in old age. While it should be noted that these narrators were all above the age of 75 (compared with Neugarten's categories of 55–74 and 75+ years of age), this might be explained by rising life expectancies and advances in medicine which have altered the chronological limits on persons considered old in the first place. All in all, the available data demonstrate that there is vast variety but it does not explain why particular narrators should choose one narrative over the other.

Conclusion

It is not a matter of either-or. Life, and narratives of contemporary late life, cannot be categorised as black or white; it is more like a mix of colours. The value of this research is in showcasing the particular and the unique, and connecting them to the human condition that is shared by individuals living late life in the contemporary western world. What is valued in life is always worth debating, and the discussion should not be limited to the extremes. On the contrary, it should be acknowledged that there are multiple factors that weigh in, and a whole variety of routes from which to choose in search of a meaningful (late) life.

More research is certainly needed to understand the paths that lead to experiences of well-being and how to find these routes. It is important to understand the reasoning behind different attitudes and choices over the life course, and how various meanings are assigned. An appreciation of heterogeneity is a good starting point: it is important to understand that perhaps not all roads lead to Rome, but many do. Thus, the heterogeneity of life in its various forms should be valued and celebrated. Good practices are not easy to pinpoint, but we should strive to understand and distinguish the factors that may contribute to the possibility of living life to the fullest.

The overall impression of contentment with life that is embedded in these individual narratives of late life is comforting. It assures us that good outcomes are possible in a society that allows leeway for individuals

to age in a manner they experience as fitting. The findings of this study suggest that it is above all the ability to arrange one's way of living in a manner compatible with one's personal values and preferences that is the key to the experience of ageing well. An adequate home, necessary support and meaningful things to do are vital basic needs that cannot be set aside, but what counts as adequate, necessary and worth pursuing should be left to the discretion of the individual – as should the choice of whether to retire to solitude, or to plunge full speed ahead into the whirls of the world.

Acknowledgements

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Migrant care workers in elderly care: what a study of media representations suggests about Sweden as a caring democracy

By Sandra Torres[1] & Jonas Lindblom[2]

Abstract

This article sheds light on the ways in which migrant care workers in the elderly care sector were represented in Swedish daily newspaper articles published between 1995 and 2017 (*n* = 370); it uses the notions of the "ethics of care" and "caring democracy" as a prism through which the findings can be made sense of. By bringing attention to the fact that they are often described as the solution par excellence to the staffing crisis Swedish elderly care is experiencing, this article draws attention to portrayals of these workers as people who are both particularly good at caring and capable of providing culture-appropriate care. Thus, although depicted as "particular Others," these workers are represented as an asset to the sector – a sector that is thought to offer much needed but highly undervalued services. By bringing attention to both of these representations, and using the theoretical and conceptual framework "ethics of care" formulated by Tronto, the article questions whether Sweden – a country often described as the epitome of an egalitarian society – can be regarded as a caring democracy.

Keywords: elderly care, ethics of care, media representations, migrant care workers, Sweden.

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Introduction

Research has shown that media representations of ethnic minorities and migrants – often regarded as ethnic "Others" – influence ethnic majority members' perceptions of these groups (Ferguson 1998; Wood & King 2001). This is because the media offer input to adult citizens' daily discussions, implying that the role of the media "as a prevailing discourse and attitude context for thought and talk about ethnic groups is probably unsurpassed by any other institutional or public source of communication" (van Dijk 1987: 41). From this, it follows that media representations play a role in how prejudices are taught and reproduced (cf. Brown 1995), as well as in facilitating populist sentiments (see, e.g. Gale 2004). It is against this backdrop that we set out to study Swedish media representations of migrant care workers in daily newspaper reporting on elderly care. Our interest is informed by the debate on the ethics of care, which suggests that studies of the care discourse can give us an insight into the moral fabric of a society. We believe that the ways in which daily newspapers write about migrant care workers could have implications for public opinion about them, as well as for the ways in which people come to regard the welfare sector, that is, elderly care.

The analyses presented here tap into the ways in which the globalization of international migration, and population aging, have heightened European societies' awareness of why care work cannot be relegated to the periphery of policy-making (Kilkey et al. 2010; Pfau-Effinger & Rostgaard 2011; Torres 2006a, 2013). Long-term care systems' increasing reliance on migrant workers (e.g. Browne & Braun 2008; Leeson 2010); the gendered, racial and ethical challenges that importing these workers entails (e.g. Bettio et al. 2006; Robinson 2006); and the care chains that are created by them (e.g. Hochschild 2000; Yeates 2004) are all issues that demand our attention. We have deemed it useful to rely on the debate on the ethics of care – which began in the early 1990s and was reignited some 6 or so years ago partly due to international migration and population aging (see, e.g. Barnes et al. 2015; Olthuis et al. 2014; Tronto 2010, 2013) – as the lens through which media representations of welfare sectors can be understood.

At the core of this debate (see, e.g. Tronto 1987, 2010, 2013) is the following argument:

> Vulnerability belies the myth that we are autonomous, and potentially equal, citizens. To assume equality among humans leaves out and ignores important dimensions of human existence. Throughout our lives, all of us go through varying degrees of dependence and independence, of autonomy and vulnerability. (Tronto 1993: 135)

Besides bringing attention to the inevitability of our interdependence throughout the life course, the ethics of care debate has problematized how care regimes organize care work, what care work means to those who receive and provide it, as well as who is best suited to providing care and why (e.g. Barnes et al. 2015; Olthuis et al. 2014). In addition, care scholars have argued that relegating care to the periphery of the public sphere makes little sense, because one person's dependency can be the means through which another person asserts his/her autonomy (Robinson 2006). Against this backdrop, it is perhaps understandable that ethics of care scholars regard the organization of care as a complex set of power relationships.

Tronto (1993) made the following argument: "there is great ideological advantage to gain from keeping care from coming into focus. By not noticing how pervasive and central care is to human life, those who are in positions of power and privilege can continue to ignore and to degrade the activities of care and those who give care" (Tronto 1993: 111). It is against this backdrop that we set out to explore the media representations of migrant care workers that a Swedish daily newspaper has relied on since it first started reporting on the effects of globalization of international migration would have on the elderly care sector back in 1995. Narayan (1995) aptly expressed one of the reasons we deem this angle of investigation interesting:

> [W]hile aspects of care discourse have the potential virtue of calling attention to vulnerabilities that mark relationships between different situated persons, care discourse also runs the risk of being used to ideological ends where these "differences" are defined in self-serving ways by the dominant and the powerful. (Narayan 1995: 136)

Thus, inspired by the ethics of the care debate, the present article's starting point is the assumption that studies that draw attention to care offer important

insights into a society's moral backbone (cf. Tronto 1995, 2010) as well as its relationship with "particular Others" (cf. Narayan 1995). This means that although we acknowledge that "care is not the only principle of modern moral life," we deem care discourse to be an interesting angle of investigation in our attempt to expose power relationships. To this end, it would seem necessary to point out that, in one of her latest contributions, Tronto argued that welfare states need to "figure out how to put responsibilities for caring at the center of their democratic political agendas" (2013: ix), and that only those who end up managing to do so can be regarded as caring democracies.

Research on Migrant Care Workers

Research on migrant care workers has slowly but surely gained momentum over the past two decades. The following are the angles of investigation that have received the most attention:

- Research on the policies that have opened the door to their recruitment as well as the policy implications that their recruitment has for the sector (e.g. Di Rosa et al. 2012; Lowell et al. 2010; Lutz & Palenga-Möllenbeck 2010; Wall & Nunes 2010)
- Studies that shed light on migrant care workers' migration motives (e.g. Raijman et al. 2003)
- Research that brings attention to the tasks they perform in different countries, and the conditions under which they work (e.g. Elrick & Lewandowska 2008; Iecovich 2010)
- Studies that bring attention to the ways in which migrant care workers view their work and life situation (e.g. Doyle & Timonen 2009; Doyle & Timonen 2010; Iecovich 2011; McGregor 2007; Stevens et al. 2012; Timonen & Doyle 2010; Walsh & O'Shea 2010).
- Research that reveals the ways in which different stakeholders, and clients, regard these workers and the care they provide (e.g. Bourgeault et al. 2010; Iecovich 2007; Jönson 2007; Shutes & Walsh 2012; Walsh & Shutes 2012).

Few studies have brought attention to the ways in which public debates or daily newspaper reporting depicts migrant care workers. To the best of our knowledge, there seem to be two studies with this starting point:

first, a study by Weicht (2010), which analyzed Austrian discourses on migrant caring by bringing attention to both newspaper articles and focus group discussions about these workers; second, a study by Nordberg (2016), which analyzed Finnish media representations of migrant care workers using data collected in collaboration with the present authors (as described below).

Method

The present article utilizes data generated from a comparative project of daily newspaper reporting on elderly care, which focuses on how ethnicity, culture, language, religion and migration-related issues are addressed in the major newspapers in Sweden and Finland between 1995 and 2017.[1] The analysis begins with articles from 1995 because this is when public debates on the challenges associated with culture and ethnic diversity within the elderly care sector started in the countries the project focuses on. The sample for the Swedish part of the project, which we rely on here, includes *all* articles published in *Svenska Dagbladet* (SvD) and *Dagens Nyheter* (DN), the two Swedish daily newspapers with nationwide coverage (*N* = 370). In the present article, we focus primarily, though not exclusively, on the articles about migrant care workers. These articles constitute 44.4% (164) of the data corpus.

The analysis has been conducted in two phases. First, we conducted a quantitative analysis by taking into account the *context* the reporting brought attention to, the *topics* being discussed, whether the interest in migrant care workers had changed over time (which we refer to as the *time angle*), the *resources* associated with these workers, the *actors* being discussed (i.e. in relation to whom are migrant care workers being discussed?), who has participated in the discussion (which we refer to as the

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[1] This project has already generated some publications. For example, Torres et al. (2012) focused on country comparisons covering the period 1995–2008, while Torres et al. (2014) presented results covering the period 1995–2011. In addition, Lindblom and Torres (2011) presented results from the Swedish material covering the period 1995–2008, while Torres 2017 revealed how migrant care workers were described in a 3-page-long piece for a Special Issue of *Sociologisk Forskning*. In addition, and as already mentioned, Nordberg (2016) presented the ways in which Finnish newspapers have written about migrant care workers during the years 2003 and 2013.

participants), and the *ethnic background* of those who have been given the opportunity to express themselves in these newspaper articles. In order to systematize the analysis and create conditions for good reliability, we created a coding scheme (in which all coded data were registered) and a code book (describing the principles used when coding the data) (cf. Neuendorf 2002). The establishment of coding principles was important, because the newspaper material scrutinized seldom deals only with the relation between elderly care and issues of ethnicity/migration but often with other topics as well. In other words, an article can contain information that is not relevant to the project's aims, and in such cases, only parts of the content have been coded. It is also worth noting that, in order to ensure the reliability of the coding, we discussed how the codes should be delimited and how the coding principles would be used, throughout the entire coding process. Thus, the coding process involved close collaboration between three researchers (the two present authors and their Finnish colleague). This means that we relied on "peer-debriefing sessions" to guarantee the reliability of the quantitative analysis (Cresswell 1998).

The results of the quantitative analyses were used as a starting point for the qualitative analysis, which in relation to migrant care workers focused on the following two questions: How do the newspaper articles in question describe migrant care workers, and what assumptions do they make about them? This part of the analysis followed Bryman's (2006) guidelines for thematic content analysis. Thus, we looked for both the manifest and the latent meanings of words, expressions and longer excerpts to identify the underlying patterns in the newspaper material. This is why the qualitative analysis was carried out only after the quantitative analysis provided the necessary background data on the frequency of various patterns. The analysis followed, in other words, Silverman's (2001: 222) recommendation to start each study by asking basic "what" questions before going on to ask more advanced "how" questions. Thus, although the present article focuses primarily on the findings generated through the qualitative analysis, we will also refer to some of the findings generated by the quantitative analysis. Continuous comparison with the quantitative data served as an important reliability measure, helping us to avoid drawing conclusions that only capture isolated tendencies in the material. The analysis presented here is therefore the result of our active search for disconfirming evidence (cf. Silverman 2001).

Findings

Table 1 shows the topics that are primarily discussed in the newspaper articles that comprise the data corpus. The table shows that recruitment of migrant workers to the elderly care sector and deliverance of culture-appropriate care are the two main topics discussed in the data corpus.

Table 1 also shows that the topics receiving the most attention in the daily newspaper reporting referred to here focus on different elderly care actors. The recruitment of migrant care workers (which 44.4% of the data corpus focuses on) is mostly discussed from the angle of what migrants who are care providers have to offer (40.3% of the articles on migrant care workers utilize this angle). This means that this is the one reason that was utilized most often in the data corpus. The topic of culture-appropriate care (which 42.3% of the articles focus on) is discussed from the perspectives of migrants who are care recipients (29.2% of the articles on this issue take this perspective). Both of these topics are, thus, discussed from the perspective of the ethnic minority. In other words, the perspectives of those who constitute the majority of elderly care providers and

Table 1. Topics discussed in the data corpus in relation to the background of the elderly care actors in focus (*N* = 370)

Background of the elderly care actors in focus	Topics discussed			
	Recruitment of migrant care workers (%)	Culture-appropriate care (%)	Other (%)	Total
Migrants as elderly care recipients	1.9% (7)	29.2% (108)	6.5% (24)	37.6% (139)
Migrants as elderly care providers	40.3% (149)	3.2% (12)	3.5% (13)	47% (174)
Migrants as relatives	0.3% (1)	1.6% (6)	0.3% (1)	2.2% (8)
Non-migrants (or natives) as elderly care recipients	1.6% (6)	7.8% (29)	1.9% (7)	11.3% (42)
Non-migrants (or natives) as elderly care providers	0.3% (1)	0.5% (2)	1.1% (4)	1.9% (7)
Total	44.4% (164)	42.3% (157)	13.3% (49)	100% (370)

recipients (i.e. ethnic Swedes) are not in focus in this data corpus. Less than 8% of the articles on culture-appropriate care focus on nonmigrants, while only close to 2% of the articles focusing on migrant care workers focus on them.

Although not shown in Table 1, some of the articles focusing on migrant care workers are about hiring people with migrant backgrounds who are already in Sweden (64.6% out of these 164 articles focus on settled immigrants), in contrast to importing migrants to the sector (only 22.6% of the articles focus on the actual import of workers to the sector). Thus, when we use the term "migrant care worker" here, we mean both those who have migrated *in order to* care and those who *have ended up* in the care sector after having migrated (often because they have failed to integrate into the Swedish society and have therefore not secured employment in other sectors).

Migrant Care Workers as the Solution to the Labor Shortage in Elderly Care

In order to understand how migrant care workers are portrayed in the data corpus, we need to consider that Swedish elderly care has been at a critical breaking point for at least two decades due to, among other things, population aging. Most of the articles report that the number of people over the age of 65 has dramatically increased and will continue to do so in the future, meaning there is and will be a shortage of staff. Two articles summarize the situation as follows:

> There is a crisis again regarding the population issue in Sweden. The question of how we should take care of our elderly, our very own elderly, has a prominent place in the public debate. And its significance will grow. Just like the number of elderly in the population. (Article entitled "Immigration solves the crises" - "Invandring löser krisen" - published on November 1, 1998 in SvD)

> &

> The claim has been made countless times in recent years: since Sweden's population is getting older, immigrants are needed to increase the number of people working. Instead of asking how much immigration Sweden can manage, the question should be how much immigration does Sweden need? Who else will take care of us when we get older? (Article entitled "How does immigration become profitable?" - "Hur blir invandring lönsamt?"- published on December 8, 2015 in SvD)

The first article referred to here alludes to the fact that "there is a crisis again." This article refers to Swedish sociologists Gunnar and Alva Myrdal who, during the 1930s, discussed the serious consequences of a continued low birth rate in Sweden. The reference to the critical situation experienced in the past stresses the gravity of the present situation. This article proposes – as others do as well – that immigration is the answer to the crisis. Thus, the care that migrants can provide is referred to as one of the ways (in fact, the preferred way as we will see shortly) in which the elderly care sector can address the challenge of population aging. It is also worth noting that, although the solution discussed in these extracts involves importing migrants to the sector, this is not the only solution offered in this daily newspaper reporting. On the one hand, we have articles suggesting that the sector should recruit people with migrant backgrounds who are currently living in Sweden but are unemployed – that is, settled immigrants should be attracted to the sector. On the other hand, there are articles suggesting that, to solve the elderly care crisis, the welfare sector should attract people from abroad – that is, the sector should import staff and invest in labor migration schemes. Thus, in this newspaper reporting, Sweden is depicted as a country that not only needs migrants who can work and contribute to its economy but also as a country that needs migrants who can care for its aging population (see also Nordberg 2016, who shows a similar pattern in Finnish media representations). This resonates well with Tronto's (2013) argument regarding how a caring democracy is built. She argues that when societies regard care as something that "Others" are "naturally" good at or destined to do, they tend to "assign the responsibilities for caring to noncitizens /…/ and working-class foreigners" (Tronto 2013: 10). The media representations of migrant care workers referred to here argue this very thing, because they state that it makes perfect sense for migrants to take on the caring tasks the elderly care sector crisis has generated, now that population aging entails demographic changes in the Swedish population.

Table 2 shows that it is mostly economic, organizational and/or demographic reasons that are given to explain *why* recruitment of migrants to the elderly care sector is necessary. These reasons are utilized in 28.2% of the articles arguing that the Swedish elderly care sector needs to recruit migrant care workers.

Table 2. Topics in relation to the reasons alluded to (n = 370)

Reasons alluded to when representing the topic	Topics depicted (% and actual number)		Total
	Recruitment of migrant care workers	Other topics	
Culture-related reasons	12.4% (46)	38.9% (144)	51.3% (190)
Economic, organizational and/or demographic reasons	28.2% (104)	14.8% (55)	43% (159)
Other	3.8% (14)	1.9% (7)	5.7% (21)
Total	44.4% (164)	55.6% (206)	100% (370)

Among the reasons alluded to are: the high ratio of unemployed migrants already living in Sweden, the growing elderly population, and ethnic Swedes' low motivation to work in the elderly care sector. However, the recurring idea many articles present is that migrants who are already living in Sweden are untapped resources because they already have some experience of Swedish society and customs (even of the welfare sector in some cases), which is why they should be regarded as an attractive labor force before importing migrants to the sector is considered. Importing migrants to the sector seems to be deemed more costly than attracting migrants who already live in Sweden. Furthermore, some newspaper articles point out that some migrants living in Sweden already have professional backgrounds that fit the needs of the elderly care sector. Finally, some of the articles mention that the social and economic problems migrants already living in Sweden face need to be solved before any further immigration can take place. The idea being that becoming employed in the elderly care sector is a step in the right direction for settled (but currently unemployed) migrants' integration. For instance, one of the articles analyzed stated:

> Sweden has failed to take advantage of the "reserve army" made up of existing immigrants and refugees. As long as these people are shut out of the job market, possibilities for development and civic life, labor migration is surely impossible. It is morally difficult to imagine that Latvians, Romanians, Czechs and Ukrainians would be offered work in Sweden while Swedes with an immigrant background remain unemployed. And the popular resistance to large-scale immigration will no doubt continue to be significant

as long as today's problems related to the multi-ethnic Sweden remain. (Article entitled "Commentary – Wanted: visions and courage" - "Kommentaren – Efterlyses: visioner och mod" - published on March 22, 2000 in SvD)

In this excerpt, settled migrants are described as "a reserve army"; a resource into which the Swedish society, in general, and the elderly care sector, in particular, have yet to tap. This is not the only military allusion in this article; the title also uses a word often associated with military jargon (i.e. courage). Thus, this article and others like it depict Sweden as a society that has failed to integrate its immigrant population or to become multi-ethnic in the true sense of the word. Against this backdrop, the articles in the data corpus argue that it would be both inappropriate and costly to embark on more labor immigration schemes. Settled migrants are described as "a great untapped resource, which it is both humanely and economically indefensible not to make use of" (As stated in the article entitled "Better educated immigrants meet companies'needs" - "Bättre skolade invandrare täcker företagens behov" - published on June 6, 2000 in SvD). In other words, articles like this highlight the societal consequences of the failed integration of settled migrants, given that such a large number of them remain unemployed.

Something else that seems worthy of attention is that most of the newspaper articles analyzed take for granted that migrants should shoulder the burden of the staff crisis the Swedish elderly care sector is facing at present. Thus, in this data corpus, recruitment of settled migrants to the sector is an alternative that is neither questioned nor problematized. The possibility that recruitment efforts could be made to attract ethnic Swedes to the sector goes virtually unmentioned in the material. One of the few articles discussing the assumed difficulties that would arise when trying to attract ethnic Swedes states the following:

The sector where employment is growing the fastest is care for the elderly – and it is expected that by 2050, one in ten Swedes will be older than 80. Who's going to take care of you when you get old? Demanding that well educated, young Swedes do it would crush their dreams and also be enormously costly to the economy and the public finances. So why not let, say, Filipinos do it? They would earn more than they would have in Manila, and Swedes – old as well as young – would benefit from it. (Article entitled "More immigrants save the Swedish welfare state" - "Fler invandrare räddar svenska välfärdsstaten" - published on May 4, 2008 in DN)

This excerpt clearly demonstrates the unspoken assumption underlying Swedish daily newspaper reporting on elderly care, namely, that migrants are a better solution to the staffing crisis because it is unrealistic to assume that young ethnic Swedes will want to work in this sector. Young Swedes are depicted as well-educated people with dreams of a better future, while migrants are represented as their opposites. Migrants are described as people who could "benefit" if they were to join the elderly care sector, while ethnic Swedes are depicted as people whose dreams would be shattered if they were to become care workers. As such, migrants are represented as people who would not only be grateful to come to Sweden, but who would also appreciate getting work within the care sector. Describing migrants as "guardian angels" who are "helping" the sector overcome its staffing shortage, and as people who can "solve the crisis," "save elderly care," and "save the Swedish welfare state," this extract (and the data corpus as a whole) reminds us of Narayan's argument that "care discourse runs (not only) the risk of being used to ideological ends," but also in "self-serving ways by the dominant and the powerful" (1995: 136).

Migrant Care Workers: Proficient in Other Languages, Highly Motivated to Work in the Sector and Well Suited to Offering Culture-Appropriate Care

Nordberg (2016) ended her analysis of the Finnish media imagery on migrant care workers by alluding to the fact that the daily newspaper reporting she focuses on (2003–2013) seems to be characterized by ambiguity. On the one hand, migrant care workers are depicted in her data corpus as "entrepreneurial, skillful, and flexible labor force," while, on the other, they are depicted as "childish family-oriented women who are out of place" (Nordberg 2016: 112). Although the Swedish media do not refer to migrant care workers in the same manner, we recognize that Swedish media representations can in part be described as containing ambiguity. This is particularly evident when we look specifically at the proportion of articles explicitly alluding to the actual characteristics and skills attributed to migrant care workers. Table 3 shows that the vast majority of articles do not explicitly state what it is these workers will bring to the elderly care sector (71.6% of the newspaper articles analyzed do not make explicit allusions

Table 3. Characteristics and skills migrant care workers are believed to have (*n* = 370)

Proficiency in other languages	10.3% (38)
High motivation to work in elderly care	6.8% (25)
Possession of occupational knowledge from their home country	2.4% (9)
A special respect for and ability to take care of the elderly	2.1% (8)
Abilities to act with authority and make quick decisions	0.3% (1)
Fast learners who adapt easily to Swedish working conditions	0.3% (1)
Entrepreneurial interest in establishing multicultural nursing homes	0.3% (1)
Unspecified skills	5.9% (22)
Not stated	71.6% (265)
Total	100% (370)

to skills and/or characteristics they are thought to have). When newspaper articles note something in particular, it is sometimes their proficiency in other languages that is mentioned (10.3% of the articles in the data corpus do this), and that they are believed to be highly motivated to work in this sector (6.8% of the articles refer to this). With regard to their proficiency in other languages (other than Swedish), it seems relevant to mention that the proportion of people born abroad in the 65+ population in Sweden has steadily increased over the past two decades. According to national statistics, 20% of Sweden's population belongs to the 65+ category. The percentage of people in this category that was born abroad (which is the category Statistics Sweden uses) has risen from 9% in 2001 to 13% at the end of 2018 (SCB 2018). Thus, the media representations of migrant care workers that do allude to specific skills these workers have seem to be referring to the fact that caring for elderly people with diverse ethno-cultural backgrounds is one of the future challenges the welfare sector will face.

Table 3 also shows that few articles make explicit allusions to these workers' caring skills (only 2.1% of the articles during this period do so). However, a look at the part of the data corpus that focuses on culture-appropriate care (*n* = 157) shows a slightly different picture, in that 24.2% of the newspaper articles focusing on this issue give the impression that migrants are better suited to caring for migrants (see Table 4). Thus, we need to take a closer look at what the qualitative content analysis shows. One of

Table 4. Suitability claims made in the articles that explicitly address culturally appropriate care (*N* = 157)

Who is referred to as the best provider of elderly care in the articles discussing culture-appropriate care?	%
Migrants are best suited to providing care to migrants	24.2% (38)
Migrants are best suited to providing care for non-migrants (ethnic Swedes)	3.2% (5)
Migrants are not suited to providing care for non-migrants (ethnic Swedes)	2.5% (4)
Both migrants and non-migrants are suited to providing care for migrants	0.6% (1)
Non-migrants (ethnic Swedes) are best suited to providing care for migrants	1.3% (2)
Not stated	68.2% (107)
Total	100% (157)

the articles analyzed focuses on a recruiting program primarily comprising men with a migrant background, who are said to be "a very deserving group" (Article entitled "Immigrants solve labor shortage" - "Invandrare löser arbetskraftsbrist" - published on June 6, 2000 in SvD). A man from Somalia, who is described as being dedicated to his family and children and as someone who speaks positively about Swedish elderly care, is the focus of this article. Although he was originally a technician and has no previous experience of the Swedish job market, he is quoted as saying that he has always wanted to work with people, especially older people. In addition, this particular newspaper article claims that men with migrant backgrounds who are looking for work "come from cultures with a tradition of the man carrying a great responsibility for supporting the family" (Article entitled "Immigrants solve labor shortage" - "Invandrare löser arbetskraftsbrist" - published on June 6, 2000 in SvD). In another article, the focus is on a Swedish care recipient with experience of care staff from various ethnic backgrounds. This article stated the following:

> The home-help workers she appreciates the most are people from countries and parts of the world that are far away, from cultures where people are used to respecting older

people, whereas the home-help workers that she feels stress too much and are too impersonal in their treatment are often native Swedes. (Article entitled "118 Home-help workers in two years" - "118 hemvårdare på två år" - published on August 3, 2002 in SvD)

In this excerpt, migrant care workers are juxtaposed to their Swedish counterparts. By describing migrant workers as people who are respectful and understanding of older people, this article (and others like it) make an implicit assumption that ethnic Swedes do not share these values. Another article states that these workers come from countries "where it is self-evident that the young should take care of the old; anything else would be shameful. But here in Sweden, the young don't have the time that's needed" (Article entitled "Safe in a Spanish environment" - "Trygga i spansk miljö" - published on April 23, 2003 in SvD). A similar statement is made in another article: "the respect that older people are accorded is far greater in Africa than it is in, for example, Europe" (Article entitled "Mugabe's faux pas brings hope" - "Mugabes fadäs ger hopp" - published on February 21, 2015 in SvD). Thus, the constant comparison – in explicit or subtle ways – of migrant care workers to Swedes to workers without these backgrounds is one of the ways in which these newspaper articles convey the notion that migrant workers are an asset to the sector. In another article, the relative of an older person receiving care from such a worker explains that they are "dedicated people who are there for you, treat the elderly with love and care, work a double shift if there's not enough staff, sign up to work at Christmas and New Year" (Article entitled "On class, hate and love" - "Om klasshat och kärlek" - published on May 31, 2003 in SvD). The relative interviewed claims to have had completely different experiences with Swedish staff, describing them as workers who "seem to lack all interest, they watch TV instead of talking with the elderly, sit there, apathetic and passive, call in sick at the last minute even when they're well". (Article entitled "On class, hate and love" - "Om klasshat och kärlek" - published on May 31, 2003 in SvD).

As mentioned, migrants' language abilities are especially important against the backdrop of the debate on culture-appropriate care that has taken place within Swedish elderly care since the mid-1990s, as shown in Table 1 (cf. Torres 2006b). Thus, both the increased diversity of elderly care recipients and the debate on culture appropriateness prompted by this diversity have provided the context in which the explicit representation

of migrant care workers as culture- and language-competent caregivers takes shape. In one of the articles analyzed, one of the migrant care workers working in a Spanish-speaking Latin-American nursing home describes why care recipients with migrant backgrounds would want to be cared for by a migrant care worker:

> After all, it's not just the language that we have in common with those at the home. We also understand each other because we come from the same culture and have had similar experiences. (Article entitled "Safe in a Spanish environment" - "Trygga i spansk miljö" - published on April 23, 2003 in SvD)

In this excerpt, we see how the daily newspaper reporting assumes that having the same background is crucial if care recipients and care providers are to understand one another. Thus, some of the analyzed material assumes that no one could be a better caregiver for an elderly care recipient with a migrant background than a person who him-/herself has a migrant background, preferably one who comes from the same culture and speaks the same language. The fact that they are sometimes assumed to come from cultures that value old age is part of the explicit representation of these workers not only as skillful caregivers but also as care workers who can provide culture-appropriate care. In contrast, care staff with a Swedish background are depicted as not understanding culture-based needs, even though they do their best to consider care recipients' cultural backgrounds. One of the articles analyzed states: "misunderstanding is a great problem in the care of older immigrants" (Article entitled "Compatriots best for old immigrants" - "Landsmän bäst för gamla invandrare" - published on December 14, 2000 in SvD). The same article exemplifies this using a story about an older Iranian man, whose bed the Swedish staff had forgotten to lower. To make it easier to visit the bathroom without stumbling from the high bed, which would have unpleasant consequences, the man decided to take out the mattress and lie on the floor. However, the Swedish staff could not understand what the man was trying to do. Instead of adjusting his bed, they began to care for him on the floor, with considerable difficulty, in an effort to respect his cultural lifestyle and tradition, assuming that he was on the floor because, as a Muslim, he would probably want to pray.

Thus, the data corpus analyzed suggests that Swedish care providers face difficulties, not only because they are not particularly skillful at caring but also because they lack the ability to provide care that is culturally appropriate.

In another article, we find the following statement: "Many elderly immigrants do not apply for home-help care or for elderly care because of language or cultural differences/…/ they worry about having a home-help care worker who does not speak their language" (Article entitled "Elderly immigrants do not seek care" - "Äldre invandrare söker inte vård" - published on August 23, 2003 in SvD). Thus, just as bilingualism and communicative competence distinguish migrant care workers from care workers who are ethnic Swedes, care recipients with migrant backgrounds are described as people who want to receive care in their mother tongue and/or want to be cared for in a culture-appropriate way. Thus, articles addressing the potential difficulties migrant care workers could face are more the exception than the rule. Table 4 shows, for example, that only 3.2% of the articles making suitability claims allude to migrants being best suited to providing care for nonmigrants, while only 2.5% allude to them not being able to provide such care. However, let us take a closer look at an article from 2005 entitled "Older people who do not want to be cared for by people with migrant backgrounds" (published on February 8, 2005 in SvD); this is one of the articles hinting at some of the challenges migrant care workers may face. This article refers to a radio program that caused a scandal within the sector. In the program, 20 care homes and home-help care units were called by a radio reporter who pretended to be a family member of an older Swede who did not want to have his/her older relative cared for by a migrant care worker. The vast majority of the care facilities called (i.e. 16 out of the 20) said that this could be arranged (see Jönson 2007, who studied this very case). The 2005 article quotes the then Minister of Elderly Care saying that she finds it "unacceptable that older people are allowed to reject a person with a foreign background" (Jönson 2007). However, articles like this one are not common in this data corpus. In other words, the issues of recruitment of migrant care workers to the Swedish elderly care sector and their situation once in it are seldom addressed and/or problematized in the daily newspaper reporting analyzed.

Discussion

The content analysis presented here reveals that the Swedish newspaper representations of migrant care workers analyzed in the present project rely on four ideas: (1) that migrant care workers are the solution to the labor shortage the elderly care sector is experiencing; (2) that these workers are proficient in other languages; (3) that they are highly motivated to work in this sector; and (4) that they are well-suited to offering culture-appropriate care to Sweden's ethno-cultural minorities. The fact that some of these representations portray these workers as particularly skillful is in accordance with the only previous study on media representations of migrant care workers we could find (e.g. Weicht 2010). One of the key ideas in the representations presented here is that migrants come from cultures that are "used to respecting older people" and "where it is self-evident that the young should take care of the old." Thus, portrayed as naturally gifted caregivers, migrant care workers are depicted as people who have a lot to offer the elderly care sector. Research on cross-cultural interaction within Swedish long-term care facilities suggests that the representations analyzed here resonate well with the ways in which migrant care workers working in Swedish nursing homes are viewed. The assumption that these workers are naturally gifted caregivers has been found to affect the division of labor within nursing homes and create unbalanced care loads between workers (e.g. Torres 2010). Thus, we suggest that the representations our analyses have shed light on could have implications for everyday interaction within the Swedish elderly care sector.

Comparisons to Nordberg's (2016) analysis of Finnish media imagery concerning migrant care workers can readily be made here. Nordberg (2016) noted, for example, that the Finnish media imagery concerning migrant care workers depicts them as disciplined, hardworking, and as people "with a strong repertoire of flexible strategies on how to manage their wealth and well-being in relation to a distant 'real home'" (Nordberg 2016: 111). Although the idea that migrant care workers are hardworking is also found in our material, the notion that they are "agents selling their labor to the Finnish welfare state, compensated by money transfers" is not part of the Swedish public discourse. This may be because most of our data corpus is more focused on settled migrants than on attracting

workers from abroad to the sector. Irrespective of why this is the case, we note that comparisons between migrants and Swedes are sometimes used in the newspaper articles analyzed here. We also note that allusions to migrant care workers being particularly skillful at caring and especially well equipped to care for people who, like themselves, have a migrant background are among the reasons often offered to suggest that these workers are an asset to the Swedish elderly care sector.

The idea that migrant care workers are particularly well equipped to provide culture-appropriate care builds on the notion that they have language competences that would benefit the sector at present, when Sweden's older population is more culturally and ethnically diverse. Curiously enough, the representations in question never ask whether these workers' language skills actually match the sector's needs. Two facts – that the vast majority of people these workers actually care for speak Swedish and that migrants' language skills are not really needed everywhere in Sweden – are never discussed (we make this claim because migrants tend to mostly reside in the bigger cities). Thus, migrant care workers are depicted both as the *general* solution to the sector's staffing shortage and as a *particular* solution for the few who will need language-specific care in the future. It is for this reason that we suggest that the representations presented here seem to be a prime example of how the fine line between acknowledging challenges and failing to identify new ones can be discursively managed. The articles analyzed here never explicitly address the implications recruitment of migrant care workers could have for the majority of care recipients (i.e. native Swedes). By failing to do this, these newspaper articles do not consider how their own line of reasoning could be used to argue that recruiting migrant care workers to the sector could entail offering culture-incompetent care to native Swedes. The material does not acknowledge research showing that migrant care workers working in Swedish nursing home settings often feel less respected by residents and their families than native workers do, and that they report experiencing racism directed at them by both elderly patients and their family members (Olt et al. 2014).

The idea that migrant care workers are the solution par excellence to the staffing crisis the elderly care sector faces is in line with the literature presented in the section on research on migrant care workers

(e.g. Lowell et al. 2010; Walsh & Shutes 2012). In the newspaper articles analyzed here, migrant care workers are frequently described as "guardian angels" who could rescue the Swedish elderly care sector from its crisis, or as "a reserve army" that this sector has yet to tap into. These representations help to convey the message that migrant care workers are the *obvious* solution to the sector's staffing crisis. Irrespective of whether or not the newspaper articles focused on settled but unemployed migrants, or on importing migrants to the sector, this representation takes for granted that recruiting migrants to the sector is a win–win situation. Migrants are described as people who not only need to work but who are grateful for a chance to enter the Swedish labor market. However, the staffing crisis the elderly care sector is experiencing is discussed in two different ways. First, a growing number of older people will need help in the future, and the number of staff needed to meet their needs must increase. Second, the kind of work the sector offers is not attractive, so finding people who would be interested in it is not going to be easy. As one of the articles put it, helping older people is not necessarily the kind of work people "dream" of having. According to another article, the prospect of such work is a "dream crusher" for some. This is interesting, considering findings showing that media representations can influence how people think about topics they know little about. In this respect, we draw attention to Robinson's (2006) argument, which is that when we call attention to care discourses, we tend to reveal that "the values and work associated with care and caring are undervalued and under-resourced globally" (Robinson 2006: 8). The fact that some of these newspaper articles describe the elderly care sector as one in which young ambitious people would not want to work (i.e. as a dream crusher) is a prime example of how undervalued the sector seems to be. For this reason, the material analyzed here reminds us of Tronto's (2010) argument that the fact that "care is still disproportionately the work of the less well-off and more marginal groups in society reflects care's secondary status in society" (Tronto 2010: 166).

Some of the explicit references to migrant care workers' skill set (albeit uncommon in the material as a whole) remind us of one of Tronto's (1993) first contributions to the ethics of care debate, in which she argued that we need to inquire into what she calls "privileged irresponsibility" (Tronto 1993: 120–121), that is, the fact that some people can pass on their caring responsibilities to others. In her latest contribution to this debate,

she has developed this idea further, arguing that we need to deconstruct the ways in which the powerful argue that "some people have to take up their caring responsibilities while others are given 'passes' out of such responsibilities" (Tronto 2013: 33). Our analysis has tapped into this very angle by showing how daily newspaper reporting on elderly care in Sweden hands out such passes through its descriptions of migrants and Swedes as each other's caring opposites. In the material, it was not uncommon to refer to ethnic Swedes in ways that suggest they "are given passes because they are engaged in other activities that they (and presumably society) deem to be simply more important than caring" (Tronto 2013: 33). Migrants, in contrast, are portrayed as not only needing, but also wanting, to take on Swedes' caring responsibilities. This remind us of Narayan (1995), who has warned us that care discourse can be used in "self-serving ways."

The newspaper reporting analyzed here relies on the constant juxtaposition of migrant care workers with ethnic Swedes by implying that migrants have modest dreams, are more reliable workers, have innate caregiving skills, and come from cultures that have respect for elderly people and that they can, therefore, naturally provide culture-appropriate care. For this reason, we propose that the media representations analyzed here depict migrant care workers as "particular Others" (cf. Narayan 1995) who are an asset to the sector merely because they are assumed to be different from the majority population, that is, the general us that the newspaper articles never really address, but that is the backdrop against which these representations are constructed. This is why these representations can be regarded as a double-edged sword, because while migrant care workers are depicted as assets to the sector, their "Otherness" seems to be the very reason why they are also depicted as the "reserve army" ("reserve" being the adjective worth noting).

Last but not least, we would like to draw attention to Tronto's (2013) argument that the ethics of care lens allows us to see the ways in which "more powerful people can fob the work of care onto others: men to woman, upper to lower classes, free men to slaves, those that are considered racially superior to those whom they consider racially inferior people" (Tronto 2013: 105–106). The newspaper articles analyzed here clearly depict migrant care workers in ways that serve the needs of the Swedish elderly care sector – a sector that is trying to attract these workers while

fobbing the country's older population's care needs onto them. As such, these media representations provide us with an unsettling glimpse not only into how Swedish media view "the Other" but also into how the rationale is used to fob care onto them (Torres 2017). In this connection, the present article raises questions about Sweden's capacity to become a caring democracy of the type that Tronto (2013) argued must be the way forward for welfare states. She contends that these welfare states need to "figure out how to put responsibilities for caring at the center of their democratic political agendas" (Tronto 2013: ix). We argue that when we use the ethics of care lens to look at media representations – as we have done here – we can shed light on a society's moral backbone. The picture of Sweden painted by the daily newspaper reporting on elderly care analyzed here is troubling to say the very least, as far as "particular Others" are concerned. The finding that care work appears to be so undervalued in these media representations is part of the reason why we question whether Sweden can be regarded as a caring democracy.

Acknowledgements

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Age-Friendly Approaches and Old-Age Exclusion: A Cross-City Analysis

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Abstract

Developing "Age-Friendly Cities and Communities (AFCC)" has become a key part of policies aimed at improving the quality of life of older people in urban areas. In spite of this development, there is evidence of rising inequalities among urban elders, and little is known about the potential and limitations of the age-friendly model to reduce old-age exclusion. This article addresses this research gap by comparing how Brussels, Dublin and Manchester, as three members of the Global Network of AFCC, have responded to social exclusion in later life. The article combines data from document analysis and stakeholder interviews to examine: first, the background against which age-friendly programmes have emerged in the respective cities; second, the extent to which the goal of reducing social

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exclusion is integrated in the age-friendly strategies; and third, barriers to the implementation of age-friendly programmes. The paper suggests that there are reciprocal benefits in linking *age-friendly* and *social exclusion* agendas for producing new ways of combating unequal experiences of ageing in cities.

Keywords: age-friendly communities, social exclusion, old-age exclusion, social policy, urban ageing.

Introduction

This article examines the potential of "age-friendly" city initiatives to reduce "social exclusion" in old age, drawing on the example of three European cities. "Social exclusion" is the process through which individuals and groups become deprived of the rights, resources and services available to most people in society (Levitas et al. 2007). In line with research on exclusion in later life, this paper defines social exclusion as a multidimensional concept, covering domains such as exclusion from material resources, services, social relations, neighbourhoods, and civic and sociocultural participation (Precupetu et al. 2019; Van Regenmortel et al. 2016; Walsh et al. 2017). We also recognise that exclusion is dynamic, and it varies in form and degree across the life course, with an increased prevalence and impact in later life, especially amongst those facing old-age vulnerabilities and those who have experienced cumulative disadvantages across their life course (Walsh et al. 2017; Prattley et al. 2020).

Reducing the number of people at risk of exclusion has been a central theme in European social policy, reflecting concerns about the social and economic costs when individuals and communities become cut off from the wider society (Eurostat 2017). Yet, enduring inequalities in the experience of ageing suggest that policies have had limited effect in reducing old-age exclusion (Nazroo 2017; Scharf & Shaw 2017). Addressing this issue has become especially urgent given the impact of economic austerity and widening inequities within urban settings (Buffel & Phillipson 2016, 2018).

Many older people are excluded from participating in society due to a combination of structural and environmental barriers (De Tavernier & Aartsen 2019; Wanka et al. 2018). By promoting inclusive and accessible

environments that are responsive to older adults' needs, "age-friendly" programmes can be seen as an effective approach to counter exclusion in later life (WHO 2018). The World Health Organization (WHO 2007) has been especially influential in developing the "age-friendly" perspective. In 2010, the WHO launched the Global Network of Age-friendly Cities and Communities (GNAFCC). Since then, the GNAFCC has had a rapid increase in membership, reaching over 1000 cities and communities across in the Global North and South by 2020. Members share a commitment to adapt their structures to the needs of their ageing populations, with attention to service provision (health services, transportation), the built environment (housing, outdoor spaces) and social aspects (civic and social participation).

These "age-friendly" domains suggest not only an overlap but also a possible response to the various forms of exclusion in later life, representing a shared focus in fostering the full participation of older people (Scharlach & Lehning 2013; WHO 2018). In spite of these connections, little is known about the actual potential of the age-friendly model for *reducing* old-age social exclusion. In strategic terms, this means it is unclear whether or not we should increase investments in age-friendly programmes, as a means of enhancing the inclusion of disadvantaged older adults. The limited availability of meaningful cross-national comparative data compounds these issues and our ability to affirm common principles and success. It also impedes our understanding of the degree to which the age-friendly framework may serve as a transferable model to improve the multifaceted lives of older people across jurisdictions.

This paper reports on a comparative study of age-friendly strategies in three European cities, exploring the extent to which they address issues relating to social exclusion in later life. In doing so, the article addresses the following questions: to what degree is social exclusion integrated as a part of the goals of age-friendly strategies and policy documents in the respective cities? What projects and policies have been developed to respond to social exclusion in each city? What are the barriers to implementing age-friendly programmes that will affect the delivery of initiatives aimed at combating social exclusion?

Research Design and Methods

This study used a case-study approach, allowing for an in-depth investigation of "a contemporary phenomenon within its real life context, especially when the boundaries between a phenomenon and context are not clear and the researcher has little control over the phenomenon or context" (Yin 2002: 13). This method is effective to examine programmes or policies (Yin 2002), and has been shown to be particularly instrumental in exploring age-friendly strategies and initiatives (i.e. the cases) across different cities (i.e. the sites) (Rémillard-Boilard 2019). The benefits of such an approach are threefold: first, it can increase awareness of the policy options adopted by different cities/countries in combating exclusion (Buffel et al. 2014, 2018); second, it can improve our understanding of both the success factors and barriers to implementing age-friendly initiatives (Moulaert & Garon 2016); and third, it is important in fostering "mutual policy learning across national borders" (Hantrais 2009: ix) about what is effective and what is not.

The research employed a purposeful and convenience sampling strategy (Patton 2002) to select three cities: Brussels, Dublin and Manchester. Three criteria guided the selection process. Cities were purposefully selected on the basis that they: (1) had adopted the WHO framework to structure their work around age-friendliness; (2) were amongst the first to become a member of the GNAFCC, reflecting their pioneering role in developing age-friendly programmes; and (3) were located in different countries. The opportunity to compare these cities arose from collaborative work between research teams focusing on age-friendly work in the respective cities, through the COST Action network "Reducing Old-Age Social Exclusion" (ROSEnet). This provided a unique opportunity to bring together existing qualitative data sets for new, comparative purposes. Combining different sets of qualitative data not only has the potential to "lend new strength to the body of fundamental social knowledge" (Glaser 1963: 11) but also "brings greater power to answer research questions" through comparison across contexts, social groups and cultures (Corti et al. 2005: 8).

Data were derived through a combination of policy documents and secondary qualitative data from interviews with stakeholders in each city. This approach facilitated both an understanding of the formal recognition of the connection between age-friendly work and social exclusion in strategic goals and descriptive statements, and an insight into an insider, more

subjective, perspective of the degree to which age-friendly activities actually target, or have the potential to target, a reduction in social exclusion.

Documentary Analysis

Internal reports and official policy documents were analysed to provide background to the study and explore the extent to which social exclusion was integrated as part of the age-friendly strategies and policy documents in the respective cities. A first step in the documentary analysis was to find the relevant documents and assess their connection to the research questions. The documents were selected according to two criteria: material that referred to the city's ageing strategy from 2010 to 2018, and material that was developed in preparation for, or following the admission of the city to, the GNAFCC membership (see Table 1, Key documents guiding the development of the programme).

Based on the selected material, a preliminary document analysis was carried out by the lead researcher in the respective city, using qualitative content and thematic analysis (Bowen 2009). To enhance comparability between the cities' programmes, a common framework was agreed, using six key codes to analyse the documents: context analysis, key priorities and aims of the programme, key concepts, actions, and explicit and implicit links to social exclusion. Using this framework, the data were summarised into a matrix, and the frequency or number of occurrences of concepts and dimensions linked to old-age exclusion was documented for each city. A next step involved a face-to-face meeting between the cross-national author team to explore how the codes were interrelated to one another in each of the cities separately, as well as to identify similarities and differences in the policy responses adopted across the cities. Finally, the lead author produced analytic memos presenting the key findings for each of the cities, and these were subsequently discussed, adapted and agreed with other members of the research team.

Secondary Data Samples

In addition to documentary analyses, the authors of this paper also combined relevant data sets from their previous work in order to form a new secondary data sample for this study. Thus, data from stakeholder interviews in Brussels (n=23), Manchester (n=25) and Dublin (n=27) were

Table 1. Characteristics of the age-friendly programmes

	City of Brussels	City of Dublin	City of Manchester
Actor leading age-friendly work	City Council Senior Service	City Council Age-friendly Alliance	City Council Age-friendly Manchester Team, Public health
Year the city joined the GNAFCC	2010	2013	2010
Key documents guiding the development of the age-friendly programme	• Plan Seniors 2010 [Seniors Plan 2010] • 'Plan Seniors 2015' (tentative title, the plan was not adopted by the council) • Assemblée General BXL 55+, Projects Action, 2016–2018	• Age-friendly Dublin. Dublin City. A Great Place to Grow Old Age-friendly Strategy 2014–2019 • Age-Friendly Dublin, progress report 2016	• Manchester: A Great Place to Grow Older, 2010–2020 • Manchester: A Great Place to Grow Older, 2017–2021. Second edition
Research team involved in this study exploring the age-friendly programmes	*Anonymised*	*Anonymised*	*Anonymised*

GNAFCC, Global Network of Age-friendly Cities and Communities.

drawn from multiple primary studies in the respective cities (see Table 2), all of which shared an interest in inclusion/exclusion and the participation of older people in the context of age-friendly initiatives. The shared focus of the primary studies provided us with a unique opportunity to explore the research questions across different contexts.

For Brussels and Manchester, interview data for the secondary study were derived from research conducted between 2015 and 2018 that

Table 2. Secondary data samples

	City of Brussels	City of Dublin	City of Manchester
Participants (n)	n=23	n=27	n=25
Duration of interview	50–92 min Averaging 69 min	36–105 min Averaging 78 min	43–89 min Averaging 62 min
Background of participants	• Local authority (n=5) • Voluntary organisations (n=4) • Statutory services (n=5) • Policy specialists (n=3) • Academia (n=2) • Community stakeholders (n=4)	• Local authority (n=8) • Voluntary organisations (n=4) • Statutory services (n=6) • Policy specialists (n=4) • Private services (n=1) • Community stakeholders (n=4)	• Local authority (n=7) • Voluntary organisations (n=5) • Statutory services (n=3) • Policy specialists (n=2) • Academia (n=3) • Community stakeholders (n=5)

explored age-friendly policies and initiatives, and their relation to social exclusion (led by the first and second author). A maximum variation sampling strategy (Rapley 2013) was used to ensure that a wide range of research, policy and practice perspectives was captured across the cities. The interview guides included questions concerning the goals of the age-friendly programmes, and barriers and opportunities associated with implementing age-friendly initiatives.

Dublin data were derived from two primary studies involving interviews with stakeholders: first, a research study (led by the third author) aimed at reimagining communities for vulnerable groups of people (including older adults) in three Irish cities (The 3-Cities Project – fieldwork completed in 2014); and, second, a project (led by the fourth author) exploring the implementation of an age-friendly programme in Fingal, an administrative area within Dublin County (fieldwork completed 2014–2016).

Both studies addressed topics reflecting *different domains of exclusion*, including civic participation, services and neighbourhood exclusion.

While the original research protocols for data collection in the three countries were not codeveloped or designed to follow the same protocols, the author team had broadly contributed to the development of each of the primary studies, through network meetings and feedback/review sessions. The three city samples, in three different countries, also point to the similarity in stakeholder participants (see Table 2). All primary studies received ethical approval from their respective home institutions. The secondary analysis was conducted according to University's code of ethics and good research practice.

Secondary Data Analysis

The secondary analysis involved the reanalysis of the stakeholder interviews for the purpose of answering new research questions that were not part of the primary analysis (Ruggiano & Perry 2019). All interviews were audio-recorded and transcribed verbatim as part of the primary studies in the respective cities. Using a thematic content analysis approach, the secondary analysis involved three steps (Corti et al. 2005). First, the reading of the three sets of interviews was completed by the lead researchers involved in the respective primary studies, noting how the coding strategy and labels used in the primary study related to the secondary study, with the aim of developing the same coding schedule across all interviews. In order to increase the credibility of the analysis approach, the coding frame for the secondary study was subject to systematic review by all authors and refined through a process of consensus (Ruggiano & Perry 2019).

The second step of the secondary analysis entailed the coding of each interview on the basis of the jointly agreed conceptual framework, as well as directly from the interview data. Sixteen codes were identified, including "aims and priorities of age-friendly strategies," "definitions of social exclusion," "projects tackling old-age exclusion," "economic austerity," "bureaucratic structures and interagency collaboration," "sustainability" and "measuring impact." Third, a two-day face-to-face meeting was held between the author team to review thematic codes and cluster pre-existing codes into key themes common to each dataset (Silverman 2006) (such as "barriers to implementing age-friendly programmes" and "approaches

to reduce social exclusion"). The team then jointly reread the interview data across the three cities, to refine and verify the overall themes to achieve validity in the findings. The aim was to further identify whether or not there were any specific patterns with regard to the key themes identified in each of the cities.

Findings

In the following sections, the main findings are presented within four overarching themes. The first section provides the background against which the age-friendly programmes have emerged in the respective cities. Second, the paper examines whether and how the goal of combating "social exclusion" is integrated into the age-friendly strategies in Brussels, Dublin and Manchester. The third section reviews various age-friendly projects and initiatives that have focussed on reducing one or multiple domains of social exclusion. Finally, the paper identifies four interconnected challenges to implementing age-friendly programmes based on the stakeholder interviews in the respective cities.

Emergence of the Age-Friendly Approach

The analysis suggests that in all three cities, the political context was favourable to the emergence of new proposals and frameworks at the time the age-friendly approach was adOpted by the respective local councils. Becoming a member of the WHO GNAFCC was seen as the formal start of the respective cities' age-friendly programme, following a commitment to develop an inclusive baseline assessment of the age-friendliness of the city and an action plan based upon the assessment's findings aimed at improving both the physical and the social environment. However, the analysis also highlighted differences in the way the age-friendly approach emerged on the political agenda, which will be described below.

In Brussels, the age-friendly approach was initiated in 2007 by the city's councillor responsible for ageing issues who used the WHO framework as a way of expanding the council's programme of work for older people. Until then, population ageing had been given limited policy attention, which was attributed in part to the relatively young age structure of the city. In collaboration with the Belgian Ageing Studies (BAS) research

group in Brussels, the council conducted a baseline assessment for the city in 2009, using a participatory methodology involving older people in all stages of the study. The results enabled the council to develop a framework for action, which served as the basis for the city's application to become a member of the GNAFCC in 2010. In line with the WHO framework, the Brussels' age-friendly strategy (2010) focussed on various domains of city life, including community safety, housing, mobility, participation, information and health, with a range of initiatives identified for each domain. Joining the GNAFCC was seen as a way of reaffirming the council's commitment to the ageing agenda and ensuring the sustainability of the Senior Services (the administrative body responsible for older people) and the Council of Seniors (an advisory body comprising older residents) that had recently been developed.

Whereas Brussels was the first and one of the few cities in Belgium to join the Global Network at the time of the study, the Dublin Age Friendly Initiative began in 2013 amidst widespread adoption and endorsement of Age-Friendly programmes across Ireland (McDonald et al. 2018). This development took place against the backdrop of the Dublin Declaration on AFCC in 2011, Ireland's membership of the GNAFCC as one of the original ten affiliated states and the efforts of Age Friendly Ireland, a philanthropic funded organisation, in developing the national programme. It also developed in the context of the Revitalising Areas by Planning, Investment and Development (RAPID) programme, a central government initiative, which since 2001 had focussed on tackling social inclusion and disadvantage in nine deprived areas in the city. The Dublin Age Friendly Strategy 2014–2019 comprised nine strategic goals around key themes, including outdoor space and buildings; transport; home and community; safety; social, economic and political life; and healthy and active living. The initiative was led by the city council and supported by a high-level inter-agency and cross-sector (public, private, voluntary) City Alliance and five local area alliances, aligned with Dublin City Council's five administrative areas. An older person's council had been formed in each area to inform the decision-making of Dublin's age-friendly programme.

Compared to Brussels and Dublin, Manchester had a somewhat longer tradition of developing work aimed at improving the quality of life of older people in the city. The origins of Age-Friendly Manchester can be traced to the Valuing Older People (VOP) project in 2003, a strategic cross-sector

partnership to promote the participation and engagement of older people, with a range of projects across the city, including local neighbourhood networks, and a campaign to promote a more positive image of older people. Building on this work, Manchester became the first city in the United Kingdom to join the GNAFCC in 2010, with VOP rebranding itself as the "age-friendly" programme now located in the newly established Public Health Manchester Service in Manchester City Council. Since its membership of the GNAFCC, Manchester had developed a number of key documents to guide its work, including a 10-year strategy (2010–2020) and the Age-Friendly Manchester's refreshed strategy (2017), which identified three priorities: first, to develop age-friendly neighbourhoods; second, to create age-friendly services; and third, to promote age equality to reduce ageism and address the negative image of ageing. As with Brussels and Dublin, Manchester had an Older People's Board to promote the voice of older residents in decision-making.

Age-Friendly Strategies and the Goal of Combating Social Exclusion

The documentary analysis showed that the goal of "combating social exclusion" was integrated into the age-friendly strategies of all three cities, albeit in different ways. Tackling exclusion was mentioned as an explicit goal in the case of Manchester, whereas Brussels and Dublin demonstrated a commitment to reducing certain *forms* of exclusion whilst no explicit reference was made to the "social exclusion" concept. As for the latter, the age-friendly programmes in Brussels and Dublin shared a focus on challenging exclusion from social relationships, through their commitment to reduce social isolation and promote community participation.

Tackling the social isolation of older people had been a key priority of the Senior Service in Brussels since the start of the programme. Brussels did not have an official action plan to guide the development of its age-friendly work at the time of the study; however, the Senior Service had developed a brochure, reflecting its priority to promote community participation, which advertised age-friendly leisure, sports and social activities, and was distributed by post to older residents across the city. "Active ageing" or the idea to optimise opportunities for health and participation

was mentioned as a key principle guiding the work in Brussels in this brochure. In a similar fashion, the Dublin City Age Friendly Initiative was dedicated to "improving the quality of life of older people by including older people in decisions which affect their lives; providing opportunities that enable older people to live full and active lives" (Dublin Age Friendly City 2014). Building on the National Action Plan on Social Inclusion 2007–2016, the Dublin Age Friendly Strategy identified "inclusion" as one of the core values underpinning its work; this defined as "recognis[ing] the diversity of older people and advancing equality of participation for older people in the city" (p. 13). As with Brussels, a major orientating principle was that of "active ageing," or removing barriers to (or exclusion from) participation in social, cultural and sports activities in later life (Dublin Age Friendly City 2014).

Social exclusion was an explicit focus of the Manchester Strategy for Ageing (2017):

> A significant number of Manchester's older residents experience high levels of *social exclusion,* which means they live in poverty, and are excluded from *social relationships, civic relationships, basic services, and their neighbourhood.* (p. 16)

Social exclusion here was defined as a multidimensional concept, with a particular "focus on those who are most disadvantaged" facing multiple forms of exclusion. Within the Manchester age-friendly programme, ensuring the social inclusion of older people in their communities, and tackling *neighbourhood exclusion*, had been long-standing themes, in part because of the high levels of deprivation in urban neighbourhoods. The focus on social exclusion had also been reinforced through collaborations between the Council and researchers, highlighting the social exclusion of older residents living in deprived urban neighbourhoods in Manchester (Phillipson 2007; Scharf et al. 2005).

Age-Friendly Initiatives Aimed at Reducing Social Exclusion

The analysis revealed a number of age-friendly projects and initiatives that had a focus on reducing one or multiple domains of social exclusion. These can be grouped into three categories: projects aimed at (a) promoting participation, (b) combating social isolation and (c) reducing

neighbourhood exclusion. In terms of the first, all three cities had set up an Older People's Council as part of their age-friendly programmes to encourage the participation of older residents and older people's organisations in decision-making. In Brussels, the "Council of Seniors" had an advisory role and consisted of several working groups, reflecting the key domains of an age-friendly city. Local authority representatives emphasised the importance of having different voices represented and described the Council of Seniors "as one of the most participative mechanisms for older people we have." In a similar fashion, the Older People's Council in Dublin reflected the local authority stakeholders' commitment to "involve older people in the initiative" and ensure that their "lived experiences inform age-friendly developments" (Local authority representative and representatives from the Older People's Council). Manchester had two mechanisms to encourage the participation of older people in the age-friendly programme: an Older People's Board, including local older residents with an advisory role, and an Older People's Forum, a consultative body providing opportunities for older people and organisations to voice their questions, concerns and advice directly to decision-makers. As was the case for Older People's Councils in Brussels and Dublin, however, there was an underrepresentation of minority groups and those facing social exclusion in Manchester's older people's Board and Forum, in spite of a strong commitment to be "inclusive":

> We want to engage a slice of the city, we want to engage, you know, BAME (Black, Asian and Minority Ethnic groups), LGBT (Lesbian, Gay, Bisexual and Trans) groups, every... so kind of targeting quite select groups of older people and ensuring that we have represented all older people... to make sure that they all feel represented by this [age-friendly] strategy and they are happy with the direction this is going in. (Manchester, Local authority representative)

Other examples of age-friendly initiatives aimed at promoting participation were those framed under the banner of "active ageing." The Age Friendly Dublin Programme, for example, had played a crucial role in promoting initiatives such as the "Let's walk and talk" project to encourage people to participate in walking activities while learning about local history and meeting new people. This was reported to provide health benefits and serve as an important source of inclusion for isolated individuals

by some stakeholders involved in the research, but no references were made to studies or evidence to support this claim.

"Active Ageing" was also found to be a priority of the Brussels age-friendly strategy, with range of initiatives targeting older people's participation in sports and exercise:

> We installed fitness bikes in the parks; ensured that seniors had a discount in sports clubs; stimulated clubs to be more open to seniors; and offered seniors [subsidised] sports-cheques [to remove financial barriers]. We are also exploring the idea of 'exercise on [doctors'] prescription' with sports coaches offering personalised exercises in older people's homes or in the community.

The above quote and the focus on "active ageing" was illustrative for the target groups that were prioritised in the age-friendly programme in Brussels, that is, the more active and autonomous groups of older people. Indeed, the Brussels' programme gave limited attention to older people requiring assistance and care or those considered vulnerable in some way. The programme also made limited contact with the different migrant groups within the city's older population. Given the diversity in Brussels (with 62% of the population with a migration background, and 54% of this foreign population [a third of the total population] from outside the European Union), this was recognised as a major limitation by a number of community stakeholders.

A second category of initiatives was aimed at combating social isolation. Examples of flagship projects here included the Culture Champions Scheme in Manchester, an initiative involving 150 older volunteers (Cultural Champions) who aim to mobilise socially isolated groups of older people to participate in the city's cultural offer. Age-Friendly Manchester also aimed to reduce isolation in later life by addressing the needs of various groups within the older population, for instance, through the development of the United Kingdom's first lesbian, gay, bisexual and transgender (LGBT)-majority extra care specialist housing scheme. Other examples came from the Ambition for Ageing (AfA) programme, a £10.2 million National Lottery-funded Greater Manchester level programme, with a focus on tackling social isolation amongst older people living in low-income neighbourhoods. Ambition for Ageing's belief was that a series of small changes within communities will bring large-scale success in a practical and sustainable sense, which will ultimately help to reduce

social isolation. This was done by providing small investments to groups of older people, with the aim of widening social networks and increasing the range of activities in the places in which people live.

Tackling the social isolation of older people has been a key priority since the start of the Brussels' age-friendly programme. To support this, the council had built six new community centres for older people across the city in 2018 ("Espace S pour les seniors"). These centres offered a range of social activities free of charge such as cooking, exercise classes, coffee mornings and workshops. Creating such opportunities for social participation had been identified as a priority because of the links with financial exclusion and housing-related problems, arising from inadequate housing stock and pressures from European institution office development and gentrification. A local authority representative described these Espace S centres as: "spaces where local residents can meet. They are neighbourhood-orientated and managed in a participatory way to better respond to the needs of older people in the neighbourhood." The delivery of the age-friendly programme in Brussels had mainly occurred through these community centres, and local authority representatives reported an increase in the use of and activities organised in those community hubs, but there had been no formal evaluation of their impact on reducing social isolation in later life.

Third, the analysis identified initiatives aimed at improving aspects of the built environment to reduce neighbourhood exclusion. For example, the Dublin Age Friendly Programme had committed to the development of a new demonstrator model – the Housing with Support Scheme – that prioritised accessibility and the needs of older residents. The project aimed to serve as an exemplary project for future housing and urban development initiatives, building upon principles of life-time adaptable housing, autonomy of choice and ageing in place. Plans were in place for a multi-phased evaluation of the scheme at the time of the study (see Walsh 2018), which included research into the experiences of older people who moved into the new housing development. Another example was found in Skerries, north of Dublin City, where 25 older residents were recruited to undertake a walkability study that subsequently informed the development of footpaths, pedestrian crossings, public seating and transport facilities. The town was awarded a national age-friendly town environmental award in 2015 for its successes in improving access to services

and amenities for older people. The award also recognised the improvements made in the social environment, including the establishment of a befriending scheme, increased support for older carers and the development of an information pack on local services, clubs and amenities.

The "Age-Friendly Old Moat Neighbourhood" research project was a similar initiative in Manchester, bringing together a housing association, the local authority, the Manchester School of Architecture and older residents (White et al. 2013) to improve the age-friendliness of a neighbourhood traditionally associated with poverty and high levels of social exclusion. The research has led to £730k being invested in local projects between 2012 and 2018, with older people involved in designing aspects of the neighbourhood, including outside seating, social infrastructure and green spaces. Significant achievements included: a "Take a Seat Campaign," which engaged retailers to provide older people with a seat, access to a toilet and a glass of water on request; improvements to signage to assist older people in navigating the area; the organisation of a range of events and activities in community venues or people's own homes to reduce social isolation; and the design of adapted and accessible gardens to encourage older residents back into their gardens, providing raised beds and food growing support. These changes were reported to have a significantly positive impact on the lives of the housing association's tenants.

Challenges to Implementing Age-Friendly Programmes

Four interconnected challenges to implementing age-friendly programmes were identified in the analysis, including economic austerity, bureaucratic structures and interagency collaboration, sustainability and measuring impact. Unless otherwise specified, these barriers were generally shared across all cities.

Economic austerity

Economic austerity, as a result of the global economic crisis, was the most significant challenge for stakeholders, impacting the implementation of age-friendly programmes in each city. While in some instances circumstances had improved in recent years, in others the effects of austerity left a lasting legacy for stakeholders to contend with.

In Brussels, public spending on health and social care had stagnated due to the global recession. Stakeholders highlighted the need for more investment to secure the availability of (semi)residential services, especially in densely populated and deprived urban districts. Sustaining successful pilot projects with limited resources was also identified as a key issue. A community worker on an intergenerational housing project highlighted that this was particularly felt when projects focussed on supporting vulnerable groups:

> We need to start thinking about how to move forward because in less than a year's time, we'll run out of funding. It is expected that the group will be self-sustaining at the end of the project, so we're forced to slowly withdraw and shift responsibility to the residents. But it's a tricky process, especially with people who are vulnerable and may need support to take on such responsibilities.

In Dublin, the age-friendly programme was initiated at a time of severe recession in Ireland (McDonald et al. 2018). Major cutbacks to public health and community-based social services were introduced contemporaneously with the development of the programme. This included not only cuts to the budgets of key partner agencies but also reductions in community care provision, fuel and telephone allowances, community transport schemes and the closure of local services (Walsh 2015). Several stakeholders commented on the significant challenge of having to mobilise people and organisations under these constraints:

> You've got very difficult times at the moment with all the cutbacks that have happened. So you're asking a very busy person to do an even busier job. I find it more difficult to get buy-in from people when they just feel overwhelmed, it's a huge [challenge].

In Manchester, public services, such as libraries, information centres and day care facilities, had been reduced due to *budget cuts* in the wake of the financial crisis. While these developments in themselves impeded plans to promote the city's age-friendly agenda, direct funding for the Age-Friendly Programme in the period 2013/2014 and 2014/2015 was reduced by 50% (Buffel & Phillipson 2016). Consequently, both the scale of the programme and its core team contracted, with an important group of staff taking voluntary severance schemes from the local authority.

Bureaucratic Structures and Inter-Agency Collaboration

Bureaucratic structures and inter-agency collaboration were considered to be challenges to different degrees in each city. In Brussels, this took the form of specific *political barriers* that limited the potential of age-friendly work. This was summarised by a local authority representative: "It is the complexity of the political structures." A policy expert highlighted how such complexity was manifest in a number of ways:

> Brussels is very complicated politically. There are five different ministers responsible for aspects of social care, plus a coordinating minister at the level of the Flemish Region and another for the Walloon region, as well as the City Council of Brussels and the Social Services. And nobody talks to each other… Organisations work in their own area, in their own perspective, and their own language. They don't communicate with each other, on the contrary, they compete with each other.

Reflecting some of the austerity-driven cutbacks, analysis in Dublin highlighted difficulties in terms of inter-agency partnerships. These included pressures in relation to recession-induced organisational downsizing, such as those that were identified as impacting on the national health agency – the Health Service Executive (HSE) (McDonald et al. 2018). Some stakeholders recognised the need for integrated service delivery but doubted if the Irish public service was in an appropriate state to operate as envisaged in the age-friendly programme:

> You have to be cognisant of the fact that people don't have a huge amount of time, particularly at local authority level and HSE with all their embargoes on staffing and everything, and the big departure a few years ago of senior staff you know. Capacity shrank but the work didn't. (Representative of voluntary organisation)

Sustainability

Concerns about the sustainability of the age-friendly programme in each city were pervasive in stakeholder accounts, and were often connected to the first two challenges. Funding and budgets continued to be a general issue, but it was the impact that austerity cuts had on organisational capacity and know-how that was often highlighted. For instance, a Manchester local authority representative highlights the impact of the loss of staff, and their skills and networks, during the earlier budget cuts:

> There were massive restructures in local government, huge cuts, lots of people left under severance schemes. A lot of the networks that we'd built up almost disintegrated overnight.

In Dublin, pressures due to local government reform had produced similar issues. While political leadership proved crucial, individual leadership in the public service was also considered critical to sustainability. When this leadership was lost due to people moving roles, there was a risk that the programme itself could lose momentum:

> A lot depends on the attitude of a manager locally… When people change – as in the public service people do – if the new person isn't bringing the same level of commitment, it can slip away.

However, in spite of these difficulties which were the result of austerity measures, the Dublin City Age Friendly programme was eventually integrated fully into local government mainstream structures in 2016.

In Manchester, there had also been positive developments in terms of sustainability. Since 2016, the *devolution* of powers had put Greater Manchester (GM) in charge of improving the health and well-being of those living in the region, bringing additional resources to the local level. The GM Ageing Hub, a group of leading policymakers, third sector representatives and researchers, responsible for developing policies to respond to demographic change across the region, was seen as essential for developing local partnerships:

> We have these locality partnerships and Greater Manchester is one of them, and that's about putting a lot more resources [towards] one urban area where we know we have got momentum to work on ageing…. (Centre for Ageing Better)

As a consequence, even with significant implementation barriers in times of *austerity*, Manchester had been able to *expand* and *raise* the ambition of the urban ageing agenda. It had been able to secure much-needed political support for the programme from the outset, and develop partnerships to extend the reach of its programme into a broader city region (McGarry 2018). The city is now at the forefront of an ambitious city–regional approach to age-friendly development in GM, the first of its kind in the United Kingdom.

Measuring impact

In spite of the expansion of the age-friendly programme in the three cities, efforts to measure the impact of such initiatives had been limited, leaving major questions unaddressed, including: what contribution the approach makes to the quality of life of older people; whether it benefits some groups more than others; and whether it leads to improvements in urban environments. Establishing answers to these questions will be vital if local authorities are to extend financial support to age-friendly programmes (see, also, Golant 2014; Moulaert & Garon 2016; Scharlach 2017). Stakeholders across the three cities understood the need to evaluate their programmes and measure their impact but recognised the significant challenge in designing and implementing appropriate approaches under current resourcing.

In Dublin and Brussels, and as with the vast majority of age-friendly initiatives (Buffel & Phillipson 2018), local survey evidence was used to support the local *implementation* of age-friendly strategies, but a formal *evaluation* of the programme had yet to be completed. As one stakeholder from Dublin commented:

> I think it's our next big challenge, I don't think we've licked it [measuring outcomes]…
> I think if we had the methodology and the funds to do that assessment.

The Age-Friendly Manchester team had plans to develop a framework that enhances systematic evaluation of the impact of its work. The aim was to inform the future development of the programme by both using existing data and collating new information about older residents. At the time of the study, a number of benefits had been associated with Manchester's age-friendly work, including the increased voice and visibility of older people and an increased participation in decision-making. The importance of monitoring and evaluation was mentioned by different stakeholders, and progress had been reported in relation to the evaluation of particular programmes (i.e. the AfA Programme, see above) linked to the age-friendly work. However, it was generally accepted that further development of tools that can support self-assessment, monitoring and evaluation was urgently needed.

Discussion

This study represents the first attempt to explore the challenges and opportunities of the AFCC model to reduce social exclusion in later life across three city contexts. Addressing this issue has become especially urgent given the impact of economic austerity and widening inequalities within urban environments (Buffel & Phillipson 2016, 2018).

The analysis identifies a number of factors that stimulate age-friendly strategies to respond to old-age exclusion. These include political support, strategic partnerships with multiple stakeholders, and mechanisms that facilitate the participation of older people in decision-making. A significant issue in this respect is the recognition that older adults are not just the beneficiaries of age-friendly communities but can play a key role in their development (Menec et al. 2011). Such factors were evident to some degree across the three cities, and have contributed to the survival – in some cases the growth – of the age-friendly movement in the context of economic austerity. The value of such attributes to efforts in combating social exclusion is also clear.

The research highlights a number of different age-friendly initiatives, with a focus on reducing one or multiple domains of exclusion across the three cities. These include, first, projects aimed at promoting the participation of older people in sports and "active ageing" activities on the one hand and in decision-making through the Older People's Councils on the other. A second category includes initiatives aimed at combating social isolation through creating community spaces and social infrastructure where older people can meet, socialise and volunteer. A third group of initiatives is aimed at reducing neighbourhood exclusion through involving older people in improving and designing aspects of the built environment responsive to the variety of needs within the ageing population.

The paper shows that such initiatives targeted at improving particular "age-friendly" domains (e.g. promoting social participation) provide a response to related forms of social exclusion (e.g. exclusion from social relationships). Given the linkages across the conceptual frameworks of exclusion and age friendliness, and the domains they both focus on, the argument developed here is that the concept of "social exclusion" provides a useful frame to assess the value of "age-friendly" programmes.

A number of benefits can be identified in linking age-friendly work to a central goal of reducing social exclusion in later life, in terms of: first, reaching out to those "left behind"; second, connecting age-friendly work with other major urban agendas; and third, providing a much needed orientation for age-friendly programmes, which can be the basis for monitoring and evaluation of outcomes and impact. Addressing these, the paper argues, will have the potential to expand and raise the ambition of the age-friendly agenda in a difficult economic climate with competing demands for resources.

A first advantage of linking age-friendly work to the goal of reducing social exclusion is that it will help to recalibrate age-friendly programmes, so that their focus is concentrated on those experiencing multiple forms of disadvantage and those most at risk of being excluded. This is in line with calls made by the WHO in its "Decade of Healthy Ageing 2020–2030" strategy and with the United Nations Sustainable Development Goals (2019) to "leave no one behind" and endeavour to reach those furthest behind first. However, as our analysis has shown, there are still groups of older people who tend to be underrepresented in age-friendly initiatives. A relevant question here is: "do age-friendly initiatives reach out to people with all types of health conditions or are they focused predominantly on the 'healthy', that is, those involved in different forms in terms of involving 'active aging'?" (Golant 2014). The findings from this paper suggest that whilst progress has been made in terms of involving diverse groups of older people, it is mainly the latter group who has dominated the development of age-friendly initiatives in the three cities. But this raises questions about whether the goal is to create "inclusive" rather than "exclusive" communities (Gonyea & Hudson 2015). If the former, then age-friendly initiatives must have the capacity to support people diagnosed as "frail" or with dementia and associated conditions (Grenier 2007), and acknowledge the variety of groups for whom age-friendly issues are relevant.

Employing a central focus on reducing social exclusion is also likely to lead to consideration of the need to reach out to groups that may be disengaged from age-friendly issues. The age-friendly initiatives reported in this study have mainly drawn upon organisations already involved in campaigns on issues affecting older people, such as voluntary bodies working on behalf of older people, pensioner action groups and carers' organisations (Steels 2015). But these may have limited connections

to organisations representing minority ethnic groups, the lesbian, gay, bisexual, transgender, and questioning (or queer) (LGBTQ) community, women's groups and faith-based organizations. Each of these will be affected by age-related issues in different ways: their involvement could make a substantial contribution to creating a more inclusive and representative age-friendly movement.

A related observation made by Lehning et al. (2017: 53) also applies to the age-friendly programmes in Brussels, Dublin and Manchester studied here, in that they, to a greater or lesser extent, have "failed to address the specific needs of racial and ethnic minorities or those with low incomes." The authors go further to note that: "this is of particular concern, given these subgroups of older adults are likely to live in particularly un-aging-friendly, under resourced neighborhoods." More generally, the social exclusion experienced by many groups in urban areas – notably migrants, refugees and those living in communities with high levels of deprivation – has been neglected in discussions about the development of age-friendly policies (Buffel & Phillipson 2018). Acknowledging social and ethnic diversity is therefore an important issue for the age-friendly movement to address. The implications are wide-ranging, including responding to different cultural interpretations of what "age-friendliness" might mean; shaping policies around the needs of particular groups with contrasting migration histories and life course experiences; recognising distinctive forms of inequality experienced by particular ethnic groups, notably in areas such as health, income and housing; and understanding the impact of racism in communities and the challenge this presents for the achievement of successful age-friendly work.

A second advantage in linking age-friendly work to the goal of reducing social exclusion lies in its potential to facilitate a more active integration of age-friendliness with other major priorities within cities, increasing its relevance and harnessing its holistic approach to addressing major societal challenges. Environmental issues, sustainable development and affordable housing are all significant urban and public policy concerns that impact older people and that require new approaches and perspectives. A starting point for extending the scope of age-friendly activity would be to strengthen collaboration with the range of movements campaigning to improve urban environments. One response would be to establish links with groups working on initiatives such as "smart cities," "healthy cities,"

"resilient" and "sustainable cities" (Ramaswami et al. 2016; UN-Habitat 2016). Encouraging links between different urban programmes might help expand the range of age-friendly interventions. For example, ideas from the "smart" and "sustainable" cities movement around supporting alternatives to cars, increasing energy efficiency and reducing pollution, should also be a central part of making cities "age-friendly." Engagement with this type of work has the potential to produce both further resources for the movement as well as adding to the sustainability of existing projects.

Third, harnessing social exclusion as an orientating lens will help to derive a more defined multidimensional measurement framework for determining the impact and effectiveness of age-friendly programmes – a framework that is underpinned by a conceptual, practical and political understanding already evident across policy and practice spheres. This will be critical to justify funding for new age-friendly initiatives in the future, particularly in a context of economic constraint and austerity (Buffel & Phillipson 2018; WHO 2018). It may also remove some of the ambiguity around what age-friendly initiatives are attempting to achieve, and offer a focal point for measuring impact and prioritising interventions in the context of complex real life challenges for disadvantaged and vulnerable groups. Findings from the three cities highlight an urgent need for models and tools that help measure the impact of interventions and monitor change over time. Existing efforts to assess the impact of age-friendly initiatives are hampered by the lack of an adequate logic model specifying what inputs and interventions are hypothesised to produce particular outcomes and impact. Given the need for a stronger emphasis on research, a key task for the age-friendly movement will be to create stronger linkages with academic institutions and researchers from multiple disciplinary perspectives to demonstrate the social and economic impact of the work. Whether the age-friendly approach actually makes a significant difference in reducing social exclusion will need careful attention over the next phase of the development of the movement.

Finally, the research identified a number of common barriers to implementing age-friendly initiatives across the three cities, including economic recession, bureaucratic structures and sustainability. Some of these challenges illustrate how the goal of age-friendliness has to compete with macro-level economic processes, and indeed wider objectives associated with urban development (Buffel et al. 2018; Menec et al. 2011).

Others illustrate issues that influence its future existence, development and effectiveness, raising fundamental questions about sustainability. What is more, these challenges are likely to impede the capacity of age-friendly policies and practices to combat the exclusion of older people.

Although this study identifies important findings in terms of linking age-friendliness with the goal of social exclusion, there are a number of challenges arising from taking a cross-national approach that serve as limitations to our analysis. These include linguistic, social and political differences between the cities, and more practical differences relating to sampling and data collection procedures, that can have implications for the interpretation of findings. A first challenge is "inherent in its nature" in that the data were not collected to answer the secondary research questions. A second limitation of using secondary data is that the researcher is not a participant in the data collection process. However, in this study, the research team was at an advantage because they were involved in executing data collection in their respective cities. Notwithstanding these significant limitations, a key contribution of this research comes from bringing together existing qualitative data sources for new, comparative purposes in order to produce novel ways of understanding approaches to ageing and social exclusion in cities. This is especially important given the limited availability of cross-national studies examining age-friendly work. Our study highlights the potential of qualitative secondary data analysis to bring greater power to answer research questions through comparison across contexts and social groups, and to identify relevant barriers, principles and successes of age-friendly work that may foster learning and exchange between cities.

Conclusion

This article has identified various benefits linked to connecting the age-friendly approach to the goal of reducing social exclusion: first, it offers a lens for incorporating the views of seldom heard or hidden populations; second, it provides a forum for developing interdisciplinary and cross-sectorial partnerships to challenge discriminatory practice and marginalisation; and third, it provides a viable orientation and focal point for measuring the impact of age-friendly initiatives. Applying a "social exclusion" lens will not in itself resolve the problems facing older people

subject to economic and social change. However, it does provide the basis of a programme of action in which age-friendly activities can be an important part of policies improving the communities in which people live.

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Tensions in intergenerational practice guidance: intergroup contact versus community development

By Katie Wright-Bevans*, Michael Murray* & Alexandra Lamont*

Abstract

Intergenerational practice (IP) is an approach within community health promotion which aims to bring older and younger community members together in collaborative activity. Little research has critically examined the assumptions and values within IP and their implications for these communities. A sample of 15 IP planning documents were analysed using a social constructionist thematic analysis (Braun & Clarke2006) guided by Prior's (2008) concept of documents as active agents. Three tensions were identified: a community-led model versus a contact model; old and young as targets versus older people as targets; and process-focused versus outcome-focused evaluation. IP has relied on contact theory as a mechanism of change, which has rooted IP to an overly individualistic practice targeted at older people (rather than all ages). In contrast, the community-led ethos of IP was also evident alongside values of mutual benefit for old and young, and a desire for more process-focused evaluation.

Keywords: community, guidance, health, intergenerational, document analysis, ageing, social representations.

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Introduction

Intergenerational practice (IP) is an approach within community health promotion which aims "to bring people together in purposeful, mutually beneficial activities which promote greater understanding and respect between generations and contribute to building more cohesive communities" (Beth Johnson Foundation 2011). Initiatives may involve a broad range of creative, social or skills-based activities such as arts, befriending or gardening. Governments have endorsed the use of IP as a means of promoting more cohesive communities (Statham 2009).

Detailed guidance on how to implement IP has been developed by various organisations in the United Kingdom (UK) and elsewhere in recent years as the practice has become increasingly formalised. Toolkits, practice literature and organisations supporting IP have also grown, as have the number and range of projects (Henkin & Butts 2002). Despite this, the assumptions underlying the guidance and practice have received very little empirical attention.

The aims and objectives of organisations implementing IP vary; however, a common focus is the promotion of community cohesion, intergenerational contact and knowledge exchange (Buffel et al. 2014). Across the UK, the United States and the mainland Europe (where IP is equally prevalent), health professionals have recognised the value of social engagement for older people, and research has witnessed a steady shift away from combatting individual barriers to social engagement, such as cognitive decline, towards ways to promote active ageing involving social connections (Sampson et al. 2009). The development and increasing popularity of IP also map onto a growing trend of citizenship programmes for young people in the UK, many of which aim to promote community participation and address health and social issues (Haste 2004).

The Dominance of Contact Theory in IP

Health-promotion programmes are most likely to benefit individuals and communities when guided by social and behavioural science theories (Kok et al. 2004). Kok et al. (2004) noted that theory-driven health-promotion programmes require an understanding of the operational or

practical forms of such theories. These may be applicable to behaviour at one or more levels: individual, interpersonal, organisational, community and society, and whilst students are taught to apply theories to problems, practitioners work in the opposite direction. They have to find useful theories to help understand and address problems. Kok et al. (2004) argued that the application of theory has been a challenge for health-promotion researchers and practitioners and too often, theories, prior evidence and programme objectives are mis-aligned, resulting in either ineffective interventions or successful programmes where the mechanisms for change are unclear. The aim of this article is to critique the theory underlying the practice of IP.

Contact theory, which works on an individual and interpersonal level, has been cited consistently and extensively in IP research and evaluation (e.g. Abrams et al. 2006; Alcock et al. 2011; Gaggioli et al. 2014; Grefe 2011). A content analysis of 128 studies of IP revealed that research is largely underpinned by contact theory or variations of it (Jarrott 2011). The many variations of contact theory all have their basis in Allport's (1954) contact hypothesis, a social psychological theory, rooted in the idea that prejudice stems from an inability to identify with those who are different (out-group members) from us (in-group members). The theory predicts that positive inter-group contact (i.e. contact between in-group and out-group members) results in positive inter-group relations and reduced prejudice. Such changes in prejudice are frequently measured through attitude scales before and after contact interventions (Hewstone & Swart 2011).

Reviews of over 200 examples of IP (Granville 2002; MacCallum et al. 2006) concluded that IP can have a broad range of health and social benefits for individuals and communities beyond attitude change. Critical commentaries on IP are plentiful (e.g. Bernard & Ellis 2004; Granville 2002; Knight 2012; Statham 2009). Each suggested that IP needs greater theoretical and practical attention in order for it to reach its full potential as a community health-promotion tool.

The over reliance on contact theory has also resulted in a neglect of research into processes of change. In a paper by Bernard and Ellis (2004), titled "How do we know that intergenerational practice works?," it was concluded that the mechanisms behind successful practice are still largely

unclear. A recent review attempted to address this gap by analysing the mechanisms behind 31 studies of IP (Drury et al. 2017). However, this review was also driven by contact theory and although it identified some of the mechanisms behind successful intergenerational contact (e.g. equal status, extended contact), this review neglected the political, social and cultural contexts within which IP is conducted, reviewing mechanisms of contact in isolation of wider practices.

The narrowing of attention to quantifiable measures of individual change is a common feature of health-promotion programmes (Sykes et al. 2004). Although this approach to capturing evidence is inevitably more resource-light, this approach hinders the advancement of health promotion, as it only values one type of research and evaluation. Health-promotion evaluation that relies solely on surveys and scales to determine its success or failure is inadequate for several reasons. It is highly individualistic in the sense that the focus is on individual change rather than social change. It also values evaluations of outcomes and not processes or mechanisms of change. Contact theory falls within the dominant individualistic psychological approach which draws upon "the same rationalistic assumptions" (Markova 2007: 232) as other theories commonly employed in health-promotion programmes such as the Theory of Planned Behaviour (Fishbein & Ajzen 1974). Contact theories and individualist measurement tools have masked the role of community- and societal-level factors in shaping and constraining the capacity of IP.

Critical Approaches to Community Health Promotion

New public health tools such as community health promotion adopt a more value-laden and political perspective (Petersen & Lupton 1996). Although defined as a community development tool, IP has not been approached as such by most scholars to date. There is a need for more critical empirical examination of the nature of IP in order to examine the assumptions and values that drive practice, rather than simply the most appropriate mechanisms or outcomes of contact. Such investigation would allow researchers and practitioners to look beyond attitude change and gain insight into how IP works, who it benefits and in what way.

Other community health-promotion tools and social change initiatives, which have been investigated more critically, demonstrate how a more critical approach can provide insights into how practices are constructed. These benefits are illustrated in two rather different yet noteworthy examples. Campbell and Cornish (2010) identified four approaches to behaviour change in HIV/AIDS interventions: top-down information provision, peer-based, whole community and community mobilisation. The approaches range from more individualistic apolitical approaches to behaviour change, to more political community-led approaches. Campbell and Cornish (2010) argued that only the latter are effective in the long-term, and even then community mobilization approaches need support from individuals and agencies both outside and within the community.

In a similarly critical manner, Maoz (2012) examined models of social change in the context of encounters between Israeli Jews and Palestinians. He identified four models: coexistence (groups working together yet with little interaction), joint projects (groups work together), confrontational (groups work together and acknowledge power dynamics) and narrative-story-telling (groups work together to share stories with each other and the wider community). Maoz (2012: 278)argued that the fourth narrative-story-telling model had the greatest potential for fostering actual and lasting social change. This model "combines interpersonal interaction with interaction through group identities and the forming of personal ties with discussions of the conflict and of power relations."

By dissecting respective health and social interventions both Campbell and Cornish (2010) and Maoz (2012) shed light on the assumptions and values within different practices and allowed for closer scrutiny of various approaches to interventions and the impact of these. There is potential value in applying a similarly critical lens to the study of IP as a community health-promotion tool to illuminate its assumptions and values.

Documents as Active Agents

This study drew upon Prior's (2006) concept of documents as active agents to conduct a critical examination of IP documents in the UK. Prior argued

that documents are not simply containers of information, instead they are active agents, embedded with the assumptions and values of those who create them. By recognising the social and political role of the documents that guide IP, these can be subject to a more critical empirical investigation and recognised as a terrain in which concepts surrounding IP are constructed or contested.

Social constructionist analyses of health-related policy and documentation have provided a deeper understanding of how other health issues operate in practice. Brisbois and Plamondon (2018) in a noteworthy recent example analysed a selection of global health research documents and identified contrasting representations of the world in which global health research is taking place. Their research highlighted the ways in which damaging representations could impact the health of communities.

Social Representation Theory

This study drew on the social representation theory (SRT) (Moscovici1988) to understand the assumptions and values constructed and contested in IP documents. SRT has been used to help understand meaning-making regarding such phenomena as health and illness (Murray et al. 2003), ageing (Moreno et al. 2016) and technology (e.g. Kalampalikis et al. 2013). Such studies have demonstrated how social representations shape experiences and action. Social representations are the shared assumptions and values of a community which are shared through everyday communication. The earliest research done by Moscovici (1988) explored how social representations were reflected in popular newspapers. Since then, there have been many studies on social representations of different phenomena in different media (e.g. Höijer 2011). However, there has been less research on the content of scientific communications such as in official documents.

As SRT is critical in its version of social constructionism, recognising that knowledge, whether lay or expert, is neither apolitical nor value-free, it is particularly well aligned with Prior's (2006) concept of documents as active agents.There has not been any research to empirically examine IP guidelines in the UK. This article complements and extends the work of others (Granville 2002; Knight 2012; Larkin & Rosebrook 2003; Statham 2009) by offering insight into how IP in the UK is constructed and the implications of those meanings for practice.

The aim of this study was not to synthesise guidelines or identify effective practices in an objective manner. Instead, this study sought to explore the ways in which IP documents socially construct and conceptualise IP. Furthermore, we sought to understand the implications of these constructions for practice. In doing so, the following two key research questions guided our analysis:

- How do IP documents conceptualise IP?
- What do conceptualisations of IP suggest about the nature of the practice?

Methods

Document Sample

The search strategy aimed to gain a representative sample of the most accessible documents, rather than the most detailed or up-to-date ones. Documents were initially selected based on ease of availability to the UK facilitators of IP. All documents considered were publicly available and accessed freely over the Internet between Spring 2014 and Summer 2018. As documents were accessed through a public forum, it was not necessary to seek permission for their analysis. The search strategy involved searching, using Google, for documents and guidance, including the word "intergenerational" alongside the following search terms: "practice," "guide," "approach," "strategy" and "toolkit." This search strategy allowed for the inclusion of any relevant documents that used the term "intergenerational" but not necessarily the term "practice." Those which appeared high in search results were scanned for suitability. Case study reports and evaluations rather than guides to practice were excluded. After judging documents against these inclusion and exclusion criteria, a total of 15 documents, including a total of 359 pages of text and images, remained for analysis.

It was made clear that the guidelines were aimed at facilitators through the use of such phrases as "aimed at those new to setting up intergenerational projects" and "aimed at people working in community development, neighbourhood management, and regeneration." The final selection of documents came from diverse local government sources and charitable

Table 1. Key features of the documents sampled

Author: National charity (NC) or local authority (LA)	Target audience	Target community
NC	Community facilitators	Older people
NC	"Those new to setting up intergenerational projects"	Older people
NC	"Those working with community groups"	All ages
NC	Community workers	All ages
NC	Community workers	Older people
LA	Neighbourhood regeneration officers	All ages
LA	Intergenerational officers	Older people
LA	Community project managers	Older people
LA	Community workers	All ages
LA	Community workers	All ages
LA	Community project facilitators	All ages
LA	Community workers	Younger people
LA	Community workers	Older people
LA	Community development officers	Older people
LA	Not specified	All ages

organisations, but all were created with an aim of providing guidance on practice to potential IP facilitators (see Table 1).

Analysis of Content and Function

All content was subjected to a social constructionist thematic analysis (Braun & Clarke 2006), where the analytic lens was broad, including function as well as content as advocated by Prior (2003). The analysis took a social constructionist stance in the sense that it strove to "identify and examine underlying ideas, assumptions and conceptualisations" (Braun & Clarke 2006: 84). In line with the theory of social representations, the analytic focus was on exploring underlying assumptions and shared ideas

rather than any perceptions held by individual document authors. The identification of themes was driven by both a desire to capture the core content of the codes and the common sense understanding that underpinned them.

The analysis of function was conducted in tandem with the thematic analysis. This aspect of the analysis considered the context within which the documents were constructed. This process required questions to be addressed such as "who is the author, what purpose does this document serve for them?" and "who is the target audience?" The answers to these questions (e.g. documents are aimed at facilitators working to help manage older people) were then integrated into the themes derived from the content of the documents. The marrying of thematic analysis (Braun & Clarke 2006) and document analysis (Prior 2008) allowed the research aims to be addressed in a more critical and context-sensitive manner.

Findings

Three primary dimensions were used to characterise the content of 15 documents. The structure of these dimensions are shown in Figure 1.

Community-Led Model versus Contact Model of IP

The majority of documents contained descriptions of how IP was believed to work as a community-led approach in which the practice must be developed from the community's interests, needs and agenda. In one guidance

Figure 1. Three primary dimensions characterising IP.

Community-led model — Contact model

Old and young as targets — Older people as targets

Process-focused evaluation — Outcome-focused evaluation
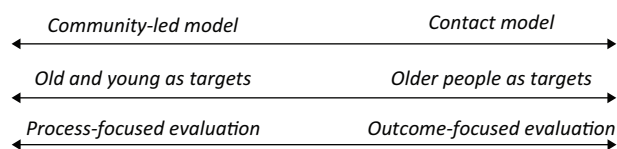
document, the value of bringing the community together to communicate these interests was emphasised:

> UNDERSTANDING THE PROCESS. When creating new ideas, bring together the people with the first-hand insight and experience to identify the opportunities and add their perspective to the creative process. This will be about bringing together different generations and facilitating joint conversations and activities. You cannot possibly have all the best ideas alone. (Document 1, p. 17)

The process of implementing IP was described as the act of bringing together young and old in order for the IP facilitator to listen to multiple perspectives. IP was described as a community-led process where the community members were valued for their first-hand insight and experience. In this bottom-up process, the facilitators gathered information and ideas from the community rather than implement their own agenda or rely on intergenerational contact alone as a tool for success. This might involve identifying goals and expectations or might be a freer process with no predetermined end.

Despite descriptions of IP placing emphasis on community needs and action, where the documents outlined practical steps, contact was a central concept throughout the documents and not only in step-by-step guidance on bringing old and young participants together. Here, contact was discussed as a framework whereby local implementation could be tracked: "It is useful to see its local implementation as a continuum that tracks the levels of contact with and between participating generations" (Document 1, p. 5). Throughout the documents, these two ways of constructing IP could be seen in tension. On the one hand, IP was described as an agent of community change, but, on the other, the mechanism through which this was believed to work was through "connecting the generations." Whilst IP would inevitably involve intergenerational contact, this approach was highly problematic in its neglect of the community resources that would be needed to achieve change and in its assumption that contact alone would allow communities to be revitalised. In omitting these wider community factors, the onus and responsibility was implicitly placed on individuals to achieve change.

Some documents were more reflexive in their practice guidance than others. The following example illustrates how some documents warned against being too prescriptive:

> There are a number of definitions, toolkits and manuals around as Intergenerational Practice pushes its way to the top of the agenda, however throughout this process it is important to remember to listen to your communities and run your projects in line with their wants and needs. (Document 5, p. 3)

This document reminded facilitators of the need to listen to their communities, suggesting that this might be difficult or conflicting with other agendas such as those of funders. Such responsible practice might be challenging when in theory, much practice is based on the assumption that contact alone would provide a route to community change.

Old and Young as Targets versus Older People as Targets

All documents included at least some discussion of who IP was targeted at. Two approaches strongly emerged. The first constructed IP as all-age friendly and targeted both young and old. The second constructed IP as targeted at older people, with little, if any, mention of younger people. Some of the documents emphasised age equality as a core value of IP:

> Intergenerational practice is based on the principle that older and younger people work together in an equal power relationship, for their benefit and the benefit of their local community. By giving people a time, place and structure to do this, it helps different generations share their past, present and hopes for the future. (Document 11, p. 5)

Age equality and mutual benefit were promoted as a foundational principle of IP. Furthermore, IP did not simply involve both young and old benefiting but also involved the establishment of equal power relationships. The nature of the equal involvement of participants was emphasised, rather than simply who should be targeted to participate. This example is typical of half the sample in that it explicitly emphasised the all-age friendly nature of IP, where both young and old should have the space to engage, learn and share in a reciprocal way.

Despite mutual benefit being core to the definition of IP, the idea that IP was for older people was a dominant construction in these documents. One document illustrated this construct clearly and succinctly through its title: *Strategy for older people in Wales: A Strategy for intergenerational practice in Wales*. Here and across the documents, younger people were

notably absent from discussions of benefits and the purpose of IP. In other instances, younger people were constructed as simply a resource to help older people:

> The recognition that discords between the generations is a phenomenon appearing throughout all societies and eras, it deeply depends on social and economic circumstances, and helps us in seeing that young people are receptive to bridge the gap between generations, which social problems such as unemployment, poverty, exclusion and racism make wider. (Document 6, p. 5–6)

Underneath this text was a quarter page-sized image of a young boy holding a globe in his arms. The boy is gazing down at the globe and smiling. Both the extract and the image together constructed younger people as a resource to assist with the social problems outlined. They were not represented as equal in vulnerability or power to older people.

Analysis of the function of the documents provided further evidence that the documents constructed IP as targeted at older people. The majority of documents were published either by all-age organisations or those working with older people. Only one of the 15 documents was published by an organisation working with younger people. This conflicts somewhat with IP definitions, which promote mutual benefits of old and young as a core value. Instead, the publishing of the documents in this way constructed a practice that was for older people and facilitators who work with older people.

The tension between IP as all-age friendly and IP as for older people was evident within documents as well as across them in content and function. The following extract highlights this tension more explicitly:

> This strategy has grown out of our Strategy for Older People and, whilst we see it as an essential step in taking intergenerational approaches forward, we recognise that further work needs to be undertaken to ensure that our approach is owned equally by all of the generations. (Document 7, p. 4)

This extract illustrates the difficulties of implementing an all-age friendly IP where both young and old were equal stakeholders in the practice. More often, documents did not reflect on this difficulty and the tension was evident in content that promoted equality within documents positioned for older people's facilitators.

Process-Focused Evaluation versus Outcome-Focused Evaluation

All documents made reference to the outcomes of IP and the majority also suggested ways and means of measuring some of the benefits or capturing processes of change. Whilst the benefits that were frequently showcased in the documents were wedded to the process and act of participating in IP, in other instances IP was constructed as outcome-focused and reliant on the measurement of tangible outcomes. One document listed the benefits of IP for older people, younger people and the community. These included: "increased motivation; increased perception of self-worth; improved wellbeing; increased self-esteem and resilience; and, improved community cohesion." (Document 9, p. 5). Similar lists were presented in most documents. Not only were few of the benefits listed concrete and tangible, they also mostly reflected processes of change rather than end goals. There was a sense of IP facilitating personal and collective growth and learning. It was not promoted as a means to an end goal or series of goals. This process of learning and understanding was presented as a core principle of IP.

Equally, great emphasis was placed across the documents on the collection of evidence of success. Outcomes and their measurement were constructed as crucial to IP. Facilitators were reminded of the importance of outcomes:

> An important note to people using this guideline –
> Consultation on the contents of this resource indicated that evaluation has become an increasingly important aspect of IP management for organisations, staff and volunteers working in all sectors if they are to evidence the impact of their work. Evaluation enables projects to discover what works, what doesn't work and how to measure the difference that is being made. This can help with project and business planning and lead to the delivery of better services. It also allows better reporting which means the organisations can be more accountable to funders, stakeholders and to the people who use services. Projects that are not outcome focused will find it extremely challenging to evaluate their value and to evidence this. (Document 2, p. 17)

Facilitators were told that projects needed to be outcome-focused in order to gain legitimacy among funders as well as be accountable to all stakeholders, including the communities who participated. Evaluation and evidence were presented as compulsory components, which the future practice and the funding of this depended on. Examples of

outcomes were usually those tangible and quantifiable outcomes. A pressure to demonstrate "hard outcomes" was recognised in another document under the heading *Monitoring and Evaluation:*

> In the 'more for less' environment, the competition for resources is becoming increasingly fierce within and between organisations. Consequently, demonstrating the wider benefits of any policy action is more crucial than ever. In common with many areas of social action based in communities, those advocating Intergenerational Practice at local level will need to address the perceived tensions between what have become known as 'hard' (quantitative) and 'soft' (qualitative) outcomes. (Document 3, p. 12)

Despite the inclusion of monitoring in the heading, the emphasis remained on outcomes, rather than processes, and facilitators were cautioned once again to ensure that projects were adequately evidenced. The author did, however, acknowledge and distinguish between quantitative and qualitative outcomes, suggesting that there was a tension between these that would need to be addressed by IP advocates.

Discussion

Our analysis of IP documents found that IP in the UK is characterised by tensions. IP relies on the contact theory as a mechanism of change which roots IP to an overly individualistic outcome-focused practice targeted at older people. In contrast, the community-led ethos of IP was also evident in the documents alongside values of mutual benefit for old and young, and a desire for more process-focused evaluation. These findings provided empirical support of critical commentaries which suggested that IP needs to be more clearly defined and understood (Granville 2002; Statham2009). These findings also addressed the limitations of other reviews such as Drury et al. (2017), who, in focusing more narrowly on the concept of intergenerational contact, were unable to engage in analysis of broader assumptions and values underpinning practice.

Whilst definitions of IP embraced a community-led ethos, guidance on implementation drew upon a top-down intergroup contact theory-driven approach where the needs and interests of communities were easily lost or obscured. This finding in many ways mirrors the work of Campbell and Cornish (2010) and their four approaches to HIV/AIDS

interventions ranging from top-down interventionist to a community mobilisation approach. Sykes et al. (2004) demonstrated how the highly individualistic nature of scientific discourse in health promotion hinders its advancement.

The challenge for the future research on IP is to identify how this tension is managed in practice and how facilitators can be supported to develop initiatives that can embrace a community-led approach without being compromised by top-down pressures, which result in intergenerational contact as the focal point of practice.

The tension between IP as targeted at young and old and IP as targeted at older people revealed constructions of who is believed to benefit from the practice. Whilst mutual benefits are at the core of IP definitions, the skewed way in which IP documents were produced contested this definition. IP is in conflict between promoting opportunities for all ages and providing support for older people and this reflects in part the practical challenge of implementing IP in what Hagestad and Uhlenberg (2006) have described as an age-segregated society. The danger of this representation is that it risks neglecting the agency of older people and countering active ageing by constructing older people as dependent upon IP initiatives rather than actively contributing to health promotion. More work therefore needs to be done to promote the benefits of IP to organisations working with younger people to demonstrate what young people can potentially gain from working with older people.

The third tension was identified regarding evaluation of IP; process-focused versus outcomes-focused. Whilst aims of practice referred to processes such as ongoing relationship-building and community participation, practical advice on evidencing the success of initiatives focused, almost exclusively, on tangible quantifiable outcomes. Our findings further suggest that a reliance on the contact theory may be at the root of each of the tensions as, although it provides a simply framework with which to implement and manage practice, it is problematic as it neglects social, political and economic environment within which practice occurs.

The present findings extend previous work by providing a novel critical insight into what IP can achieve (Drury et al. 2017; Granville 2002; Jarrot 2011; Springate et al. 2008). Pressure to provide quantifiable

evidence resulted in outcome-focused practice, despite attempts to showcase the value of practice processes for communities. This has consequences for those participating in IP who may not benefit or fully engage in the processes advocated. Pressures to be outcome-focused may result in time-limited projects with pre-determined goals and end states, comprising the success of IP from the community's perspective.

Our finding that IP documents were characterised by competing approaches is not unusual. We argue that in making sense of IP as contact-driven, targeted at older people and outcome-focused, the documents legitimise and validate practice as it aligns with institutional cultures across the UK. In mapping IP onto existing institutional structures, agendas and practices that value quantifiable evidence and time-limited projects, the documents provide a more manageable pathway to implementing IP. Through this process, IP is granted familiarity to the practitioners tasked with facilitation. Social representations serve to make familiar the unfamiliar (Moscovici 1988). This representation is highly problematic, because, at best, it distorts the original intention of the practice, and at worst, it directly contradicts it. We found that the documents did also construct IP as community-led, as all-age friendly and process-focused however these representations, which highlighted the values of IP, were in constant tension with representations which better serve IP in practice.

The exclusion of guidelines that did not feature the term "intergenerational" may have resulted in the exclusion of prominent guiding documents for intergenerational work. The rationale behind this final exclusion criterion was the one based on an explicit need to explore "IP"as an emerging practice distinct from other approaches. The broad nature of the sample also resulted in a picture of IP across the UK, potentially neglecting nuances in particular regions or within particular organisations. The most apparent limitation of the present study is the need to assume the usage of the documents sampled. The study did not gather data on the extent to which the documents sampled are used by facilitators. However, the documents sampled were the leading resources available to facilitators across the UK.

Our study has highlighted the need for policy and practice to attend to the ways in which IP guidance may shape and limit practice. The benefits of IP for younger people need to be recognised within policy and

practice. This recognition may go some way to resist the representation of IP as being an intervention *for* older people. Furthermore, this may help diversify the communities, activities and scope of IP in terms of content, aims and objectives. Our study has provided further support that policy makers and practitioners need to resist the appeal of and apparent ease of tokenistic intergroup interventions and limited evaluations and "embrace the messiness of real-life social change projects" (Campbell & Cornish 2014: 11), which requires an understanding of processes as well as outcomes.

To conclude, in treating documents as active agents, rather than static sources of information, the present study has demonstrated the role of IP documents in shaping and constraining the nature of practice. In examining this otherwise taken-for-granted guidance on practice, the present research has addressed calls for a more critical examination of IP as a community health-promotion tool.

Acknowledgements

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The final stage of human development? Erikson's view of integrity and old age

By CHRIS GILLEARD*

Abstract

This paper considers the significance for ageing studies of Erikson's theory of adult development, particularly his last stage the crisis of 'integrity' versus 'despair'. Because his model assumes a clear pattern of lifelong upward development, culminating with the 'achievement' of integrity and wisdom, it can be seen as helping underpin gerontology's moral imperative to confer meaning and value upon old age. Despite the difficulties in empirically demonstrating the stage-like nature of adult development, and the dubious evidence that integrity is an essential feature of a successful old age, the inherent directionality of Erikson's model supplies ageing with a purposive quality in contradistinction to alternative 'decline' narratives. Rather than continue a potentially fruitless search for proof, it might be better to conceptualise his adult 'stages' of identity, intimacy, generativity and integrity as key narratives running through the development of adult character, articulated, expressed and struggled over in various ways throughout adulthood, including late life.

Keywords: Erikson, Integrity, Stages of development.

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Introduction

Much credit is due to Erik Erikson in proposing a view of human development that continues throughout the realisable human lifespan (Kivnick & Wells 2014: 40). Some have claimed that "there has not been a more influential theory of psychosocial development" (Dunkel & Harbke 2017: 58). Although the idea of the lifelong development of human character goes back thousands of years, appearing and reappearing in a wide range of cultures (Arnett 2017), Erikson's achievement was to formulate a set of principles to account for that development that seemed explicit and testable. His model assumed that human development could be understood as being (1) *stage like*, with definite transitions from one stage to another (2) *epigenetic*, in the sense that each stage emerges from, but is not reducible to earlier stages at the same time as being (3) *universal* in form and sequence (Erikson 1982). In elaborating this model, Erikson drew heavily upon biographical resources, particularly those of major historical figures such as Ghandi and Luther (Erikson 1958, 1969, 1975). His model of psychosocial development has been the subject of much research, conceptual elaboration and radical critiques (Coles 1970; Friedman 1999; Hoare 2002; Newton & Stewart 2012; Roazen 1980). Perhaps, the most long-lasting value of his work, however, lies in its underlying message, as much moral as it is empirical, that human development extends beyond the mere achievement of adult form and reproductive fitness into old age.

While the trans-species trajectory of the life course can be summarised as one of birth, growth, stability and decay, Erikson's position was that development is evident throughout the course of human life, during periods of both biological growth, stabilisation and decay. This "uplifting" narrative – implying that human beings at every age continue to possess the capacity to grow and to become more thoroughly human during the course of their adult life – has become a central tenet of much contemporary gerontology (Kivnick & Wells 2014: 48). From such a viewpoint, a wide range of lifespan developmental themes have been proposed from Baltes' model of selective optimisation (Baltes 1997; Baltes & Baltes 1990) and McAdams' theory of the narrative self (McAdams 2019; McAdams & McLean 2013) to researchers such as Becca Levy who has challenged the intrinsic decline narratives by which later life is defined as largely

socio-cultural constructions (Levy 2003). While there is much debate over the limits of human plasticity and the nature and extent of "post-adult" personality change, after Erikson it has become possible to consider the question of continuing adult development open to inquiry.

This paper outlines a critical appraisal of Erikson's final stage of development, the psychosocial crisis of "integrity" and its "basic antipathy," despair (Erikson 1984: 156). It does so for several reasons. In the first place, his model has acquired an almost totemic status in demonstrating the purposiveness of adult development and the positioning of old age as the culmination of that development. Is this actual or merely aspirational? In the second place, like psychoanalysis, Erikson framed his underlying theory as a science but is propounded more often as a moral framing of life and society. Despite a growing number of measures and methods operationalising integrity, little attempt has been made to either analyse their component parts, integrate the differing findings or critique their methodologies. Unsurprisingly, the findings lack consistency.

As a number of authors have noted, most Eriksonian empirical research has focused upon the earlier psychosocial crises of adulthood, identity (vs. identity confusion), intimacy (vs. isolation) and of generativity (vs. stagnation) with much less investigation or further conceptualisation of his proposed final stage (James & Zarret 2006: 61; Newton & Stewart 2012: 220; Torges et al. 2008: 1005; Westerhof et al. 2017: 400). When Erikson first conceived his life cycle model of human development in his book, "*Childhood and Society*" (Erikson 1963), old age and retirement played a relatively small part in adult lives (Winter et al. 2006: 108). In subsequent decades, old age has become a larger and more varied cultural economic and social space as the number of people living through old age has grown remarkably (Cauley 2012; Rowland 2009). How resilient has Erikson's model of this final stage proved in the face of over half a century of cultural and social change? Over the course of a half century of writing, did Erikson himself alter, modify or reject this framing of adulthood and later life? Might its central position be more a function of its totemic value to ageing studies, in rejecting bio-gerontology's "decline narratives" (Gullette 2011) than its status as an empirically supported index of later life development?

Exploring the empirical evidence and theoretical coherence of "integrity" as a "final" phase or stage in human development confronts one of

the fundamental tenets of gerontology – that lives lived through old age realise aspects of human character and demonstrate human virtues that reflect genuine growth that "fulfils…the promises of childhood" (Erikson 1984: 156). Evidence supporting the "full" emergence of integrity as a positive virtue in later life could provide a strong counter-weight to the view that the psychosocial study of ageing and old age involves little more than the investigation of mental and physical decline and attempts at coping with and adapting to those changes. Although not themselves unworthy topics, the value of these latter endeavours lies largely in their negatives, offering little solace and limited resources to combat nature's iron laws. The need is considerable within the field of psychosocial gerontology for there to be a distinct, positive value attached to old age, what might be thought its moral imperative, to make of old age as something more than mere chronological achievement. While bio-gerontology can be said to have a value in itself, without necessarily having to value old age, its non-biological disciplines (the human, psychological and social sciences) stand in more need of sustaining interest and enthusiasm in what otherwise might easily become another "dismal science." Erikson's model provides that.

This paper aims first, to outline the Erikson's formulation of (and his own evolving views on) the psychosocial crisis of later life as the achievement of integrity and others' interpretations of this construct, then to review the existing research on integrity and its operational elaborations and finally to re-consider retaining, revising or rejecting the "stage-like" status of integrity versus despair as the culminating struggle of adult development. In so doing, two other, secondary aims are intended. The first is to promote the view that *character* although largely eschewed in contemporary studies of "personality and individual differences" represents an important dimension of psychological functioning, on a par with, if not superior to the maintenance of function, fitness and well-being throughout adult life. The second is to support the potential relevance of integrity (and indeed all the other "staged" achievements of adult development delineated by Erikson) in reframing policy towards later life and the scope for society and its institutions to foster the development of integrity, alongside identity, intimacy and generativity as outcomes that are no less important as "health" and "happiness."

What Did Erikson Mean By "Integrity"?

When Erikson introduced his stage model of human development, he was concerned with childhood and the broader issue of identity holding the book together (Friedman 1999: 234). At that stage, Erikson had planned a "seven stages of man" model, moving directly from identity and intimacy to old age. It was his wife, Joan, who suggested including the stage of generativity, in partial recognition of their own actuality as parents. Though neither had at this point in their lives experienced old age, it seemed the inevitable final chapter. Still, his formulation of what became the eighth and last stage, the crisis of "integrity vs. despair" was relatively brief, outlined when "we had no intention of (or capacity for) imagining ourselves as really old" and framed around an imagery of "elders" whose long survival conferred a special obligation to display their dignity to the world (Erikson 1982: 52). Erikson's model of psychosocial development was first expounded in his book, *Childhood & Society*, and has been repeated ritually and repetitiously by him, throughout his career (Erikson 1984: 157).

He divided the life span (or life cycle) into eight stages, with four developmental stages leading towards adulthood, and four involved in becoming ever more fully adult (Erikson 1963). Each stage is characterised by a core psychosocial conflict between a syntonic and its opposing, dystonic quality or trait, the resolution of which provides the platform for further development and the acquisition of a particular virtue or characterological strength. In old age, the crisis is between the integrity and despair, the resolution of which sees emerging the virtue of wisdom crowning the end of life. Without the conflict between the syntonic and dystonic traits, Erikson would later insist, the basic characterological strength would not emerge. Nor would it, he added, without a resolution that left the syntonic element dominant (Erikson 1984: 159). The framework of his stage model, he described as "epigenetic," in the sense that while each stage has its critical moment of "full ascendance," this will be most effectively realised by "the proper development in the proper sequence" of all the other stages (Erikson 1982: 29).

According to a later commentator, the broader division between pre- and post-adulthood stages can be seen as a sort of repetition

– moving "from basic trust to identity, and again from identity to integrity" (Logan 1986: 125). Although, for the purpose of this paper, I will ignore the earlier "cycle," Logan's point is worth retaining. He sees Erikson's model reflecting, not just the continuation of development in adulthood, but within that development envisaging elements of earlier development re-emerging, albeit in different circumstances. In this sense, Erikson is reiterating a point made originally by Freud, that there exists a "compulsion to repeat" in most adults' psychic life, psychological issues, conflicts and developments that had arisen earlier (Freud 1989: 132, 2006: 164). Erikson re-framed this through the principle of "epigenetic recapitulation on a higher developmental level" (Erikson 1982: 40). Logan's general point is that each stage of adult development can also be seen containing within it, elements of all earlier "pre-adult" stages. The important proviso that Logan makes however is that the later stages not only repeat but also *improve on* the qualities initially established. So, he suggests "the stage of integrity represents the highest form of the themes central to basic trust and identity – a sense of wholeness and self-worth, and a sense of place in a larger scheme of things" (Logan 1986: 129). This point of later stages incorporating and building on earlier developmental stages does unfortunately make attempts to operationalise and test Erikson's model of psychosocial development, particularly problematic for both biographical and psychometric approaches.

Erikson's own later life leads him to row back a little from his earlier formulation of integrity as the final fulfilment of all the earlier stages. As Hoare has noted, in midlife, Erikson had "projected forward his assumptions about the fruits waiting at the end of a long, productive, engaged life" (Hoare 2002: 185). In his late seventies and early eighties, he considered these terms – integrity and wisdom – "somewhat grandiose" and wondered whether these expectations still hold now that "old age is represented by a fast increasing …group of mere long-lived 'elderlies'" (Erikson 1984: 160). He was already qualifying the last stage as befitting a bracketed "pre-senile" old age, as if intimations of another old age seemed unable to bear the weight of wisdom (Erikson 1982: 54). Throughout his seventies, Erikson considered himself still in the "generative" stage of life (Hall 1983: 24) but leaving that decade behind, his conviction in the virtue awaiting old age had somewhat weakened.

By the time his "last" book was written, focusing entirely upon the last stage of old age, he was scarcely the author of his own writing. His "intellectual and physical vitality had ebbed"; he was no longer in a position to revise and re-write the "final statement" he had striven for in *The Life Cycle Completed*. *Vital Involvement in Old Age* (Erikson et al. 1986) was, as Friedman bluntly noted "a Kivnick production…heavily influenced by Joan," with Erikson's name added "to assure a wider readership" (Friedman 1999: 461–462). In this book, wisdom was described as merely "conveying the integrity of experience in spite of the decline of bodily and mental functions" (Erikson et al. 1986: 38). A general sense is conveyed of "elders" "feeling retired by society, unneeded and unproductive" forming a "large 'functionless' segment of the population" likely to prove catastrophic "for any society" (Erikson & Kivnick 1986: 294–295).

Erikson clearly was not content with his own final formulations, expressed in the *Life Cycle Completed*, but it is to others, rather than to this "unauthored" last book that we must turn for further theoretical elaboration of this final struggle between "integrity" and "despair."[1] Logan's paper, noted earlier, represents one of the first "post-Eriksonian" reformulations. In his paper, Logan framed "integrity" the last of Erikson's three "core stages" that emphasise the sense of continuity between the individual and his or her place in history as well as his or her place within society. While the first stage of basic trust establishes the infant's sense of both being in the world and being in society (primarily through its attachment to its caregiver[s]), identity provides the pivot between a personal and a social identity – belonging both to oneself, to one's species and to one's society. Integrity is the third core stage, accepting one's life as one's own at the same time as accepting it as one amongst others, as part of society and as part of humanity itself. What Erikson referred

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[1]The status of "*Vital Involvement*" is problematic for Erikson scholars, in a way his earlier books were not. While they often elicited severe criticism, the critics were critics of Erikson, the author and agent of his ideas. With *Vital Involvement*, it is doubtful if this constitutes a development in Erikson's thinking (Friedman describes it as "a rather flat, concrete and linear recapitulation of his life cycle model," Friedman 1999: 462). For this reason, Erikson's *Life Cycle Completed* will be treated here as his last book, but taking account of his wife's later extension and revision of it (Erikson 1997).

to as the "sense of coherence and wholeness" (Erikson 1982: 65) applies equally to the individual, his or her species being and his or her social being.

Hearn et al., in particular, indicated how the "sense of integration is both intra- and interpersonal" (Hearn et al. 2012). The perceived integrity of one's own life is viewed at this stage, not in splendid biographical isolation but in explicit relation to other lives – imagined broadly as partaking in and serving as a representative of what it is to be "human" and more particularly as what is consonant "with tales of one's cultural group" (Hearn et al. 2012: 2). Such sentiments reflect Erikson's view that integrity encompassed in its "radius of significant relations" all mankind (*sic*, Erikson 1982: 22). This notion of fusing personal and interpersonal wholeness, of a long life joining all other lives was of course central to Erikson's earlier writings. Subsequently he became disenchanted when applying such features of his earlier version of "elders" to his own peer group of "elderlies," for whom these designations of integrity and wisdom seemed now, in retrospect, "somewhat grandiose" (Erikson 1984: 160). But, by framing his developmental model as one of upward movement – of growing wisdom, reaching integrity – a peak had been reached. His wife's suggestion of yet another ninth stage, also proposed a reversal, a decline even, when the dominance of the syntonic element supporting the "growth and expansion" is reversed and the dystonic acquires "prominence and potency" (Erikson 1997: 106).

With few exceptions, however, most subsequent work on integrity has focused not upon theoretical development but on empirical examination of Erikson's model. Still in the course of what might be termed the "operationalisation" of integrity, some of these studies have sought to redefine or define more clearly what constitutes the "core" of integrity, what constitutes its dystonic opposite, despair and how these concepts relate to other factors and features of personality, adjustment and mental health. Other studies have focused upon research methodologies to elucidate the relationship between all eight stages; how each stage might be distinguished from the other stages, while at the same time demonstrating a common cumulative source of psychosocial development (or character development) over the whole life course.

The Operationalisation of Integrity

At the same time as considering integrity a quality of both intra-personal and interpersonal relations necessarily dominant in the achievement of wisdom, it is important, as Erikson himself stressed in relation to each of his "stages," to understand their negative aspects – which, in the case of later life, is the failure to achieve any sense of the "completeness" or "wholeness" of one's life, and the despair that arises from the "disappointments, failures and missed chances in life" (Hearn et al. 2012: 2). Hence, several writers have stressed that integrity should not be assessed uni-dimensionally or as the product of a uni-dimensional process that is more or less realised by the individual, but as a duality with one set of processes fostering integrity, operating alongside its opposite – the processes that are represented by and realised in despair, both necessary components in realising wisdom as the basic strength of later life (Westerhof et al. 2017: 400). Several early studies adopted the strategy of using a single measure of "integrity" to place individuals along a dimension of being more or less "integrated" (e.g. Ryff & Heincke 1983). Others adopted measures designed to assign individuals to one of several possible "integrity" statuses, basing their assessment upon a combination of responses to issues covered through semi-structured interviews (e.g. Hearn et al. 2012; Walaskey Whitbourne & Nehrke 1983/84). Others have continued to use self-report scales, measuring the individual's degree of integrity and his or her degree of despair, such as the Northwestern Ego Integrity Scale (Janis et al. 2011; Kleinj et al. 2016; Westerhof et al. 2017). Still, others have used omnibus psychometric questionnaires designed to assess all the eight "psychosocial development" indicators, such as the *Expanded Inventory of Psychosocial Development* (Boylin et al. 1976; Tesch 1986), the *Inventory of Psychosocial Balance* (Domino & Affonso 1990; Domino & Hannah 1989), the *Measure of Psychosocial Development* (Hawley 1988), the *Modified Erikson Psychosocial Stage Inventory* (Darling-Fisher & Leidy 1988) and *the Psychosocial Inventory of Ego Strengths* (Markstrom et al. 1997).[2]

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[2]This latter scale operationalised Erikson's stages differently from the others, contrasting the basic strengths achieved (for the psychosocial crisis of later life, wisdom) with the basic antipathies arising from the failure to achieve that strength (for the psychosocial crisis of later life, disdain). Unlike the other scales, however, it seems to have been employed almost exclusively with adolescents and college-age students.

Other researchers have eschewed both semi-structured interviews and self-report questionnaires and instead have adopted a life narrative approach. These researchers have either elicited written accounts of people's lives and their paths through life, which are then reviewed and the salient themes in those narratives concerning integrity and despair coded as present or absent (Pals 2006; Torges et al. 2009) or have drawn upon archival material from longitudinal follow-up of a cohort, using a system of coding to highlight themes judged to reflect key aspects of either pole in Erikson's developmental stages (Vaillant 2012; Vaillant & Milofsky 1980). Despite the open-ended nature of such methods, the resulting grading or scoring of narratives reflects other confounding factors such as the articulateness, fluency and reflexivity that respondents display in their writing, and in their telling of their lives, which risk distorting, or restricting interpretations based upon what might be called "good copy."

Given the large number of "measures" of integrity (in contrast to measures of identity, intimacy and generativity, for example), empirical research on the correlates and consequences of integrity has failed to achieve what might be called a cumulative evidence base, since each measure tends to represent a different approach (interview, Q sort, self-report, etc.) and/or a different conceptualisation. Some measures, for example, have emphasised the aspects of "wisdom," as the virtue that Erikson saw emerging from the development of "integrity," others have emphasised the "acceptance of the past," while still others have focused upon "attitudes to the future." Some have focused upon a measure of integrity as a unipolar characteristic associated with general life satisfaction (Torges et al. 2008), some on separate measures of "integrity" and "despair" (Chan & Nakamura 2016), while others have calculated a composite "resolution" score, typically obtained by subtracting scores on the negative pole from scores on the positive pole, without framing this balance in terms of the presumed wisdom that is acquired in balancing these qualities "in real life" (Ryff & Heincke 1983; Tesch 1986). Other researchers have sought to identify "narrative themes" dominating the discourses of later life concerning self-dissatisfaction, resistance, the non-acceptance of ageing, fear of death and coming to terms with or failing to come to terms with oneself, one's past and one's connection or lack of connection with others (Rylands & Rickwood 2001; Torges et al. 2009). Furthermore, most research has focused upon cross-sectional correlational analysis, which is unable

to demonstrate the emergence, rise and/or fall in individual characteristics implied by Erikson's model. Even these cross-sectional studies have not always shown the anticipated age differences that might be expected, that is, older people scoring more highly than younger people (Hannah et al. 1996; Ryff & Heincke 1983; Tesch 1986; Webster 2003).

Very few studies have reported the development of human character from adolescence into old age. Even so, most of the published research has been reasonably positive in identifying some kind of construct called "integrity" and, for those that have used such a separate measure, also of "despair" (Van Hiel & Vansteenkiste 2009; Westerhof et al. 2017). In a follow-up, a sample of college students from 1969 to 2000/2, Sneed et al. (2006) used the *Expanded Inventory of Psychosocial Development* to examine the changes in integrity, along with basic trust and ego identity. While basic trust and identity scores increased at each of the four measurement points, patterns of change on the "integrity" scales were non-linear, showing an initial decline followed by a rise which was still lower than the initial scores obtained four decades earlier. The researchers raised the question of whether such changes reflected 'period effects' rather than intra-individual development, indicating the possible rise and then fall in more "individualistic" attitudes before and after the late nineteen eighties (Sneed et al. 2012: 155). Another study employed a self-report measure to assess the "acceptance of the past" as a core component of integrity (Rylands & Rickwood 2001). The authors found that "not accepting the past" contributed "to the prediction of depression" in a multivariate analysis drawing upon the responses from residents of a retirement village in Canberra, Australia (Rylands & Rickwood 2001: 85). They argued that the failure to achieve "integrity" (judged by the non-acceptance of the past) "caused" some residents to experience mental health problems, but, of course, in such a cross-sectional study, the direction of causality is impossible to determine.

Similar criticisms can be levelled at other, more sophisticated studies, that have pursued a more or less similar strategy, correlating measures of self-reported "integrity" with mental health – albeit recognising that the two aspects of integrity (the struggle for it and the failure of achievingit) may have different correlates and consequences for mental health (Westerhof et al. 2017). Some support exists for further differentiating ego-integrity as an "achievement" into two distinct components – the development

of meaningful life purpose and the absence of life disappointment feelings, such that despair may arise from either a felt lack of meaning or a felt sense of regret or both (Chan & Nakamura 2016: 24).

Even when "integrity" is not measured by a scale but by interview, designed to assess it as a "status" rather than a "score," the observed associations with other "well-being" measures remain problematic when data on all measures are collected at the same time (e.g. Hearn et al. 2012). To give these latter authors credit, they recognise the problems in any attempt at empirically validating Erikson's concepts – whether in terms of its correlation with other measures thought likely to be causal of or consequential to the measure of "integrity" or in terms of the construct validity of the chosen measure itself (Hearn et al. 2012: 18). Studies that have adopted a "developmental" approach to test the Erikson's model by employing both longitudinal and cross-sectional measures to show that "success" in achieving earlier stages of growth (such as identity,intimacy and/or generativity) is predictive of later measures of integrity have been broadly supportive (e.g. James & Zarrett 2006; Torges et al. 2008). However, this may reflect a common core or general factor of ego development "subsuming Erikson's eight stages of psychosocial development" rather than demonstrating a specifically "epigenetic" relationship between stages (Dunkel & Harbke 2017: 74).

Problems over measurement reflect issues at the very heart of Eriksonian theory. As Hoare has pointed out, Erikson was uneasy about the reification of his stage theory model and particularly its reduction to empirical measures (Hoare 2013: 51). As a clinician, he framed development as a narrative process – a matter of becoming, not of being – that had its own inherent order, but that was always distinctively realised through individual lives lived in particular places and at particular times. His universal framework provided a hermeneutic framework through which to interrogate people's lives, but he never lost sight of the fact that those lives were always and only ever realised "in synchrony with the current times and with the society of those times" (Hoare 2013: 59). Most empirical research on integrity has focused upon reasonably well-educated late middle-aged and early old-aged persons from Western developed economies. Studies have been conducted in several East Asian developed economies, however, which suggest that although integrity may be expressed in somewhat different domains (e.g. through the peacefulness of

one's relations with the world and the quality of one's inter-generational relationships), the concept itself seems to possess meaning and relevance in those settings (Chang et al. 2008; Kim et al. 2009; Lim & Chang 2017). Whether that meaning is capable of an analytic, psychometric delineation however remains dubious.

Critique

There are limits in how far one can take the existing empirical literature on integrity, just as there are limits in how far one can take Erikson's own writings on this topic. The idea that is central to Erikson's view of integrity in human development is that people can, under some circumstances at least, grow as persons, become wiser, more understanding and feel more at peace with themselves and the world as they grow older. This is arguably an aspiration and a hope, the evidence for which can only be glimpsed in most individual lives even as it may be highlighted in some exceptional "elders" (Erikson 1975). But Erikson at times seems to imply something else – that the whole of life can be seen to lead towards the accumulation of a kind of worldly wisdom – what he calls a grand-generative, or generalised grandparenthood narrative of later life (Erikson 1984: 163). Such a position is essentially an aspiration – a wish that it should be so, a desire that it can be so, and of necessity, an anxiety that it might not be so – rather than a repeatedly verified empirical observation. Taking such an essentially moral stance towards human development is as many have noted a reflection of Erikson's own, benign and somewhat grandfatherly style as a major twentieth century figure of American letters – reflecting perhaps his own desire to be considered a wise and ethical older American – a "sage" for his time (Hoare 2000: 75).

At the same time, the longer he lived, the less it seems he was so sure. As he finally relinquished his "generative" stance, late on in his life, his views became less unequivocally benign, as he felt surrounded not by the elders to which he perhaps aspired but to growing number of elderlies instead. The positive resolution promised for old age was, it seems, slowly being overshadowed (Hoare 2002: 220). Wisdom was no longer the outcome of a long life, but a general feature of adult life; as his wife notes, as life elongates further "the dystonic elements win out" (Erikson 1997: 113). Erikson's moral aspirations were increasingly challenged. So often

criticised, because they seemed "paternalistic," reflecting a male oriented view of the life course and its directions and because they seem to be embedded in a North American context where marriage adaptation career and the raising of children constitute the basis of "the generative life" (Hoare 2002: 219), towards the end of his life he too seems to have become aware of their "grandiosity" (Erikson 1984). Perhaps he was drawing less on direct experience but on some generic, pre-modern set of ideals of later life, reflecting the equally paternalistic views of older men displaying and dispensing wisdom (Cicero 1923; Plutarch 1936).

While such views were often expressed by pre-modern philosophers, politicians or religious leaders, Erikson started off propounding something similar as a psychologist, a modern man of science. Erikson's framing of his status, not as an artist, a philosopher, politician or writer but as a practitioner of psychology and psychoanalysis echoes Freud's sense of himself as always a scientist. Unsurprising then that this has been a point of reference from which other students of human development and personality have framed their investigations seeking to define his terms operationally in order to render his model as empirically testable. Two themes become interwoven as a result: the first the more specific, that later life is a period marked distinctly by the intra-psychic struggle between integrity and despair; the second the more general, that human or personal development continues through and builds upon each successive stage of life through to and including old age. While it may be possible to demonstrate support for the latter, it may be argued that such development is neither confined to, nor expressed primarily through the achievement of "wisdom" nor realised in the struggle for "integrity" and that, as Erikson seems increasingly to have realised, these are lifelong struggles of adulthood, to be wise, to take responsibility for one's actions and, despite doubts and moments of despair, to seek purpose and meaning in life.

Although it may be the case that change is possible at each stage of life, longitudinal studies of both intellectual abilities and personality traits suggest that their stability increases progressively over time and with increasing age (Briley & Tucker-Drob 2014, 2015; Fraley & Roberts 2006). Change does not necessitate development no more than trait stability implies the absence of development. In contrast to studies focusing upon intellectual or personality traits, studies that have attempted

to measure the trajectory of the proposed stages in Erikson's model of adult development – such as identity, intimacy and generativity – have however produced mixed findings (Beyers & Seiffge-Krenke 2010; Newton & Stewart 2012; Schoklitsch & Baumann 2012; Sneed et al. 2006; Torges et al. 2009). This uncertainty is compounded by Erikson's own insistence of a "lifelong interweaving of items which develop in successive stages… [that is evident] in all previous stages …and will be revised and renewed in all subsequent stages" (Erikson 2006: 143). Erikson recognises that the themes underlying his stages of development are (1) lifelong issues, present at each stage of life, in some shape or form but (2) which become dominant at particular times in the life course. This means that "scores" can be obtained for the traits characterising each of the eight stages at any point in time, without any requirement that adults' or adolescents' must obtain higher or lower scores dependent upon their age/stage of life. Furthermore, Erikson acknowledged that their expression will also depend upon the social ethos that actualises them and the intergenerational linkages that contextualise them, so that it becomes possible to envisage secular and cultural changes in their expression.[3]

In a sense, Erikson must be right – personal qualities of whatever nature can only be realised in a social setting. Moreover, his choice of themes in adult development – identity, intimacy, generativity and integrity – seems a priori important human qualities for society. It is difficult to imagine a society where adults had no sense of identity, formed no intimate relationships, contributed nothing to future generations and felt no sense of coherence in their lives. By treating these as epigenetic stages in adulthood, however, Erikson implies at the very least that the "earlier" stages are necessary for the "later" stages to mature, while the later stages are not necessary for the earlier stages to become salient: without identity there can be no intimacy; without intimacy there can be no generativity; and without generativity there can be no integrity. In short, while Erikson assumes a "developmental ordering" of adulthood, it is difficult to "prove" or "disprove" such ordering because of the provisos he makes concerning the recapitulation, re-enactment and anticipation of each and

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[3]The work of Jean Twenge illustrates the possibility of quite marked period effects on character traits associated with social and cultural, rather than personal change (Twenge 2014).

every "crisis" across the adult life course (Beyers & Seiffge-Krenke 2010: 388; Dixon 1998). What is at stake is whether "integrity" is a demonstrable, empirical "proof" of psychosocial development in later life, capable of being distinctly shown by observed cross-sectional or longitudinal observation, or whether it is sufficient to say that it is a valid, measurable concept, dependent upon the psychometric characteristics of whatever scale, rating or features are being used that possess face validity, whose causes consequences and components are largely independent of age and stage of life. Efforts to fully operationalise Erikson's stages and to analytically model their developmental ordering might be not just impractical but unnecessary, should one conclude that their importance and interrelationships lie in their constituting key components of a generic "ego-development" or "maturity" rather than as "emergent properties" only appearing in full form in later life.

Conclusion

Erikson was aware that the processes that shape individual lives operate through both the biological and the social, even as they are, as individual lives, thoroughly psychological, in the sense of their being acted, experienced and understood by individual persons. Personality development reflects both the biological processes underlying growth, maturity and decay and the social continuities realised through the institutions of society that acknowledge, frame and support the ordering of the life course (Briley & Tucker-Drob 2014). Time place and circumstance will affect accentuate or attenuate these processes and the strength of such institutional influences, while the narratives by which individual lives are constructed will themselves be constrained by how lives can be told. What Erikson's model of development offers, perhaps, is not so much a kind of hidden truth underlying the path that lives must follow but an aspiration for what a human life can amount to. In that sense, he is as much a moral philosopher as a psychologist, a social commentator as much as a psychoanalyst who bears affinities as much with the pre-modern world as with modern traditions in thinking about the nature of human life.

   His theory emphasises development, not differences. It is as strong as his vision, and his vision was clearly affected by the circumstances of his own life, his experiences of the history he lived through and the peoples

and communities with whom he worked (Douvan 1997; Friedman 2004; Roazen 1980). Thus, his work on identity caught the spirit of the times. Just as identity politics were beginning to emerge, so his writings appeared setting forth the centrality of youth and identity as the platform from which all adult lives are built. The issues that once emerged at this "pivotal" point in development (Logan 1986: 125) never disappear, as identity continues to remain a central issue across all adult lives and arguably within and between nearly all cultures and communities (Arnett 2017; Logan 1986; Marcia 2014). At the same time, old age was not an issue, not for him, not for society, at the time he first articulated his model. The stages of adult development that Erikson outlined in the immediate post-war era are of course salient issues in most adult lives – of achieving, losing and restoring a sense of belonging and closeness, of establishing continuities over time and across the generations and of taking responsibility for one's life. The question is whether Erikson should be given credit primarily for articulating this point so eloquently or for theorising it so well – or both.

Erikson's theory is as much prescriptive as it is descriptive. It offers a narrative ordering of human development, of how to become and how to be an adult. This moral direction makes it significantly different in emphasis from theories of development that focus upon personality traits, personal adjustment or "global" well-being, even if it is thereby rather too accomodationist, individualistic, moralistic and paternalistic (Gilligan 1982; Hoare 2002; Novak 1986; Riley 1978; Roazen 1980). As such it seems doubtful if it can lead to clearly testable science, without losing its inherent narrative flexibility. Its value lies not in representing a "bio-psycho-social" pathway of adult development as the super-structural outcome of some genetic or over socialised programme directing what constitutes a valuable human life, but rather as a hermeneutic, a coherent narrative capable of rendering sensible and understandable those things of which it tells – the narratives of a life. In this sense, it highlights the importance of development as a possibility throughout the adult life – arguably a key construct underlying gerontology itself (Kivnick & Wells 2014), the importance of identity, intimacy, generativity and integrity as the key aspects of adult character and its maturation within an individual life, while offering an essentially narrative approach towards the study of human lives that recognises conflict, struggle and the operation

of influences operating beyond those of which we are conscious (Hoare 2013).

Rather than insisting upon each of a measurable, stage-like epigenetic emergence of these phenomena within an individual life, it is possible to envisage them as central features whose precise contours vary over time and place. As such, they may emerge and re-emerge at various points in various forms in an individual's life. In that sense, those researchers who have explored the multi-dimensionality of these stages, or statuses, provide a valuable corrective to more uni-directional, uni-dimensional approaches to adult development. What is most important, perhaps, is the acknowledgement that reaching reproductive fitness or biological adulthood is not the end of human development and that longer lives if nothing else may provide wider arenas for the play of such development. But whether later life provides a specific arena that is in some way necessary for the development of certain qualities like "wisdom" seems much more debatable. Even Erikson later in life would acknowledge his earlier over-egging of this virtue, subsequently de-centering its position as the stage-specific outcome of the psychosocial crisis of later life (Hoare 2002: 185).

Accepting that the concerns evident in later life may be evident at earlier stages of adulthood and that many earlier concerns over identity intimacy and generativity may reappear in later life, these core issues in Erikson's theory of adult development remain valuable. Among various options are the recognition that personal development may continue to take place throughout adulthood, that much of that development hinges upon issues of identity, intimacy, generativity and integrity, that these issues address central concerns of growing up, of maturity and that they are sufficiently universal for there to be collective narratives, rituals and structures that make sense of and provide social imaginaries for such achievements (Arnett 2017).

The fact that, of all the stages of life, old age is currently undergoing the most rapid social change with more people living through it in more diverse ways and under more diverse circumstances, suggests that the forms taken by any later life "developmental" processes may be particularly fluid. As such, they deserve equally fluid modes of inquiry. Rather than being constrained by ordering and operationalising Erikson's

model, or insisting that old age has a distinct or particular meaning or purpose relatively undeveloped and unexpressed earlier in adulthood, the best way of realising his legacy might be to develop a greater diversity in our explorations of adult character. In so doing, we should bear in mind the three dimensions that Hoare felt were all too often missing from research in this area – the unconscious, the existence of negative attributes and the fluidity of society – that Erikson did not (Hoare 2013). This is perhaps as much a moral imperative for ageing studies to embrace as any insistence upon clothing old age with some more singular virtue.

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Using a life course perspective to understand early labor market exits for people in their late 50s living in the UK

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Abstract

This paper explores the reasons why people exit the UK labor market early and some of the barriers working against them returning. The specific focus is a qualitative exploration of three out of work individuals, approaching the age of 60, each of whom had experienced poverty and periods of worklessness during their lifetime. The fieldwork took place in 2016 and was part of a wider mixed methods study about retirement, which used data from the 1958 birth cohort study. Researchers used narrative interviews to uncover the lived experiences and realities of these three people's lives, and applied a life course perspective to understand how the accumulation of advantages and disadvantages during their lives shapes their attitudes and expectations. The data also show the effects of money, health, and previous employment on their decision making, and how structures such as social class, gender, and poverty are represented in and through the stories they tell.

Keywords: labor market exits, barriers, retirement, life course, narrative, agency.

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Introduction: Context and Background Literature

Leaving the labor market is often a complex process and has profound consequences for the individuals involved. This decision can be made either voluntary or involuntary but sometimes the act can happen almost subconsciously as a gradual realization begins to dawn on a person that they are unlikely to work again.

With the impending retirement of the late baby boomer generation, improved health outcomes leading to generally increasing life expectancy, declining birth rates, transformations in work resulting from globalization, and continuing budget restrictions due to the financial crisis of 2008, the current policy in many industrialized countries has moved away from promoting early retirement to an emphasis on extending employment (Fleischmann et al. 2013), and creating more "active ageing" (Formosa 2014; Hamblin 2010) and "fuller working lives" (Foster 2018; Hofaecker et al. 2019; Hovbrandt et al. 2019; Phillipson et al. 2017). Although Phillipson et al. (2017) maintain that many of the policy reforms in the UK from the last 15 years or so have lacked coordination and coherence, a central pillar of the government policy has been driven by the need to mitigate concerns in the business community and avert a feared pension catastrophe that has the potential to threaten the viability and sustainability of the welfare state itself (Brown & Vickerstaff 2011; Esping-Andersen 1996). For these reasons, studying people's early exits from the labor market and investigating aspects of working life that motivate older workers to keep working are highly relevant and urgent (e.g. Ekerdt 2009; Hovbrandt et al. 2019), and have become a central concern to policy makers, pension program calculators, and researchers working in the fields of gerontology, associated health studies and labor economics. Of course, another way of looking at these attempts to prolong working lives is that governments of all political persuasions need to try to prevent, or at least make it more difficult, for people to leave employment prematurely. Many countries have already raised pension ages or have legislated increases for the future (Organization for Economic Co-operation and Development 2017), and in the UK it is currently 66 years, and by 2028 it is planned to reach 67.

In the UK, as well as in Europe (e.g. see Komp et al. [2010], there has actually been a notable increase in the number of people in employment, aged 50 years and over, during the last two decades: at the time of the

research reported in this paper, in 2016, the employment rate for the people aged 50–64 was 71%, which was 13 percentage points higher than the rate 20 years ago (DWP [Department for Work and Pensions] 2017). In terms of when people leave employment, there has also been an upward trend in the average ages, although this has only recently returned to the rate last seen in the 1970s (DWP 2017). At the beginning of the century, men left employment at an average age of 63 and women at 61, but by 2016, this had risen to an average age of 65 and 64, respectively (DWP 2017: 14). However, Phillipson et al. (2017) maintain that, although retention rates of older workers in their jobs may have improved, prospects for recruitment to new jobs for this age group continue to remain poor. Moreover, over half of the men and women were not in work in the year before reaching State Pension Age (SPA) (DWP 2017), and one in four men and one in three women had not worked for 5 years or more before SPA; there were also almost 1 million individuals, aged 50–64 years old, who were not in employment but say that they are willing to, or would like to, work (DWP 2017: 7).

In the majority of the industrialized countries, the traditional three-phase life course chronology of education, work, and retirement (which is particularly applicable to men) has been slowly transformed (Evans, Schoon & Weale 2013), and exit patterns from employment to retirement have become increasingly heterogeneous and fragmented (Hallerod et al. 2013). We maintain that the reasons why individuals leave paid employment are numerous and complex, and frequently overlap. Whereas rational choice models that underpin many policy assumptions presume that people will carry on working if they cannot afford to retire (e.g. Beehr 2014; Brown & Vickerstaff 2011; Quinn et al. 1990), contend that this is only a small part of the story and that the expanding literature on this area has settled around five main influential, and typically interdependent, factors or variables: in addition to financial status, there are health, decisions of partners and/or close family members, caring commitments and job satisfaction. However, as Ragin (1999) and Brown and Vickerstaff (2011) point out, there is a "causal complexity" (531) in the interaction of these variables, where seemingly similar circumstances amongst people (such as poor health) can lead to very differentiated outcomes. For example, Brown and Vickerstaff (2011) argue that structural variables (e.g. of

social class) do not necessarily need to have such an overwhelming impact on people's lives. For example, while there may be an association between social class and levels of social and cultural capital and empowerment, some people will be able to have a greater level of agency than others because they are able to develop coping skills and strategies, perhaps through social networks and other support systems such as from family and friends. Greater economic resources may also enable agency to become more affordable and lead to greater levels of empowerment.

There is relatively little research on how physical challenges at work influence labor market transitions of older workers, especially near retirement ages, but using US data from the Health and Retirement Study from 1992 to 2008, McLaughlin and Neumark (2018) suggest that recent policy changes intended to delay retirements of older workers and extend their work lives can run up against barriers owing to rising physical challenges of work as people age. Hazardous and adverse physical working conditions are concentrated in some male manual occupations, which are also associated with more unhealthy lifestyles (e.g. smoking, diet quality, and alcohol consumption). They argue that, although some older male workers with physically demanding jobs are able to mitigate the challenges of their jobs – either at new jobs or with the same employer – many are unable to accommodate the demands.

Some of the other main barriers that limit late employment prospects, and the likelihood of working up to SPA, are poor qualifications and lack of skills training (Lain & Vickerstaff 2015). These are particularly prevalent amongst the poorest sections of society (Radl 2013) and are a notably acute problem when these individuals are competing in the labor market against younger people who have more qualifications and up-to-date skills, and are more confident to attend training. Disproportionate numbers of them are working, or will have worked, in "Lopaq" occupations: "typically low paid, part-time and requiring few qualifications" (Phillipson et al. 2017: 7), and echoing the point made by Lain and Vickerstaff earlier, these jobs are also likely to provide fewer prospects for in-house training or progression in, for example, new technologies.

Recently, academic researchers from Europe, the UK, and the US have drawn on a number of large longitudinal data bases and have used quantitative surveys to investigate questions about early exits. These have highlighted a number of reoccurring themes, such as workers' motivations for

early exits (Du Prel et al. 2019); the effects of poor physical health and wellbeing (Ebbinghaus & Radl 2015); physical limitations on early exits (Leinonen et al. 2018; McLaughlin & Neumark 2018; Stafford et al. 2017); and mental health, in the form of anxiety and depression, (particularly for women) (Rudolph & Eato 2016); and low cognitive performance in the 50s as an indication of early exits (Stafford et al. 2017).

Brown and Vickerstaff (2011) argue that some of this previous research about early exits, that has used quantitative surveys, can treat some factors (e.g. health) as being "straightforward," "objective," or "independent" variables and cautions against overlooking more subjective experiences and expectations. Qualitative research (e.g. Smeaton et al. 2017) allows researchers to explore the nuances and subtleties of the decisions individuals take – including emotional factors – and their expectations about whether to either continue to work, look for work, give up work for a short period, or retire completely. Brown and Vickerstaff (2011) argue that policy debates around extending working lives and deferring their retirement will be much more successful if they are able to recognize how individuals construct narratives about their situations, including their reasons for exiting the labor market and expectations formed from their previous experiences over the life course.

Following the injunction of these researchers, this paper explores the reasons *why*, rather than *when*, people have exited the labor market in the UK, and the barriers working against them returning. The specific focus is a qualitative, in-depth exploration of three older workers, approaching the age of 60. The researchers use narrative methods to uncover the lived experiences and lived realities of these three people's lives, and also apply a life course perspective (Elder & Giele 2009; Elder et al. 2003) to analyze and understand how the accumulation of advantages and disadvantages during the life course, and the contribution of various experiences, affects, and shapes attitudes, and the expectations and decisions that these three have made and are making.

Methodology

The fieldwork for this paper was part of a wider mixed methods research study about retirement (Carpentieri et al. 2017), which was funded by the Joseph Rowntree Foundation. The research used data from the 1958 birth

cohort study (also known as the National Child Development Study or NCDS). Following the lives of over 17,000 people born in a single week, the most recent quantitative sweep was in 2013, with 9,137 individuals aged 55, and included specific questions about cohort members' attitudes toward retirement and, for those still in work, their expectations of when they might leave the labor market.

The original mixed methods study (Carpentieri et al. 2017) was quantitatively based on cohort members who had answered these questions about retirement, and, qualitatively, on interviews with a subset of 36 of these individuals, who aged 58 at the time of the fieldwork, in 2016. One of the main themes investigated in the quantitative research was the effect of poverty on retirement attitudes and expectations, and a subset of 36 participants was purposively chosen for qualitative research because they had reported experiencing low pay, and/or poverty, at the ages of 50 and 55. Being poor at any given age was defined as being in the bottom 20% of the income distribution *within the cohort* (rather than being referenced against a national poverty line). The sample was geographically divided: 19 interviewees lived in the South East of England, including London, and 17 lived in the North. The gender split was 50–50. While 25 of the 36 were further purposively selected because they were still in work (mainly in relatively low-paid and low-skilled jobs and categorized as *the working poor*), the other eleven were chosen because they had exited the labor market and out of paid employment. It is from this eleven that we have decided to focus on three individuals in order to carry out greater in-depth analysis of their narratives than would have been possible with eleven. The three cases were generated inductively from the empirical data and represent a particular, or distinct, type that represents stories from the sample of eleven.

We are aware that this approach can never fully capture the heterogeneity of the qualitative interviewees' responses from the sample of eleven, yet alone the stories of those from the thousands in the wider quantitative survey who were out of work, and for instance, no one from the eleven had been made redundant from their workplace. Nevertheless, we believe that each of the three individuals represents a distinct and particular story that is typical and commonly found amongst people from similar economic backgrounds and who are unemployed as they approach the age of 60. While we are not claiming them to be representative of a possible

wider population, we are regarding the three stories as being "telling" cases (Candappa 2017), which allow us to draw out concepts and theories from the cases. They can also be viewed as "revelatory" cases (see Liebow 1967), where researchers are able to gain access into the daily lives of relatively poor people approaching 60 and provide important insights into why they have left their employment, and the barriers preventing their return, so stimulating further policy action, and allowing researchers to develop hypotheses that can potentially be tested using quantitative data sets, such as those of the NCDS.

Although the cases vary in that they consist of one woman and two men, two from the north and one from the south of England, all three individuals were white British, the same age of 58, were living alone in a rented accommodation, had poor to moderate physical health concerns, and all had experienced poverty and periods of worklessness at some point in their lives. One woman (Anne) wanted to work but was unable to find a job; one man (Mark) did not want to work and was content to continue living on meager financial resources without seeking paid employment; another man (Lewis) had retired because the work on offer was so personally unfulfilling and had no plans to reenter the labor market. If we were to try and further categorize these three people, we would say that the first individual was a person who is *desperate to be employed and is looking for work*; the second *can get by living without being employed and is not looking for work*; while the third *has retired and will not work again*. However, these typologies also reveal a series of smaller, or micro, stories, which enable us to highlight and discuss particular issues. For instance, the age discrimination that Anne faced as she realized that many firms and organizations prefer to employ younger people, who they can pay less, or the difficulties she encountered because she could only offer to work for a limited number of hours due to her child-caring responsibilities.

Three experienced researchers interviewed the participants, face to face, in their own homes. The interviews not only were semi-structured, which provided a topical framework, but also gave the interviewers the flexibility to probe on certain issues with more open and follow-up questions. This meant that, although the interviews were relatively structured, in the sense that there were a designated series of main questions that every interviewee was asked to respond to, the questions were not necessarily asked in the same order, and people were also given the freedom

to talk about, and elaborate on, other connected areas if they wanted to. Two interview schedules were developed: one for interviewees who were in paid employment, and one for the eleven who had existed the market. The interview schedule for the eleven was divided into eight areas of enquiry: in addition to asking questions about why they were not in the labor market, questions also collected demographic information and data on their general health, history of employment, their feelings about growing older, leisure interests, caring responsibilities, and their financial situation. The average interview time was 90 min, and all data were all digitally recorded and transcribed. The participants have been given pseudonyms, and any identifying features of their stories have been suitably anonymized.

We utilized narrative analysis (Riessman 2004) to identify and investigate the potential significance of stories that the interviewees told us. Cohort studies, of course, inherently contain some narrative properties: they enable researchers to follow individuals' lives through time and allow for the estimation of models that focus on how earlier life experiences and environments may impact on later outcomes (Elliott 2005) – for example, the ways in which the experience of poverty over the life course may influence why they have chosen, or been forced, to exit the labor market early. The most concise definition of narrative is a story with a beginning, a middle, and an end; however, a successful narrative is more than just the chronicle of events that is found in the data from surveys such as the NCDS, and Labov and Waletzky (1967) have argued that a defining feature of a typical narrative is that the teller does not just list events or actions; he or she interprets them. Narratives can thus be seen as a powerful and useful tool for exploring the *meanings* of events and experiences from an individual's perspective, and for improving researchers' and policymakers' understanding of individuals' attitudes, plans, and expectations regarding themes such as why particular people are outside the labor market in their late 50s.

In order to make sense of these interview data, we used a type of thematic analysis called a hybrid approach (Swain 2018), which incorporates the two main contrasting philosophical methods of reasoning: a top-down, deductive, theoretical process and a bottom-up, inductive, data-driven process. The former produces a set of a priori (or pre-empirical) codes that come from the research aims and questions, and individual

interview questions, whereas the latter approach results in a series of a posteriori (post-empirical) codes that derived from an examination of data generated.

In other words, many of the a priori codes were known to researchers before the first interview began. For example, *living accommodation*, *health*, *employment history*, *financial resources*, and *reasons for early exits* would already all be listed because interviewers were tasked with asking specific questions about these areas or themes.

On the other hand, it was much harder to foresee the a-posteriori codes that began to emerge as we read through the interviews transcripts on the completion of the fieldwork. Some of these codes that were created included *death of partner*, *lack of training*, *contentment with life*, *volunteering*, and so on.

Theoretical Perspective

The Life Course

The theoretical approach we use in this paper is the life course perspective. Although there has recently been an increasing emphasis on using mixed methods, the majority of similar studies using life course theories (e.g. about a stage of retirement) have adopted quantitative methodologies. Despite there being no unified theory of the life course, it contains four common perspectives or principal themes (Elder 1994; Heinz et al. 2009; Settersten 2003): (i) individuals' lives follow trajectories that are situated in a specific historical time and place; (ii) the meanings and consequences of their lives are affected by the timing and nature of transitions and key events; (iii) lives are socially connected to, and interdependent with, other key people; and (iv) people have a degree of agency to make choices and form plans, although they live and operate within structural constraints.

The life course contains a series of long-term identifiable pathways called *trajectories*, such as education, employment, and family, and short-term *transitions*, which occur within trajectories and are biographical milestones that produce changes in status, ranging from, for example, leaving school, beginning work, to retiring. One of the principal concepts of the life course is that the later years of a person's life cannot be fully understood without knowledge of the prior stages (Elder 1994): for example, the repercussions

of choices made in early adulthood can be seen in the forms of economic resources people have accumulated, the skills and the attributes they have assimilated, and the activities they pursue in their later years.

Similar to transitions are *key events*, which can also become *turning points* (Verd & López 2011). These are more akin to "biographical disruptions" (Verd & López 2011) or "discontinuities", (Settersten 2003) and can lead to moments of significant change. However, rather than being seen as single events, they need to be understood more as processes, and they can be positive (such as finding a new job or a partner) or negative (such as losing a job, a divorce, or experiencing a serious health issue). The extent to which a turning point leads to a loss of personal control is contingent on the amount of preparation a person has made, as well as the nature and severity of the change (Elder 1994).

Because lives are socially connected and lived interdependently, these events will often involve changes in other people as well, and so, along with key events, there may also be *key people* who can have a profound influence on individuals' lives. These include, not only family members and partners, but also special friends, employers, teachers, and so on, and, for some people, figures in the media. Key people and key events will also often overlap and can be difficult to disentangle, and they will also often be connected to linked lives: for example, a divorce will involve a key person (their partner) in a linked life, which may also then take on the status of a key event.

As we have mentioned earlier, one of the central principles of the life course has been the agentic concept of individuals being able to shape, or have a major influence on, their own trajectory (Elder & Giele 2009). Although personal *agency* can be difficult to both define and/or identify, we are using the term to mean the capability and degree to which individuals are able to act or "exercise control" (Bandura 2001:11) over events and situations. Any understanding of human agency begins with a recognition that the life course is affected by multiple influences such as macroeconomic conditions, institutional structures (e.g. social class) as well as acquired attributes, dispositions, and individual resources such as motivations and aspirations (Evans & Biasin 2017). The degree of agency an individual is able to invoke is also affected by their access to other resources such as financial and social capital, and this means that the implications, or consequences, of a key event/turning point (cited earlier) will be different for different individuals.

We also recognize that the decisions people make are affected by the past, present, and future (Emirbayer & Mische 1998; Heinz et al. 2009). This means that there is a great heterogeneity in the amount of choice and agency that individuals have in their decision to exit the labor market and how permanent this state remains. The structural factors that are likely to be particularly influential are socio-economic status (Komp et al. 2010), including financial status and poverty (Banks et al. 2005; Scales & Scase 2000) where, for example, those on lower incomes (and who are likely to have lower pensions and savings) are much more likely to be forced to continue working for financial reasons and not be able to exit the labor market early, at least voluntarily. Gender is another factor, and the differentiated experiences of men and women approaching retirement have been increasingly understood (Vickerstaff & Cox 2005). Women often confront their retirement years with different amounts of economic, social, emotional, and physical capital than men (Moen 1996), and changing family responsibilities means that they commonly experience less stable employment histories; more women move in and out of the labor market, often in part-time jobs, and consequently, they can therefore expect a lower income from a state or work-based pension. Another important factor is health (Banks & Smith 2012), which is further complicated because the health of a spouse, or of a significant other, may also have a dramatic effect (Carpentieri & Elliott 2014). These structures mean that the three individuals in this paper may have a limited scope for agency.

Three Case Studies

We begin this section by introducing the three interviewees as a series of vignettes.

- A woman who liked, and wanted, to work but was, for a variety of reasons, unable to find a job – *an involuntary exit: wants to work*
- A man who did not want to work and was content to continue living without seeking paid employment – *a voluntary exit: does not want to work*
- A man who has retired because he finds the work on offer unfulfilling and has no plans to re-enter the labor market – *a voluntary exit: has retired*

Anne: *Desperate to Be Employed and Is Looking for Work*

Anne had been living alone for the last 5 years in rented accommodation in a small town in the north of England. Although her mental health was sound, she had suffered a number of physical health problems over the past few years: "I've got bad knees, I've got bad hips, just everything," and at the time of the interview, she was waiting for an operation on her back. Her husband died 10 years ago and she found it very difficult to cope. "I didn't want to carry on – I wanted to give up life." She could not bear to live in the same house and so decided to sell it, give the proceeds to her two grown-up children, and move a few miles to the town where her siblings lived, and in which she now resides. She spends a lot of her week looking after her two granddaughters, including taking them to and from school.

Anne left school at the age of 16 with relatively poor qualifications. She worked for nearly 20 years as a chef, but after leaving because of her back problem, she was employed in a variety of roles by a major supermarket. She has a strong work orientation, and maintained that she has "loved every job I've had because I just like to work," pointing especially to the routine and social aspect of employment: "I like talking to people I totally miss it." Her last part-time job on the supermarket checkout had been organized around looking after her grandchildren before she was unable to continue due to ill-health.

After being briefly in the receipt of disability benefits, she was reassessed as being physically capable of work for less physically demanding work. In order to continue receiving benefits, Anne was required by UK law to actively and regularly seek paid employment, spending, on average, 20 h a week on a computer looking for a work.

She found her dependence on government assistance to be:

> *Upsetting to think that you've come to this, you know, in your life. You don't really want to be on the dole [government funded unemployment benefit], you don't want to be unemployed. [But] sometimes your body puts you through these things and it's annoying and upsetting. I could still be at work, if it wasn't for my health.*

She did not regard herself as being retired, or near retirement: "I've still got eight years left!" Although she would lose out financially by working, because the majority of her rent would not be paid by government benefits, she was currently looking to get back into part-time work. However,

her lack of qualifications or up-to-date training, her poor health, and the scarcity of locally available work were making this extremely difficult. Sometimes, she recalled, there "could be 200 people going for one job." She had had some interviews but confided that she just could not get the hang of "these modern application tests": "I'm too old now." What she wanted, she affirmed, was to find a job, work to retirement age, and then become "an honest retirer instead of being an unemployed retirer."

Apart from her benefits, she also received a small, monthly pension from her deceased husband's pension scheme. Money was tight but she appeared to be able to get by, although she could not afford to go swimming or have an evening out with her friends in her old town because there were no evening buses and she could not afford a taxi back. Her main worries were her health, which she felt was going to get worse: "as I get older I'll struggle more, I think."

Mark: *Can Get by Living without Being Employed and Does Not Want to Work*

Mark was living alone in a small northern town and, at the time of the interview, had been out of work for about 4 years. He was not in good physical health and also had mobility issues:

> *I've got what they call rolling knee, so I've had problems with my mobility, especially carrying things. So like even going upstairs and stuff and things like that I'm in pain all the time. I take painkillers four times a day for it, and I'll be on them the rest of my life.*

He was worried about his health: his brother died of a heart attack in his early 50s, and both his parents died of a cardiovascular disease in their early 60s. Mark also has memory problems and, for example, has trouble in remembering people's names or the ages of his grown-up children. He says he finds learning difficult, particularly when it concerns technology.

In many ways, Mark appears to have had a difficult, and sometimes, unhappy life. He has had two marriages, from which he has had five children, although one died at a comparatively young age. He only sees one of his children, but not on a regular basis, and he has no close friends or relatives.

He left school at 16, with poor qualifications, to join the army and has also worked in the steel industry, in a factory, and as a security guard.

Most of these jobs have been physically demanding and, for most of the time, he has not enjoyed them. He said he left his last job because he could not afford to renew his security license. He has had two spells of lengthy unemployment, which has meant that over the course of his adult life he has been out of work almost as long as he has been in work.

One might think that he may be depressed, but he expressed that he was very satisfied with life in general, and was feeling optimistic about the future. Until recently, he lived with his second wife and one of his daughters, but he now lives alone. He did not get along with his wife, who, he felt, dominated him, which included her looking after his finances, but he now feels in control of his life. He has no caring obligations for older or younger people.

He was receiving a modest income, but his rent and most of his utility bills were being paid from his Jobseeker's Allowance (a government benefit). He has a small pension from his job as a steel worker, which he took at 50, and from which he is able to save a few pounds most months. He confided that he never wanted to own a property as this would come with too much responsibility. He has low aspirations and expectations and is satisfied with a few material belongings. He does not have a TV, rarely drinks alcohol, and spends very little money on food. He has never had much money anyway and so claims he does not miss it.

He was currently volunteering 5 days a week in a local charity shop, which has given him social access to a group of working people and a sense of purpose and routine. He has also gained confidence from feeling needed by the shop. Mark says that he does not regard himself as being retired, declaring: "*I'm definitely not retired. I would say I'm just not working.*" He says – perhaps rather typically of many others – that he does not enjoy taking "the benefit payments"; he is interested in working again, and would like to work on a full-time basis, although, due to his poor health, he recognizes that his employment options are restricted.

Lewis: *Retired and Will Not Work Again*

Lewis was living alone in a small rented flat in a town in the south of England. He was friendly but admitted to being "a loner and always have been" and enjoys living by himself: the thing, he says, that means the most to him is "peace and quiet." He has no real friends but is very self-contained, and ensures that his life has a built-in structure that includes daily

walks and coffees, and regular visits to the library. Although his mental health is fine, he developed diabetes in his 30s and anticipates that his health will increasingly deteriorate.

He is the youngest of four siblings; he has never had a cohabiting partner and has no children. He left school at 17 with some basic qualifications and his main career has been in the civil service at a junior level, where he worked for almost 30 years. Around the turn of the century, he was working in London, but he opted to take a career break to move to, and look after, his mother, who had dementia, near the town where he now lives. ,When she died 2 years later, he decided to give up his job and stay in the area permanently. He had also bought a flat near the Olympic site in London but sold it a year or so before the decision was made to award the Olympic games to London. He regards this as his biggest financial regret as he could have acquired a lot more money if he had waited: "Having your own flat in east London or that part of London at that time would have just been like winning the Lottery, quite frankly."

Subsequently, he found it difficult to gain employment in professional and/or stimulating jobs, blaming the fact that he was regarded as being too old and "the wrong gender," and he ended up taking a series of low-skilled, low-paid jobs in the private sector, such as in call centers. After spending so long working in the public sector, he also found it difficult to adjust to working for private companies: "There's something the private sector wants from you which with me isn't for sale." He also recalled that "I just felt unwanted," working in jobs he did not believe in. After becoming increasingly disillusioned, he decided to take his civil service pension 3 years early and retired in 2015, aged 57. He was not receiving any state benefits and has no intention of working again.

His main worry is his physical health, and also, to a lesser degree, his finances, although he says he has enough money to "get by" on the modest lifestyle he lives. "I'm not rich, I'm just not poor… I just cut my cloth, you know… I don't drive, I don't smoke, I don't have any dependents, I don't have a great social life… I'm very low maintenance."

Summary of the Three Case Studies

Before we present our analytical discussion, we begin by providing a descriptive summary of the three interviewees' background circumstances, attitudes, and personal feelings in Table 1.

Table 1. Summary of interviewees' background circumstances, personal resources, and views about retirement at the time of interview

	Anne	Mark	Lewis
Health (physical and mental)	Physical: poor Mental: good	Physical: poor Mental: poor	Physical: fair Mental: good
Financial resources – enough money to live on	Meager. Has a small pension from her husband and receives limited state benefits. No savings	Meager. Has a small pension from the steel industry but at the time was currently receiving state benefits. No real savings	Enough for a relatively frugal lifestyle. Does not receive state benefits. Small amount of savings
Possible financial windfalls	None	None	Possibly some from one of three other siblings but he is not expecting much
Employment trajectory	Two main jobs: chef and working in various posts in a supermarket	Four jobs: soldier, steel worker, factory worker, security guard	One main career: job in the civil service. Has had a few low-skilled, low-paid jobs in the last 10 years
Home ownership	Rents privately	Rents in sheltered accommodation	Rents privately
Partnership status and family composition	Lives alone after partner died. Has a grown-up son and a daughter. Looks after her daughter's two children when she is at work	Has a partner but lives alone. Only in touch with one of his four children	Never had a cohabiting partner. No children. Has three siblings

(*Continued*)

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Table 1. (*Continued*)

	Anne	Mark	Lewis
Dependents	None but helps out with granddaughters	None	None
Social networks	Has friends but few live nearby	No real friends	No real friends
Level of education	Left school at 16[†] – low qualifications	Left school at 16 – low qualifications	Left school at 17 – basic qualifications
Thoughts about retirement – timing	Wants to work to SPA	Says he has not, but is effectively retired	Has retired and does not intend to work again
Financial regrets	Selling her house when her husband died 10 years ago and giving the proceeds to her two children	Handing over financial decisions to both wives who took advantage of him	Selling a flat near the Olympic site in London before the city was chosen to host the 2012 games
Main anxieties	Health, finance, and not being able to find work	Health and finance	Health
Life satisfaction at time	Partially satisfied	Very satisfied	Partially satisfied

[†]Sixteen was the lowest legal age that a pupil could leave school in the UK at that time, during the mid-1970s.

Analysis and Discussion

Our analysis shows how we apply some of the main paradigmatic features of the life course, which we set out earlier, in order to develop our understandings about how and why particular individuals have exited from the labor market, 8 years before SPA. Although we regard their exit from the market as being a transition, as so much data about transitions are either missing or too speculative, the headings we use to organize our discussion are (*employment*) *trajectories*, *turning points*, *key people and linked lives*, and *agency*.

(Working) Trajectories

In this section, we focus on the interviewees' working trajectories, which have been a central part of, and helped to structure and organize, their lives (Henretta 2003). Two interviewees left school at 16 and their lack of qualifications has meant that they have had a limited range of career options, which continues to have repercussions in their later lives and future years. Both have worked in jobs which have been relatively low-skilled and low-paid: Anne has had two main jobs, while Mark has had four main jobs, three of which have been physically demanding and have taken a toll on his physical health. Although Lewis only stayed on at school for another year, his higher range of qualifications gave him more choices of career and he has spent the majority of his working life in a professional job, which has given him a stability. The series of uninteresting, low-paid jobs that he worked in after leaving the civil service were a factor in his decision to retire early.

The history and trajectory of these three adults' working lives has had a major effect on their financial resources, which, in turn, has affected the type of life they are leading and would wish to lead, the accommodation they live in, and on their aspirations and expectations for the future. Lewis has the greatest amount of financial capital, which he has accrued by working for a considerable part of his working life in the state sector: this has provided him with a work-based pension, which, as we will see later, gives him more options or agency to either return to work or decide to retire completely, which he has done. All three are relatively poor and none own their own property: Anne and Mark receive state benefits,

which pay for their housing, while Lewis' rent is covered by the income he earns from his work-based pension. Although Mark also receives a work-based pension from the state-run steel industry, the small number of years he spent working means that the amount is negligible.

Key Events

We can see that all three have experienced key events and turning points that have disrupted their lives and have had profound consequences in the succeeding years. Poor health has affected each of them and continues to do so: Anne's physical disability has been a contributory factor in losing her job, first as a chef, and also in her struggle to reenter the labor market, while Mark's knee problems have also severely restricted his employment options. For Lewis, the discovery that he was diabetic in his 30s has resulted in a loss of confidence about his health, which he expects to slowly and inevitably deteriorate and has possibly affected any ideas of long-term planning for the future.

As researchers, we acknowledge that it can be difficult to judge when a particular event is deemed to be "key," and sometimes the consequences or repercussions of an event (e.g. the death of a close associate) may not become known for some time in the future. Researcher's interpretations invariably involve a lot of speculation, and a researcher's and participant's idea of whether an event is a turning point may not always be the same. Moreover, as we will see later, some of these turning points can have positive as well as negative consequences and repercussions over a longer time span. It would seem, though, that the death of Anne's husband around 10 years ago and the loss of her job at the supermarket due to ill health have been the key events. The earlier details of Mark's life are rather unclear, and we do not know enough about his first divorce or the death of one of his children, or brother, to know their effects. It is too early to tell whether leaving his wife recently and setting up home on his own will turn out to be a turning point but it seems likely it will, and it has certainly led to higher levels of contentment. For Lewis, the ill health of his mother meant that he gave up his job as a civil servant and he moved to be near her so he could look her after; while his decision to sell the

property he owned in London near the Olympic site, just before London was awarded the Olympic games, means that he is less financially secure.

Key People and Linked Lives

As we have seen earlier, many of these events have involved relationships with key people, although it can be difficult to tell whether an individual can, or should, be judged as being a key influencer in a person's life, and, like turning points, we will often need time and the benefit of hindsight. Key people are also connected to the theme of linked lives. Only Anne had a network of close friends, although most of them lived in the town where she had moved from and she no longer saw them on a regular basis; the two men had no intimate friends that they met with or could confide in. Although Mark had four children, he had lost contact with three of them and only saw his daughter infrequently, while, although Lewis had siblings, he did not describe them as being emotionally close.

Both these individuals also exemplify the point that solo living is becoming more common across many parts of the world, particularly for men, and that single men are more likely to be socially isolated than women (Klinenberg 2012, 2016; ONS 2019a; Snell 2017; Vandervoort 2000).

As far as linked, lives are concerned none of the three was living with a partner, and none had dependents. Anne's life was currently intertwined with, and enriched by, her two granddaughters and the main person in her life was her daughter. However, although Anne loved caring for her granddaughters, the fact that she needed to be available for the school run in the morning and afternoon also meant that her potential hours of employment were restricted.

Agency

Underpinning all of these themes is the concept of agency, and the level of current agency each interviewee has is affected by the past and present key people and the key events we have identified earlier. Agency is also conditional on the resources a person is able to access (economically, socially, physically, emotionally) – which in turn is linked to their personality, habits, and dispositions, which have been formed over the life course.

This further illustrates how people's current plans and expectations are often based on past experience and future anticipations (Heinz et al. 2009).

If we consider the degree of agency each is able to express in terms of their ability to reenter the labor market, we can see that Lewis has the greatest level and therefore more capacity to do so. This is because he has the highest level of qualifications and a track record of steady employment in a professional job. However, ability and desire are two different things and his work-based pension gives him the financial capital which has allowed him to choose not to work anymore, and so he has more control of his life, at least in terms of not needing to seek paid employment. Both Anne's and Mark's agency is constrained by their poor health and their lack of skills, which have not been updated to include using new technologies. This is not to say these two have not demonstrated they have agency in other areas of their lives: Anne has made the choice to look after her granddaughters, while Mark's recent decision to leave his wife and set up a home independently, plus the fact that he has chosen to carry out voluntary work shows that he has the capability to act and exercise some control over his life.

Conclusion and Discussion

This paper has focused particularly on three people, aged 58, who had, for various reasons, left the labor market at least 8 years before the SPA. Each of these three represents the three possibilities of exiting that we wrote about in the first few lines of the paper: Anne has left employment involuntarily but wants to work; Lewis has left voluntarily and will not work; while Mark, who also left voluntarily, does not want to work and is gradually realizing that he will not work again.

As late baby boomers, their expected increasing life expectancy has made them subject to close policy attention and significant pension and employment reforms, and we maintain that finding out their reasons for not working and the barriers preventing them returning to work are particularly worthy of attention to policy makers and academics. Moreover, we also feel that it is particularly important to study those who have been, and still can be *characterized* as being, *the working poor*, most of whom have less financial capital, or resources to live on, but despite being more likely to suffer from poor health, often need to work longer to avoid an insecure

retirement. Taking the view that people's choices are based on a series of often intricate and overlapping factors is very different from the more simplistic rational choice models that assume people will need to continue work if they do not have enough money to retire. These models are used to understand the moment of exiting the labor market by studying individual's financial resources (Beehr 2014), but they tend to miss the complexity of people's lives and dispositions, including, as we have seen for example, the more seemingly subjective and irrational decisions people make based, for example, on emotional influences and ties.

In this paper, we have used a life course approach to try to explore and understand the reasons why these three individuals have made the transition to exit the labor market, and this is because, we argue, the later years of a person's life cannot be fully understood without the knowledge of the prior stages of the life course. These three are representatives of wider narratives typically found amongst this age group and from similar financial backgrounds, and we can also see how macroeconomic conditions and constraining wider structures of social class, gender, and poverty are represented, encapsulated, and demonstrated in and through these three lives. Narrative methodologies that use life course theories help us to understand more of the nuanced and interconnected factors such as how much agency people are able to express in these exits; what their expectations are, and why some people do not want to continue working, even if this means they have little money. They also show that some people prefer to live meagerly because personal contentment means more to them than material possessions, and, again arguing against rational choice theories, why some people do not reenter the job market for pecuniary reasons. When it comes to the barriers against returning to work, apart from the obvious impediment of poor health (which affected all three), there are also emotional and more ideological factors which often remain hidden in survey research. For instance, Anne was emotionally tied to looking after her granddaughters, which restricted her employment opportunities; Mark felt content working on a voluntary basis; while Lewis declared that he would not work for something he did not philosophically believe in.

We characterized the first individual we introduced as a person who was/is *desperate to be employed and was looking for work*; the second *could/ can get by living without being employed and doesn't want to work*; while the

third *had/has retired and will not work again*. However, embedded within these typologies are a series of smaller themes and issues, which this in-depth enquiry has enabled researchers to reveal. Poor health (both physical and mental) is the single biggest factor that both forces people out of the labor market and prevents them returning. Poor physical health has a particular effect on people, like Mark, who have worked in manual trades, and find that their bodies have begun to break down under the sustained pressure and strain. For other people, like Luke, health concerns can cause them to lose confidence, and a degree of uncertainty begins to creep in when they think about making future plans, including possible employment opportunities. Even people like Anne, who is eager to find employment, find out that their options are compromised by health concerns, which can also reduce the hours they are able to work for. However, another factor limiting potential times and hours of employment is caring issues, for both old and, in the case of Anne, her daughter's young children. We can also speculate that this may also have a greater effect on women, who are more likely on average to take on caring responsibilities than men (ONS 2019b). Age also plays a part and even though people of Anne's age still have (at the time of fieldwork) potentially 8 years of work left before SPA, and are perhaps more likely to remain in their job than someone younger, employers can probably find, or prefer, someone younger whom, espe- cially if they are under the age of 25 (in the UK), they can pay less. People approaching 60 are also subject to the effects of age stereotypes, which are another form of age discrimination (Truxillo et al. 2018). It is also the case that, unlike in more professional work, prior experience does not count very much in relatively low-skilled jobs, such as working on supermarket checkouts, and in manual blue-collar trades, and there is also a shortage of up-to-date training provision, such as in new types of technology, and opportunities to gain new qualifications. However, in some cases, there can also be a lack of personal motivation, or even inability, to retrain or return to studying, due to low confidence and poor self-esteem. We argue that people like Mark, who undertake voluntary work as part of a civic responsibility (Haddad 2006), not only gain from the experience of a fuller working life and improved mental wellbeing, but also contribute a great deal to society – it is just that they do not get paid for it. Similarly, people who take on caring responsibilities, such as Anne, save the state

a lot of money in child-minding fees and also make it possible for their offspring to work. Another group of people are, like Lewis, who, despite claiming they have "definitively" retired could work if they wanted to. However, there is little incentive to take a low-paid, uninteresting, and possibly high stress job when they can exist on savings they have accrued, which, in the case of Mark, is his work-based pension, even if this means that he has to live rather thriftily. Many people would be enticed back into the labor market if employment opportunities included work which people felt was making a difference to society and helping people, particularly if they had more freedom to negotiate their hours and could work part time. There are many people, like Mark, who, although they only have enough money to just about survive, are personally satisfied and not in any hurry to seek paid employment, particularly involving manual labor (McLaughlin & Neumark 2018). Indeed, one of the key findings from the research is that many people are content to live relatively frugally due to habitual expectations accumulated over the life course, and, as long as they have a roof over their head and food on the table, will not be tempted to work for pecuniary reasons because personal contentment and general wellbeing mean more to them than material possessions or money.

To briefly summarize some of the main barriers preventing people of this age and economic background returning to the labor market, we can see that, after an individual's poor health, some of the other factors are caring responsibilities; the lack of flexibility in the market that makes it difficult for people to find part- time employment and work limited hours; a scarcity of opportunities to retrain and gain more qualifications; the economic incentives for employers to target younger workers; the age discrimination that is prevalent in society; and a shortage of interesting and intellectually stimulating work, and new alternatives to work that does not involve hard physical labor.

As far as reentering the labor market goes for the three individuals in this paper, perhaps the bottom line is that Anne is the only one of the three who is really motivated to work. If all financial streams were cut off tomorrow, all probably *could* work, but only in particular jobs which are more flexible and tailored to their personal needs, and very few of these are likely to exist without state planning and intervention. Indeed, the closure and subsequent privatization of the

government-run Remploy organization (which provided employment placements for disabled people) in 2014 is but one example of an opposite trend in the UK. Although policy makers will point to the "active ageing" agenda and argue that it is of vital concern to develop and improve knowledge about the incentives that can encourage older workers to extend their working lives, it is hard to see what these could entail for these three people. Although we concur with Phillipson et al.'s (2017) assertion that there needs to be significant improvements in the quality of work, early interventions to support people with chronic health conditions, and a fundamental restructuring of the system of lifelong learning and training, an increasingly fractured society, driven by neo-liberal ideologies where the state sector is under increasing attack, makes these words look more like a utopian dream that a realistic coordinated policy option.

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Raquel Medina. (2018). *Cinematic Representations of Alzheimer's Disease.* London: Palgrave Macmillan, 224 pp. ISBN 978-1137533708 (hardback)

REVIEWED BY JILL M. CHONODY*

Using a feminist framework and an interdisciplinary theoretical approach, including film studies, the author undertakes the challenge of discovering the ways in which people living with Alzheimer's disease are represented in other cultures by diving into nonmainstream film representations. The depictions of dementia in the mass media have left the general population riddled by anxiety that their fate will be a state in which their mind is lost, and simultaneously, these stereotypical images bolster cultural narratives that act to dehumanize individuals living with dementia. The author sought to understand how global narratives might differ and perhaps offer positive portrayals of the resilience of individuals living with Alzheimer's disease, while balancing this with the struggles that are faced. Moreover, this exploration of film tackles the meaning-making that occurs through representation and parses how other common elements of life are handled through the lens of Alzheimer's disease.

The main crux of the author's analysis is the film that gives agency and personhood to the individual living with Alzheimer's disease – not to romanticize the illness but to avoid stereotypical depictions that are

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reductionistic and demeaning. Outside the Hollywood machine of film making, the approach taken to representation of people living with Alzheimer's disease offers viewers a chance to explore self, that is, both ontological and phenomenological, by casting the individual with the disease as the main character, whereby she/he can be seen sharing, loving, and communicating, that is, living her/his life. This reframe of traditional casting from the person living with the disease as object – seen primarily through the lens of the caregivers – to subject engenders empathy in the viewer as they can now see the experience of the individual living with the disease. In turn, this narrative elevates the voices of people living with dementia by truly showing the richness of life and challenges of cultural narratives that support fear and anxiety among the public and how they perceive life with dementia.

Each chapter in this book is analyzed within in its own theoretical context in order to fully examine the issue under investigation. A range of important constructs that surround age and aging are addressed through this analysis, including intergenerational interactions, gender, agency, masculinity, and historical memory. While mindful of critical gerontology and important concepts such as ageism, personhood, and the mind/body dichotomy, the author provides an in-depth analysis of these constructs and how their representations are critical to dismantling the negative stereotypes used to depict people with dementia. By showcasing the value of individuals living with Alzheimer's disease, public anxiety may be quelled, individuals living with the disease will be respected, and significant strides can be made on the societal level to support agency in the aging process.

This book not only offers new analyses but also proffers nonmainstream film as the focus for those analyses, which not only builds on the previous work of the author but also broadens the literature base for this type of research. Looking outside mainstream, Western depictions of people living with Alzheimer's disease provide key insights into how cultural narratives are shaped by mass media and reliance on negative stereotypes that indoctrinate the viewer into a narrow perspective and feed their anxiety and fears. This is an exciting area of research that is ripe for additional investigation and exploration, which can challenge the thinking of international readers, researchers, and academics.

Ageism, as a concept, is not rooted in everyday discourse, and as such, the stereotypes, both positive and negative, that support it are largely unchallenged in the wider public's mind. Jokes, memes, and general sayings (e.g. "I'm having a senior moment") act to reinforce notions of aging that are associated with physical and mental loss, depression, boredom, and loneliness. Impairment in memory and living with dementia are hallmark of these ageist beliefs, and the mass media relies on them as a lazy way to showcase an older person. Challenging these tropes is essential for change, and this book embarks on that journey by offering a film that stresses personhood and agency. Anyone interested in film analyses, cultural narratives, and critical gerontology would find a number of key insights by reading this book.

Gemma Carney & Paul Nash (2020). *Critical questions for Ageing Societies*. Bristol: Policy Press, 234 pp. ISBN 978-1447351580 (paperback)

Reviewed by Aled Singleton*

This volume responds to nine questions about ageing societies posed by students to the authors Gemma Carney and Paul Nash. To that end these topics, such as retirement, politics and gender, dictate the overall flow and direction of the book. From the perspective of a more experienced academic or researcher this may lead to familiar ground which has been surveyed in many other books. However, in the end we arrive at something which is more subtle and incremental; for example the larger concepts of political economy, language and post-structuralism are only made apparent in the last five pages of the main text (pp. 145–149). Moreover, to read this book you have to put yourself in the position of younger readers – presumably who are largely at undergraduate level and born around the time of the Millennium – to understand how they sense the world.

Based on the concept that ontological frameworks differ between older and younger students, this review focuses on four elements critical to this book: firstly an explanation of population ageing; secondly the terminology of 'birth cohorts' and 'generations' as being different; thirdly the

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attention paid to neoliberalism; and finally the relevance of the cultural turn in academic research and methodology.

Central premise and style

Gemma Carney and Paul Nash use their experience of teaching, both in the UK and in the USA, to frame this book. In the preface, they describe the format as "perhaps risky" but contend at the same time that it could offer greater "relevance and timeliness." As such, the chapters respond to topics decided by students, with group activities and multiple choice questions at the end of each section. The same questions have also been collated online. The latter resource is useful, as is providing the email addresses for each of the two authors. The appendixes contain some further resources, including a simple demonstration of how to visually represent age distributions with population pyramids (pp. 167–175).

The first chapter explains the three factors that drive ageing, which are, broadly, falling birth rates, living longer and less immigration. The deeper one gets into the work, the more the reader senses that these factors change over time. Overall, the style is fairly conversational and there is a feeling that both authors are driven by their desire to confront ageism and ageist language associated with older people.

Birth cohort and generations

The authors explain that generations are connected to time and social structure. In particular, they cite Mannheim's premise that "a generation can only participate in a temporally limited section of the historical process" (p. 100). We then learn about the temporal dimension over the following three pages: that a generation can contain birth cohorts who are born over periods of perhaps 5 or 10 years. Moreover, we appreciate that the boundaries between generations can be linked to major events such as wars, recessions and so forth. As such, generations can differ in terms of expectations and standards of behaviour. Having given time to explain that the concept of a generation is a relative, my one criticism is that the analysis of 'neoliberalism' – which appears throughout the book – could have been set in a temporal context just as were generations.

Neoliberalism

Pretty much from the offset this book references neoliberalism and brings forward evidence of policy – such as housing and health care – changing from social provision towards individualism. For example, they chart this agenda emerging in the 1970s and properly taking effect from the 1980s on both sides of the Atlantic because of British Prime Minister Margaret Thatcher and US President Ronald Reagan. There is one case study about the cost of care (p. 43) which does not provide enough depth or nuance to convey to neoliberalism. However, the ideas start to fit into a wider context when the authors reveal that the "politics of post-war Britain were collective and cohesive" and that neoliberalism of the past thirty years has made a "sustained onslaught on this collective mentality" (pp. 112–113). Though this latter statement may be true, it is perhaps hard to grasp for people born since the collectivist-individualist battles of the 1970s and 1980s.

In my view, it helps to put neoliberalism into the context of place and time. For example Stephen Metcalf's essay describes neoliberalism as "the idea that swallowed the world" (The Guardian, 2017) and is "...a premise that, quietly, has come to regulate all we practise and believe: that competition is the only legitimate organising principle for human activity." As such I think that *Critical Questions for Ageing Societies* could have described how neoliberalism has gained power over some decades and has therefore influenced generations and birth cohorts differently. To that end, this book potentially could use biographical or pen picture examples of provision in housing or health care for people born in different periods of time.

Cultural turn

The book adheres to the central premise of answering the student questions and is not necessarily aimed at deeper questions of theory or epistemology – which is to say that research and method is not the main focus. However, there is a chapter that is useful in terms of exploring what it means to live a long life. The authors cite examples of approaches to understand ageing turning away from biomedical or political economy influences (pp. 125–127). The culture turn includes the work of Gilleard and

Higgs on topics such as sexual orientation, identity and consumption, Gullette's writing on narrative or Twigg's various works on embodiment. Carney and Nash argue that bringing human experience "back into the foreground" and using examples about everyday life allows forms of evidence, approaches and theories to come forward (p. 137). This writing on what it means to live a long life bridges into the final chapter where some of the bigger theoretical concepts of post-structuralism and language are outlined. Effectively, it is at the end where the authors give a taste of how a post-graduate research project could be compiled. I think that this gradual approach works.

Conclusions

Through this work we get to know something about the authors and what has motivated them to write this book. To that end I think that the desire to shape it around the questions posed by students has succeeded. Throughout there is a consistent desire to break down ageism and also to question topics like intergenerational conflict. Apart from the examples that I have explored in detail, there are also investigations into sexuality, gender, pensions and the problems of providing care. However I would have welcomed a more nuanced critique of neoliberalism. Given that generations and the cultural turn were explained in some detail, perhaps some small biographical narratives could explain how policy has affected the lifecourse of people born in different decades? Such examples would help explain how life could be different in terms of social care, pensions, housing and much more.

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