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UK magazine advertising portrayals of older adults: a longitudinal, content analytic, and a social semiotic lens

By *VIRPI YLÄNNE**

Abstract

The focus of this article is the depiction of older adults in UK magazine advertising. Theoretically located in the broad area of cultural gerontology, with its central focus on culturally constitutive meaning of age(ing) (e.g. Twigg & Martin 2015), it applies social semiotic categories (Kress & van Leeuwen 1996, 2004) and draws on critical discourse analytic insights in investigating persistent trends in advertising images of older adults. These are linked with the role of advertising media in constructing and contributing to specific social “imaginary” or “imagination” of later life. A content analytic comparison between two corpora of adverts (221 ads from 1999 to 2004 and 313 ads from 2011 to 2016) reveals only minor changes over time. These include relative consistency in the product categories linked with older models, the adverts predominantly targeting older adults, but a decline in humorous portrayals. A semiotically oriented analysis of a subset of adverts further examines their compositional and affective dimensions, in addition to representational qualities. This uncovers strategies that are in line with aspirational third age discourse and imagery, but which also contribute to the marginalisation of older adults via a restricted portrayal of later life(styles) and can also be seen to problematise “ageless” depictions.

Keywords: advertising, agelessness, content analysis, older adult lifestyles, print media, social semiotic analysis.

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Introduction

A cultural dimension in the analysis of ageing has increased in age studies (e.g. Gullette 2004, 2015; Katz 2005; Twigg & Martin 2015), in line with postmodern orientations to age as an aspect of identity that is to an extent malleable via consumption and lifestyle choices. Furthermore, a cultural angle is advocated in the resistance to ageism. This study uses content analysis and a social semiotic approach to investigate persistent trends in advertising images of older adults in the UK and links these with the role of advertising media in constructing and contributing to specific social “imaginary” (e.g. Higgs & Gilleard 2020) or “social imagination” (Blaikie & Hepworth 1997) of later life. Work in critical discourse analysis has shown how media texts are written and read against the concurrent social, cultural, political and economic background, and discourse is seen as social practice (e.g. Fairclough & Wodak 1997). This study similarly takes the view that media texts and images are not simply reflective of societal/cultural ideologies but are instead “socially constitutive as well as socially shaped” (Fairclough & Wodak 1997: 258). Furthermore, they function as resources for us to learn about age and ageing, even if we cannot expect them to determine readers’ behaviour in a simple way. The relevant wider context surrounding the study is consumer culture, advertising and third age imagery.

Interest in media portrayals of older adults has been growing in recent years (for reviews, see, e.g., Loos & Ivan 2018; Mosberg Iversen & Wilińska 2020; Ylänne 2020). Research has examined media such as film and TV (e.g. Chivers 2019; Dolan 2017; Oró-Piqueras & Wohlman 2016), advertising (e.g. Lamb & Gentry 2013; Ylänne 2015; Yoon & Powell 2012), magazines (e.g. Lumme-Sandt 2011) and online contexts (e.g. Nimrod & Ivan 2019; Xu 2020), among others. Although images of ageing are a relatively well-explored area in ageing studies, this study contributes to existing research by offering a longitudinal examination of advertising images in a specific context. It investigates UK magazine advertising by adopting a chronologically comparative method, comparing adverts from 2011 to 2016 with those from about 10 years earlier (1999–2004) via a content analysis. As a more novel contribution to existing scholarship, this is complemented with a visual analysis that draws on Kress and van Leeuwen’s (1996, 2004) social semiotic model to further investigate compositional

and affective dimensions of the adverts, in addition to their distributional qualities. These will give further access to the meaning potential of the adverts in constructing aspirational imagery of later life.

Advertising forms a specific genre of media text. Cook (2001: 219–226) outlines some typical features of advertising, suggesting they “foreground connotational...and metaphorical meaning”, “seek to alter addressees’ behaviour”, “attempt to give pleasure”, “gain and hold attention, ...[and] fix a name with positive associations”. Cook also proposes that “the worlds in ads are ‘unreal’...they are often bland and problem-free. The families are happy; the days are sunny; the meals tasty...the grannies kind” and “[they] generally avoid the truly controversial”. Exceptions are, for example, charity appeals with scenes such as war or abject poverty.

The most important categorisation process by advertisers is one by consumer, and publications targeting the “grey/silver market” have been researched in the UK at least since the 1990s (Blaikie 1999; Featherstone & Hepworth 1995). Meiners and Seeberger (2010: 294) suggest that “seniors [are] one of the most important target consumer groups for the coming decades and ... a significant driving force for company success in many industries”. They report that this consumer group is growing much faster than the rest of the adult market, and their review of the 50+ marketing literature summarises the message by marketers as “focus on feel age, not real age” (2010: 300). Indeed, as found by Sudbury and Simcock (2009) in a UK questionnaire study, consumers with a mean chronological age of 62.4 years displayed a cognitive age of 52.7 years, and marketers aim to respond to this discrepancy in their strategies. Moschis and Mathur (2006: 344) similarly demonstrate older adults’ “subjective age as an explanatory variable of consumers’ response to age-relevant products and age segmented marketing strategies”, with “young old” consumers being reluctant to identify with such products. Kohlbacher and Chéron (2012: 185) add that the difference between chronological age and cognitive age decreases with lower levels of wealth and health. As regards older consumers’ values, “the most important value ... is selfrespect, followed by security, warm relationships with others, and ... a sense of accomplishment”, with fun and enjoyment in life being the fifth most important, according to Sudbury and Simcock (2009: 30). Although the order of this ranking varies between older age cohorts, the inclusion of these values in advertising is expected to be positively received. These findings

suggest hypotheses for the current study. First, we might expect at least some changes in advertising imagery over the two time periods under investigation, to reflect the increase in ageing populations as purchasers of a variety of goods, and their spending power. Increasing number of consumers might be reflected in more varied types of representations and product categories. Second, ageing is likely to be oriented to implicitly rather than explicitly in adverts (e.g. by avoiding direct reference to age in years in line with target consumers' cognitive age) and to reflect the above-mentioned values.

As Heinrichsmeier (2020) and many others (e.g. Enßle & Helbrecht 2020) discuss, there are two predominant discourses of ageing circulating in current Western societies. One, influenced by biology, views ageing as inevitable decline (e.g. Gullette 2004, 2015) reflected in the negative stereotypes of frail, vulnerable and lonely older adults. This representation predominated in the media last century. But it continues to frame, for example, public discourse that "others" older populations, conceptualising them as a homogeneous vulnerable group (e.g. Rozanova 2006; this framing has also been evident in recent news media commentary during the coronavirus disease 2019 [COVID-19] pandemic). The second predominant discourse of ageing is different, although linked to the decline narrative. That is the discourse of "successful ageing" (e.g. Katz & Calasanti 2015), which appears more positive in conceptualising later life as a time of renewal and new opportunities. This "third age" rhetoric is visible in advertising and in publications directed at affluent older consumers (e.g. Lumme-Sandt 2011). Appearing to frame later life with positive qualities and imagery, this discourse links with neo-liberal ideas of self-responsibility, in this case for one's health and ageing, promoting an active late lifestyle to age "well" (Ylänne et al. 2009). The promotion of "ageless" (e.g. Andrews 2018; Lamb & Gentry 2013) extended midlife-styles also pushes the boundary of "old age" further to those in the dependent and vulnerable "fourth age" (e.g. Gilleard & Higgs 2010). In line with the general trends in advertising mentioned earlier, it seems reasonable to expect advertising to foreground "successful ageing", whilst advertising for products offered as solutions to age-related "problems" may also draw from the decline discourse.

To investigate the depiction of older adults in UK magazine advertising, and to link the analysis with cultural gerontological concerns with

culturally constitutive meaning of age(ing), this study will address the following research questions (RQs):

RQ1: how does a more recent sample (2011–2016) of UK magazine adverts featuring older adults compare with an earlier sample (1999–2004) regarding distribution across magazines, type of portrayal, product categories, gender distribution and advertising target?

RQ2: how is later life lifestyle depicted in these adverts?

Whilst the first RQ aims to mainly address distributional aspects of the data via content analysis, the second RQ aims to address qualitative dimensions of how the adverts link to the “successful ageing” discourse and the social imaginary of later life. However, content analysis and qualitative analysis are not mutually exclusive (Lutz & Collins 1993, cited in Rose 2012: 90), and the typology aspect of the analysis in RQ1, for example, involves the coding of features that are potentially overlapping and require interpretation.

Literature Review and Background to Study

Under-representation of older adults in the media has been reported across the globe. For example, studies in the USA (Miller et al. 2004; Roy & Harwood 1997), the UK (Simcock & Sudbury 2006), Germany (Kessler et al. 2010), China (Zhang et al. 2008), Japan (Prieler et al. 2009, 2011), Hong Kong (Prieler et al. 2016), South Korea (Lee et al. 2006) and Taiwan (Chen 2015) have highlighted the scarcity of older models in the media, compared to their proportion in the population, with the exception of the study by Idris and Sudbury-Riley (2016) on Malaysian adverts. Under-representation is typically linked to (visual) ageism, but the qualitative and semiotic aspects of the depictions are under explored in these studies.

As regards older adults’ status or prominence, where older adults do appear in adverts, they are often cast as the main characters, especially when targeting older consumers (Williams et al. 2010b). Older advertising models are found to index specific qualities of the product, such as reliability or to imply that the company represented is well established (e.g. Swayne & Greco 1987; Williams et al. 2010a). The roles and contexts are likely to be age-marked in some way, suggesting that older characters

tend to appear in adverts for a specific reason. It is, therefore, important to examine *how* they are portrayed since their presence constitutes specific meanings of older age. Similarly, it is important to acknowledge in what ways older adults are typically absent.

The setting in which older models appear in adverts has also been investigated. In TV adverts in the USA, older adults have been found predominantly depicted in domestic settings (Swayne & Greco 1987), and this is also true in older-age-targeted print adverts in the UK (Williams et al. 2010b) and TV adverts in Malaysia (Ong & Chang 2009). But older adults also occasionally appear in business settings (Kessler et al. 2010). It has been suggested that older females are more likely to appear in domestic settings and older males in the workplace (Prieler et al. 2011). This reflects the role of advertising in sustaining not only stereotypes associated with age but also those regarding gender roles.

Food, pharmaceutical products, health aids, and financial/insurance products and services are the categories of product adverts which most often use older models in both Western and Asian contexts (Chen 2015; Prieler 2012; Williams et al. 2010b), even though some cross-cultural differences have emerged. For example, older adults do not appear in food adverts as prominently in Japan as in the West. These product associations reflect and sustain stereotypical expectations about older people as a social group. For example, food adverts might depict inter-generational family groups (where older adults feature as grandparents), and older consumers (and their families) are targeted with products aimed to alleviate various minor health- or mobility-related “problems of ageing”. Some financial/insurance products are specifically marketed for the over 50s and employ older celebrity endorsers (e.g. Chen & Ylännä 2012).

Finally, some content analytic studies code the depiction of the older adults along the dimension of its tone using a scale from very negative to very positive, for example. Roy and Harwood (1997) coded older characters in US TV adverts as regards their physical features (e.g. strong/weak), personality traits (e.g. happy/sad and comical/serious) and cognitive abilities (e.g. lucid/confused) and found that positive portrayals predominated (see also e.g. Miller et al. 2004). However, it is not unproblematic to ascertain to what extent a portrayal is “positive” or “negative”: what might be considered “positive” portrayals can turn out to be more ambiguous in their constructions of older age than appears at first sight

(Fairhurst 2012), which a semiotic focus can help to uncover. We will return to this theme in the analysis below.

Content analysis is a method widely used in researching the mass media as it is well suited for systematically coding and analysing large data sets (Rose 2012: 82), can effectively uncover general trends and patterns and has also been used in cross-cultural comparisons (e.g. Chen 2015; Prieler et al. 2016). However, Rose (2012: 86) suggests that “it...has very little to say about the production or the audiencing of images”. By “audiencing”, Rose refers to “the process by which a visual image has its meanings renegotiated, or even rejected, by particular audiences” (p. 30). The composition of images and the social practices that structure the viewing – in this case, the reading/browsing of a magazine – affect the audiencing of images. I will now move onto describing another framework that is used in the analysis; one that, in taking images apart, focuses on how they make meaning, “how they work in relation to broader systems of meaning” (Rose 2012: 105), such as current discourses of (successful) ageing and how they might be read.

Kress and van Leeuwen (1996, 2004) offer a grammar approach to visual representation. They propose a three-way categorisation of meaning making in images: *representational*, *interpersonal* and *compositional/textual*, drawing on Halliday’s (e.g. 2004) three metafunctions in his model of grammar.

The representational metafunction or meaning refers to images representing the world as narrative or conceptual. Narrative representations comprise action of some sort, so we could look at, for example, what type of action an older protagonist is carrying out in an advert, or whether there are any differences in the actions of older men versus older women, or the older characters versus other characters, if such are present. Conceptual representations deal with participants in terms of their more stable, essential and generalised qualities that suggest taxonomic classifications (such as a grandparent). Second, the interpersonal meaning of images relates to how depicted participants symbolically interact with the viewer through gaze, social distance and frame, and the angle of interaction. For instance, a direct gaze at the viewer establishes a “demand gaze” – a reaction is “demanded” of the viewer. In an “offer gaze”, on the other hand, with no direct eye contact with the viewer, the viewer is invited to scrutinise the depicted participant(s). Differing degrees of social

distance is created via the angle of interaction: horizontal angle suggests relations of involvement, and vertical angle (e.g. looking up to the person in the image) suggests relations of power. Third, the compositional/textual meaning refers to how “the representational and interactive elements are made to relate to each other, the way they are integrated into a meaningful whole” (Kress & van Leeuwen 1996: 181), for example via the placement of elements in the foreground or background, left or right, centre or margin and so on, thus constructing meaning via the principles of information value, salience and framing.

Whilst content analysis allows a systematic quantification of distinct qualitative content categories, “it is not concerned with ‘reading’ or interpreting each text individually” (Bell 2001: 14), and therefore cannot facilitate in-depth interpretation. Semiotic analysis, in contrast, is a qualitative method aiming to answer *how* particular depictions – in this case of older adults – are achieved or composed. I will now describe the data and how it was collected, before moving onto the analysis. The subsequent main sections comprise the chronologically comparative analysis of the adverts in the two corpora and a semiotically oriented analysis of a subset of adverts in corpus 2. I will conclude by discussing the findings as a contribution to research on ageing in the media.

Data and Sampling

In order to generate a representative sample of British magazine advertisements, we (Williams et al. 2010a, 2010b, corpus 1) used *Brad Monthly Guide to Advertising Media* (March 2004), *Willing’s Press Guide to U.K. Media* (2003) and the *National Readership Survey* (NRS 2003). According to the criteria of popularity (circulation figures) and demographic readership information (aiming for a varied audience), the following magazines were selected for corpus 1 (years 1999–2004): *Radio Times* (home), *The Economist* (business), *Saga Magazine* (older readership), *ASDA Magazine* (general, home and family), *Marie Claire* (younger women), *Rugby World* (men and sport), *Men’s Health* (men), *FHM* (younger men), *Good Housekeeping* (women, home and family), *Family Circle* (older, home and family) and *BBC Good Food* (home) (see Williams et al. 2010a, 2010b). For corpus 2 (years 2011–2016), the aim was to sample the same magazines. However, the unavailability of *Rugby World* and *Family Circle* meant leaving *Rugby*

World out of corpus 2 and replacing *Family Circle* with *Yours* (having a similar readership profile). The second corpus, thus, comprised only ten magazines. As with corpus 1, hardcopy magazines were sourced from the British Library in London, complemented with the author's university library archives. To create a more manageable sample in both corpora, a single composite year was compiled using stratified random sampling, so that magazines across the different years and months were represented.

The resultant 121 magazine issues (corpus 1) and 116 issues (corpus 2) were scrutinised for any advertisements quarter of a page and larger, containing a recognisable human figure appearing to be 60 years of age or older (on the basis of visible signs of ageing, such as grey hair, wrinkles and possible older-age salient features in the environment and/or text). This resulted in an initial total of 253 adverts (corpus 1) and 479 adverts (corpus 2) with an older person featured as one or more characters in the adverts found in the sample magazines. From these, duplications were eliminated, and this resulted in final corpora of 221 advertisements (corpus 1) and 313 advertisements (corpus 2). Although discarding duplicate adverts admittedly erases the effect of repeated exposure to images, this was motivated by the original aim to capture the types and categories of portrayal, rather than, for example, to investigate the frequency of representation of older versus younger adults. I will now proceed to the data analysis.

Content Analysis: Earlier Versus Later Corpus

Distribution of Adverts across Magazines

As can be seen in Table 1, the vast majority of the adverts in both corpora featured in the 50+ targeted *Saga Magazine*, as well as *Yours* (corpus 2), also with an older readership. The decline in the number of adverts in *Saga* in corpus 2 is partly explained by a large number of duplicate adverts (only counted once). *FHM*, *Marie Claire* and *Men's Health* magazines whose readership tends to be under 35 years continue to have very few adverts depicting older adults.

Product Categories

In corpus 1, the most frequently advertised products overall were help and support aids, such as mobility aids, stairlifts, walk-in baths and showers

Table 1. Distribution of adverts across the magazines

Magazine	<i>N</i> in corpus 1	%	<i>N</i> in corpus 2	%
Saga Magazine	137	61.9	138	44
BBC Good Food	13	5.8	28	8.9
Good Housekeeping	12	5.4	21	6.7
Radio Times	12	5.4	32	10.2
Family Circle	10	4.5	N/A	
FHM	10	4.5	3	0.9
Economist	10	4.5	9	2.8
Marie Claire	8	3.6	10	3.2
Rugby World	4	1.8	N/A	
Asda Magazine	3	1.4	11	3.5
Men's Health	2	0.9	8	2.6
Yours	N/A		53	16.9
Total	221		313	

(26.2% of the total). The next most frequent category was medical and health products (14.5%) and food and drink (14%), followed by retirement housing (8.1%) and household items (8.1%). Cosmetics, hygiene, and grooming products (4.1%) and charities (4.1%) were infrequent, as were clothing (3.2%) and professional/expert services (3.2%). Miscellaneous consumables (1.4%) and education (0.9%) were also infrequent. The most infrequently encountered products were final arrangements and holidays (both 0.5%).

In corpus 2, the most frequently advertised products were again help and support aids (15.3%), followed by medical and health products (14.4%). But this time retirement housing was the third most prominent group (13.1%), followed by food and drink (9.6%). Whereas cosmetics and financial/insurance products were almost as frequently present in the two corpora, the number of adverts for holidays had increased in corpus 2 (from 0.5 to 6.1%) as had the number of adverts for funeral plans (from 0.5 to 3.2%). Charity adverts had declined in corpus 2, as had those for household items and professional expertise. Table 2 summarises the results for the two corpora. The relative number of adverts overall had increased from an average of 1.83 adverts per magazine issue in corpus 1 to 2.7 per issue in corpus 2.

Table 2. Products associated with older models across the magazines

Product type	<i>N</i> in corpus 1	%	<i>N</i> in corpus 2	%
Help and support	58	26.2	48	15.3
Medical/health	32	14.5	45	14.4
Food and drink	31	14.0	30	9.6
Retirement housing	18	8.1	41	13.1
Household	18	8.1	17	5.4
Entertainment (media, electronics, etc.)	13	5.9	14	4.5
Financial insurance	12	5.4	20	6.4
Cosmetics/hygiene/grooming	9	4.1	15	4.8
Charities	9	4.1	9	2.9
Clothing	7	3.2	15	4.8
Professional expertise	7	3.2	7	1.9
Funeral plans	1	0.5	10	3.2
Holidays	1	0.5	19	6.1
Education	2	0.9	6	1.9
Other	3	1.4	17	5.4
Total	221		313	

Table 3. Gender distribution in adverts

Gender distribution	<i>N</i> in corpus 1	%	<i>N</i> in corpus 2	%
Female	90	40.7	127	40.6
Male	63	28.5	87	27.8
Both	68	30.8	99	31.6
Total	221		313	

Gender Distribution in Advertisements

The distribution of gender in the magazine adverts in the two corpora was practically identical (see Table 3). Just over 40% of all adverts depict older women, either as single images or in groups; about 28% depict only men and about 31% both men and women.

Rhetorical Schema

Thimm's (1998) German research classified images of older people in advertising along four dimensions (rhetorical schemas) that consider the target audience and the overall imagery of the advert. These were labelled age inclusive, age exclusive, age contrastive and age preferential. The first includes adverts targeted at all age groups, whereas age exclusive adverts are aimed at older adults only. Age preferential adverts are likely to be of more interest to older than to younger people (because of the product and the general tone of the advert). Age contrastive adverts, in turn, draw a direct or indirect contrast between younger and older adults in ways that tend to (but do not always) portray older people more negatively, typically in adverts targeting younger audiences. Thimm's classification system was applied to the UK data, but the category "age inclusive" was replaced with "age incidental", in which the product is not targeted at a specific age group and which does not use the character's age as a selling point. Table 4 presents the findings regarding the two corpora on this aspect of the analysis.

Whereas the proportion of age exclusive adverts has remained at a similar level, age preferential adverts have increased. Both age incidental and age contrastive adverts have decreased over the years. In corpus 1, out of the 86 age exclusive adverts, ten (12%) made direct reference to chronological age. In corpus 2, 28 (25%) of such adverts included a reference to age-in-years. In both corpora, these were typically adverts for health and support products, insurance (e.g. life insurance) or medical procedures or

Table 4. Rhetorical schema in adverts

Rhetorical schema	N in corpus 1	%	N in corpus 2	%
Age exclusive	86	38.9	114	36.4
Age preferential	54	24.4	118	38.0
Age incidental	68	30.8	70	22.4
Age contrastive	13	5.9	8	2.2
Other	0	0	3	0.95
Total	221		313	

drug trials. As discussed earlier, age-targeted advertising tends to refer to age in more implicit ways, either by reference to “retirement” or through various visual indices of age. We will return to these in the following semiotically oriented analysis.

Typology

Hummert and colleagues’ (1994, 2004) research (in the USA) has uncovered a range of positive and negative stereotypes of older people. In their taxonomy, positive stereotypes held by people of all ages consist of the “perfect grandparent” (a kind, loving and family oriented older adult), the “golden ager” (lively, adventurous and alert) and “John Wayne conservative” (patriotic, religious and nostalgic). The four negative stereotypes are the “despondent” (depressed, sad and hopeless), the “shrew/curmudgeon” (complaining, ill-tempered and bitter), the “recluse” (quiet, timid and naïve) and the “severely impaired” (slow-thinking, incompetent and feeble). It can be predicted that in advertising, in the pursuit of positive associations with the product, positive stereotypes predominate, unless the advert aims to evoke sympathy or fear, for example.

Williams et al. (2010a) aimed to inductively devise a typology of adverts depicting older adults, although some of the resultant labels echo Hummert’s category labels. The adverts in corpus 1 were investigated to determine the main thematic portrayals, which was done via an iterative process of sorting and re-sorting the adverts into similarity types. This was repeated until the researchers arrived at a set of themes that adequately described the entirety of the portrayals in the data set, and a satisfactory inter-coder agreement was reached, complemented by a discussion of differences in coding. A thematic typology of six image types of older adults was proposed. The “golden-ager” describes older people who are youthful and full of zest, often having luxurious lifestyles. “Perfect grandparents” are older people shown with grandchildren, often close-ups of smiling and happy families, sometimes depicting several generations. “Legacy” theme refers to older persons with “gravitas” and status, often mentor types with implied experience and wisdom, and these were almost exclusively males rather than females. “The coper” is an older person who has a problem, such as a mobility limitation, but is coping with

Table 5. Typology of depictions

Type	N in corpus 1	%	N in corpus 2	%
Golden ager	79	35.7	96	30.7
Coper	53	24	85	27.2
Mentor/legacy	32	14.5	26	8.3
Celebrity endorser	22	10	46	14.7
Perfect grandparent	17	7.7	29	9.3
Comedic	13	5.9	2	0.6
Other	5	2.3	29	9.3
Total	221		313	

it because of the product being sold. “Comedic” older people are those depicted in humorous situations and/or poses. “Celebrity endorsers” are well-known older adults in the public eye who endorse the advertised product. The six types from this analysis were offered as candidates for a typology of advertising images of older adults, at least within a British context, and the present study investigated its applicability for corpus 2. Table 5 presents the results of this part of the analysis.

It appears that the “golden ager” type depiction is still the most common. This is specifically the case in older-targeted advertising, such as that in *Saga Magazine* and *Yours*. The prevalence of “coper” types has remained high, and celebrity endorsers have increased slightly, as have grandparent depictions. The mentor/legacy type has decreased, and, most notably, corpus 2 has hardly any examples of humorous depictions. The slight differences in the magazines sampled might be one reason for this latter difference. A possible reason for advertisers now avoiding humorous depictions of older adults is because these typically rely on negative ageist stereotypes, which make older adults look (literally) “laughable”. It can also be noted that 9% of adverts this time round were coded as “other”, suggesting that the earlier typology no longer fully captures the types of portrayals.

The adverts in the “other” category in corpus 2 fell into different groups. Most included an older adult or a couple (male and female) who were healthy, sometimes active, but who looked less glamorous and whose

surroundings were less luxurious than golden agers'. Others included a picture of an older adult among adults of various ages, providing a wider age range of imagined consumers for the advertised product. Yet others focused on family and intergenerational relations, but the older characters signified parents, not grandparents. I will now move onto the social semiotically oriented analysis, especially to answer RQ2.

Social Semiotically Oriented Analysis

As discussed earlier, a content analysis of adverts provides some overall patterns in the portrayal and shows in what contexts we might see older characters in advertising. A more nuanced picture of *how* the depictions are achieved in terms of what choices are made in the design of the adverts can be obtained via a social semiotic lens, building on the compositional aspects coded for the content analysis. Van Leeuwen (2005: xi) explains that "in social semiotics the focus...[is] the way people use semiotic 'resources' both to produce communicative artefacts and ... to interpret them". According to Jewitt and Oyama (2004: 136), social semiotics is "a tool for use in critical research", and Rose (2012: 106–107) links semiotic approaches with those seeking to understand the working of ideologies. Similarly, in this study, the social semiotically oriented analysis seeks to link the advertising images with current discourses of ageing, in particular "successful ageing", and to examine what strategies advertisers use to imply or connote certain interpersonal relations and what techniques of design are used to involve the reader with the image. As adverts for retirement housing were the third most prominent category in corpus 2, and the category which had increased notably over time, I will focus on the 41 retirement housing adverts in this later corpus for this closer analysis.

The representational meanings will be analysed in terms of "who are the residents in these dwellings" (conceptual categorisation), by focusing on what narratives emerge via the actions depicted. The compositional meanings, on the other hand, will give access to the setting of the participants, the most salient objects and, for example, the centrality of the older adults in the visuals. The interpersonal meaning will relate to the angle of the picture and how the viewer is positioned. These aspects could arguably also be approached from a content analytic perspective, but we will

approach the adverts socio semiotically in terms of the symbolic links they make with later life and the meaning potential that is designed to be activated in the viewers. Overall, the focus is on the construction of implied "positivity" in the adverts (their selling point), in addition to what activities the older characters are depicted as doing. I first offer an overview of this group of adverts.

Representational Meanings

Most protagonists in the images are depicted as couples or small groups. The activities include having refreshments (such as orange juice, tea/coffee and food such as cakes or salad) in the garden. The participants are seemingly enjoying each other's company and in conversation. In some adverts, residents appear to be visiting each other's apartments, connoting friendly communal relations. Couples (a man and a woman) are also featured walking, cycling or walking their dog outdoors. In only three adverts, the older characters are positioned as grandparents interacting with family, for example having a birthday party. It is the life within and around the residence that is typically the narrative setting.

Compositional Meanings

The older characters are depicted sitting down more often than standing or moving. The setting is as often outdoors as it is indoors, with only eight consisting of a neutral, blank studio setting. In the majority of the pictures, the older adults are central, sharing the focus with younger characters in only nine adverts. In slightly over half of the adverts, the older characters are smiling. The most common objects surrounding the protagonists are those linked with the activity of drinking and eating, such as tea/coffee cups and saucers, glasses of orange juice, cake, bowls of fruit, wine glasses and bottles. Other objects relate to activities such as reading (newspapers, books and reading glasses), walking (walking stick), going to the gym (gym equipment) or the setting (garden furniture, roses and sunhat). Indices of relative wealth, age, and standard of living and taste include aspects of the protagonists' attire (stylish scarves, jewellery, grey and light-coloured clothing to match the colour of a person's grey or white hair and lipstick), delicate china and well-appointed communal dining rooms.

Interpersonal Meanings

The horizontal angle of viewer positioning is almost exclusively fully frontal, suggesting a relation of involvement between the viewer and the character(s). In only ten adverts, there is a direct gaze ("demand") towards the viewer. The relational distance between the protagonists and the viewer tends to be constructed via close or medium close rather than long shots.

Bell (2001: 34) proposes that "research adopting [content analysis] should supplement and extend its findings by means of detailed analysis of typical examples". To do this, I now give two examples of these types of adverts. Since copyright restrictions prevent showing the original adverts, they were traced to give a sketch of how they looked on the page of the magazine.

Example 1

In example 1 (see Figure 1), the image is an "offer" for the viewers' gaze. The central focus of this gaze is the narrative action of the two females' seemingly enjoyable talk and interaction over a "cuppa". They are gazed at by the male, whose gaze forms a vector (Kress & van Leeuwen 1996: 44), shared by the viewer, towards the women and their joined laughter and mutual eye contact. The women sit next to each other on a well upholstered sofa. The action is socialising, also confirmed by the prominent text in the left-hand corner of the picture - "*Because friendship matters...*". The women are, thus, conceptually to be understood to be friends, not mere fellow residents in the same apartment complex. The other accompanying text underneath a row of outdoor shots of these apartments reiterates the theme of social activities ("Owners' Lounge where you can meet new friends"), whilst also mentioning independence. A medium close shot photo in the bottom left-hand corner is of the named company chairman, with a direct gaze (and thus address) at the viewer, with the accompanying text: "Now is the time that you should be enjoying life... you will experience the Independence, Security and Peace of Mind that comes with choosing an award-winning retirement development company". The text and photo in the lower part of the page serves to elaborate the ideologically foregrounded top part of the page, occupied by the main image (cf. Kress & van Leeuwen 1996: 194).

Figure 1. Example 1

AWARD-WINNING RETIREMENT APARTMENTS



Because friendship matters...

[EXTERIOR SHOT OF APARTMENTS]	[EXTERIOR SHOT OF APARTMENTS]	[LOGO OF AN AWARD]	[EXTERIOR SHOT OF APARTMENTS]	[EXTERIOR SHOT OF APARTMENTS]
-------------------------------	-------------------------------	--------------------	-------------------------------	-------------------------------

...you'll want the best in retirement living

[small text] [small text] [small text] [small text]
[small text] [small text]

	[small text] [small text] [small text]	[price range] Request a brochure on [phone number]
-------------------------------------------------------------------------------------	----------------------------------------------	----------------------------------------------------------

[signature] [BRAND LOGO]

Enjoy Independence and Peace of Mind in Your Retirement [website]

The inference the reader can make of this advert is that the housing provides a solution to potential social isolation, a sense of vulnerability, as well as providing an independent living arrangement and the prospect of “enjoying life”. The advert, and others like it, seems to be trying to balance these somewhat conflicting and potentially challenging aspects of later life. There are various indices of wealth and luxury in the image, such as the style of the furnishings, the protagonists’ attire and the soft, muted colours of gold, beige and pale orange in the room and rhymed in the visible clothing. The composition places the image and theme of friendship in a prominent position and that is the main construction of positivity here. The medium close shot of the residents creates an interactive meaning of “far personal distance” (Kress & van Leeuwen 1996: 130), bringing the target audience into an imagined acquaintance relation with the protagonists. Regarding the values reportedly being important for older consumers (Sudbury & Simcock 2009), security and warm relationships with others, together with fun and enjoyment, are connoted by the prominent image in this advert.

Example 2

Example 2 (see Figure 2) most likely uses a stock photo from an image bank of a couple cycling, with the male in the lead and the female just setting out on her bicycle behind him. The male is looking ahead, and the female is looking at the male, both smiling. The man is in a clearer focus than the woman, and the background behind her is blurry greenery and trees, suggesting a parkland setting. The couple appear as exemplars of those “*young-at-heart*”, a reference in the red text on white on the right-hand side. The image on the left of the main text signifies “given” information (already “known” to the reader), with the text, being on the right-hand side, the “new” information, the “message” (Kress & van Leeuwen 1996: 186), associating the referents with the company/housing. Positioning the picture at the top half of the advert indexes the imagined “ideal”, the “promise of the product” (Kress & van Leeuwen 1996: 193). The physical activity of the couple and reference to youthfulness provide the basis of the implied positivity in this advert, strengthened, for example, by the casual colourful clothing and jeans worn by both protagonists. The colour palette of the main picture is fresh, constituted by turquoise,

Figure 2. Example 2

AWARD-WINNING RETIREMENT APARTMENTS



If you're young
at heart...

...you'll love
[BRAND]

[EXTERIOR SHOT OF APARTMENTS] [EXTERIOR SHOT OF APARTMENTS] [LOGO OF AN AWARD] [EXTERIOR SHOT OF APARTMENTS] [EXTERIOR SHOT OF APARTMENTS]

Love Independence. Love Safety. Love Security.

[small text] [small text] [small text] [small text]
[small text] [small text]



[small text]
[small text]
[small text]

[signature]

[price range]
Request a brochure on
[phone number]
[web url]

[BRAND LOGO]

Enjoy Independence and Peace of Mind in Your Retirement

pink and indigo in the couple's clothes, and this high modality contributes to the affective meanings of the image (Kress & van Leeuwen 1996: 170). The couple are both tanned, fitting the summer setting. The value of fun and enjoyment (Sudbury & Simcock 2009) is foregrounded in this advert via the main image. Although there is no visual demand "you" via direct gaze, there is a textual repeated address of "you" for the reader. The text underneath the picture elaborates the selling points of the apartments and addresses potential buyers' age-related concerns about safety and security, in addition to independence (as in example 1).

Besides being age-targeted images of retirement housing, the adverts constitute specific gender roles, too. In both examples, we can see gender stereotypes at play: the females in example 1 are socially engaged in conversation (in friendly gossip?), and in example 2, the woman is following the man, who is taking the lead. Advertising texts and images have the power to normalise certain types of representations. In general, it seems that older age-targeted advertising tends to offer conventional scripts about coupledom.

In the retirement housing adverts, later life lifestyle (cf. RQ2) is constructed in particular ways, foregrounding a lifestyle where the residents are using communal spaces indoors and outdoors to socialise with other residents over seemingly endless cups of tea/coffee/wine and dinners, in their pursuance of independent, yet socially connected lives. For example, in one such advert, depicting a woman sitting, knees bent, on a sofa and reading a book, we read "The countless coffee mornings, afternoon teas, flower arranging, book clubs, keep fit, garden parties and charity events will be sure to keep you busy. And after all that, you can just put your feet up with a good book! Enjoy independence or companionship – the choice is yours". In looking after their health (signified by occasional gym and gardening shots), diet and friendships/ relationships, the older adults are presented as pursuing leisure and social relations with other residents. They are portrayed as independent but not lonely, living in their own apartment but not isolated and active but only in a domestic or leisure setting. Interestingly, the activities do not seem to include interacting with media (e.g. social media to connect with others, cf. Kivimäki 2017). The context of the retirement housing adverts needs to be acknowledged, as the majority appeared in *Saga Magazine*, whose readership tends to be relatively affluent. They are, therefore, more likely than readers in lower socio-economic groups to identify with the depicted settings and imagery.

Discussion and Conclusions

To answer RQ1, this study found only minor differences between adverts depicting older adults in UK magazine advertising between the two time frames. The sixfold typology (Williams et al. 2010a) appears still fairly, but not wholly applicable for categorising adverts in the 21st century. We can detect some blurring of boundaries in that the “golden ager” depictions do not now uniformly consist of glamorous images, but rather fit and healthy older adults more generally. This links with the social imaginary of the third age in foregrounding activity and healthy lifestyles. It also both reflects and helps maintain the reported discrepancy between cognitive and chronological age, especially among affluent third agers. The “coper” category seems to have lost many negative aspects of representation – these are more typically now smiling images, not helpless images, again promoting the idea of self-care and responsibility. The mentor/legacy types have declined in number, and the comedic representations seem to have practically disappeared.

No notable differences emerged regarding the gender distribution of the older protagonists. Product categories were very similar in the two corpora, too: adverts for retirement housing and holidays have increased, and adverts for food and drink have decreased. Whilst the proportion of age exclusive adverts has remained constant, age preferential adverts (those most likely targeting older adults) have increased, and both age incidental and age contrastive adverts have decreased over time (in the magazines sampled). Most magazine adverts using older models, then, seem to be designed for older consumers, and increasingly focus on lifestyle advertising (housing and holidays), whilst also maintaining a focus on health-related products. Adverts in magazines targeting younger adults continue to include very few images of older adults, which points to visual ageism in this context.

“Positivity” in advertising representations of older adults is achieved via an emphasis on coupledness, communality, health and fitness, and active pursuance of addressing perceived problems of ageing (minor mobility and health issues). Grandparenting is also positively depicted, and family networks also create positive connotations. There is a preponderance of smiling images in these data, presumably designed to have a positive effect on the viewer, and this is not surprising in an advertising

context, as noted earlier. Against these potentially appealing qualities, we need to acknowledge, though, that the activities engaged in by the older protagonists tend to be limited to daily personal and domestic activities, socialising, leisure pursuits or acting in a grandparent role. Thus, the roles and activities are limited, and the representations marginalise older adults in that we only see them in certain contexts. Interestingly, the mentor type portrayals have decreased over time. Older adults as experts do feature, but these are mostly in food-related contexts, continuing the domestic theme. Apart from a well-known older British female celebrity cook, expert roles are typically occupied by men in these data.

In terms of RQ2, the later life lifestyle in the retirement housing adverts is presented as achievable, for example via the predominantly medium close shots of the residents, involving the reader at a horizontal, full frontal angle as acquaintances. This is designed to increase the potential for readers to relate to the images. The modality (degree of “realness”) ranges from relatively low (e.g. via blank studio backgrounds to images) to high (vibrant colours), and thus the degree of “truthfulness” of the depictions varies. Most images contain enough detail and “naturalness” to be relatable for the target audience, yet the poses of the protagonists can look staged. Ledin and Machin (2019) analysed the changing depictions of IKEA (Swedish multinational ready-to-assemble furniture retailer) kitchens in the company’s brochures over time, and they observe a change from representing this part of the home as a separate, “functional” space in the 1970s to a “creative” space integrated into the home in 2016. A link is made by the authors between the changing conceptualisation of the kitchen/domestic space and neoliberal ideology. The representations have become more and more “codified, with increasing prescription over the meaning of space and also...what takes place there” (Ledin & Machin 2019: 165). Such coding aligns with ideas, values and identities, including self-management. Similarly, we can see a prescription of a specific kind of third age later lifestyle and use of space in retirement housing advertising.

Hanson (2001) makes the point that over 80% of older adults in the UK live in a “normal” mainstream family house (often a two-storey house, although some older adults move to a bungalow). Whilst there has been a decrease in local authority residential provision, private sector housing schemes have increased – this likely explains the increase in retirement housing adverts. These sometimes emulate US style retirement villages.

What distinguishes these from houses in a normal residential street is that the age-profile of residents is much more homogeneous. Hanson (2001) suggests that this recent housing trend is worrying in that it results in self-segregation of affluent older adults, which negatively impacts on the composition of future communities. It is noticeable in the retirement housing adverts that very few depict interactions involve people younger (or older) than the residents. The residents are rarely portrayed as grandparents or as members of larger families. This seems to echo the segregation Hanson identifies. Perhaps the luxury retirement apartment complexes offer diminished opportunities for intergenerational mixing. The residents are depicted as free from family and work commitments.

But to what extent are these adverts representations of “agelessness” (cf. Andrews 2018; Fairhurst 2012)? Even though they do not tend to refer to the third age residents via explicit age categories (such as “housing for the over 60s”, although “retirement” is mentioned), the commodity advertised is age marked, with the models appearing to be over 60, and the selling points being implicitly age salient. Age is not, therefore, erased but purposefully packaged. Retirement housing adverts voice loneliness and insecurity/vulnerability as implicitly age-related concerns, whilst framing the advertised locations as attractive safe havens for care-free, secure and socially engaged (with people of similar age) retirement lifestyle in a new community of likeminded retirees. In other product adverts using older models, implied “problems of ageing” besides loneliness are presented as ones that can be successfully managed. These centre around mobility and relatively minor health problems, such as those relating to hearing, failing eyesight or personal care.

Timonen (2016: 78) proposes that we now have models of “very specific, normatively driven social constructs of ‘ageing well and appropriately’”. These are seen in advertising, amongst other form of public discourse. More and more agency is attributed to all older adults: “model ageing notions systematically advantage older adults with specific qualities (such as good health, driven personality, extensive social networks), in specific circumstances (for example, in good-quality housing and safe neighbourhoods); in other words, individuals who are already...likely to enjoy social, health and economic advantages as they age” (p. 79). Third age marketing and advertising are part of this perpetuation of an advantage: those who are already ageing “successfully” are encouraged to do so

in specific ways and are targets of product and lifestyle advertising that promote active, even if not completely “ageless” behaviours. As Pickard (2016: 191) suggests, “in these ads greater chronological age is linked to maturity and freedom, an elegant sexuality, a moneyed savoir-faire. This, of course, is not ‘old age’ but privilege”. Independence and self-care are prominent themes in these data, too. Yet, as shown earlier, the “agelessness” in this imagery can be questioned, as specific models for ageing “appropriately” at retirement age are offered.

Although the imagery of active and healthy “golden agers” appears positive, it arguably promotes idealistic notions of individual responsibility in the management of the ageing process. Age-related limitations and risks are constructed as problems for which consumerised solutions are provided via help and support products, as well as (semi-) independent housing solutions, for example. Although it is important to approach advertising as a specific genre with specific promotional aims and priorities, it is notable that little variety in ageing “successfully” or in lifestyles is featured in UK magazine advertising (Ylänne 2015, 2020). Older adults might be portrayed in more varied ways in other types of advertising. But in magazine adverts, older adults continue to be depicted in limited ways that predominantly promote “stylised ageing”. It is also evident that the images almost exclusively represent white demographics, erasing any ethnic heterogeneity of the “ideal readers”. Couples are depicted as heterosexual; in adverts with two females (never two males), they seem to be positioned as friends (as in example 1 earlier). Only in a few adverts is the relationship status more ambiguous (albeit there is no physical contact).

Research on portrayals of older adults in the media, including advertising, has spread over the past few decades across the world. This study contributes to this area of work via its longitudinal focus, investigating persistent trends in advertising portrayals of older adults over almost two decades, and by contextualising the depictions within advertising genre and the target audience, as well as by linking its findings with current discourses of ageing. In addition, it used a methodology that captures both changing trends and offers more in-depth analysis, which can usefully contribute to cultural gerontological theorising about ageing and its representation. The combination of content analysis and (social) semiotic analysis can help us to critically approach representations of ageing, including “successful ageing” and supposedly “ageless” representations in

contemporary visual media, as shown by this study. A critical linguistic focus on advertising discourse (language) and its construction of ageing would usefully expand this study to examine the interplay between the visual and the linguistic elements. Since age intersects with other aspects of social identities, such as gender, sexuality and ethnicity, more research is needed to uncover patterns in media portrayals of these, too, in later life. Audience research, in turn, can uncover the interpretation of the meaning potential of adverts by the target audience and others.

Ethical statement

As the materials were publicly available, no ethics permissions were required. Copyright permissions to reproduce adverts have not been sought.

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Retirement transitions in the 21st century: a scoping review of the changing nature of retirement in Europe

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Abstract

The ways to transition from work-life to retirement are undergoing important transformations. The timing and pathways are changing, and many individuals are undergoing long periods of being in between working and retirement life. Yet, our cultural understandings of retirement tend to maintain a clear distinction between pre- and post-retirement life. Although the changes in retirement transitions are not new, the trend has accelerated in recent decades. We focus on what is known from the literature about the tendencies in alternative retirement transitions of healthy seniors in Europe since 2000.

We review some conceptual and political transitions in the societal understandings of retirement, followed by a scoping review in three sections: (1) *later life employment transitions (bridge employment and employment after retirement)*, (2) *self-employment*, and (3) *unretirement*. We conclude that

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although 21st-century retirement transitions are complex and understudied, there are clear tendencies regarding who engages in such practices and why.

Keywords: bridge employment, employment after retirement, push-pull factors, self-employment in old age, unretirement.

Introduction

There are important transformations taking place regarding the nature of retirement and the ways to transition from working life. This scoping review addresses these transformations and shows how the retirement transition has become a process rather than a point in time. Thus, a clear distinction between pre- and post-retirement life is increasingly obsolete.

Decreasing infant mortality rates at the beginning of the 20th century and the application of new health technologies during the century prolonged life and created a surplus of labour. Thus, retirement was institutionalised, and older people were segregated from the labour market. When mandatory retirement and pension schemes became widespread in European welfare states during the 20th century – which have since been a key factor in the consolidation and maintenance of such welfare states – retirement was a point in time. It was usually decided by chronological age and sometimes by years in the labour market.

Closely related to the industrialised society, retirement was at the end of an institutionalised life course organised temporally into rather fixed periods of childhood and education, adulthood and production, and finally old age and rest (Kohli 2007). Celebrated as a universal security system, retirement and pensions were also criticised for creating dependence and more sedentary lives among the older generations (Townsend 1981; Walker 1980). In the last decades of the 20th century, this criticism was counteracted by a continued increase in life and health expectancy, which entailed long lives after retirement age. Those years were not used sedentarily. Instead, the nature of retirement was transformed by policies of active, healthy, successful and productive ageing combined with healthy generations of senior citizens, often engaged in many post-retirement activities.

In recent years, not only the increasing life and health expectancy has changed life post-retirement, but also the timing of retirement and the different pathways to it are evolving as European citizens increasingly postpone retirement and extend their working lives (European Commission 2018). Whilst some people work full-time beyond retirement age, most engage in different kinds of jobs with a transitional character (i.e. reduced time, reduced status, small-scale consulting, etc.).

Therefore, in this scoping review, we ask what is known from the existing literature about the current, different retirement transitions of healthy seniors in Europe in the 2000s. As retirement is changing, our understanding of this important transitional phase should change as well. Our aim is to summarise and disseminate research findings, which scoping reviews are ideal for (Arksey & O'Malley 2005). We believe that highlighting and disseminating the existing heterogeneity of retirement transitions plays an integral part in countering a stereotyped stance towards people approaching retirement age.

Recent review studies and conceptual contributions have focused on two main issues: how to characterise the myriad of emerging flexible retirement trajectories and how to explain this trend (Alcover 2017; Cahill et al. 2013; Earl & Taylor 2017; Hofäcker & Radl 2016; Sullivan & Al Ariss 2019). An illustrative example of the former can be found in the paper by Earl and Taylor (2017). They use the concept of “bridge employment (BE)” to signify a “broad range of late and post-career jobs including part-time work with the same employer that involves a reduction of working hours (also called phased retirement); a new or modified role with the same employer that involves a reduction of job complexity or physical demand (also called partial retirement); a job with a new employer in the same career field; a job with a new employer in a new career field; and self-employment (SE) ... ‘bridge jobs’ share an ambiguity of being located beyond career but preceding retirement” (pp. 332–333). This is echoed by Alcover (2017: 247), who states that “The most common definition of BE refers to any kind of paid work (part-time, full-time, or SE) carried on after the end of an individual’s professional career or full-time employment before complete withdrawal from the labour force or retirement. BE alternatives may therefore be considered modalities of retirement that prolong working life, allowing the term ‘full retirement’ to be used to refer to final withdrawal from the workforce”.

According to these definitions, BE¹ signifies any late career employment transitions before full retirement. In contrast, employment after retirement (EAR) emphasises continued employment or transition to new EAR *age*. The problem with both concepts is that inclusion in the study populations is unclear. For BE, it is difficult to say when you enter “post-career” as the job market is increasingly characterised by more flexible work forms, short-term contracts, etcetera. Furthermore, there is a gradual, sliding shift to new job functions or requirements for many employees, which means that it is difficult to say when you have entered BE. EAR may seem more well defined. However, the individualisation of pension schemes in many countries means that opportunities for retiring have become more flexible as opposed to the idea of a fixed retirement age for all. These ambiguities should be acknowledged, but they cannot be fully resolved as they reflect underlying empirical heterogeneity. A key implication for our review is that we must recognise a degree of empirical overlap between EAR and BE studies in our material. We will use the concept of “later life employment” (LLE) as the umbrella term but will refer to BE and EAR as subcategories in the results section, as these terms are used in the reviewed studies.

Building on this discussion, we take retirement to be the absence of formal work, and retirement transitions to be a process towards retirement with varying degrees of labour participation. This is in line with the dynamic perspective of retirement found in Cahill et al. (2013), who identified six periods through which older workers pass (or may pass) in their transition from full employment to permanent or definitive retirement.

A useful summary of the various explanations for the flexible retirement trend is found in the institutional rational-choice model developed by Hofäcker and Radl (2016: 8). This model suggests that retirement decisions at the micro-level (individual) are also influenced by several factors at the macro (societal) and meso (organisational) levels. A similar perspective of the interaction between micro-, macro- and meso-level factors is found in earlier contributions (e.g. Beehr et al. 2007). Hofäcker and Radl further identify four different factors or mechanisms that influence the transformation from institutional structures to individual choices.

¹ We use the following abbreviations: BE, bridge employment; EAR, employment after retirement; LLE, later life employment; SE, self-employment.

“Push” and “pull” factors have traditionally been used in economic analyses, whilst the additional factors of “maintain” and “need” provide a more nuanced perspective, particularly suited for the current era and the emerging dynamics of flexible retirement patterns. Individual choices are clearly important explanatory factors for understanding retirement patterns. Yet, we agree that additional insights may be gained by supplementing this with an awareness of the meso- and macro-level factors that influence individual choice options. Such factors not only include the economic and policy contexts mentioned by Hofäcker and Radl but should also be extended to include cultural and normative pressures at societal and organisational levels (March & Olsen 2010). An illustration of such normative factors can be found in a study by Manfredi and Vickers (2009), which showed that many people feel pushed out of the labour market – by their employers, peers or themselves – when they reach a certain age.

Whilst these explanatory frameworks are very useful, it is essential to note that many of the studies in our review present associational relationships rather than causal explanations. We will summarise the study results whilst emphasising the need to remain aware of this weakness in the material.

The following scoping review should be seen as an introduction to a broad field with many approaches, explanations and complexities rather than a systematic review aiming to summarise results across a narrowly defined set of studies with similar scopes and methods. After the design and method section, we introduce the field by reviewing some conceptual and political transitions in the societal understandings of retirement. This is followed by the actual scoping review, which we have divided into three sections. (1) *LLE* includes BE and EAR, thus, consists of studies investigating people who transition into new work either full-time, part-time or in new transitional jobs in late career or after statutory retirement age. (2) *SE* consists of studies investigating people starting new enterprises around retirement age. (3) *Unretirement* covers studies investigating people who have exited the labour market only to enter again after a period of retirement. In the three review sections, we ask (1) who engages in such practices, (2) why do people engage in such practices, and (3) which structures and initiatives enable such practices. The three sections have emerged from the main themes in the empirical papers identified in our search.

Design and Methods

We have used the research databases PubMed and Scopus and included relevant studies published after 2000 and until May 2019 in those databases. In a second search, we updated with more recent studies published until June 2020. We have only included studies in English. As we have included studies investigating a minimum of one European country, studies comparing, for example, retirement practices in Germany, Japan and the US have also been included, but only the European findings are reported in the review. Numerous studies have focused on specific medical conditions that each have a significant impact on retirement transition. Thus, we chose to focus on studies that include only healthy seniors or do not specify the included subjects' health conditions.

Regarding the content and quality of the studies included, we have not excluded studies due to poor research designs, as this is not the role of a scoping review (Arksey & O'Malley 2005). In many cases, we include the research design in our discussion of their findings. This is important, for example, if a study includes people from 50 to 69 years of age (Haynes et al. 2014) because most of them are not in retirement age. It should also be noted that we have only been interested in studies that include people in or around retirement age. Therefore, studies that have asked future retirees about their prospective and speculative retirement/work practices have not been included (e.g. Matthijs Bal et al. 2012).

Initially, we found 142 relevant articles or chapters. After a screening of abstracts by the authors, the authors and student assistants went through all included abstracts to find duplicates and studies that should be excluded due to the above criteria. This left us with 100 studies. These studies were screened in full length by the authors, which left us with 72 studies. Initially, we also included a fourth category, BE. However, after analysing the nature of the studies in this category and those in the EAR category, we decided to combine BE and EAR into the LLE category, as there were too many overlaps in terms of what was actually being studied.

In the spring of 2020, a second search was conducted to update the sample of studies. Initially, 33 new relevant studies were included, which finally led to 15 new studies included in the sample. In total, we have included 87 studies divided into 67 studies investigating EAR, 15 studies investigating SE and five studies investigating unretirement (see Appendix 1).

Before presenting the results of this review, we will explore the shifting nature of retirement in the following section. As this exploration is primarily conceptual and policy-oriented, we have included studies within and outside Europe as well as policy reports from the European Union (EU).

Reforms and the shifting nature of retirement

In the past decade, the EU member states have undergone substantial pension reforms centred on “the introduction of higher pensionable ages, tighter eligibility conditions and reductions in early-retirement opportunities” (European Commission 2018). Central to these reforms is the postponement of retirement age, mirroring the increasing life expectancy (Moreira 2016) as well as policies and discourses of active ageing, which reframe old age as a life phase including societal participation (Lassen & Moreira 2014).

In the same period, the stability of retirement institutions across Europe has been questioned. In many countries, debates about the standards and designs of pension schemes and retirement rights have flourished, as models of flexible, gradual and differentiated retirement have been proposed and tested. As described recently by Phillipson (2019), retirement has become a contested institution as people in their 50s and 60s experience an increasingly fragmented nature of working life and engage in a range of precarious jobs. In the EU, part-time work is widespread among the 65+ age group, and 38% of the 65+ workforce were engaged in part-time work in 2011 (Eurofound 2014), and more than 50% of retirees would like to work at least some hours weekly.

An important measure for calculating the economic sustainability of European member states has been the old-age dependency ratio (e.g. European Commission 2012). However, this is currently being questioned, as the ratio’s clear delineation between pre- and post-retirement is out of touch with current retirement practices. In current dependency ratios, 65+ is deemed out of the workforce, but in the EU, about one out of every ten persons between 65 and 69 years of age work (Eurofound 2016).

As numerous scholars have argued, retirement is a process that can take years, and it is often complex, with various pathways not necessarily entailing a complete withdrawal from the labour market (Cahill et al.

2013; Calvo et al. 2017; Fasbender et al. 2016; Leinonen et al. 2018; Tang & Burr 2015). The complexity of retirement pathways suggests that the traditional explanatory model of push-pull factors should be modified to include additional factors such as “need” and measures to “maintain” seniors (Hess et al. 2016). In this regard, it is relevant to note that one of the most important factors for post-retirement life satisfaction is the ability to choose one’s retirement timing, instead of being forced to retire by sickness or unemployment (Fisher et al. 2016).

Whilst some identify working beyond retirement as a consequence of increasing precariousness, others embrace it as caused by increased health expectancy and a continued wish to engage and contribute. What should be clear is that there is rising uncertainty regarding the status of retirement and retirement timing (McDonald & Donahue 2011), as it becomes individualised. As Vickerstaff et al. have argued (2015), in the past retirement happened to us at a fixed age, whereas now it is something we do, and we do it in different ways. In a British qualitative study about senior workers, Phillipson et al. (2018) showed that after the end of mandatory retirement, senior workers are still implicitly expected to retire voluntarily in times of cutbacks and are implicitly expected to plan for their retirement. As such, the systems and organisations around workers appear to have retreated from the management of work-endings, thereby individualising retirement timing and creating uncertainties with limited support for taking good and timely retirement decisions.

A wealth of studies highlight the importance of retirement planning (e.g. Adams & Rau 2011; Elder & Rudolph 1999; Hershey et al. 2007; Taylor & Doverspike 2003). However, explored qualitatively, Moffatt and Heaven (2017) found that many workers were not able to plan, as they did not experience control and the ability to choose retirement timing. Unanticipated events (such as disease or unemployment) impeded them from acting according to plans. As such, retirement planning is a socially structured issue containing normative ideals about the ability to plan the many bumps of life. Retirement is uncertain to a degree. One US study found that white-collar boomers now perceive complete retirement as negative. Indeed, retirement is in flux (Kojola & Moen 2016).

Above, we have emphasised important shifts in the policies, practices and cultural understandings of retirement to frame the following review. We have also shown that whilst some attempts have been made to

summarise aspects of the new retirement patterns across Europe (Cylus et al. 2018; Eurofound 2012, 2014, 2016; Hofäcker & Unt 2013), more systematic information about the retirement transitions across Europe is needed. We will address these issues by looking further into the shifting nature of retirement through the studies investigating the heterogeneity of European retirement transitions. Although we have identified a considerable number of studies, there are clear limitations in converting this into a systematic analysis of differences across countries, regions or institutional designs, as there are simply too few studies to populate such subcategories. Therefore, our main contribution is to highlight several trends regarding retirement transitions as they unfold in the European countries covered by the available peer-reviewed studies.

Scoping 1: Later life employment

EAR can be defined as continued full- or part-time employment after the statutory retirement age. Across Europe, people tend to retire in their 60s (see Figure 1), although there are many signs that labour market participation, in general, is increasing beyond retirement age. Across Europe, people work longer than previously (European Commission 2018: 85; also Figure 2). Simultaneously, rates of sick leave are falling among the 65+ group, as documented, for example, in Sweden (Farrants et al. 2018), which could contribute further to this movement. Whilst we explore this tendency in the following, it should be noted that conventional retirement at the official retirement age remains the dominant pathway (Madero-Cabib et al. 2019).

Several studies use the concept of BE. As noted above, this concept is usually presented to signify a wide range of different types of part-time employment and dis/continuity. As such, it is challenging to define narrowly and has considerable empirical overlap with the EAR concept. Some people stay in the same job after pension age but at reduced hours. Others find new jobs with fewer hours, sometimes in entirely different fields than their previous jobs. Some people start businesses (which we will review in Section 2). Some people engage in one of the above but do not consider it part of their retirement transition. Others define BE as participation in paid work when you also receive a pension income (Dingemans et al. 2017). Thus, BE is not easily defined (Beehr & Bennett

Figure 1. Age structure of the workforce, including formal careers, adjusted for full-time equivalence. Data from the European Social Survey including Austria, Belgium, Czechia, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Israel, Lithuania, Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, Switzerland and United Kingdom. The group “Paid work and fulltime carer” is unfortunately not visible in black and white graphics, but it is much smaller than the other groups and primarily exists in the age groups from 30 to 60. For details, please see the original source (*Source: Cylus et al. 2018: 20*)

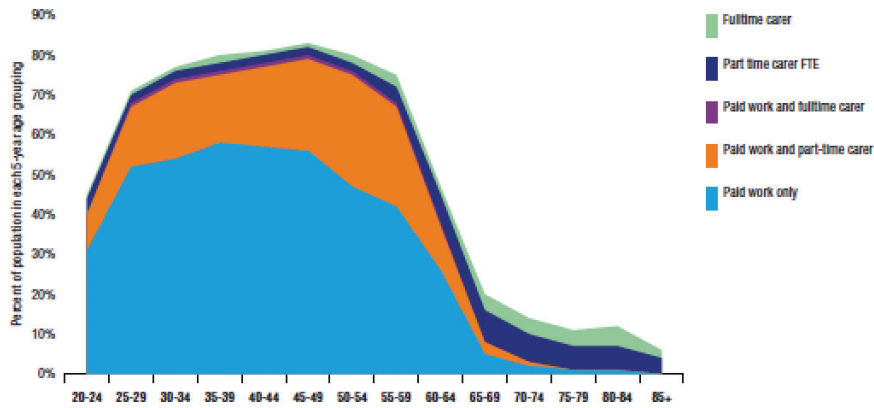
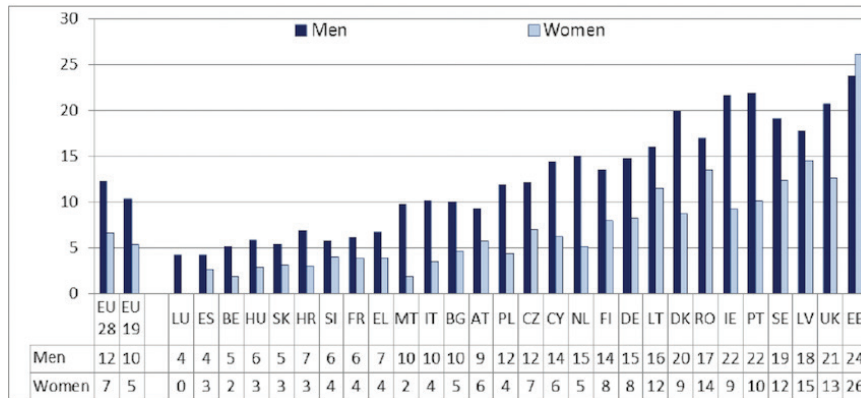


Figure 2. Employment rate of older people in different EU countries in 2016 aged 65–74 in per cent (*Source: European Commission 2018*)



2015), and in many instances, it corresponds to gradual, phased or partial retirement. The empirical perspective on BE is complicated because, in countries like the Netherlands, 75% of women and 25% of men work part-time throughout the life course. As such, BE can simply be a continuation of part-time work, perhaps with a gradual reduction in working hours. BE has been widely studied in the US, where it has, for example, been shown to have positive effects on mental health (e.g. Cahill et al. 2013), but it has been less studied in Europe. Much of the European research has been conducted in the Netherlands. We conclude that a uniform definition of BE is lacking. It often overlaps with EAR in terms of the empirical phenomena studied, although with the difference that BE is defined as a pre-retirement phenomenon in some studies.

LLE as a societal practice appears to be increasing, although the variability in definitions makes it harder to conclude across studies. One Dutch study found that 25% of retirees participate in BE after retirement (Dingemans et al. 2016). In another study using SHARE data from continental Europe, only 14.6% of the sample aged 55–70 engaged in BE when interviewed, making it less common than in the US (Brunello & Langella 2013). The growth in LLE makes it important to study the complex empirical reality of this phenomenon.

Who *engages in later* life employment and why? Whilst the majority of employees stay in the same working environment when continuing post-retirement work, a German study showed considerable heterogeneity in who engages in such activities (Burkert & Hochfellner 2017). Similarly, Swedish research points to differences in propensity to continue work due to a complex interplay between working life experiences, economy, health status and geographical location (Lundgren et al. 2018). In a cross-European study, clear differences in the likelihood of EAR were found, depending on whether the working retiree is employed in a high-strain or low-strain job (Dingemans & Henkens 2019a).

Whilst such complexity should be acknowledged, some common traits emerge from studies across Europe that generally point to four overall characteristics of people continuing to work: good health, high education, good working conditions and meaningful work. A European review that included 15 studies focusing on the importance of gender for EAR found that health is the most important factor for EAR across genders (Edge et al. 2017). Those who work at 65+ in the Netherlands are in better health

than the retirees (Van der Zwaan et al. 2019; Wahrendorf et al. 2017). Another Dutch study based on qualitative data confirmed this observation of good health as the main predictor of EAR (Sewdas et al. 2017), whilst a longitudinal study from Scotland also pointed to the importance of mental health for EAR (Demou et al. 2017).

Across Europe, education is an important factor for the uptake of EAR. A study comparing Germany, the US and Korea found that in Germany, it is those with high education who engage in EAR (Cho et al. 2016). Also, in countries with low employment rates among the old, such as Poland, higher education increases the probability of EAR (Oleksiyenko & Życzyńska-Ciołek 2018). A qualitative study about EAR among academics in the UK, New Zealand and Australia found that this particular group experienced greater satisfaction levels when working after retirement age, which was caused by a decrease in administrative responsibilities (Hutchings et al. 2020). In Finland, a country with a flexible retirement age between 63 and 68, people with higher education retire later. However, people with lower education engage in more EAR, thereby decreasing the difference in actual working hours between the two groups (Leinonen et al. 2018).

Overall, we find the same tendencies in studies about BE and EAR regarding health and education. Another emerging insight from a growing number of studies is that barriers and options in the pension system are important, as greater flexibility promotes LLE.

One scoping review, including countries across the world, supported the conclusion that BE is primarily for those in good health (Carlstedt et al. 2018). This is also confirmed by a study across 16 European countries, which concluded that BE is most likely among those in good health, and high education increases the likelihood of BE. The same study also mentioned the importance of pension income and marital status. When people have a high pension income, their likelihood of BE decreases, and when they have experienced divorce or widowhood, their likelihood of BE increases (Dingemans et al. 2017). A British study showed not only that more men than women are engaged in BE but also that the strongest predictors are physical and cognitive abilities (Stafford et al. 2017), which confirms that health is strongly correlated with BE.

Working conditions throughout the life course are also important factors in EAR. A study including 14 European countries found that people with disadvantageous and discontinuous working lives were less likely

to engage in EAR (Hoven et al. 2018). Furthermore, people in more privileged positions engaged in EAR, and their psychosocial working conditions when doing so were better than those reported by retirees reflecting on their last occupation (Wahrendorf et al. 2017).

Another cluster of studies points to meaningfulness in the job as an essential factor for EAR. Personal attitudes to work (Van der Zwaan et al. 2019), work engagement (De Wind et al. 2016), and high levels of personal and social meaning in work (Fasbender et al. 2016) are all associated with EAR. The importance of perceiving employment as meaningful is also confirmed in a Dutch study about BE (Veth et al. 2018). Other key factors include task autonomy (Alcover & Topa 2018; Müller et al. 2015) and flexible working conditions (Oude Mulders et al. 2013). Whilst such positive “pull” factors are important, it should also be kept in mind that some people engage in LLE due to economic necessity and/or a desire to gain financial security. This complexity of background factors is displayed in a German study about EAR (Burkert & Hochfellner 2017).

When scrutinising companies’ HR policies, a Dutch study found that in many cases, there are no formal agreements on BE. However, the most valued workers are often offered BE through informal agreements (Oude Mulders et al. 2013). This finding suggests that BE is more easily available for the most privileged or specialised workers, who often do not need formal agreements.

Two of the key reasons for EAR that emerge across many studies are social relations and fulfilment in the workplace. Those who engage in EAR tend to have more friends than those who do not work (Haynes et al. 2014). Furthermore, people with jobs contributing to their identity and a sense of accomplishment are more likely to be employed after traditional retirement age (Hovbrandt et al. 2019). Another factor, although this has only been scarcely investigated, could be people’s attitudes towards ageing. A German longitudinal study investigating psychological aspects of EAR showed that employees who perceive retirement as a social loss or working as personal growth are more likely to engage in EAR. In contrast, people who experience ageing as a gain of self-knowledge are not likely to continue working beyond the normal retirement age (Fasbender et al. 2016).

What are the consequences of engaging in later life employment? The reasons for engaging in LLE appear to be correlated with the effects in terms of self-reported wellbeing. In the UK, those who state

that they engage in EAR for financial reasons score lower in quality of life than those who retired at the usual age. Conversely, those who continue employment for non-financial reasons score much higher (Di Gessa et al. 2018). Nevertheless, it is also essential to keep the broader societal and economic context in mind. A study of 16 European countries found that retirees with low incomes or who live in countries with low retirement income increase their life satisfaction through EAR; however, this is not evident for retirees with high income (Dingemans & Henkens 2019b).

Some Dutch studies point to BE as good for the quality of life, life satisfaction and mental wellbeing, particularly if the transition from career job to retirement was involuntary (Dingemans & Henkens 2014, 2015). However, a European study concluded that there is no difference in overall wellbeing between people who retire early or late, partially or fully (Sohieret al. 2020).

Which structures and initiatives enable employment after retirement? In recent years, there have been many initiatives across Europe to extend working lives. Whilst some of these have targeted retirement age in general, others have endeavoured to create more flexible working conditions around retirement, which has been shown as a precondition for increased EAR (Sewdas et al. 2017). Flexible working conditions can be organised through formal legislation and contracts, but informal arrangements also appear to play an important role (Cebulla et al. 2007). Key to creating such flexible working conditions is the removal of barriers for financially vulnerable groups who find it difficult to obtain employment (Dingemans & Henkens 2019b) as well as the maintenance of employment rights after retirement age (Lain 2012). Initiatives such as increasing the minimum retirement age and reducing employment protection rights have raised BE levels in Northern and Central Europe and increased permanence in full-time employment in Southern Europe (Brunello & Langella 2013). Also, policies encouraging BE by allowing for additional pension income seem to work well in the Netherlands (Dingemans & Henkens 2014) and Norway (Furunes et al. 2015). A European macro-level study found that the higher the tendency to engage in part-time employment in general across the population, the lower the propensity to retire early, as many continue in what could be considered BE (Been & Van Vliet 2017).

Besides flexible conditions and structures, age management is highlighted by some studies as being essential in promoting EAR (Principi

et al. 2020). A Swedish qualitative study highlighted the introduction of age management in the workplace as important for retaining older workers (Blomé et al. 2018). This has also been studied in another Swedish qualitative study. Through interviews with managers, it is suggested that workplace norms and cultural understandings are crucial, and the issue of transitioning to a less demanding role is often seen as a problem for the individual worker rather than a typical part of the “socio-temporal order of companies” (Krekula 2018). Another study of Swedish managers showed that managers’ attitudes towards EAR determine whether they try to retain older workers (Nilsson 2018). One aspect of such age management strategies could be to provide older workers with an increased sense of control, as a British longitudinal study points to this as key for EAR (Carr et al. 2016). Furthermore, it has been suggested that guiding senior workers and reducing ageism in the workplace can also promote BE (Carlstedt et al. 2018).

Another cluster of studies focuses on the importance of working conditions throughout the life course for EAR. A study across 14 European countries revealed that work trajectories throughout the life course are important for EAR, and disadvantage accumulates during the life course, leading to early retirement (Hoven et al. 2018). Likewise, a study of eleven European countries found that acquiring skills and good working conditions through the life course can facilitate the ability to engage in EAR (Komp et al. 2010). In this regard, gender plays an important role, particularly in countries with caregiving policies requiring the mother to take care of the children, often leading to less stable work trajectories (Wildman 2020; Worts et al. 2016).

To sum up, good health, a high level of education, good working conditions and meaningful work contribute to an increased likelihood of engaging in LLE. Other factors such as a widespread culture of part-time work throughout the life course also play a role. People tend to engage in EAR when they experience a sense of meaning through work. EAR is reported to be good for wellbeing if it is not caused by financial need. These results should be tempered with the observation that most studies only observe associations, and there may be issues of bias and reverse causality. In any case, it appears that LLE can be promoted through various pathways. At the same time, a flexible infrastructure around retirement and good working conditions, in general, are likely to promote LLE.

Scoping 2: Self-employment

SE in old age appears rather easy to define. However, a recent systematic review has pointed to several issues for empirical studies (Ratten 2019). First, when describing SE, should people who are entering old age as self-employed also be included, or only people who begin SE at older ages? Most of the studies included focus exclusively on newly started companies by older people, but some studies do not differ clearly between the two. Second, SE can vary substantially in terms of how the older entrepreneur envisions the company and whether it is a small hobby enterprise, an endeavour to make a living or to build a larger company. Third, the boundary between adults and older adults seems lower within this area than other areas of senior employment. As such, most studies included in this section involve people in their 50s. We have included these studies, as few studies on SE only including people 60+ have been conducted.

Whilst the EU encourages entrepreneurship in older ages (Eurofound 2014), and so-called grey entrepreneurship (Stirzaker & Galloway 2017) has been embraced in some European nations through support programs (e.g. the Prince's Initiative for Mature Enterprise [PRIME] in the UK), there are also some issues regarding precariousness and ageism forcing people out of the labour market, which we will highlight in the following sections. Whilst evidence shows that more SE people are working after 65 compared to wage earners (Wahrendorf et al. 2017), it is unclear whether this is due to poorer pension schemes or other factors (e.g. a different concept of work or stronger identification with own company compared to wage earners). A German study on SE people (not in retirement age) showed that they do not save for pensions sufficiently (Fachinger & Frankus 2017). Whilst this suggests that people might remain in SE for financial reasons, other studies point to more positive aspects of SE or suggest that some seniors simply continue what they are doing because they can (physically) and because no one is telling them not to. This may have positive mental and physical health implications, as shown in an Italian longitudinal study, where SE people were shown to live significantly longer than the rest of the population (Lallo & Raitano 2018).

Who engages in self-employment and why? The studies in our sample present a mixed picture regarding the issue of who engages in SE. Overall, it is difficult to claim that older entrepreneurs are generally well-off

or in advantaged positions. Whilst a Dutch longitudinal study showed that it is primarily older people with high levels of finance and education starting SE and that they do so due to opportunity rather than necessity (Van Solinge 2014), another Dutch study revealed that SE is prominent and growing among older workers in the creative industries, but only the most successful strive at this. The rest get supplementary income from unskilled labour jobs (Hennekam 2015). A UK study showed that for individuals who have been made redundant at 50+, SE is a valuable option. However, although triggered by redundancy, the qualitative findings show that the study participants view their SE as a positive experience, enabling increased satisfaction and personal growth (Stirzaker & Galloway 2017).

In terms of how widespread SE is, a UK study showed that it is a commonplace, and it seems a valid option for many to extend their working lives (Small 2012). However, the total numbers are based on estimates and response biases. A cross-European study found that SE's relative importance is higher for the 50–69 cohort than for younger groups (Morris & Mallier 2003). Moreover, a study comparing SE patterns in Greece and the UK found that older people are more likely to be engaged in SE than younger generations. However, who these older people are in terms of educational and professional backgrounds differs from country to country and region to region. In terms of gender, more males than females are engaged in SE in general, but with age, SE increases for both genders (Morris & Mallier 2003).

The reasons for SE among older people are often studied as either push or pull; however, this does not appear to fully cover the complex pathways of SE (Stirzaker & Galloway 2017). For some people, redundancy is the event triggering SE (Small 2012; Stirzaker & Galloway 2017; Van Solinge 2014), but in other instances, redundancy can be a triggering event for positive experiences. Moreover, whilst redundancy may be a triggering event, the decision to become SE is not only caused by this event. For example, a study across the Rhine Valley found that whilst half of older people who engage in SE are pulled and the other half pushed; factors such as family traditions for SE matter in terms of the probability of SE (Harms et al. 2014). Another study pointed to higher age as increasing the likelihood of engaging in SE out of self-will (Kautonen et al. 2014). Finnish research using register data showed that people pushed into SE have lower

education than those who were pulled, and that males and married people, in general, tend to be opportunity-driven. In contrast, women tend to be necessity-driven into SE (Tervo & Haapanen 2017).

In many cases, SE offers older people the opportunity to retire gradually (Morris & Mallier 2003). A UK-based study showed that older people, for the most part, engage in SE in the same field as their former employment (Small 2012), which adds to the findings from studies concluding that older people do not engage in SE to increase wealth but to use their skills and be their own boss (Stirzaker et al. 2019). SE can also be a response to ageism in the workplace (Stirzaker & Galloway 2017). Moreover, SE brings joy, meaning and purpose to some older people (Stirzaker et al. 2019). A qualitative study from the UK found that women aged 50+ draw on narratives of a new life stage with more freedom, self-knowledge and greater financial and personal security when they engage in SE. At the same time, they actively use this narrative to distance themselves from the category of older woman (Tomlinson & Colgan 2014). As such, the reasons for SE are many, and limiting the decision to either push versus pull or necessity-driven versus opportunity-driven does not account for the complex pathways towards SE.

Which structures and initiatives enable self-employment? Only a few studies have investigated the structures and policy initiatives that enable SE in older age. Overall, government support and favourable policies seem to work as pull factors for SE, whilst an ageist labour market and precariousness sometimes push older people into SE. Also, general patterns of SE within the population affect the SE levels of the older population.

Specific evidence on a policy initiative may be found in a UK study on the PRIME scheme, which supports people aged 50–70 considering SE. This initiative shows positive effects in terms of how many participants end up starting a business; however, this finding is biased because people contacting PRIME are already inclined to start up a business (Kautonen et al. 2008). This study also found that only 15% of the people contacting PRIME are 60+, but when contacting PRIME, this group is more likely than younger age groups to actually start a business.

In the Netherlands, policies favouring SE among the older population have increased the trend (Van Es & Van Vuuren 2011). Other factors such as an ageist labour market also drive older people to SE (Van Solinge

2014). Some countries operate benefit schemes that create disadvantages for people engaged in SE. This can be seen in a study from Finland, where older SE persons who have to close a business must become regular job seekers for a period before they can obtain incapacity benefits (Kautonen et al. 2008).

Whilst policies supporting or penalising SE in old age might influence the likelihood of SE, an EU study showed that if a country, in general, has a high level of SE, the 50–69 cohort are also more likely to be SE (Morris & Mallier 2003). Hence, whilst policies and support structures might prove beneficial to increase SE in old age, the general SE patterns and cultural norms within the population could prove just as important.

In summary, SE is widespread among older workers, and the likelihood of self-initiated SE increases with age. More males than females engage in SE in high age. However, it must be considered that most studies do not differentiate between SE throughout the life course and engagement in SE when approaching retirement. There are many pathways to SE, and redundancy is merely one among others. However, SE can become a positive way forward for people experiencing redundancy.

Scoping 3: Unretirement

Unretirement has mostly been studied in the US. For example, it has been shown that 26% of US retirees unretire (Maestas 2010). Whilst one explanation for this could be a financial shock or unexpected boredom after retirement, the study shows that unretirement is often expected prior to retirement, reflecting a complex process with many pathways to retirement. Although this phenomenon has not been widely studied in Europe, the few studies that exist suggest that the practice is widespread.

As with the other scoping categories, unretirement is not easily defined. Unretirement could both entail people ceasing paid work entirely and then, after some time, starting to work a few hours weekly, and people who gradually retire and start working full-time again (Platts & Glaser 2017). Also, the numbers suggesting it is a widespread practice could be caused by fluid boundaries between formal and informal work in practice. If a person retires from formal work but works informally for some hours a week at a small local business, and then formalises this work

through a contract at some point, this would be considered unretirement in some research designs. Unretirement is distinguished from EAR and SE by a temporary break in labour participation, where the individual retires completely, followed by some kind of re-uptake of labour participation. Based on our empirical review, we find this phenomenon sufficiently unique to justify separate attention.

Who unretires and why? Similar to EAR, unretirement is mostly practised by the wealthy, the healthy and the well-educated. A study from Germany, Russia and the UK found that financial need was generally not the reason people unretired (Platts & Glaser 2017). The study found that 42% in Russia, 25% in the UK and 17% of retirees in Germany unretired. This may be compared to another study showing that only 6% in the UK and 2% in Italy unretire (Smeaton et al. 2018). The large difference for the UK is due to differences in the study designs and varying definitions of unretirement. In Sweden, the number seems to be low and varies between 6 and 14% depending on the definition (Pettersson 2014). In the Swedish study, the same association between unretirement and education was found, but it was also found that higher pensions decrease the probability of unretiring (Pettersson 2014). Another study not only confirmed the UK pattern but also showed that males tend to unretire more than females, and people with a mortgage when reaching retirement are more likely to unretire (Platts et al. 2019). Also, in the UK, if a person's partner is still engaged in paid work, that person is more likely to unretire (Kanabar 2015; Platts et al. 2019). Moreover, people who have recently retired have the highest probability of unretiring (Platts et al. 2019).

As suggested in the section above, unretirement is usually not caused by financial need (Pettersson 2014; Platts & Glaser 2017). Unretirement is not a way for people with few resources to obtain an improved financial situation during retirement. Rather, unretirement reinforces social differences, as it is usually the resourceful who unretire (Platts et al. 2019). In a comparative study of the UK, the US and Italy (Smeaton et al. 2018), the predictors in countries where unretirement is common (the UK and the US) are financial needs, high level of education, good health, no care responsibilities and being male. In Italy, where unretirement is less

common, it is solely being male that is associated with a higher frequency of unretirement.

Across the studies, unretirement seems to be more a choice of lifestyle rather than driven by financial necessity (Kanabar 2015; Pettersson 2014), although financial necessity plays a larger role in some countries than others, with the US and the UK as the main examples (Kanabar 2015; Smeaton et al. 2018). However, the complex pathways towards unretirement have only been scarcely studied qualitatively. In a mixed-methods study that included qualitative interviews (Smeaton et al. 2018), the dichotomy between lifestyle choice and financial necessity is challenged. For example, whilst income level did not predict unretirement in the UK, the qualitative data showed that people often had mixed financial and social considerations when unretiring. Debt and children under the age of 30 (in need of expensive education) were part of the motivation to unretire. Hence, structural, social, cultural, inter-generational and financial considerations can be difficult to distinguish in unretirement practices.

Which structures and initiatives enable unretirement? As the research on unretirement in Europe has been sparse, it is difficult to determine which structures hinder or promote this phenomenon. Although the studies suggest that unretirement is often a lifestyle choice, in countries with high levels of pension adequacy, there is a decreased probability of unretirement (Pettersson 2014). Also, it has been suggested that the early retirement culture in Italy – in part due to a perceived moral duty to step aside for younger adults in countries with high unemployment – explains low unretirement probability. This is combined with a cultural perception of retirement as a well-deserved period of resting that includes new and important social roles in terms of grandparenting (Smeaton et al. 2018).

Although such research findings seem somewhat speculative, they reveal a crucial gap in knowledge regarding unretirement as a social and cultural phenomenon. To sum up, more research is needed that analyses the retirement patterns leading to unretirement. With this scoping review of unretirement, we have shown that simple causal explanations (such as financial need or boredom with retirement) are insufficient.

Discussion and Conclusions

This scoping review has presented a number of trends and observations across European countries based on the available studies. This is useful for generating hypotheses to be explored in subsequent studies with a systematic inclusion of more countries, regions or institutional designs for comparisons.

The present study focuses on retirement from formal employment. Yet, it should be acknowledged that formal retirement is not the same as retiring from activities that are productive or useful for society, such as volunteering, paid work and caregiving (Mergenthaler et al. 2019). In many European countries, retirees are actively engaged in volunteering (Erlinghagen & Hank 2006). Likewise, grandparenting is widespread and has proven good for subjective wellbeing (Arpino et al. 2018), health (Di Gessa et al. 2016) and verbal fluency (Arpino & Bordone 2014), as well as contributing to the coherence of families and the productivity of the grandchildren's parents. Today, we see new gender roles also in this life phase, as grandfathers are increasingly involved in grandparenting (Mann & Leeson 2010). Also, many older persons engage in informal care for their spouses (Bertogg & Strauss 2018), and the people reaching retirement age are now increasingly seen to provide informal care for their parents, as the life course is stretched out (Dudová 2015). However, in this review, we only include studies dedicated to examining paid work. Nevertheless, as we have noted here, there are other retirement transitions that could also be classified as participatory, engaged and contributing. Indeed, such unpaid activities and associated identities may play a critical role in decision-making regarding paid work (Sullivan & Al Ariss 2019: 278).

This review has largely confirmed the relevance of macro-, meso- and micro-level factors influencing retirement decisions. It appears that national policies, general economic context, labour market conditions and a range of individual-level factors serve to push, pull, maintain and create needs that influence retirement transitions and engagement in LLE, SE and unretirement. Yet, this review has also indicated that retirement choice is embedded in a broader cultural and institutional context of values, norms and perceptions. Nevertheless, the interaction between such factors and traditional push, pull, maintain and need factors should be studied more extensively.

This review has also illustrated that the choice of LLE, SE and unretirement is more real for some senior citizens than for others. Pull and

maintain appear to be particularly relevant for a highly skilled, healthy and well-connected labour force. In contrast, push and need seem to be the reality for many other groups. Whilst the first group may thrive under the turn to more flexible retirement schemes, the latter may experience this as a continuation of an increasingly precarious labour market situation. Some may not be able to find late career employment despite need (Earl & Taylor 2017: 332). Thus, the differences in choice architecture and opportunities for various employee groups should be studied in more detail across different institutional settings.

In any case, it is clear from our analysis that the tendency to create fixed, spatial, political and cognitive boundaries between life pre- and post-retirement does not fit well with the complexity in actual retirement practices that has emerged over the past decades. Indeed, drawing the line between retirement and post-retirement is complicated.

This mixture of push-pull factors and necessity- and opportunity-driven reasons is general for the three themes of LLE, SE and unretirement. However, it is important to note that many studies in our review present associational relationships rather than causal explanations. More studies and different study designs are needed to clearly establish causalities in the frameworks that have been put forward to understand LLE, SE and unretirement trends in different contexts.

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Queering generativity and futurity: LGBTQ2IA+ stories of resistance, resurgence, and resilience

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Abstract

A preoccupation with heteronormative metrics of success in aging leaves many studies of “LGBT aging” focused on the needs, failings, and vulnerabilities of older LGBTQ2IA+ people (i.e. lesbian, gay, bisexual, trans, queer, two-spirit, intersex, asexual, and people of other nonnormative sexual and gender expressions). As a result, LGBTQ2IA+ elders are frequently depicted as isolated, re-closeted, or simply nonexistent. Heeding calls to intervene into such bleak and pathologizing portrayals of queer/trans aging (e.g. Ramirez-Valles 2016; Sandberg & Marshall 2017), this article explores diverse subjectivities, nonnormative aging experiences, and their potential intergenerational implications. It draws on stories of queerness, gender, aging, futurity, and social change from 13 LGBTQ2IA+ people ranging in age from 23 to 74, recorded in an intergenerational research-generation workshop held in Nogojiwanong (Peterborough, Canada) in 2018. This article argues that queer and trans stories are crucial to confronting the erasure of LGBTQ2IA+ aging, aiming to extend ongoing efforts within aging studies to queer concepts of successful aging, aging

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futures, generativity, and intergenerationality. Ultimately, this article aims to complicate constricted understandings of queer/trans aging, instead of depicting LGBTQ2IA+ people aging with connection, pride, learning, and purpose, as well as with struggle and vulnerability.

Keywords: queer, trans, generativity, futures, successful aging, intergenerationality.

Introduction

Part of it is my own resistance to... the box that I grew up in... [Now] I appreciate that my world is broader and includes all colours of the rainbow. The narrow definitions of what it means to be human don't serve me, and they don't serve the world.

- Dora, 61 years old

Well, I feel a lot safer than I did back then... and I think the word "queer" has opened up so much in my world in terms of the people, the beautiful people that have started circulating into my life, and making it safer to explore parts of myself, and to look at parts of myself that I hadn't before.

- Sandy, 27 years old

Throughout academic and popular discourse, older LGBTQ2IA+ people (including lesbian, gay, bisexual, transgender, queer, two-spirit, intersex, asexual people, and others whose sexual and gender identities do not conform to heterosexual and cisgender norms¹) are frequently depicted as vulnerable, isolated, re-closeted, or simply nonexistent (Brown 2009; Hurd et al. 2020).² In gerontology, a preoccupation with heteronormative vectors of "success" in aging often functions to pathologize older queer and trans lives, with the majority of studies of LGBT aging focused on

¹We use this long acronym, as opposed to LGBT, as a challenge to the erasure of lesser-represented non-normative sexual and gender identities. For more information about these terms, consult <https://lgbtqia.ucdavis.edu/educated/glossary> or www.the519.org/education-training/glossary

²While some scholarship instead highlights the interdependent lives of older LGBTQ2IA+ people with their partners and chosen families (Fredriksen-Goldsen & Muraco 2010), narratives and studies focused on isolation, invisibility, loneliness, re-closeting, and the failures of these nonetheless prevail (e.g. Butler 2019; Harley et al. 2016; Perone et al. 2020), thus contributing to an ongoing trope of a despairing queer/trans old age. While we recognize that some older LGBTQ2IA+ people experience loneliness associated with their aging, we problematize the idea of queer aging as *necessarily* lonely, or dominated by loneliness.

the needs, failings, and vulnerabilities of older LGBTQ2IA+ people (Ramirez-Valles 2016). Though the field of “LGBT aging” has proliferated in recent years, it has been critiqued for a lack of substantive theoretical engagement and for the ways in which dominant aging narratives have continued to reproduce heterosexism (e.g. Sandberg & Marshall 2017). Analyses that delve into the complexities of aging futures among people of diverse subjectivities remain scarce (Brown 2009; Goltz 2013). Queer and trans people of all ages tend to be “figured by the cultural imagination as being outside of mainstream temporalities and standing in the way of, rather than contributing to, the promise of the future” (Port 2012: 3). Critics do continuously intervene into these bleak portrayals of aging and futurity (e.g. Ophelian & Florez 2016); yet, there remains a need for more sustained, nuanced, and theoretically engaged understandings of diverse, nonnormative aging experiences and their potential intergenerational implications (Jones 2011; Sandberg & Marshall 2017).

In the fall of 2018, 24 people from LGBTQ2IA+ communities in Nogojiwanong (Peterborough, Canada),³ ranging in age from 23 to 74, gathered to tell stories of queerness, gender, aging, futurity, and social change, in an intergenerational research-generation workshop. Over 3 days, we shared stories, joked about childhood crushes, envisioned our futures, reveled in moments of joy in our identities, and remembered harmful experiences of homophobia, transphobia, ableism, and racism. With equal parts’ wisdom and whimsy, each moment of this workshop was complex and vibrant, defying limiting narratives of queer and trans aging.

In this article, we draw on 13 of the stories generated through this workshop to explore how LGBTQ2IA+ people from two different age cohorts discuss their own sexual and gender identities, how these have changed over their lives, and how they imagine their aging futures. Specifically, we focus on six older storytellers born between 1944 and 1959 and seven younger storytellers born between 1986 and 1995. Intervening in the

³Nogojiwanong means “the place at the foot of the rapids” in Anishinaabemowin. This is the original name for the region 150 kilometres northeast of the major urban centre of Toronto, which includes the mid-sized city of Peterborough. This territory is governed by Treaty 20 and the Williams Treaties, which settler (non-Indigenous) governments, communities and corporations are neglecting to uphold (Gidigaa Migizi (Williams) 2018; Taylor & Dokis 2015).

silencing of older LGBTQ2IA+ people, which “render[s] elders invisible in queer theory and queerness invisible in gerontological theory” (Brown 2009: 66), these stories contribute to ongoing conversations in both aging studies and queer studies.

This article responds to calls to better understand diverse later lives, particularly the intricacies of queer and trans aging futures (Cruikshank 2008; Jones 2011; Rajan-Rankin 2018; Sandberg & Marshall 2017). Linn Sandberg and Barbara L. Marshall (2017), among others, challenge how dominant narratives of “successful aging” are predicated on heteronormative markers of a good life, tying success in later life to heterosexual coupledness and narrow reproductive understandings of generativity. By corollary, these narratives mark many nonnormative lives, LGBTQ2IA+ lives among them, as “failed” – a notion we confront with the complex and rich stories that emerged in our research.

Similarly, we consider the scarcity of work exploring the meanings and practices of intergenerationality among LGBTQ2IA+ communities, including queer conceptions of generativity (Goltz 2013; Hostetler 2009). In tandem with narratives of isolated queer and trans later life, literature on LGBTQ2IA+ aging often assumes a generational divide within queer communities (Cooper Fox 2007; Farrier 2015; Namaste 2014) with little apparent grounding in the lives, perspectives, or practices of LGBTQ2IA+ people (Krainitzki 2016; Rodriguez 2016). We, thus, draw on stories from our research to ask how aspects of generation and age might influence LGBTQ2IA+ experiences; how storytellers from different generations discuss their own aging futures in similar and/or contrasting ways; and whether and how storytellers experience, envision, and practice intergenerational exchange.

With our analysis, articulated through a four-part argument, we aim to extend ongoing scholarship by queering simplistic conceptions of successful aging, aging futures, generativity, and intergenerationality. First, while the stories in this research depict some key differences in how storytellers from different age cohorts describe their experiences, aging, futures, and identities, they, nonetheless, offer more commonality and overlap than they do divergence and, thus, contest assumptions of generational divides. Second, challenging marginalizing and no-future narratives, storytellers across both age cohorts strongly depict their aging as a process of unlearning and healing the internalized shame and

cis-heteronormative expectations imposed on them in childhood. Third, confronting conceptions of generativity as based on hetero-reproductive relationships, these stories illuminate storytellers' sense of responsibility toward future generations, particularly within their extended families and LGBTQ2IA+ communities. Finally, beyond tropes of intergenerationality as "passing-down" knowledge from older to younger, the intergenerational connections within and among storytellers' lives illuminate deeply held commitments to and practices of learning, advocacy, and care, across ages in all directions.

Overall, then, this article offers complexity to constricted understandings of queer and trans aging, futures, and intergenerationality – shifting from pervasive narratives of queer old-age as isolated, risky, and limited toward stories that reveal connection, pride, learning, and purpose intertwined with struggle and vulnerability. We write for an aging studies audience, adding our work to ongoing interventions into the heteronormativity of successful aging discourses, and expanding and nuancing core gerontological concepts of intergenerationality and generativity.

Methodology: Stories of Resistance, Resilience, and Resurgence

This article draws on stories recorded at an intergenerational LGBTQ2IA+ storytelling workshop held in October 2018 as part of "Stories of Resistance, Resilience, and Resurgence in Nogojiwanong/Peterborough," a multiyear research project (2016–2020) centring stories from groups that have historically been, and remain, least valued in academic scholarship and aging studies, including women and gender diverse people, people who are racialized, Indigenous peoples, people living with disabilities, and LGBTQ2IA+ people (Chazan 2018; Rajan-Rankin 2018). The project was initiated in 2016 when coauthor May Chazan was approached by a local activist organization to document a "people's history of activism in Peterborough," and build an archive of this work at Trent University. At the time of writing, we had completed three rounds of workshops, in 2016, 2017, and 2018, respectively; each paired with a different community organization, recording a total of 40 stories. Coauthor Melissa Baldwin assisted with organizing and facilitating all three workshops. The 2018 workshop

was reviewed and approved by the Trent University Research Ethics Review Board in 2018, while the larger project as a whole was approved in 2016.

Critical storytelling methodologies posit storying as crucial decolonial, feminist, and queer forms of knowledge production (e.g. Sium & Ritskes 2013; Zepeda 2014). This approach – facilitating group storytelling workshops as a form of research – recognizes that contexts and relationships inform how stories are constructed, shared, circulated, and remembered. Through its attention to particularity, complexity, and relationality, storytelling-as-methodology has the potential to challenge dominant narratives and reveal multiple counter-narratives. This project combines storytelling workshops with participatory media-creation methodologies in order to offer participants direct input into how their stories are shared and circulated (e.g. Loe 2013).

The 2018 LGBTQ2IA+ workshop was organized in collaboration with Anya Gwynne from the Rainbow Youth Program at PARN – Your Community AIDS Resource Network and local queer organizer Ziyah von Bieberstein. Four additional researcher/facilitators from LGBTQ2IA+ communities assisted with the workshop. All participants were invited into the project through existing relationships with members of the research team and were living in the small Canadian city of Peterborough at the time of research. We recorded 16 individual stories, facilitated several roundtable discussions, and invited all participants to create personal “zines” guided by the following core questions:

- Do you want to start by introducing yourself and give us a sense of how you would describe who you are?
- How has your sexuality and/or gender changed at different times in your life, as you have aged?
- Is your gender and/or sexuality connected in some way to resistance or social change, and if so, please tell us about this?
- What is your relationship to this community – Nogojiwanong? What is it like to be you in this place?
- How do you imagine growing older here in Nogojiwanong?

Our team of researcher-facilitators took audio recordings of the interviews and roundtables, as well as observational notes throughout the

workshop. Researchers worked together with storytellers to create short digital stories with the option to share them on the Aging Activisms website (see www.agingactivisms.org) and in the Trent University Library and Archives (see <http://digitalcollections.trentu.ca/collections/stories-resistance-resurgence-and-resilience-nogojiwanong-peterborough>).

In preparing to write this article, the authors engaged in an analytic process based on a grounded approach. This involved close readings of interview and roundtable transcripts and researcher-facilitator field notes produced in the 2018 workshop, followed by a combination of reflexive thematic and narrative analysis (see Braun & Clarke 2020⁴; Reid et al. 2016). Attending to storytellers' different ages and diverse backgrounds and experiences, this analytical process produced several key thematic areas, including generational differences (e.g. shifting sociopolitical contexts through time), intergenerational similarities (e.g. experiencing aging as a process of unlearning multiple internalized oppressions), (queering) generativity and intergenerational connection, shifting experiences of LGBTQ2IA+ identities throughout the lifecourse, responsibilities to the future, and more. The first three of these themes are central to this article. Indeed, to explore age and generational dynamics in this article, we focus our discussion around 13 of the recorded stories, selecting those falling within two broad but distinct age cohorts, and omitting three participants whose ages fall between these cohorts from this paper. The pseudonyms and ages (at the time of recording) of the storytellers of each cohort are as follows:

- Born between 1986 and 1995: Kit 23; Devon 23; Keenan 24; Lilo 24; Bailey 26; Sandy 27; Sam 32
- Born between 1944 and 1959: Cam 59; Dora 61; Mia 66; Marlowe 72; Basil 72; Callee 74

We draw on a small number of participants to offer in-depth, interconnected, and situated experiences and stories of LGBTQ2IA+ aging in one context. These stories are not intended to universalize nonnormative aging experiences, but instead, in their particularity and detail, to offer

⁴ With gratitude to the reviewer who shared this piece with us, we feel this gentle guide for thematic analysis, while new to us, resonates with the approach we took.

important conceptual interventions into normative and widely circulated narratives. We hold such stories, and the intersubjectivity of their knowledge, as always theoretically generative.

The knowledge produced through this research is informed by the positionality of the authors as well as the activist focus of the research project. Many participants in this research were actively involved in LGBTQ2IA+ groups or community organizing in Peterborough, so our findings do not include the experiences of those who are more private about their sexual and gender identities. While we consider each of these participants as activists (based on our multifaceted understanding of quieter activism, see Chazan 2018), most would not identify as front-line activists, and most do not have direct ties to formal LGBTQ2IA+ activism. As authors, we are both currently able-bodied, white settlers who had been living and working in Nogojiwanong, on Michi Saagiig Anishinaabeg territory for 5 years at the time of the research. Of different ages (43 and 27, respectively, at the time of the research), we are both part of various queer/trans/activist communities in Peterborough. Our social positions inform our own experiences of aging, the questions we ask in our research and, thus, the concepts we have chosen to explore in this article. In addition, our relationships with participants and within the community more generally undoubtedly have informed the knowledge produced in our workshop. Although we did not personally know every participant at the start of the workshop, all were invited through existing relationships, and this allowed for a sense of trust from the outset. We acknowledge, however, that size of this community and our own varying levels of insiderness among participants could result in both intimacy and omissions. Hence, we ask readers to consider our analysis within this important context.

Concepts

At the intersections of critical aging studies and queer studies, the interpretation we offer in this article engages with – indeed, seeks to extend and queer – concepts of aging futures, generativity, and intergenerationality, while also challenging certain assumptions about queer futurity and LGBTQ2IA+ experience more generally. Our conceptualization of aging – as the nonlinear, ever-ongoing processes of change, learning, returning,

thinking, and acting that happen from birth to death – underpins this analysis while intervening in narratives that equate aging with “old age.” Most broadly, this analysis aims to challenge dominant depictions of nonexistent queer futures (Fabre 2014; Goltz 2013), and heteronormative, ableist, classist, and whitewashed assumptions about “aging well” (Chazan 2019; Sandberg & Marshall 2017; van Wageningen et al. 2013) that disregard the joys and complexities of coming out,⁵ living, and aging as LGBTQ2IA+ people.

The proliferating field of LGBT aging has largely focused on assessing and responding to the needs, risks, and concerns that older LGBTQ2IA+ people face as they age in a still-heteronormative world (e.g. de Vries & Croghan 2015; Fredriksen-Goldsen & de Vries 2019; Sears 2009). This scholarship examines older LGBTQ2IA+ people’s experiences with service provision (e.g. Boulé et al. 2020); institutionalized homophobia and transphobia in medical and care contexts (e.g. Kattari & Hasche 2016; Kia 2016); financial, personal, and social insecurity in the context of queer and trans aging (e.g. Elmet 2016); older LGBTQ2IA+ people’s fears of and tendencies toward isolation and loneliness (e.g. Butler 2019; Perone et al. 2020); their resilience in the face of the interlocking oppressions of ageism and cisheteronormativity (e.g. Fredriksen-Goldsen & de Vries 2019; Moane 2008; Witten 2014); and more. While this work is crucial, much of it still situates older queer and trans people as a population in need (e.g. Boulé et al. 2020; Ramirez-Valles 2016).

A resulting narrative of despair, isolation, and/or vulnerability, thus, arises, in part because many key concepts and theories within aging studies (including, for example, that of “generativity”) remain limited by wider heteronormative assumptions (Boulé et al. 2020; Ramirez-Valles 2016). Scholars in this field have worked diligently to seek to better understand and provide for LGBTQ2IA+ aging *within* existing frameworks and institutional service structures, yet they rarely explore what older LGBTQ2IA+ people and their stories have to offer to revisioning concepts and theories of aging itself, or what LGBTQ2IA+ aging *could* look like

⁵While many storytellers highlighted different ways of “coming out” as an ongoing and ever unfinished process, we join challenges to the linear “coming out” narrative and recognize that “staying in” can also be a resistant and empowering choice (e.g. Hasmanová Marhánková 2019).

when it is freed from ubiquitous heteronormativity. Like Jesus Ramirez-Valles, our “goal is to unmask the ways in which heterosexual dominant norms define what it means to be an older person” (2016: 20–21). We build on this work by attempting to further complicate and nuance mainstream narratives of queer later life and intergenerational queer connection.

Indeed, we heed calls for a more theoretically engaged project of queering aging (Hess 2019; Ramirez-Valles 2016; Sandberg & Marshall 2017) – which we take to mean challenging and confronting the heteronormativity within mainstream aging studies and gerontological concepts. We draw on Sandberg and Marshall’s project of queering/cripping aging futures in the interpretation of our research, which calls into question the ways that “expectations of a good later life and happy aging futures adhere to some bodies and subjectivities over others” (2017: 2; see also Fabbre 2014; Ginsburg & Rapp 2017; Jones 2011; Rice et al. 2017, for more reflections on liveable crip and/or queer futures). Their work, like ours, contributes to a collective effort to make legible a multiplicity of positive futures – making spaces for lives lived outside of heteronormative, ableist, and otherwise constricting success-versus-failure binaries. Drawing on queer studies, we further interrogate the ways in which queerness (alongside disability, race, and so on) is positioned as antithetical to futurity (Brown 2009; Edelman 2004; Jones 2011; Kafer 2013; Muñoz 2009). We also seek to disrupt the disproportionate focus on young queer lives and challenge assumptions of queer aging as synonymous with frail, isolated, and re-closeted lives (Brown 2009; Goltz 2013; Kia 2016; Witten 2014).⁶ We heed scholarly calls to make multiple, nuanced, nonnormative futurities legible outside of constricting success-versus-failure binaries (Jones 2011; Rice et al. 2017), by offering stories and perspectives shared by a particular group of LGBTQ2IA+ people, which illuminate complex and diverse later lives and highlight queer perspectives on aging futures. Before moving to these stories and perspectives, it is useful to introduce some of the key concepts against and through which we have interpreted this research, and to outline how our interpretations might, thus, extend existing scholarship.

⁶There are a small number of powerfully important exceptions to this framing, including the documentary *MAJOR!*, about trans activist Miss Major Griffin Gacy (Ophelian & Florez 2016), and the book *To survive on this shore: Photographs and interviews with transgender and gender nonconforming adults* (Dugan & Fabbre 2018).

Our analysis engages with and contests mainstream conceptions of generativity as connection to future life through hetero-reproductive relationships. Generative “success,” which Sandberg and Marshall (2017) remind us is part and parcel of successful aging discourse, is generally represented through imagery of happy older couples spending leisure time with grandchildren: a capitalist consumerist vision that packages happy heteronormativity up with middle class ideals (see also Chazan 2019; Marshall 2018). As they explain, “depictions of older people with children and grandchildren suggest more than their reproductive success in the present – they are a frequent trope in establishing generativity and the extension of life into the future” (Sandberg & Marshall 2017: 4). This consistent “imagery of reproductive success” presupposes that it is “(hetero)kinship that makes later life meaningful and positive” (Sandberg & Marshall 2017: 3). Many scholars have critiqued the notion of generativity as reliant on reproduction, hetero family structures, linear temporalities, and colonial normativity (Chazan 2019; Dinshaw et al. 2007; Grande 2018; Hostetler 2009; Muñoz 2009), and exclusive to “conventional forward-moving narratives of birth, marriage, reproduction and death” (Halberstam 2005: 16). Instead, Jack Halberstam offers “queer time” as a concept of a life trajectory “unscripted by the convention of family, inheritance, and child-rearing” (Halberstam 2005: 16). We also build on Vanessa Fabbre’s work on the ways that later life gender transitions expand “notions of queer temporality by drawing attention to growing older in ways that do not follow heteronormative scripts” (2014: 171). Her work, like ours, offers gestures of queer aging as a process of shedding internalized oppressions. We explore storytellers’ connections to future generations and articulations of queer generativities, recognizing that few studies offer alternative practices or visions of generativity based on such perspectives (Hostetler 2009).

Furthermore, our analysis aims to challenge assumptions of generational divide or rupture, which are widespread in research and popular discourse on intergenerationality and queerness (Cooper Fox 2007; Farrier 2015; Krainitzki 2016). This perception of a queer generational divide discursively fractures queer intergenerationalities (see Connors 2019; Russell & Bohan 2005). Indeed, when they are not rendered moot by assumptions of insurmountable gaps, narratives of queer intergenerationality frequently relegate elders to the past and youngsters to the future, with

being neither afforded agency nor connection to one another in the present (Chazan 2018; Chazan & Macnab 2018; Farrier 2015). Indeed, scholars tend to elide the rich presents and futures of older people, in favor of their pasts, while obscuring younger people's current knowledges and desires for cross-generational relationships. Judith Roof notes the tendency for studies of queer intergenerationality to "ignore intragenerational differences and intergenerational commonalities, and thrive on a paradigm of oppositional change" (1997: 72). Roof suggests that this assumption of generational divide "creates a sense of perpetual debt to the past, rather than a sense of sustained cooperative relations through time" (1997: 72). Relatedly, assumptions of generation gaps in activist writings and feminist scholarship often reinforce divisions which inhibit intergenerational work for change (Binnie & Klesse 2012; Chazan & Baldwin 2016). We explore both intergenerational overlaps and dissonances in this article (Adams & Poteat 2016), seeking a more nuanced understanding of whether and how generation is implicated in these stories of queer and trans aging.

Finally, this analysis seeks to move beyond assumptions of unidirectional passing down of knowledge, which position the old as "archives of political experiences and discursive repositories" and the young as impressionable and inexperienced (Binnie & Klesse 2012: 580; see also Cooper 2014). Farrier (2015) argues that narratives of queer intergenerationality often focus on passing down the torch of history, most typically limiting intergenerationality within the bounds of conventional familial relations. We examine how intergenerationality is actually discussed and practiced by queer and trans people of different ages. From the stories shared in our research, we highlight some of the specific ways both younger and older storytellers describe their own practices of intergenerational connection.

Generational Differences among Storytellers

We turn to the findings of this research by exploring two key themes widely present among older storytellers, which contrast the perspectives shared by younger participants. While commonalities were greater than differences between age groups, there are some important distinctions in political context, which shape intergenerational conversations about queerness, and therefore, warrant attention here. First, we note

generational differences related to sociopolitical context: specifically, the older cohort discussed the ongoing impacts, still felt decades later, of growing up in a time of LGBTQ2IA+ repression without protections, supports, or access to knowledge about nonnormative genders and sexualities. Second, in contrast to younger storytellers, they raised significant concerns, fears, and vulnerabilities around growing older as queer people. Before we explore each of these findings in more detail, it is important to highlight the diversity and complexity among older storytellers' (later) lives (see Table 1).

The documented history of LGBTQ2IA+ struggles in Canada (Irving & Raj 2014; Namaste 2014; Tremblay 2015) indeed offers a trajectory of legal, political, normative, and attitudinal change over the past 70 years.⁷ With drastic shifts in the legal context, as well as in gender roles and expectations, it is not surprising that differences sprouted between the experiences and expressions of storytellers of different ages. Older storytellers discussed the lingering impacts of what it was like to live and work at a time when homosexuality was criminalized. Many also described having no awareness as children of the possibilities of queerness, no representation of nonnormative sexual identities in their lives (at school, in their families, at church, and in the media), and little to no language about gender diversity. While some younger storytellers shared similar stories of lacking access to information, the older cohort experienced longer-lasting and more pervasive internalized shame and oppression.

Like many of the older storytellers, Callee's and Basil's words are illustrative of childhood confusion followed by criminalization in early adulthood. Callee (74, a "Sapphic queer woman") described her early years as a time when the expectations on her were completely out of sync with her body's knowledge of who she was, but she had "no words" or way to make sense of the confusion, restriction, and pain she experienced. She says,

The time I was born... it wasn't like there was just silence, but it was a *fortified* silence... So, even though innumerable messages had come to me over time, messages of truth... I had no passageways in my neurons that could bring it up to the conscious mind where thought was possible.

⁷ Though legal protections of LGBTQ2IA+ rights do have positive material effects, we recognize that trends toward "queer inclusion" in settler colonial law are not a simple marker of progress nor a signal of the eradication of homophobia, and that these legal rights are not applied equally to everyone (Dryden & Lenon 2015).

Table 1. Older storytellers: Diverse (later) lives

The older storytellers described themselves as follows:

Cam (59), a white settler, identified for much of their adult life as a lesbian but, in recent years, embraced identities of queer and genderqueer, and began to use they/ them pronouns. Cam noted that enforced gender expectations had hindered their early explorations of gender nonconformity, and they had instead adopted the available language of tomboy and butch. Cam is leaving a career in the civil service to attend graduate school. They are involved in activist communities in Nogojiwanong and help to lead an LGBTQ2IA+-supportive youth group. They live with their adult child.

Dora (61) recently came to understand herself as demisexual (a term for those who experience sexual attraction only after making a strong emotional connection with someone). A white settler and former teacher (who left teaching as a result of a disability), she is engaged in arts and activist communities in Nogojiwanong. She has never had a long-term partner and described a sense of isolation, not finding the right connections in Nogojiwanong. (Along with her dog) she is excitedly embarking on a move to a distant part of the country where she feels a connection to the land and her family history.

Mia (66) moved to Nogojiwanong a few years ago after a traumatic experience with her family. After decades of caring for multiple generations, she decided to live alone. She is in a process of redefining herself and finding new community. She spoke of her decision to marry a white man in her early life as a way to have children and also to resist segregation. Mia is a Black woman who identifies as a lesbian.

Marlowe (72) described being a tomboy as a child and becoming increasingly genderless as she ages. In her early adulthood, she married and had children with a man and was read as heterosexual. She later entered into a longstanding relationship with another woman, her current partner. As a retired journalist and white settler, she continues to actively undertake learning opportunities, activism, community organizing, grandparenting, and youth mentorship.

Basil (72), a white settler, identifies as a gay man. He kept his sexuality hidden for much of his early adulthood for fear of losing his teaching job, remaining closeted in his hometown until recent years. Since the passing of his longstanding partner several years ago, Basil lives alone. He dedicated his career to making schools safe for LGBTQ2IA+ youth and continues his activism post-retirement.

Callee (74) identifies as a Sapphic queer woman, poet, theater artist, activist, white settler, and adventurer in many realms. She has had concerns that being openly identified online as a member of the LGBTQ2IA+ community could negatively impact her living situation. She is actively engaged in spiritual practices and regularly connects with people of all ages through meditation, spoken word, storytelling, and social justice activism.

In her early adulthood, Callee married a man, whom she described as a good friend, and they had a child whom she expressed great love for. She later realized that she had to come out as a lesbian and live her truth. She divorced her husband, became openly involved with a woman she cared deeply about, and found herself in “exile.” As she explained:

At the time, until 1969, homosexual activity was considered a crime, and not until the 1980s was there any protection, in law, in the workplace. So, we’re talking about years and years of living in lesbian communities in which we were off the grid completely. We were in exile... and that is hard on the human system.

Several times during the workshop, Callee explained that she is still coming to understand the lasting impacts of these early experiences and to work to be as open about her emotional and sexual orientation as she would like to be.

Like Callee, Basil (72, a gay man) described repressing his sexuality for many years because it felt too impossible or too dangerous to be gay. The impacts of shame, secrecy, and erasure extended over much of his adult life. He reflected on an embodied memory of being labeled a “bad kid,” which he later understood to be related to his sexuality:

I still feel my ears burn and my face burn.... You had this burden of shame beginning. And it did follow me for the longest time, and I withdrew into myself. I always realized I was different but I wasn’t sure what it was and then, of course, ... I repressed it. I became asexual, as far as I knew, I just didn’t want to ... think about it.... The expectations of parents in that time was that you would marry and raise families.

Basil went on to describe the compounding effect of the legal context on him:

I matured, and I began my career as a teacher. But even then, you carried this fear because you could be arbitrarily dismissed from your position without any recourse if you were found to be gay, that was just the way things were. So, you kept this repressed and hidden inside of you, and it really was a release for me then, in the 1980s.... We gained protection by law for our jobs and this kind of thing, I was able to heave a great sigh of relief.

Basil spent his teaching career working to create safer school spaces for LGBTQ2IA+ students, including developing a safe school policy, but did so with an ongoing sense of caution and secrecy: “It wasn’t until that key moment that you were protected by law that you really could do the work

publicly. And even then, I didn't present myself as a gay teacher, I always presented myself as a teacher who was protective and would work to protect LGBT students, and that was important to me."

While younger storytellers certainly described early experiences of confusion, fear, and internalized oppression (which we will discuss at greater length in the next section), Callee's and Basil's stories illustrate the extended period of time for which they lacked legal protection and support, and the implications of these formative experiences. By contrast, younger storytellers accessed support and knowledge at much younger ages, noting their access to online communities, youth groups, gay-straight alliances, and supportive teachers and social environments.

A second generational difference is that younger storytellers unanimously described feeling safer, more confident, and more whole in their genders/sexualities as they were aging (and particularly as they moved away from their childhood towns, family homes, and/or early school environments). While such positive narratives were shared in certain ways by older storytellers, five out of the six older storytellers also noted elements of challenge or fear associated with aging as queer people. Older participants raised, for instance, the realities that aging will bring them into more acute (and dependent) interactions with medical institutions, care workers, housing services, and social services. In such encounters, older storytellers discussed navigating institutionalized homophobia and transphobia reproduced by policies and mainstream attitudes. Basil, for instance, described the homophobia he and his partner encountered among hospital workers when his partner was ill. Cam noted the need for attention to long-term care, the vulnerability of dependence, and the worry that queer aging might mean going back in the closet if/when they required some form of institutional care. It is noteworthy, however, that while this is evident from the recorded stories as a generational difference – olders noted vulnerabilities associated with queer aging while youngers did not – older storytellers did not *only* discuss aging in these terms. While open about their worries, they also discussed queer aging as being joyful and liberating – indeed, as a complex human experience with a full range of associated emotions.

Shared Experiences across Generations

Beyond the differences outlined earlier, the stories in this research offered significant overlap across age. Understanding aging as a process ongoing at all ages, and gender and sexuality as fluid, we asked all storytellers about their own queer aging. We asked how their gender and sexuality had changed over time, and how they imagined aging. Three core themes germinated as common points across ages.

First, storytellers of all ages described their childhood experiences at some length, explaining almost unanimously that they did not, as children, understand their nonnormative genders/sexualities, and that their early experiences, which may have started with joy in exploring gender, involved shaming, repression, and/or restrictive or harmful expectations. Despite radically distinct legal contexts, elders and younger in approximately equal measure described early memories of not fitting in, having gender norms imposed on them, not having the tools and language to understand their experiences, and feeling afraid, ashamed, or confused. All but two storytellers (one younger and one older) described periods of time in which they actively repressed their nonnormative genders and/or sexualities. The parallels between Cam (59, queer and genderqueer) and Keenan (24, trans man) reflect these commonalities of experience across generations:

Cam: I remember, as a... 6 or 7-year-old, I often played with my brothers without a shirt on, and would go places without my shirt on as well. And I remember being told by *strangers* that I should have a shirt on, and that it wasn't ok for me to go around without a shirt... In grade 3 or so, there was a boys' yard and a girls' yard, and you would line up in girls' lines and boys' lines, and I remember wanting there to be a third line.

Keenan: I would be told by my friends that I couldn't do things because I was a girl, and those were things that I didn't really understand. But then hanging out with girls, I was seen as like, the tomboy, right? ... "Okay, you're a tomboy so we'll do tomboy things, or we will try to convince you to do these femme things," and that's when I realized that my gender was a little different. Because during these femme things, it wasn't just uncomfortable, but it was extremely uncomfortable, it was like a... fleeting from my body feeling? Like a tingling from my toes into my hands... a weird sweaty icy feeling, from your hands into your heart? Which I later discovered was a form of dysphoria... I had *strangers* you know, asking me whether I was a boy or a girl, when I was like 7 and 8. And those aren't questions that you ask strangers, but they felt that they were allowed to ask me them, because I was in this grey area.

In these stories, the parallels are clear. With 35 years between them, their timelines and early-life contexts (e.g. school rules) differ, yet Cam and Keenan shared experiences of rigid and fearful gender policing. Across ages, storytellers link these kinds of childhood experiences to a sense of deep and complex internalized shame.

Second, in discussions about aging, older and younger storytellers described – with remarkable similarities – queer aging as an ongoing process of coming to understand and unlearn their own internalized oppressions. In different ways, this theme of queer aging as deeply connected to the liberating work of shedding internalized oppressions was evident across 15 out of the 16 stories. Among the elders, Basil (72) described coming out in his hometown at the age of 70, 36 years after marrying a man,

I finally came out in my hometown and that was big. I mean, small town Ontario, they might have thought it, but to actually come out was a great step. And it was very freeing. And that only happened two years ago. So, we are in the process of becoming, as I always say.

Marlowe (72) explicitly discussed recognizing and working through her own internalized homophobia and transphobia in later life, through connections with queer and trans youth. Cam (59) described adopting queer as an identity in recent years, also through connections with youth, as part of unlearning the shame and gender confusion they felt as a child. Dora (61) talked about aging into an understanding of herself as demisexual and, finally, accepting herself outside of the boxes imposed on her. Mia (66) described aging into rejecting the racial segregation she was raised with, as well as later accepting herself as a single lesbian.

These reflections parallel many of the insights offered by younger storytellers on their own aging processes. Kit (23), for instance, described aging as a process of accepting herself as a queer Cree woman, shedding internalized racism and homophobia deeply present in her as a teen. Bailey (26), Sandy (27), and Keenan (24) – all younger Indigenous/mixed ancestry storytellers – also discussed tackling internalized racism and homophobia as part of growing up, feeling increasingly connected, safe, and whole as they age. Collectively, these reflections offer a complex depiction of queer and trans aging as a process that offers opportunities for unlearning childhood shame and understanding the ways in which

systems of power are internalized. Queer aging, for these storytellers, is a journey toward rejecting restrictive boxes, honoring truths, and making connections with those on similar journeys. These stories defy suggestions of queer aging as futureless, sad, and isolated.

Finally, and deeply connected to this process of unlearning shame, older and younger storytellers alike experienced aging as a process of honoring other forms of difference. That is, queer aging, for many, was a journey into resisting multiple, intersecting systems of oppression. For instance, Dora (61), Mia (66), and Lilo (24) explained that aging has allowed them to come to terms with the intersections of their nonnormative sexualities and their disability, or race, or both. Kit (23) explained her own aging by discussing her interconnected struggles with gender performance, body image, and internalized racism:

I think I was only able to really feel comfortable with being feminine, and being how I look at all, after I became proud of being Cree and of being a Native woman. Because when I was younger, I died my hair blonde. I wanted to have blue contacts. I was expert at curling my eyelashes, so my eyes didn't look different.... It was only when I had pride in my background that I could feel comfortable with being a woman and, you know, whatever gender I am, because I can see in my face in my features, and I can see when I look at my body, I see an Indigenous woman.

Sam (32) described her own aging as confronting intersections of internalized homophobia and fatphobia:

Going from a skinny kid to a fat kid meant that I wasn't allowed to have a sexuality and that I couldn't perform gender right, because I couldn't be pretty. And it took so much from me, but it also gave me room to become in another direction. If you can't be a Disney princess then you need to be something else, right? ... It's changed so much as I've aged because it's just sort of a learning of how to knit things together.

She went on to describe her shift was from being an asexual evangelical teen (noting the homophobic and shaming sexual messaging embedded in Christianity), to kissing a girl and needing to reconfigure her consciousness, to more recently:

[I am] coming to a place where I'm 32... and maybe what I'm experiencing is fatphobia and oppression that's not actually my problem. Maybe there's something structurally happening here.... Also, to give myself permission and forgiving myself for not girling correctly.

In her 30s, studying to be a nurse, Sam, thus, described her aging process as a journey toward thoughtfully, actively, and resistantly giving herself and others permission to inhabit their bodies as they are, and to embrace any form of gender and sexuality.

Storytellers from both cohorts described a process of making sense of and unlearning internalized oppressions and shame as they aged. Moreover, they viewed this work of becoming outwardly and acceptingly nonnormative (queer, Indigenous, racialized, disabled, fat, etc.) as a form of resistance to normalizing and violent systems of power. This aging experience offers a strong example of LGBTQ2IA+ intergenerational commonality rather than a frequently assumed generational divide. Far from a marginalizing experience with limited possibility for happy futures, it frames queer aging as a resistant and liberating process of healing from oppression in and through connections with community.

Interconnection and Queer Generativity

Throughout the stories shared by both younger and older storytellers, as well as in the interactions taking place throughout the workshop, storytellers of all ages emphasized the importance of social connection, particularly a sense of responsibility to relate and offer support across generations. Many also discussed at length both their belief in a version of queer generativity that exists outside of hetero-reproductive relationships, and their ongoing and varied practices of such generativity within and outside of their own families. Their reflections, which were amplified by the connections, resonances, and empathies storytellers made across all ages as they told their stories, critically intervene into assumptions of lonely aging futures and generational divides and offer ways of queering concepts of generativity and intergenerationality.

Storytellers of all ages described a sense of responsibility to support and nurture future (queer) generations, rooted in their own struggles to unlearn shame and oppression as they age. Indeed, many described how their own childhood experiences seeded their desire to make things easier for children and youth now and in the future, to continue to raise awareness, support youth directly, and work for structural change. Many offered detailed accounts of how they are doing this work within their extended families and communities, noting the unique positioning

of LGBTQ2IA+ people in the work of generativity. For instance, Bailey (23, Cree, and identifying as “gay uncle,” nonbinary, and two-spirit), described:

What is our responsibility as two-spirit and nonbinary folks within our communities? For me I’ve a particular interest to what that means with respect to climate change, climate change being something that we all are going to experience and something that affects future generations.... My biggest interest right now is looking at the teachings and seeing what the responsibilities are of people in between the binary... to the earth and water.

We heard from Basil (72) that his own experiences of being put down for his sexuality led him to protect and care for LGBTQ2IA+ students:

I would see kids in school being bullied because of their sexuality, and I said, “there’s one thing I can do, I can keep my classroom and hallway a safe place for kids who are gay, who are different.” So, I would make it a point to be out in the hall, and if I heard homophobic sneers and snipes, I would address it and point out the need for people to feel safe. And it was a great sense of relief that you were able to do something positive in the lives of another younger generation coming through.

In the context of her own family, Sandy (27, a queer woman of mixed Anishinaabe and Irish ancestry) similarly described the importance of intergenerational connection:

My grandparents, oh gosh, are amazing. So, I came out and they of course loved me and held me. Then my young cousin came out as pansexual a few years later. And they’re like, “Oh, that’s cool. I don’t know what that is.” They went on Wikipedia, talking to me on the phone, and they’re like, “And then we found all these other cool terms! What does this mean?” But just so loving.... So, I feel I have a responsibility to carry that forward in spaces where maybe other folks have not felt that love and acceptance.

Collectively, these storytellers offer ongoing and varied impressions of queer generativity that extend well beyond hetero-reproductive relationships. They suggest a concept of queer generativity rooted in a set of responsibilities that come with aging as and into queer and trans people, responsibilities oriented toward future LGTBQ2IA+ generations, and, indeed, all life through relationships within extended families, communities, and through varied social change work. Their reflections, which were amplified by the connections, resonances, and empathies formed during

the workshop, critically intervene into assumptions of lonely aging futures and generational divides.

Connection and community-making resonate throughout stories of queer and trans aging, even when also describing isolation. Four out of the six older storytellers, three of which were living alone, described their rich social networks, their connections to youth, and their ongoing practice and connection within art, activist, community organizing, and learning communities. Three of the elders described experiences of loneliness, loss, or unbelonging in their later lives, but each paired these sentiments with descriptions of their ongoing work in community, plans to foster new connections, and undertake new learning.

Discussions of intergenerational connection among both cohorts significantly challenged notions of intergenerationality as a unidirectional passing down of knowledge, care, and advocacy from older to younger. Rather, participants depicted multidirectional relationships of care, learning, and advocacy throughout their queer lives and networks. Cam (59), for instance, explained that it was only in their recent work with youth that they came to gain language and concepts to help make sense of their own gender:

It wasn't until quite a bit later, I was doing stuff with youth... They *did* have language for this, and they *did* feel more able to be themselves. I learned a lot from the youth. It's from them that I learned to accept the word "queer." ... I had known about trans stuff before but [working with youth] has given me that environment to sort of work through that stuff, because it's been a long time, that I have, like, pressed down that part of me.

Similarly, Marlowe (72) explained that her process of unlearning oppressions – of learning to change her views through listening and recognizing homophobia and transphobia – was catalyzed by the knowledges shared by youth when she volunteered at an LGBTQ2IA+ summer camp. In a further flip of generational scripts, Sam (32) spoke at length about her desire to become a nurse as a way of offering something back to the community, of wanting to be there in the more vulnerable moments to advocate and care for older people, especially LGBTQ2IA+ elders navigating the medical system as they come to the end of their lives. In a tender exchange, Basil later commented: "Well, certainly I look forward as I edge forward in my life journey, to know that there will be a nurse who cares." Sam

responded strongly and lovingly expressing the importance of intergenerational advocacy and care from younger to older: “But this is the thing though, [Basil]. I’m doing it for you.”

These stories, these interactions, and the relationships they illuminate offer a nascent concept of queer generativity and intergenerationality as a sense of responsibility and connection across generations. These stories vividly paint intergenerational connection as multidirectional learning, care, advocacy, and reciprocal relationship-building. This connection, held in these stories as precious and hallowed, is rooted in shared embodied knowledge of how homophobic and transphobic systems continue to impact people all along the lifecourse, and in a desire to be part of continuing to dismantle these systems.

Conclusions

The stories woven through this article challenge dominant concepts of “successful aging,” contributing complexity and lived experience to ongoing efforts to queer aging futures. As Sandberg and Marshall (2017) explain:

Queering aging futures entails thinking differently about life courses—asking what lives are understood as desirable to live and thrive well into old age—but also interrogating how desirable old age is problematically framed by the exclusionary discourses of successful aging. (p. 7)

Our analysis responds to these exclusionary discourses as well as to their piercing questions: “Whose lives are worth preserving for old age? Whose aging is understood as livable aging?” (Sandberg & Marshall 2017). Heeding their call – “to begin to address these questions will require that a multiplicity of futures become visible” – we centered 13 stories offered by LGBTQ2IA+ storytellers of different ages. This analysis is an effort to make visible a multiplicity of queer and trans aging futures. But beyond simply adding different voices into aging studies, the knowledges contained in these stories offer important epistemological interventions (Chazan 2019). Our analysis seeks to bring these often-omitted knowledges to bear on key aging studies concepts, thereby extending the epistemological and conceptual contours of this field.

Most evidently, these stories put pressure on binary assumptions of success-versus-failure embedded within dominant successful aging narratives (Sandberg & Marshall 2017). Storytellers do not idealistically obscure neither their fears of queer and trans aging nor the very real homophobia and transphobia that make this aging more precarious (Witten 2014). Rather, they share their varied experiences as queer and trans people growing older, including their sense of futures enwrapped with both fear *and* joy, success *and* decline, and isolation *and* connection. These are not superficially glossy stories, but rather stories of joy, hope, relationship, struggle, and growth into ever-budding self-acceptance.

Part of the task of queering aging futures is calling into question the success-failure binary and heteronormative, ableist, and classist societal ideals. Another part is unpacking the expectations that futurity (and thus happiness in old-age) is inextricably bound to a particular conception of generativity, that is, connection to future offspring (Hostetler 2009). The stories shared here offer pertinent conceptual interventions in their caring interactions with one another and their expressions of responsibility to future generations. These storytellers queer hetero-reproductive understandings of generativity, instead describing responsibilities to future life within and outside of reproductive kinship (Chazan 2019). Furthermore, these storytellers depict significant commonality of experience across age and detail accounts of cross-generational relationships. In sharing these visions, experiences, and practices, they challenge dominant perceptions of generational divide within LGBTQ2IA+ communities (Farrier 2015). In many ways, their stories honor the knowledges they held as children, their learning as they age, and their commitments to sharing wisdom, support, and advocacy across generations. These stories contest well-trodden aging themes of positive old-age, featuring happy couples passing the torch to their grandchildren, demonstrating a richer array of later-life experiences and intergenerational connections.

Remarkably, the storytellers, all living in relation to overlapping systems of oppression, collectively illuminated how the aging process is a liberating one of unlearning oppression(s), shedding internalized shame, and supporting future generations. Thus, it is in their ongoing relations to these systems of oppression that the knowledges the storytellers hold most fundamentally challenge dominant ways of thinking about aging and futurity. Without denying the pains, loneliness, and fears of aging,

storytellers simultaneously express their processes of, as Basil says, “always becoming” themselves, resisting the binary expectations of gender, sex, sexuality, and aging imposed on them across their lives. Their resistant revisioning of LGBTQ2IA+ aging, which bears strong connections to their pasts, is also very much oriented toward making new possible futures for themselves, for each other, and for future generations.

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“For us, Alibaba was just a story”: despite the power of habit, older people are gradually adopting the digital discourse

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Abstract

Information technology (IT) can help older people continue to live independently and actively for many years, yet many of them express fear of it, perceive it as a threat, and find it difficult to navigate the digital arena and enjoy the benefits of IT. The purpose of this study is to examine the technology discourse of older people in Israel, and what it reflects. In addition, the study seeks to understand the extent to which IT is present in their lives, how they experience it, and the changes it brought to their lives.

To that end, we interviewed 40 older people aged 65–93 who were attending day centers. The findings, which were examined in light of the continuity theory, reveal different levels of resistance to IT, which reflect the full spectrum, from rejection to acceptance. Moreover, the continuity strategy and adherence to familiar patterns do not necessarily prevent adaptation to change. The findings reveal an ambivalent technology discourse, incoherent, and laden with internal contradictions.

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Keywords: continuity theory, digital discourse, information technology, older people, digital divide, qualitative method.

Introduction

Smart cities, smart villages, smart living compounds, smart homes, and smart phones have all become household terms in recent years. However, for these environments to be worthy of the title “smart,” we must examine the extent to which they are adapted to and appropriate for the needs of those who use them (Angelidou 2015). One group that can especially benefit from using information technology (IT) is older people. Technology can help older persons adopt and maintain a healthy lifestyle, improve their quality of life, remain independent and keep living at home longer, express themselves, take an active part in community life, expand their social circles, stay in contact with family members, help cope with loneliness, and so on (Chen & Chan 2011; Gonzalez et al. 2012; Mitzner et al. 2010; Niehaves & Plattfaut 2014; Russell 2011; Siriaraya et al. 2014). The use of technology strengthens the feeling of self-efficacy and contributes to a sense of mental and physical well-being.

Nevertheless, despite the great benefit that older persons may derive from using IT, many researchers have reported finding patterns of avoidance and blocks that limit its use (Niehaves & Plattfaut 2014). Findings indicate that older persons tend not to use computers and the Internet since they fail to see the advantage of using online services, are not motivated to learn, and most of them are not familiar with the digital jargon. They perceive computers and the Internet as useless and sometimes even as dangerous and as a threat to their freedom and lifestyle (Hakkarainen 2012). Yet, the more positively older people evaluate the benefits of IT, the more likely it is that they will adopt it (Golant 2017). Sometimes the block is due to economic reasons, for instance, the high cost of computers or smart phones. Other times the limitations are physical or due to a decline in cognitive abilities (Seifert & Schelling 2018).

Yet, the older population is not a homogeneous group. It is characterized by great variability in terms of its attitude to IT and the extent to which older people are skilled and ultimately use IT.

The data from a survey conducted in Israel revealed that only about 60% of those aged 65 and above use a computer or the Internet, and only about a quarter of all senior citizens actively participate in social networks, use government online services, or make payments or appointments via the Internet (26%). The proportion of older adults who shop online is even lower (15%) (CBS 2019).

The information society, as Fisher (2011) argues, produces a discourse about IT and, at the same time, the technological discourse shapes society. Analyzing the discourse emerging in the information society can shed light on the social relationships that are forged by it. According to this concept, the technology discourse serves as a prism through which practices and social relations can be examined.

This study seeks to contribute to the literature on technology discourse analysis, but since the discourse does not take place in a vacuum, it should be examined in its social context. We aspire to shift the discussion from the macro level to the micro level and focus specifically on the older population in Israel. This study, therefore, examines what the technology discourse of older people in Israel reflects, in an attempt to understand the extent to which IT is present in their lives, how they experience it and talk about it, and what the central narrative that emerges from the digital discourse is. The questions derived from this purpose are as follows: "What feelings do older people express toward IT?" "what metaphors do they use in their attempt to understand the digital world?" and, "to what extent do older people perceive IT as essential for them?"

The theoretical framework within which we will analyze the older people's digital discourse is the continuity theory, as presented by Atchley (1989). This theory, which was originally written in the context of gerontology, claims that as people age, they tend to preserve familiar patterns from their past. Familiar strategies that they learned and developed earlier in their lives can help them wrestle with changes in later life. Continuity gives a sense of control. Although the continuity theory is concerned with changes and losses typical of late adulthood and old age, we use it here in the context of changes in the older adults' lives that were induced by IT. The digital discourse has not yet been examined through the prism of continuity theory. Thus, this study will contribute a new perspective to the understanding of the older persons' digital discourse.

Obstacles to the Adoption of IT by Older Persons

The digital environment has become an inseparable part of our daily life. Many services, both private and public, have moved online in recent years (Chadwick & May 2003). However, due to a lack of accessibility to infrastructures or a lack of digital skills by certain groups in the population, IT might exclude various social groups, thus creating a “digital divide” and “digital exclusion” (Robinson et al. 2015). One of these groups is that of the older persons. IT can help them enjoy healthy, autonomous, and socially active lives (Siegrist & Wahrendorf 2009). However, many older people, who lack digital literacy, fail to derive the benefits that IT can offer. They refrain from participating in communal life, and suffer from low self-efficacy (Friemel 2016; Goldschmidt 2017).

The literature proposes several possible explanations for the obstacles facing older persons when it comes to using IT and online services. One is the perception of the Internet as useless since the information available on it is perceived as irrelevant (Friemel 2016; Hakkarainen 2012). Another reason is related to the lack of skills and knowledge required in order to use the Internet. Lack of technological devices with access to the Internet (tablets and computers) also sometimes prevents the use of online services.

Lee et al. (2011) identified four components that limit Internet usage among older individuals: lack of inner motivation and self-efficacy, functionality limitations such as memory deterioration, technical structural limitations such as price, and personal limitations such as lack of support. Furthermore, smart phone usage also declines with age for a variety of reasons, ranging from a lack of interest or a lack of awareness to the advantages such devices offer, to a lack of skills and economic constraints. A study conducted in Finland found that older people perceive computers and the Internet as useless and even as dangerous and threatening to their freedom, health, lifestyle, and personal safety (Hakkarainen 2012). They feel they have other tools that they are already familiar with and prefer to use them rather than using a new and unfamiliar tool, much like the claim underlying the continuity theory, as presented below.

Continuity Theory and the Rejection of Digital Technology

The underlying premise of the continuity theory is that people tend to maintain familiar patterns from the past, in an attempt to make it easier for themselves to adapt to new stages in life. Older people will, accordingly, prefer to continue with their familiar lifestyle in later stages of life (Atchley 1999). In other words, people tend to cope with changes such as those that characterize the transition into old age using the same methods of coping that they learned and adopted throughout life. Relying on past experiences and maintaining activities and roles from the past can help older persons adapt to changes involved in the transition to old age. Although aging does not necessarily lead to a decline in functionality or health, it involves many changes and transitions (Agahi et al. 2006). Retiring from work, losing a spouse, and developing physical restrictions, for example, all affect daily life. According to the continuity theory, people do not change in their old age but rather become more and more like who they were in the past and act increasingly according to patterns they are familiar with from the past (Chapman 2005). Nevertheless, preserving familiar patterns and continuity will not necessarily ensure successful adaptation in old age.

Atchley (1989) distinguishes between internal continuity and external continuity. Internal continuity refers to a person's own perceptions and feelings. It is based on his or her inner personality and emotional coping competence. For instance, an older adult with high emotional competence can use a variety of emotional resources to deal with different events in old age, such as illness or hospitalization. External continuity is manifested in the physical and social environment, in roles and in activities, and in relation to the social environment, using familiar adaptation strategies. Continuity helps strengthen the permanence of older people's worlds in a predictable and, therefore, controllable manner (Nimrod 2010). Continuity is not presented in the theory as a concept that is the opposite of change, but rather as a strategy for coping with change. Clinging to familiar patterns and the tendency toward continuity are put to the test at times that necessitate new experiences and adaptation to changes. The intensive entry of IT, the Internet, and online services into our lives raises questions regarding the continuity strategy since it is possible that

clinging to familiar schemes and patterns does not help the adaptation process, but rather hinders the pace of adaptation and sometimes even prevents it.

The Israeli Context

The usage rate of smartphones and social networks in Israel is among the highest worldwide. WhatsApp has become the most popular instant messaging application in Israel, and Israelis are happy to adopt technological innovations (Malka et al. 2015). Yet, the Israeli society remains a very family-oriented society (Fogiel-Bijaoui & Rutlinger-Reiner 2013). This familism is manifested in behavioral parameters, such as a high marriage rate, a low divorce rate, and a high birthrate. The family is very present in the public sphere, in daily practices, and is central to the individual's identity. Not surprisingly, studies on family relations in old age found that inter-generational relations and familial roles in Israel do not diminish with age. The close family ties that characterize Israeli society are expressed, among other things, by intensive communication and the habit of seeking constant updates on the welfare of family members (Malka et al. 2015).

Research Method

The current research was conducted using a qualitative method that offers an in-depth understanding of the experience of older people when using IT, in order to reveal the subjective meaning of the investigated phenomenon. To that end, the research relies on an interpretive phenomenological approach that strives to understand the essence of the experience as it is perceived by the individuals, assuming that the experience contributes to the subject's world view (Giorgi 1997). Any and every possible human experience (event, thought, feeling, etc.) may become a topic for phenomenological inquiry (van Manen 2017). The phenomenological methods are thus particularly effective in revealing the experiences and perceptions of individuals from their own perspectives. The advantage of the phenomenological approach is that it does not seek the objective existence of the object *per se*, but rather the presence of that object as it is perceived in the experience of the individual. The phenomenological approach was chosen

since it is suited to the purpose of the study, which was to examine the experience of older people in the digital space as it is reflected in their discourse and the meaning they assign to IT. This approach allows the researcher to gain in-depth insights and understand the experience of the interviewees.

Data were collected using semi-structured interviews that integrate pre-determined central questions alongside the flexibility and freedom to create a dialog and raise additional questions during the interview. This format enabled us to let the interviewees talk about themselves and so to better understand their personal experiences in all that pertains to the use of IT and the meaning they attribute to it.

The first questions were designed to ascertain whether or not they have a smartphone, a tablet, or a computer. Next, the interviewees were asked whether and how often they use these devices and what their main uses of them are. Then, we asked about the benefits they derive from these devices and online services, the difficulties and the ways they cope with them, who they turn to when they need help, whether they would like to learn and deepen their knowledge in the field, what they think and feel about the shift toward online services, and more.

Interviewees were recruited by approaching day centers for older people, which then enabled us to come to their premises and interview the older persons who frequent the day centers. All interviews were conducted at the day centers; most of them were conducted in private, face-to-face with a single interviewee, in a quiet side room that was given to us for the interviews. Three of the interviews were conducted in a group setting with several participants; these interviews took place in the day center lobby. The average interview lasted about 1 hour. All quotes presented below are anonymized using pseudonyms to protect the privacy of the interviewees.

Participants

The research population consisted of 40 interviewees, aged 63–93 years, of which 27 were women and 13 were men (reflecting the average gender proportions in day centers). The marital status of the interviewees was as follows: 18 widows, 7 married women, 2 divorced women, 11 married

men, and 2 widowers. Of the interviewees, 30 were Jews and 10 were Druze. Although the sample was small, we maintained heterogeneity among the interviewees in terms of education and occupation. Some of the participants had an academic education and occupations, such as water engineer, school principal, librarian, and teacher, while others had no academic education and worked as an agricultural laborer, bookkeeper, taxi driver, grocery shopkeeper, and so on.

All but two interviewees had smartphones, which were with them at the time of the interview. About two-thirds of interviewees reported having a computer at home, but less than one-third said that they actually use it. Most of their access to IT was via smartphones. Their main use of the phone, beyond conversations, was for messaging, using WhatsApp, taking photos, and searching for useful information on the Internet. Five interviewees reported that they use YouTube.

At the beginning of each interview, we emphasized to the interviewees that the interviews are for research purposes only. We explained the objective of the interview and promised the interviewees that their anonymity would be preserved meticulously. The research was approved by Western Galilee College - the College ethics committee.

Analysis of Findings

The analysis of findings from a phenomenological study consists of a process of arranging and building the entire body of knowledge collected, while decomposing the data into segments and pieces of information and rearranging them differently to comprehend their meaning (Creswell 2012). Based on the phenomenological approach, and as Giorgi (1997) suggested, the interviews were analyzed in several steps. First, each interview was read separately and examined holistically with the objective of identifying primary categories. Then, each interview was analyzed and divided into units of meaning to create information groups that appear to belong to the same phenomenon; this enabled the identification of important themes and sub-themes. The third stage consisted of a comparative analysis, in which all interviews underwent lateral reading according to the previous categorization. The result of this analysis was the formation of broader super-categories or central themes. The organizing principle

according to which the findings will be presented here is based on the central themes that emerged from the interviews.

Findings

The findings presented below are organized according to four central themes that express different levels of resistance to IT, ranging from lack of interest and lack of a sense of necessity, through clinging to familiar patterns that impart a feeling of continuity, to acceptance of the change and willingness to adopt new patterns. The themes exemplify the negotiations the interviewees have with themselves regarding online services, their difficulty understanding the digital language, and the way they construct the narrative around the use of IT.

“I Do Not Surf the Web and I Do Not Miss It”

Hazan (2010) claims that older persons are in a cultural, symbolic space that prevents communication with them and, therefore, interpretation of their words usually reaches a dead end. Hazan proposes, therefore, to reformulate concepts and ways of understanding old age that are free from accepted paradigms, which are apparently ineffective. According to the interviews we conducted with older people in day centers regarding the advantages of IT, it seems that the discourse between us, as Hazan (2010) described it, was sometimes met with a lack of mutual understanding: the older persons do not understand “what they will get from using technology” and “what they need a smart phone for,” while we represent the side that cannot understand how one can possibly live without a smart phone or the Internet. Thus, for example, David said:

What will I do with it? ... I don't go on the internet. I don't miss it, I don't feel that I miss it, because I do what I need to do by phone... Look, I don't think that I'll go buy a computer. Not because of the purchase, I can buy one, but I don't see the great importance. When I need anything, I have my son, I don't need it... I understand that it is important, but so what if I don't have it? Life goes on in any case...

David, like many of the interviewees, feels that, as far as he is concerned, the computer embodies a nonfunctional product that is not part of his

lifestyle. There seems to be a social boundary between the generations regarding the use of IT and the awareness about its advantages. Like Aaron said: "It is not for our generation... Listen, we are not the computer generation. Those buttons don't talk to us," and Daria added, "For us, AliBaba was just a story."

Other interviewees testified that they were uninterested or unable to keep up with the rapid pace of change that characterizes society today. Izzy, for example, said:

I'm tired now, I'm tired of learning new things. It may not be good or nice, but I've come to the conclusion that once I get to be 80, that will be enough. At 80, you don't have to learn anything new. What I have in my head is enough. I don't want to learn anything new. I'm tired of it. And the changes are also so fast, that I don't have the strength to run after all of the changes. The changes are so fast that you need to be a very strong Superman in order to keep up.

Jim talked about similar things: "I'm too tired, too lazy really, to tell you the truth, really lazy, I have the time, it's just a matter of laziness." Jim shared that he prefers to read books rather than waste his strength on things that are less significant to him. Technology, with all its advantages, does not give him as much happiness and pleasure as a good book.

The enthrallment and dependence of the younger generation on IT in the form of smart phones is incomprehensible to the interviewees; not only do they not need it, they are not even "attracted" to it. Indeed, five interviewees used the words "not attracted" when referring to smart phones. To quote Flora:

It doesn't attract me, everyone tells me to switch to a new phone, and I say, guys, for me a phone is for making calls and talking, I don't need all these innovations, I really don't need it. I don't like it and I don't need it... I tell them I really don't need it.

Eve said similar things: "I was simply not attracted to it, even when my children said, Mom, we'll buy it for you. I said, no, it doesn't attract me... so I don't need all this technology."

To reinforce and validate the differences between themselves and the younger generation, that is, their children or even grandchildren, older persons tend to compare themselves with their young grandchildren who

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are masters of technology while they themselves know and understand nothing. Like Anat testified about herself: "My two-and-a-half-year-old granddaughter said to me, I'll find you the photos, and she really did... my children and grandchildren are masters of technology."

Yael said similar things:

I don't miss the computer at all, and I don't want to sit down and practice and learn and study. I don't need it. The children wanted to buy me a laptop, but I don't relate to it.

Older people can afford to abstain from using the Internet *inter alia* since they can rely on their children for it. Many of the interviewees told us that any time they need an online service, they turn to their children, or even grandchildren, and ask for their help. For example, David said: "Adi (his son) has a computer, whatever I need, I ask of him."

Anat said similar things: "I have two sons who can do it. It's not that they are available at all times, but whenever I can, I get them to do it."

Although all of the interviewees mentioned that they want to maintain their independence and not to be dependent on their children, their refusal to learn requires them to lean on their children and young grandchildren. Like Anat said: "I have a son who is an engineer at Intel, let him do it. Me, what I don't have to do, I don't do. Let him do it."

Relying on family members is typical of the Israeli society, in which the family holds a very central place. Intergenerational relations are particularly significant, as Israel is a family-centered society. This familiarity is manifested *inter alia* in the relatively frequent visits that adult children pay their aging parents, enabling the parents to be helped by the children instead of making an effort to learn.

Some of the interviewees, especially in Druze villages, were religious. It seems that religion adds an additional dimension of deterrence against the use of IT. Omer, for example, recounted: "With us [the Druze], especially the religious people, once people become religious, such things cease to interest them and they are prohibited from engaging in it... so in our religion it's prohibited." Hatem added, "These devices, the computer and phone, didn't exist 20 years ago. So, I never used it, not then and not now. I don't use it at all."

The religious justification for not using IT can disguise opposition to anything associated with modernity and progress. Moreover, in a traditional society, such as the Druze society, which is characterized by crowded social networks, there is awareness to social control. Omar, who lives in a Druze village, prefers to minimize his use of the phone because he is concerned with the possibility of virtual surveillance that could infringe on his privacy: "What I fear is that someone will eavesdrop on me, and it happens. Some people eavesdrop on your phone as soon as you open it. I know someone is listening to my conversations, so I'm careful about what I say and rarely use my cell phone."

Clinging to Familiar Patterns and Longing for the Past

One of the sentences that was repeated in almost all interviews in response to our question about the use of online services was the desire to receive a human response. As Ruth said, "I like to speak with people, not with the computer. Even instead of messages, I prefer to talk. I also don't like to leave messages, I immediately hang up." Lina said similar things: "I prefer to talk to a human being. I very much like to talk to people, not to computers. Like on birthdays, I don't like to leave WhatsApp messages, I call the person and congratulate them."

Furthermore, some of the interviewees mentioned that they feel it is their right to receive a human response and that the state or organization is obligated to provide them with services in the way they want to receive them. Aaron said:

I went to the bank manager and I told him that I want to receive service, I pay for this service, I've been at this branch for 38 years, and I'm still paying you for service, I deserve service, I want to speak to a human being.

Clinging to familiar patterns and refusing to change past habits manifest in daily life in a variety of activities, such as paying bills. When Daria was asked how she prefers to pay her city taxes bill, she answered:

No, no, not through the app. I go there physically and pay the clerk. I go there myself, to the place, pay, see the clerk who receives the money, get a nice piece of paper with writing on it as a receipt, with a stamp on it, and I file it.

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It looks like Daria prefers tangible confirmation like seeing the clerk and touching and feeling the printed paper receipt. A virtual receipt sent by email does not count as far as she is concerned. The findings also reveal that most of the interviewees cling to familiar habits, like reading newspapers or paper books, or listening to radio or music on tapes rather than over the Internet. To quote Izzy:

Phones are only for making calls. Only calls. Phones are only for talking... WhatsApp or Facebook is not for my age, it doesn't interest me, I'm not built for that. I'm built for reading. Not for games. If I want to listen to some music, I can also listen to the radio or television. There is everything there. The computer doesn't interest me. A book and that's all. It's enough for me.

Aaron said similar things:

A magazine I can read. Printed pages that I can understand what is written there, that it should say clearly what time to come, that things should be organized, that's how I know exactly what is there. Some people go on the internet and search, not me. I need things to be in writing.

Nadia presents an even more conservative approach and longs for another era, to which she would like to return:

I'm from the olden days, darling, leave me alone with all of this progress. Believe me, if I could only go back to the olden days, all of this progress is nonsense. Here, for example, on the phone, I would prefer to have only a landline.

The preservation and continuity trend are manifested also in the language. The language the interviewees used, as well as the world of content they are familiar with, are different and foreign to the IT digital Internet world of concepts. Older people speak the language of modernism, the language of the industrial society, which is essentially different from the post-modern digital discourse of the network individual who has adopted IT and the Internet and has created a completely new world of content and concepts. Thus, for instance, modern industrial discourse consists of regularity and order; it can be corrected, organized, and controlled, while the new digital discourse is more amorphous and is characterized by flexibility, uncertainty, and hybridity. This can be heard, for

example, when Aaron talks about fixing automobiles, knowing that his car mechanical skills are no longer relevant nowadays:

Automobiles, for example. I used to know how to fix them. Automobiles nowadays are not what I learned and knew. Nowadays you come to the shop, he puts it into the computer, and sees everything, what isn't working, what is working, he adjusts and fixes it... it's a different world. So, I know how it works, but I can't see the things they see. So, I love to stand around and watch, I'm very excited about their knowledge.

Anna's story of her search for a printed manual for the new phone she bought offers another illustration of the differences between the modern technological discourse and the new digital discourse. Her story describes her need to lean on familiar patterns even while physically holding a device that represents a novel technology:

I recently got a new phone... I don't even know how to begin using it. I opened the box and there were no instructions. I went back to the store and asked them, "Why did you sell me a phone with no instructions?" So the guy at the store told me that they stopped making paper instructions, that it's a waste of paper and nowadays everyone goes on the internet and on the internet they know how to operate the phone. So I don't have it {the phone} with me, I don't use it because I don't know how to do anything on it. I'm always with the old phone. I want to use the new one but I don't know how... the new phone doesn't even have any buttons. Everything is different. I don't even know how to operate it. I tried for like half an hour and I couldn't operate it, so I went back to where I bought it and said, "I want the instructions please," and the salesman said, "There aren't any."

Cracks in the Continuity Strategy

The aging process is characterized by many changes like retiring from work, moving to a new home, losing a spouse, and so on. At the same time, the digital world is changing at such a rapid pace that changes have become a matter of routine. In such a world, people who cannot adapt to the changing environment might find themselves left behind. The continuity strategy and clinging to familiar schemes in a changing world sometimes turn out to be inappropriate strategies for the new world. Thus, alongside the desire to preserve familiar patterns, about half of the interviewees also expressed a wish to learn and take part in the digital world. As Rebecca

said: "We have to get into technology, we cannot stay on the sidelines ... we cannot stay behind disconnected from it all, we have to flow with everything there is today." And Dina said: "Now, in the age of the smart phone, how can you be without a phone?"

The need to learn how to use online health services or digital banking services, for instance, motivates some older persons to join computer classes offered at various day centers. Observations we conducted in such classes revealed that older people show interest and practice the new things they learn. Despite the difficulties they reported and the fear of technology, they all expressed satisfaction from the instruction they received regarding the use of computers and smart phones. Alin, for example, whom we met in the computer room at one of the day centers for older people, came in to practice writing and sending emails. She describes her difficulties in learning how to use the computer and the thoughts she has occasionally about quitting and giving up. Nevertheless, she also talks about the urge to continue with the effort and to learn so as not to be left behind:

It's a kind of technology that develops at a pace so fast that it's impossible. You learn something and suddenly you have developments and more developments, and it's hard, you're constantly chasing the knowledge. So I had a couple of breaking points and I said, "That's it. What do I need this for?" But I didn't give up. I said that if I stop, I won't know it, because the more it advances, the more behind I'll be.

Cracks in the continuity strategy were found among additional interviewees, who are trying to learn, sometimes give up, and then try again so as not to be dependent on others. Rina said: "I want to learn how to extract forms all by myself because I'm very independent and I don't like to depend on anyone... I would really like to do it myself. Not to rely on anyone, because the children are not here with me all the time". Aaron said similar things: "I don't want to depend on anyone, I want to be independent, and to try to solve my problems on my own, as much as possible."

The findings, therefore, expose cracks in the continuity strategy that manifest in an ambivalent discourse about new IT. On the one hand, the interviewees express reservation and a lack of motivation to learn and adapt to the digital world, and on the other hand they recognize the need and desire to change and learn. Almost all of the interviewees have smart phones, and most of them have a computer or a tablet as well.

Cautious Surrender to IT

The fear of IT alludes to older persons' difficulty feeling comfortable and befriending the unfamiliar digital world. Most of the interviewees spoke about their concern about something going wrong, as if it is a mechanical device that might break if the wrong button is pushed. Daria, for example, said: "I'm afraid that I will delete some other file, and if I delete it, how will I make it come back?... In the beginning, it was the fear that I might ruin and spoil, I don't have the confidence for this." Sometimes the fears are irrational, as Alin shared: "I have a fear that if I hit some key on the keyboard then something will happen, and everything will disappear or change, and that stresses me out. I'm afraid that I will spoil it. That I will run into some virus."

The active use of IT, such as writing messages or sending photos, causes anxiety and fear not only because of the fear of causing damage to the technological device, but also because of the shame and dread of being exposed as lacking understanding and basic knowledge and thus becoming the object of ridicule, to quote Anat: "I'm scared of technology... afraid of making a mistake, of something being deleted and mainly afraid of making a mistake... so that nobody knows that I made a mistake, that's the fear. In our generation there was no making mistakes. That's how we were educated." Ruth spoke of similar feelings: "I don't send messages, I only receive them, I don't send at all. Even on Facebook, I only look, but I don't answer anyone, because I write with mistakes. So, I don't want anyone to see. So, when I have no choice, I write, but I don't write a lot."

A person's self-image is constructed and formed through interactions with the immediate social environment and is greatly dependent on the way he or she believes that others see and perceive him or her. There is, sometimes, a contradiction between the way in which older persons see themselves and the way they are perceived by society and the surrounding community. IT can make older people see themselves as ignorant and worthless or as smart and as having broad general knowledge, as Aaron described:

Everyone thinks that I'm smart but I'm a big fool, so when I go on the computer, I ask questions or I have doubts, and I'm afraid people will think that I don't get something and my memory now isn't what it used to be... I don't want other people to know how much I don't know and that's the truth. Other people may not tell you it, but I'm telling

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you the truth, they will see how much I don't know. I'm not going to go study because I'm afraid to study and afraid that people will say that I don't know, I don't know how to print, so what can I do, I don't know how to sit down and write, and I'm not on Facebook with everyone.

Later on in the interview, after sharing his fears and how he avoids using computers, Aaron told us how he discovered that the computer could actually help him appear smart and knowledgeable in a variety of areas:

When I go to the beach to meet up with friends, I won't go knowing nothing, so I look for subjects they know nothing about, like for example, World War I and II, and then I read about it on the internet and I go prepared. And then when we start talking about wars, I lead the conversation to the subject I specialized in a little, and they think that I know something, but in fact I don't know anything.

Like with the previous aspects reviewed above, here too the findings attest to duplicity and internal contradictions in the interviewees' attitude to technology. Alongside the fear of IT, they are slowly discovering its advantages, as expressed by Ilana, who recently overcame her fear and discovered how to order things from various websites:

At first, I was scared, but later I began buying clothes on the internet. I bought a lot of things, dresses, overalls, I learned how to take measurements, how to check, so sometimes you fail, I had to return products several times, I was also taught how to check, because it's not always genuine. Here, I bought these boots on the internet... what I have to learn is how to order flights for travel abroad, I don't know how to do that. I would like to learn how to order flights and choose a vacation package.

Since Israel is considered a family-oriented society, keeping in touch with nuclear and extended family members is a common practice. Some of the interviewees were, therefore, willing to make a great effort to learn how to use WhatsApp. They understand that this is almost the only way for them to maintain their connections with the younger members of their family. As Rose said: "I have a family WhatsApp, its name is 'Well then, how was today'. All of my children, and grandchildren participate in the group. They really like when I write to them." Rachel adds: "I use WhatsApp a lot with my family, with my kids, I talk to them on video

calls. I receive and send them pictures. I'm so happy I can connect with them. I'm on WhatsApp all day long."

One of the more surprising findings related to the discovery of the advantages of IT emerged during the interviews with Druze women. These women, who belong to an especially traditional and conservative group in all that pertains to innovation, discovered the advantages of technology, and use it to a considerable extent. Although the use is mainly for needs that preserve the gender-based division of roles, like finding stores that sell knitting yarn or looking for cooking and baking recipes, the use of various technologies constitutes an important tool of empowerment for these women. Such empowerment is manifested both with relation to men who are unfamiliar with the technology and in the autonomy of being active in all-women WhatsApp groups and, thus, creating for themselves a space devoid of male supervision, which is out of the ordinary in a traditional society like the Druze society. As Fatma shared:

We have a women's group, I talk with the group, we joke, we laugh... we talk all day long, someone made some food and she put a photo of the food she made, yes, and I also had a birthday, everyone congratulated me on WhatsApp... three days ago I made Moghrabieh [a Druze dish], which is like couscous, so I took a photo and put the picture up. Sometimes I'm at home and I want to bake a tasty cake, so I search for cake recipes, something good and easy. I use WhatsApp for everything. Look, I even took a photo of the knitting yarn, so I'll know where to get it from, and I look at knitting patterns on YouTube.

Discussion

The aim of this study was to examine how the technology discourse reflects the way in which older people perceive, experience, and feel about the digital space. Given the heterogeneous older population, the variability in the extent and amount of IT use must be taken into account, and therefore it is difficult to reach generalizations through qualitative research. At the same time, our interviews indicate that most of our informants do not feel comfortable in the digital space. Their technological discourse points to difficulties in adapting to the new digital world.

In the new digital arena, people who do not master social media in its many forms and fail to adopt the new technological discourse might find

themselves left behind – like immigrants in a new and foreign country who do not speak its language. Some of the older persons feel as if they are “time immigrants” and, like many other immigrants, might feel invisible in their new place; they become socially and culturally “transparent” (Lomsky-Feder & Rapaport 2010). They are marginalized and accused of being unable, or unwilling, to adopt the new patterns and function properly in the new system.

Nevertheless, in current societies in which the traditional, the modern, and the postmodern are intermixed, the profile of the older adult is not one-faceted, but is rather the result of flexible age-related boundaries and the mixing of identities and stereotypes (Hazan 2002). Thus, on the one hand, some older persons adopt a young lifestyle, consume leisure and brands that are identified with middle age, try to shed the signs of old age through their clothing, dyeing their hair, using anti-aging creams, and having medical procedures executed with the promise of a younger look and the loss of several years off their chronological age. At the same time, however, they often object to anything that is identified with IT and online services, preferring their daily newspaper over reading the news on their phone, a human voice reply instead of ordering through an app, paying manually instead of over the Internet, and so on. The interviewees in the present study expressed a wide spectrum of responses to IT: from rejection, a marked lack of interest, and the absence of willingness to learn and befriend online services, alongside responses of acceptance and desperate attempts to learn, to familiarize themselves with IT, and to use it.

The research findings reveal an ambivalent, sometimes incoherent discourse that is laden with internal contradictions regarding IT and the digital world. Thus, some older persons we spoke with have created a hybrid narrative that simultaneously accepts and rejects the digital world. On the one hand, they own and use a smartphone, and on the other hand, they seek familiar and human responses, fighting for their right to be part of the digital world and at the same time giving up on it.

Ambivalence is also expressed in the technology discourse in the family context. Given that Israel is a family-oriented society, almost every family has at least one WhatsApp group, where family members share experiences and upload photos. Although the older family members are

active in these groups, it seems that the attitude of the adults toward such WhatsApp groups is ambiguous. On the one hand, through belonging to the group they feel part of the family, and on the other hand, they feel that WhatsApp has replaced phone calls and even family visits. Moreover, many old people are assisted by young family members, children, and grandchildren in matters related to technology and so the decrease in the frequency of visits hinders their ability to get help from young family members. As one of the interviewees said, "Even when they come to visit, they do not disconnect from the smartphone for a moment and the feeling is that they are not really with us".

Our findings correspond with Selwyn's work (2004), which, although performed 16 years ago, revealed that older adults are profoundly ambivalent toward IT. The ambivalent discourse that characterizes the attitude of the older person toward the use of IT reflects, among other things, a feeling of dependence, entrapment, and distress due to the forced transition to a digital world. Although they adapt to the new world, they do not feel comfortable in it.

The answers we received from the interviewees regarding the use of IT were complex and went beyond mere technical considerations. For some, the scant use of IT stems from a lack of interest or motivation and a preference for familiar patterns; others are adamant about their right to receive the services they are entitled to, in the way they are familiar with. It seems, however, that some understand that clinging to familiar schemes prevents them from adapting to the ever-changing society. The findings also reveal that while some of the interviewees are too tired to keep up with the rapid pace of change, accept the digital gap, and give up, others are actually making an effort to learn and use IT, and even enjoy it and its advantages. They understand that their refusal to "time immigrate" to the digital world, might leave them on the sidelines.

Atchley's (1999) continuity theory claims that older people tend to adhere to familiar patterns, which they found effective for coping with changes. Thus, the way old people talk about the digital world and interpret the new reality according to the schemas they are familiar with from the past gives them a sense of continuity and control over their lives. This does not necessarily mean that they prefer the conservative way and reject changes altogether. Therefore, in our view, continuity theory can

explain different attitudes because each individual continues to rely on his or her unique experience to cope with new challenges.

The theory of continuity can therefore explain both the choice of those who oppose and refrain from using IT, but at the same time, it can also explain the choice of those who want to adopt the online world and be a part of it. This is because different people go through different stations during their life course and accumulate different experiences. But everyone tends to cling to patterns they are familiar with from the past in order to cope with the changes and challenges that the information society invites.

New technologies offer the older population a large variety of means for maintaining social, creative, and intellectual involvement, and they can contribute to their physical and mental integrity. Nevertheless, many older people find it difficult to adopt the new technologies or do not find them useful. As a result, the same people who could have benefited from the technology more than any other population group are those who tend to reject it. It is therefore necessary to understand the reasons for avoiding the use of IT, the cultural context, and the older persons' world view, which lead to objection, to reserved acceptance at times, and at times even to acceptance and adoption. Understanding the socio-cultural contexts and the reasons for avoiding the use of IT may lead to the development of ways that will enable older persons to enjoy the many advantages it holds for them. When the use of IT is planned as a substitute for conventional services, it is necessary to take into consideration not only the technical possibilities and economic considerations, but also and particularly the perspective of the older persons themselves.

Limitations and Future Directions

This study describes the discourse of technology as told to us by old people in day centers. Due to objective limitations, we did not address differences that originate in ethnic, gender, national, religious, or class characteristics. These are certainly variables that are worth exploring in future studies. Moreover, due to the fact that the study population was heterogeneous and characterized by great variability in terms of its attitude to IT, it would be appropriate to conduct comparative studies with reference to additional background variables.

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Moving residence in later life: actively shaping place and well-being

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Abstract

Policy discourse favours the idea of “ageing in place” but many older people move home and into different kinds of residential settings. This article extends the understanding of how relocation can promote as well as diminish older people’s well-being. Using relational understandings of place and capabilities (people’s freedoms and opportunities to be and to do what they value) we explored well-being across the relocation trajectories of 21 people aged 65–91 years living in diverse residential settings in Scotland. We found that a diverse array of capabilities mattered for well-being and that relocation was often motivated by concerns to secure “at-risk” capabilities for valued activities and relationships. Moving residence impacted several other capabilities, in addition to these, both, positively and negatively. We suggest that a capability approach offers a valuable lens for understanding and supporting well-being through

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relocation, with potential to overcome some key limitations of dominant behavioural models of late-life relocation.

Keywords: ageing, capability approach, housing, residential relocation, well-being.

Introduction

In Western contexts, the idea of “ageing in place” – of supporting older people to continue to live in their usual, perhaps long-term homes – has featured prominently in policy discourse. “Ageing in place” emphasises people’s positive attachment to their homes and frames late-life residential relocation as undesirable (Andrews et al. 2007). For various reasons some older adults do not – perhaps cannot – remain in their long-term homes and move either to other mainstream housing or to more institutional settings with varying degrees of formal support. (Table 1 summarises the main types of residential settings in the United Kingdom [UK]).

This article aims to extend the understanding of how relocation in later life can promote as well as diminish people’s well-being. It reports findings from a study of well-being among older people living in different kinds of accommodation in Dundee, Scotland. Previous research has tended to consider reasons for moving separately from experiences of moving, and sometimes neglects older people’s own perspectives on what matters for their well-being. Our findings will illustrate how a more holistic view of the process of moving, and a capabilities approach to analysing well-being, can help avoid the limitations of some previous approaches.

The article begins with an overview of previous research on relocation in later life. We then briefly introduce the conceptual lenses of capabilities and place that guided our investigation, before describing our study context and methods and reporting the key findings related to relocation and well-being.

Previous Literature on Relocation

Two sizeable bodies of literature offer insights into different aspects of relocation in later life. One focuses on understanding the patterns of

Table 1. Different types of supported settings in the UK

	Supported housing		Residential care homes
	Sheltered	Very sheltered/ extra care	
Key features	Purpose built accessible housing schemes, including various combinations of self-contained bungalows, apartments and houses, with shared facilities (e.g. laundry, a common room). When age segregated, are typically for over 55- or 60-year olds.		Small or large scale residential including nursing homes that typically combine ensuite rooms with communal facilities (e.g., shared social spaces, dining facilities, gardens)
Service and care provision	Low level service support, via either on or off-site scheme manager or warden. Facilitated access to emergency services, including community alarm services.	High level of care and support, including on-site availability of personal care staff. Services include housekeeping, laundry, meals, on-site warden, emergency community alarm services.	Highly specialised levels of personal care and support for people with a range of physical, cognitive impairments and medical needs. Some include qualified nursing care.
Comparable terms	'Congregate senior housing', 'independent living facility' (United States), 'senior cohousing' (Netherlands, Sweden) (Choi 2004).	'Assisted living facilities' (USA) (Hillcoat-Nalletamby 2014)	Since April 2002, in the UK both residential and nursing homes come under the category of residential care homes. In other Western contexts, the term 'nursing home' is commonly used

and reasons for moving from long-term homes and the other focuses on experiences of settling into new places.

Patterns of, and reasons for, relocation

Studies within this body of literature have informed and mostly been guided by three theoretical models: Litwak and Longino's "typology of relocation" model (1987), Lawton's "ecological model of ageing" (1977) and Wiseman's behavioural model of late-life migration (1980). Litwak and Longino identified three main types of move among American older adults. On their typology, first moves are typically long-distance, and lifestyle related, at retirement. Second and third moves are more typically motivated by increasing healthcare and support needs. They are often short-distance relocations to be closer to adult children or to transition into institutional care.

Bloem et al. (2008) objected that relocation trajectories do not neatly map on to Litwak and Longino's typology. They highlighted severity of health conditions as an additional influence on relocation. Other authors have also noted the influence of cultural preferences and concerns around accessing informal support (Peace et al. 2011), issues of home ownership (McCann et al. 2012) and quality of parent-child relationships (Jennings et al. 2014).

Lawton's ecological model posits that with declining health and age, interactions between people's "personal competences" (typically related to activities of daily living) and home environments influence (usually limit) their behaviour and affective states. For example, difficulty climbing stairs in a building with no lifts will reduce well-being. If environmental barriers cannot be addressed "in situ," people may relocate to settings more suitable to their personal competences. Lawton's model has been critiqued for neglecting considerations such as socio-economic contexts (Renaut et al. 2015), meaningful attachments to places of residence (Cutchin 2001) and the roles of significant others in people's lives (Thomése & Broese van Groenou 2006). Several authors have also been concerned about the limited attention paid to changes in neighbourhoods (Phillipson 2007) and the implications of neighbourhood deprivation (Smith 2009). The limited conceptions of person-environment in Lawton's model can also lead to neglect of the complexity of interactions between the two, and therefore outcomes are inappropriately seen as more determined than emergent.

Wiseman's (1980) behavioural decision-making model of migration focuses on the "push and pull factors" underlying relocation. It seeks to explain how older adults weigh up various push and pull factors. Various studies have identified a range of both push factors (including declining health, widowhood, unsuitable housing or neighbourhood environments and difficulty in maintaining housing) and pull factors (including proximity to family and friends, suitable housing, better neighbourhood amenities and attachment to place) (Bekhet et al. 2009; Croucher 2008).

Wiseman's model is criticised for inappropriately assuming that each older adult acts as an independent or autonomous agent in decisions to move. In practice, decisions are often influenced by family members, service providers and various structural factors (Ball et al. 2009; Nygren & Iwarsson 2009; Portacolone 2013). The model seems to over-individualise the process and understate the complexity of decision-making, especially during stressful life events (Pope & Kang 2010).

All three models offer some useful insights into the migration patterns of older adults and their reasons for relocation. However, they can tend to focus attention on limited, standard sets of variables, so perhaps foster neglect of people's own experiences of declining well-being and perspectives on what matters about where they live.

Experiences of settling into new settings

A second body of research focuses on how older people settle in following a move to a new setting. This research has looked primarily at moves into supported, institutional settings, reflecting concerns underpinning the advocacy of "ageing in place" (Luborsky et al. 2011).

Early research focused on documenting the negative impacts (e.g. mortality) of moving into residential care settings (Golant 2003). More recent research employing phenomenological and relational approaches (Cutchin et al. 2003; Jungers 2010) suggests mixed experiences. While some people who move into residential care settings report loss of privacy, loss of independence, fear of death and sadness, others experience a sense of relief, security, and welcome increase in social interaction (Lee et al. 2013). Similarly, some who move into supported housing report grief, anticipatory fear of death, stress or difficulty in communal living, and others describe feeling safe, socially engaged and purposeful (Walker & McNamara 2013).

Attempts to explain why some people adjust better than others suggest that good adjustment can be fostered by maintaining control over decision-making and continuity of personal routines and identity (Lee et al. 2013), personalising spaces with material possessions (Leith 2006), developing positive relationships with staff and other residents (Jungers 2010), and pursuing meaningful activities (Petersen & Minnery 2013).

There is currently, however, limited understanding of whether and to what extent reported experiences with moving are linked to people's reasons for moving or relate to other aspects of their lives. We believe that this gap arises partly because moving out of a current residence and into a new setting have often been studied separately. One under-explored possibility is that people's experiences of settling into a new residence are somehow tied – at least in part – to their motivations for moving and aspects of the moving process. Two studies have looked explicitly at changes in well-being following a move. Finney and Marshall (2018) used data from the English Longitudinal Study of Ageing (ELSA) to examine changes in well-being for community-dwelling older adults. They did not consider the kind of settings or locations that people moved into but identified post-move improvements on hedonic and eudaimonic dimensions of well-being, including among people who moved for non-voluntary reasons such as job relocation or eviction. Ewen and Chahal (2013) used mixed methods to investigate the experiences of 26 American older women who moved into supported housing. They reported improvements in positive affect 3 months after moving, both for women who had and who had not made the decision to move themselves. Both studies confirmed changes in well-being, but it remains unclear whether reported changes are manifestations of reasons for moving or derive from changes in other aspects of people's lives.

This article seeks to extend learning from the existing literature by investigating two relatively under-explored aspects in combination: (1) people's own experiences of well-being changes and perspectives on how these influenced moving decisions and (2) the implications of relocation for people's well-being in a range of domains, including those that did not feature among their reasons for moving. We used Sen's (2009) capability approach (CA) as a conceptual framework to support attention to the diverse aspects of well-being that can matter to people, and Massey's (1994) account of "place" for understanding relocation. We introduce these now.

Conceptual Framework of Capabilities and Place

The CA is a framework for considering human well-being and equality. It can be combined with different social theories and has been developed and used in various ways (see Robeyns 2016 for an overview). At the core of all variants of the approach is the idea that if we want to examine the quality of people's lives, we need to attend to their capabilities (genuine freedoms and opportunities) for "valued functionings" (the kinds of things that people can be and do that are considered important for good human lives).

Several aspects of the CA make it useful for exploring experiences of relocation. It can give due recognition to the multidimensionality of well-being and to diversity in what matters to people. Although it is not always recognised, some key features of CA imply a relational ontology of capabilities (Smith & Seward 2009). This means that capabilities should be understood not as fully embodied, internalised, and portable abilities, capacities or competences, but rather as relationally shaped freedoms or opportunities that depend in complex ways on interactions between individuals and the circumstances in which they live. The approach encourages recognition that capabilities are influenced by various social and spatial aspects of people's environments.

In the context of relocation, we envisaged that a focus on older people's valued capabilities could support engagement with what matters to them, exploration of how valued capabilities feature in relocation considerations, and generation of insights into their well-being across relocation trajectories.

The recognition that capabilities are situationally influenced can be fruitfully developed in conjunction with a complementary "relational" notion of place (Fleuret & Atkinson 2007). Relational notions of "place" view it not as "mere locations with attributes" but, as socio-spatial contexts, simultaneously material and social, made through and by the relational linkages (Massey 1994).

These ideas encouraged us to conceptualise moving from one residence to another as a relational process rather than as two discrete events. They also reinforced our recognition that as people themselves change, their relationships to places are continually challenged and need to be negotiated – and that this has complex implications for decision-making about, and experiences of, staying or moving home (Cutchin 2001; Peace et al.

2011). Relational conceptions of capabilities and place helped us to view people's agency as situated, negotiated and expressed within social structures. As we explain below, a "capabilities" framework was useful for unpacking the implications of changing people-place relationships for well-being, and helpful both for understanding reasons for moving and evaluating experiences of moving.

The Study Setting: Housing and Care Options in Scotland

In Scotland, as in rest of the UK, approximately 91–93% of people aged 65 years and over live in conventional mainstream housing, 4–5% in supported housing and 3–4% in residential care homes (Office for National Statistics [ONS] 2013). Older adults in conventional mainstream housing are likely to be owner-occupiers (Department for Communities and Local Government [DCLG] 2015), with a smaller proportion living in social housing or private rented accommodation. Reflecting the emphasis on "ageing in place" (Scottish Government 2012), a range of services such as home adaptations, home and personal care are available, but needs-based thresholds for eligibility can restrict access to these.

Older adults can move into supported housing as a couple or individually. Supported housing is usually rented, mostly from housing associations and state agencies but also increasingly from the private sector (Harding et al. 2018). Availability varies across regions (Housing LIN 2019) but supply is generally low relative to demand (Local Government Association [LGA] 2017). For residential care homes, the state provides means-tested support towards costs, but increasing proportions of resident's self-fund the costs (almost 45% according to Laing Buisson 2017). Couples may move in together if both are assessed as having care needs or if the relatively healthy partner can self-fund their stay.

Methods

This article reports one analysis from a broader qualitative interview study that explored older adults' experiences of living in diverse residential settings in Dundee, Scotland. The study sought particularly to understand how where people lived mattered for their well-being. The significance of moving residence, which is the focus of this article, became

apparent during data generation and analysis, as 21 of the 26 study participants talked in some detail about their experiences of relocation. In this section, we first describe the methods used to generate data for the study overall and then explain the selection and analysis of data for this article more specifically. The study was approved by the University of Dundee Research Ethics Committee (approval number: UREC 12028).

Eligibility, Recruitment and Consent

People aged 60 years or above with sufficient cognitive and communicative capacity for an interview were eligible to participate in the study. We sampled purposively, seeking diversity in terms of participants' residential settings (owned or rented mainstream housing, supported and residential care settings) and socio-economic levels (two geographical locales in Dundee City designated most and least deprived in the Scottish Index of Multiple Deprivation).

To recruit older people living in mainstream housing, we visited lunch clubs, day care centres, local churches and carer centres. For people living in supported housing and residential care settings, we were helped by wardens and care managers who introduced us to residents based on study eligibility criteria. We asked people if they were willing to talk to a researcher about their life, what mattered to them for a good life, how where they lived affected what they could do or not, and likes and dislikes about where they lived. We offered opportunities to ask questions about the study and explained the voluntary nature of participation, that the interview would last for 1.5–2 hours and that they could stop or take a break if they wanted and have someone present for the interview if they wished. Those volunteering as a couple were given the option to be interviewed jointly or separately. We offered some scope for participants to choose when and where the interview would be held, explained that the interviews would be audio-recorded and transcribed, and that quotations would be anonymised for publication.

People were asked to indicate their willingness to participate by telephone, email, or face-to-face. Signed written consent or verbal recorded consent (for visually impaired participants) was obtained before interviews.

Conduct of Interviews

The interviews were all conducted by the first author, mostly at participants' place of residence, but four in day centres and one at a university office. Two heterosexual married couples chose to be interviewed jointly and one participant with a mild speech impairment invited a family member to support a smooth flow of conversation. Interviews lasted for approximately 2 hours.

Interviews were conducted conversationally, supported by a topic guide that reflected the conceptual framework of capabilities and place. Seeking to exploit the benefits of biographical approaches that "offer rich insights into the dynamic interplay of individuals and history, inner and outer worlds, self and other" (Merrill & West 2009: 1), we opened the interviews by asking participants "tell me about yourself and your life?" This helped us to locate what participants said about their current and recent experiences, including of where they were living, within the broader contexts of their whole lives. A biographical approach facilitated the understanding of why people valued some things differently over time.

Next, we asked participants open-ended questions about the kinds of things that mattered to them. Drawing on Finnis (1980) we included prompts, if required, to consider domains of life/health/security, friendships, work and play, self-expression, religion/spirituality and knowledge. We encouraged participants to explain *why* something mattered to them. To investigate the implications of place for participants' well-being, we asked explicitly how where they lived made a difference to their opportunities to enjoy what mattered to them. For example, if relationships mattered, "*how does living here make it easier or harder for you to maintain and form relationships?*" We did not use the word "capabilities" relying instead on conversational questions about what participants valued being able to do and whether and how where they lived helped or made it difficult to do those things.

Data Analysis

Data analysis involved five iterative stages of the Framework Approach (Ritchie & Lewis 2003): familiarisation, identifying a framework, indexing, charting, and mapping and interpretation. All authors read a sample of

transcripts. The first author became more closely familiar with the whole data set. Paying close attention to participants' accounts our analysis was also guided by the research questions and well-being domains covered in the topic guide. For each of the six well-being domains derived from Finnis (1980) we developed a set of four low-level descriptive analytic categories to organise the data: "what matters," what participants were "able to do," "what participants were not able to do," and "how where they lived (current and previous places) made a difference." This allowed us to examine how current and previous places of residence featured in accounts of valued aspects of participants' lives.

Once the analytic categories were agreed through discussion, the first author worked systematically through all transcripts to apply them to the data (indexing), then summarised the indexed data and noted key quotes into charts, with columns describing the key framework categories and rows representing individual interviewees (charting). The first author took primary responsibility for interpretation, using the column and row arrangements to look for patterns and contradictions within and across cases, re-reading complete transcripts to maintain familiarity with whole individual stories. The charted data and a selection of interviews were reviewed by co-authors to support critical discussions of data interpretation and to develop analyses of what mattered for well-being and how well-being was tied to place, including through relocation. As joint interviewing was not deliberately built into the data collection strategy, following Öhlén et al. (2006), we analysed accounts of each partner separately.

Data Sample

We interviewed a diverse sample of 26 people between 65 and 96 years of age. Here we focus on 21 participants who discussed at least one relocation. Table 2 summarises participants' socio-demographic characteristics, including living arrangements at the time of interview. Table 3 summarises the types and timing of the moves they spoke about. While three participants had moved more than once, our analysis is limited to the most recent moves.

Table 2. Socio-demographic profile of participants

	Participants who relocated at least once (<i>n</i> = 21)	Participants (total study sam- ple) (<i>n</i> = 26)
Sex		
Male	9	10
Female	12	16
Age		
65-74	4	4
75-84	9	13
85 +	8	9
Relationship status (at time of interview)		
Married	4	7
Widowed	15	17
Never married	1	1
Divorced	1	1
Living arrangements		
Alone	17	19
With spouse	4	7
Setting		
Mainstream housing	4	9
Sheltered & Very sheltered (Supported housing)	8	8
Residential Care homes	9	9
Self-reported health conditions/impairments		
With conditions	18	24
No conditions	3	2
Previous occupation*		
Professional/managerial	4	6
Intermediate	4	7
Routine and manual	11	11
Never worked	2	2
Deprivation status of current neighbourhoods		
Least deprived	8	11
Most deprived	13	15

Table 3. Details of reported moves (n=21)

Moved from-to	Home ownership		Number of moves at 60 years age and over prior to most recent move			Length of stay in current residence (range)	Inter or intra-city moves
	House ownership: Prior to moving	House ownership post moving	None	One	Two		
Mainstream housing to other mainstream housing	4	3 owners and 1 tenant	2	1	1	2 -17 years*	Intracity
Mainstream housing to supported housing	8	4 owners and 4 tenants	8	0	0	2- 8 years	7 Intracity and 1 Intercity
Mainstream housing to residential care home	8	6 owners and 2 tenants	8	0	0	3 months - 5 years	Intracity
Supported housing to residential care home	1	Tenant	0	0	1	2 years	Intracity

*Only one participant in sample had lived in current residence for 17 years post-move

Findings

Participants' accounts revealed a diverse array of capabilities that mattered for their well-being and illuminated the role of place in shaping those. Our analysis is presented under two main headings, with sub-headings as outlined in Table 4. The first section, "Restoring or securing capabilities," provides an account of participants' changing relationships with where they lived and how those shaped relocation considerations and decisions. The second section, "Capability changes experienced," explores the implications of moving. We have selected examples from across the social spectrum to illustrate some of the different circumstances surrounding people's moves.

Restoring or Securing Capabilities

We summarise participants' accounts of what prompted them to move or consider moving residence under two headings: "Why move?: risks to multiple capabilities" and "Moving where?: considerations and constraints on options." In both cases, we consider moves between different kinds of setting.

Table 4. Themes and sub-themes

Restoring and securing capabilities	Why move? risks to multiple capabilities Moving where? considerations and constraints on options
Capability changes experienced	Expanded <i>Capabilities that already existed and could be realized but have now been augmented/enhanced</i> Reduced <i>Capabilities diminished or lost</i> Newly acquired <i>Capabilities difficult to achieve in previous setting or become available upon moving</i> Intact <i>Capabilities not impacted by the move</i>

Why Move?: Risks to Multiple Capabilities

The loss, or anticipated loss, of scope to do what mattered to them or to maintain valued identities was the main underlying motivation in accounts of relocation. We can thus interpret many reasons for (considering) moving as attempts to restore or secure diminished or “at risk” capabilities for valued functionings. These related, in broad terms, to daily life within and beyond participants’ place of residence, and particularly to caring and ensuring support for care for themselves and/or a spouse.

A substantial majority of participants highlighted diminishing capabilities to get around inside their home; get outside into gardens; go beyond the home; and, so, to manage other interlinked capabilities, such as shopping and/or participating in social and community life. These valued capabilities were circumscribed by varying interactions of material features of place (e.g. steps, a lack of lifts and narrow doors) and restrictions of bodily movement associated with health conditions, as evident in the following quote:

I had two heart attacks, quadruple bypass and that is when I had my stroke, when I came out of the bypass. I sold it [apartment] when I got unwell because I could not climb stairs very well. The doctors said I should not be climbing stairs. There were about 36 stairs to climb before you got to your front door and health people, social services put up bannisters for me going up because I could not take it[...] the wife has got COPD [a respiratory condition] very very bad. She was finally struggling up the stairs, came with all the messages [shopping] and it was far too much [...] We weren’t going out [...]we were staying in a lot.

(Henry, 73 years, lives with spouse, domestic setting)

Participants, particularly those living in less affluent or higher crime areas also described threats to other valued capabilities including to be and feel safe from intruders, avoid anxiety about something untoward happening, live in a safe environment and sleep well. Features of the local neighbourhood could undermine several capabilities, directly and indirectly, as shown in the below quote:

I had a drug dealer across the door from me, a drug dealer down the stairs [...]. I used to get my bell rung, drug addicts on stairs all night, sometimes I get my bell ringing 2, 3 or 4 in the morning or knocking on my door thinking I was selling drugs. I could not really go out, because if I went out I was frightened my house would be broken into.

(Darren, 67 years, separated, very sheltered setting)

Some participants reported significant changes in their neighbourhoods over time. When neighbourhood deterioration coincided with their own ageing and health-related changes, it could exacerbate the impact of these on a cluster of valued capabilities:

I moved here [very sheltered setting] because I had arthritis in my knees. Stairs were starting to get on my nerves, I was in too much pain [...] I did not mind being on my own [after husband's death] but sometimes I did. I felt the part where I lived [previously] there seemed to be a lot of people coming, drunks, drugs and you would see them staggering along and everything. It never used to be like that, but it is quite common now. I was scared on my own, I used to hear noise in the street and you would not believe, I had a poker under my bed. You see, you just stepped into my house from the outside, the door was on the street.

(Cathy, 81 years, widow, very sheltered setting)

For a couple of participants, moving was primarily a way to secure capabilities that had been affected by personal life events and further impacted by issues of place. For example, being widowed could limit the scope for participation in meaningful personal relationships, avoiding loneliness and getting out and about, and these capabilities might be further impaired by the altered experience of a home without the life partner with whom it was previously shared:

It's just that I wasn't going out. I was keeping well enough but I just didn't want to go out, I was in the house most of the time [...] I worried my family to death because I wasn't going out. She [daughter] is in [South England] and my son is in [another Scottish city]. I had home help coming in.

(Tina, 84 years, widow, care setting)

Concern to secure capabilities to access prompt attention and care motivated several couples to consider moving. This was particularly striking in situations in which both partners had developed health problems with similar implications (e.g. proneness to falling). Concerns about the limited availability of support in their current settings were often reinforced by family members, as shown in the following quote:

I have multiple sclerosis [...] Well I was looking after my wife and I fell twice in the house in one day, that was enough really [...] if both of us fall at the same time, we would really be in a stew. And the family said, "you are not safe living here, what if you both fall at the same time?" which could have happened. We had an alarm system

to the sheltered housing complex and they had come in and make sure you were okay. Half the time I was still lying in the same position when they came in. I just could not get up. [In residential care home] I feel a lot safer to be honest.

(Stuart, 81 years, interviewed with Sara, 78, residential care setting)

Scope to secure “at risk” capabilities in situ could depend on a combination of personal and broader considerations, including health conditions, housing design, the expense and scale of work involved in potential modifications, personal resources and connection to place.

Moving Where?: Considerations and Constraints on Options

All participants had sought, with their moves, to restore or secure several valued but diminished or “at risk” capabilities for themselves or a spouse. The question of where to move *to* was rarely simple. Some potential new locations were likely to enhance some valued capabilities but restrict others, so decisions about whether and where to move involved trade-offs. For a few, the kind of moves they first considered were, on further examination, rendered less feasible by limited financial resources, lack of access to necessary supports (sometimes due to ineligibility), or the wishes of significant others. The emphasis within the many considerations in each participant’s account varied. The first two quotations below both reflect some emphasis on the need to meet the health-related support needs of a spouse:

I wanted to stay with [wife], be together and that was it. I’d have rather stayed in our house, but it was impossible [...] you couldn’t cope on your own, which I knew I couldn’t because on many occasions, I had to phone my son and tell him to come down right away. I couldn’t handle it. She was getting too aggressive [...] we had accommodation for a couple of nurses if we wanted, but it would be very expensive to do that [...] social services said you’d really have to get a live-in nurse [...]. So, I had it all planned out that we were going to buy a sheltered house and at least we would have a warden there and we wouldn’t be on our own, but they [social services] said that that just couldn’t be. I sold the house.

(Benny, 90 years, lives with spouse with Alzheimer’s disease, residential care setting)

I was very lucky that I only fell ill once, and I could not have sat in bed because he [husband] had appointments to go to. [...] you begin to realise that – what if anything happens to me? You worry what is going to happen to him. We needed, I felt we needed a backup [...] I haven’t got any relatives at all because I am only child and so is he [...]

My daughter lives down in London and my son lives in [Europe]. To let you understand my daughter has not had anything to do with us for a long time. I know a lot of people say, "Oh no, I wouldn't sell my flat" but it was a case of either we stayed there and have no life because to get out was such an ordeal.

(Rita, 80 years, widow, sheltered setting)

Co-resident couples, however, did not always share the same thoughts about moving. Peter suffered physical and speech impairments following a stroke. His daughter-in-law explained that Peter's wife had initially been reluctant to move from their upstairs flat, although this hugely limited Peter's capability to get out and about and participate in social and community life. In this case, adult children apparently influenced the decision to move:

Daughter-in-law: Peter found it difficult to get out and about. [To Peter] You tell me if I am wrong. When you were at [previous upstairs apartment] you spent your day at the window watching the world go by. His wife was obviously doing all the looking after for him. My husband and I used to try and persuade them to move but his wife always said no, not moving [...] eventually we managed to persuade her.

(Peter, 72 years, widower, domestic setting)

For a couple of participants, especially those living alone after being widowed, securing capabilities for affiliation was paramount in their choice of where to move. Some purchased another property in a locality that they had grown up in, knew and liked, maintaining closeness to friends or adult children. Others chose to move into a supported housing to meet new people. Tina, who valued being around other people and had become unhappy living alone following her husband's death, self-funded a move into a local residential care setting although this was not (yet) necessary for health reasons:

[In the care home] I have company and I have good friends and staff are super [...] I usually go down in the lounge, there is usually somebody.

(Tina, 84 years, widow, residential care setting)

Unlike others, Darren did not indicate a desire to move into a specific setting or neighbourhood. He was unique in our sample in having neither the financial resources nor (initially) support from statutory services to follow through his preferences to leave a setting where he lacked several

key capabilities. It was 11 years before his health deteriorated to a point that he became eligible for support and was able to move into very sheltered accommodation:

I could not get help from council; nobody wanted to help me. I wanted moving and they [Council staff] were not interested; I just gave up in the end. What was it, 2008, I completely lost the use of my legs for four days and from then I got really bad, I could not walk, could not get up the stairs [...] I went to social services and I was crying. I told them I had to be moved because I was too ill [...] and this is how I got in here.

(Darren, 67 years, separated, very sheltered setting)

Capability Changes Experienced

Although moves were largely motivated by concerns to restore or secure particular, valued capabilities, participants' accounts suggest that relocation impacted several other valued capabilities as well. As summarised in Table 5, previous or existing capabilities could be "expanded," "reduced" or remain "intact," and sometimes "new" capabilities were acquired with a move. Participants experienced different combinations of capability changes with their moves, and various features of place at different scales of the settings they moved to (e.g. care home room, garden, neighbourhood and wider locality) were implicated in these changes.

Expanded Capabilities

Most participants reported some enhancements or augmentation of capabilities they already possessed. The kinds of capabilities enhanced by a move were diverse. Participants explained, for example, how a chapel within a residential care home increased their opportunities to attend church services, and how bus services between their sheltered accommodation and a supermarket made it easier to get out and procure daily necessities. Joe, who had maintained a stamp collection in his previous residence, found a more peaceful environment enabled him to engage more fully with his hobby:

[In new residence and surrounding environs] it is quiet, there is no rowdy kids going about which is a godsend for my hobby because I don't like getting distracted when I am doing it. For my stamp hobby, I also do coins. It used to be rowdy where I used to stay before, teenagers and all, near the shops.

(Joe, 65 years, widower, sheltered setting)

Table 5. Examples of Capability changes by individual participants

	Peter (mainstream to other mainstream housing)	Diane (mainstream to sheltered housing)	Sara and Stuart (mainstream housing to residential care home)
Reasons for moving residence	To be able to get out and about of their upstairs flat following a stroke as stopped going out due to the difficulty in negotiating stairs.	To access good quality treatment for her husband who had Alzheimer's and having a granddaughter in Dundee who worked in the health care system prompted Diane and her husband to make the move from another city	To feel safe and secure and reduce the constant anxiety about the implications of both partners falling at the same time due to their respective health conditions.
Direction of capability change	Peter (mainstream to other mainstream housing) <u>description of change</u> and quote	Diane (mainstream to sheltered housing) <u>description of change</u> and quote	Sara and Stuart (mainstream housing to residential care home) <u>description of change</u> and quote
Expanded	<u>None obviously mentioned</u>	<u>Being able to participate more fully in the life of her great grandchildren</u> One of the reasons why I would like to stay here is I would like to see my great grandchildren growing up as well.	<u>Being able to practice religion daily (Sara and Stuart)</u> We get to church everyday which is a plus isn't it? (Sara)

(Continued)

Table 5. (Continued)

Direction of capability change	Peter (mainstream to other mainstream housing) <u>description of change</u> and quote	Diane (mainstream to sheltered housing) <u>description of change</u> and quote	Sara and Stuart (mainstream housing to residential care home) <u>description of change</u> and quote
Reduced	<u>None obviously mentioned</u>	<u>Being able to enjoy other valued social relationships and frequent social interaction; Being able to live in a familiar environment</u> My life is much wider from where I come. We did not have a family there [previous place of residence] but we lived there for many years, lots of friends. I am lucky to have the kind of people as friends that keep in touch with phone calls or letters that I do keep in touch and that but it is not the same <u>Being able to live in spacious accommodation</u> We had a fairly-large home [...] [Two bedroom] we had a kitchen, dining room and I had taken this place unseen. My daughter and granddaughter, they viewed it, arranged for carpeting and all. And I brought [...] no dining table or anything like that. I knew that there would no space and just about enough space for meals and watching TV. I wondered where I would do the ironing [...] because by the time you got the ironing board up, it was more in the bedroom	<u>Being able to do specific household related chores</u> (Sara) It is people doing things for you that you had rather do yourself. In the house we had our tea, and then we would say we will do the dishes now so that we can sit together and watch the news, so I liked that part, whereas here, they come and take away your cup and it is washed [...] (Sara)

(Continued)

Table 5. (Continued)

Direction of capability change	Peter (mainstream to other mainstream housing) <u>description of change and quote</u>	Diane (mainstream to sheltered housing) <u>description of change and quote</u>	Sara and Stuart (mainstream to care home) <u>description of change and quote</u>
Newly acquired	<u>Being able to do things confidently on his own</u> If I want to do anything I could just go ahead and do it (Peter). Normally I would go with Peter to the hospital for appointments. I was working night shift last week and Peter had to go for diabetic screening clinic at nine in the morning. So he said, 'I will go myself'. So he took the bus, did his appointment and came back again, which he would not have done before. [Previous apartment] It was only one floor up but two flights of stairs but Peter found it difficult to get out and about. (Daughter in law)	<u>Being able to access family support and care if needed</u> She [granddaughter] said but what happens if you get ill? Well I can't really do anything if I get ill you know[.] I have got good friends [in Aberdeen] but I can't expect them to keep, take care of me when I get ill. So she said, I should think about. And I decided I would stay put [in Dundee]	<u>Being able to participate in social / health activities</u> (Sara and Stuart) We come down to the lounge and join in with everybody on what is going on. And we had the physio lady today, so we did all the exercises and I don't actually mind the physio, it is for your own good [...] and then a lady that comes in she, what does she do (to her husband) (Sara). Reminiscing, so everybody joins in and it is quite interesting. (Stuart).

(Continued)

Table 5. (Continued)

Direction of capability change	Peter (mainstream to other mainstream housing) <u>description of change and quote</u>	Diane (mainstream to sheltered housing) <u>description of change and quote</u>	Sara and Stuart (mainstream to care home) <u>description of change and quote</u>
	<p><u>Being able to participate in social life of community</u> [...] Before when you [to Peter] were in Dundee you did not go out whereas here he is definitely taking part, he talks to all these women who live around here, chats to the window cleaner [Peter nods]. [When Peter and his wife] the two of them sat outside on their deck chairs [new apartment] and they got to know everybody [Daughter in</p>		<p><u>Freedom from household chores (Stuart)</u> Yeah, I have no cleaning do here at all [in care home] (and laughs). It is great...' (Stuart)</p>
Intact	<p><u>Being able to continue being a home owner</u> Yes, [owned the apartment] in B. street and this one.</p>	<p><u>None obviously mentioned</u></p>	<p><u>Being able to see family (Sara and Stuart)</u> Sara: It [Seeing family] has not changed an awful lot, the two boys are in Glasgow and they come through every fortnight don't they. [Three daughters come up] every night (Sara)</p>

Reduced Capabilities

People who had moved to supported and residential care settings sometimes experienced unanticipated reductions in valued capabilities, including to engage in some daily household activities (e.g. do one's own ironing), to have room to do things in one's private space, and to express valued identities (e.g. by personalising rooms). The negative experiences of these reduced capabilities were perhaps exacerbated for people who had been less able to participate in decisions about their move:

I was in hospital quite a wee while and my daughter had gone around looking at all homes. In the other house, sheltered housing, we had our own furniture. When we came in here, [daughter] says, mum you do not need furniture, you have to get rid of that, it is all furnished up. And she thought it was fine. I didn't really like that [...] Well, you are in a wee room, you know and you feel constricted. I miss the table, I always like a table to sit at and do things.

(Sally, 86 years, widow, residential care setting)

Moves that enhanced particular capabilities for some participants did not do so for others. Notably, one participant who moved into sheltered accommodation experienced difficulties in forming new social relationships despite her willingness to be sociable. She had moved from another city a year ago to secure better healthcare for her husband but her lack of familiarity with Dundee and lack of shared social identity with other residents limited her scope to find common ground in social interaction:

Seventy-five per cent of the people here come from Dundee and few of them from the Ferry. This is where they were born, brought up, went to school. And so if you have a group such as this on a Friday morning, [...] that is what they talk about. I don't belong here. It doesn't mean anything for us and I suppose it would be easier if we belonged either in Dundee or the Ferry. I have not changed countries or anything like that. But it is very different. Simply because the people are very different.

(Diane, 79 years, widow, sheltered setting)

Reductions in some capabilities mattered more to some people than other. While some participants who had previously owned homes did not comment negatively about their change in ownership status when they sold up, one found the loss of his capability to identify as a house owner difficult:

I mean when you have got your own house for 20 odd years and you have to sell it, is a big comedown for me, because it was a bit of pride for me, owning my own house [...] and I could not afford to buy a brand-new bungalow.

(Henry, 73 years, lives with spouse, domestic setting)

Newly Acquired Capabilities

Participants often also acquired new capabilities following a move. A couple of participants who had previously relied on meals-on-wheels services in domestic homes or supported housing remarked how the move to residential care generated capabilities to choose what to eat, to enjoy regular, appetising meals in a sociable setting, and so to be well nourished and engage in more personal care:

[At previous residence] you were getting your food handed in and things like that [meals on wheels]. And the food was there, if you didn't like it, what happens, you didn't eat it. But here, if you say "oh, I don't want that," they say, "would you like a sandwich? Would you like this?" You get a choice, but, I mean, they were coming to your door [at previous residence] there was your food and it was a case of, if you didn't like it, what happened?

(Peggy, 89 years, widow, residential care setting)

When I first came here [residential care home] I was not strong; I had lost all weight, I had to get help to go from bed to chair and likewise to the toilet. That was annoying me because you wanted to do that for yourself but as you are well fed here and as I put on weight I got the strength I was able to do these things. That was a big thing and when eventually managed to do that that was fine.

(Sally, 86 years, widow, residential care setting)

For others, material and social features of their new residence (e.g. a garden, a quiet and safe neighbourhood, organised activities, supported exercise opportunities and the quality of interaction with staff) helped to generate capabilities to enjoy valued activities and feel relaxed or less stressed:

The bungalow it encouraged me to sit outside because we bought deck chairs and umbrellas, well, we did not have that in the other house. The other thing is it is awfully quiet here [neighbourhood] whereas round at the other house it was awfully noisy, police were never out of the street. So in one way I was glad to get out. Where I am now I find I can relax more even though there are kids running about, you can put up with that but I can relax more, I can be more of myself.

(Henry, 73 years, lives with spouse, domestic setting)

Intact Capabilities

A substantial majority were actively involved in choosing what kind of setting or locality to move into (all but one moved locally) and mentioned some capabilities that remained relatively stable following a move. These included capabilities to live in spacious accommodation, familiar neighbourhoods or a home city; engage in valued activities beyond their home (e.g. watching football or bowling); and enjoy valued social relationships (e.g. be visited by family):

We were brought up in a tenement [apartment] and we lived on third floor and then we lived in multi [storeyed apartments] and I did not want any on ground floor. There was an empty flat downstairs [in current apartment block] with a lovely new carpet. I mean I could have taken that but it was not as big as this one. I wanted up high and I like space.
(Tara, 89 years, widow, very sheltered setting)

For a few, the *absence* of some valued capabilities also persisted after a move. That the “intact capability” label can also apply to valued-but-missing capabilities is exemplified by Jim, whose wife had died recently and who saw his scope to be happy as largely dependent on that unchangeable fact:

Jim: I was living on my own and not very happy with it, coming here it didn't change it that much, wasn't that drastic a change.

Interviewer: And what would happy be, if you could do something about it?

Jim: Bring my wife back

(Jim, 82 years, widower, residential care setting)

To illustrate the different combinations of capability changes that could be experienced on relocation, Table 5 summarises the changes mentioned by three individual participants.

Discussion

Our study has identified concerns to secure valued capabilities as a key motivation for relocation by older adults. It has illustrated the challenging nature of relocation decisions, highlighting requirements for “trade-offs”

when multiple valued capabilities (including those of co-habiting partners) are “at risk” and are likely to be variously impacted by decisions to stay or move to different kinds of residence. It has also illuminated the diverse ways in which well-being, understood in terms of having capabilities for valued functionings, can influence and be impacted by relocation in later life.

Our analysis reflects and evidences the complex implications of moving for the well-being of older adults. By conceptualising moving out and moving in as part of the same dynamic process, working with relational conceptions of capabilities and place, and using a qualitative and biographical approach, we have been able to contribute to the literature on relocation in later life in three distinct ways. Firstly, our findings demonstrate that several capabilities over and above those that feature as reasons for moving can be impacted by relocation. Secondly, we have shown how reported changes in well-being can derive from different combinations of changes in other aspects of people’s lives (which reinforce the importance of understanding relocation as a process that unfolds through dynamic contexts). Thirdly, recognition of the various ways in which capabilities might change can serve as a conceptual/analytical heuristic to progress thinking about the implications of relocation in ways that can avoid the limitations of both simple binaries of positive and negative experiences and narrow views of activities of daily living.

Confirming the significance of place for well-being, our findings offer a useful reminder to adopt richer conceptions of place (Massey 1994). We note that sustaining some capabilities, for example, to develop new social relationships, can be more difficult and time consuming where an older person moves to an unfamiliar city.

Study Limitations

This study was not designed to focus on relocation: the significance of relocation emerged during interviews. Although there was considerable diversity in the kinds, number and timing of moves participants talked about, and in the reported well-being implications of moving, some moves had happened a while ago. This raises questions of recall quality and may have shaped the reporting of some capability changes. However, as our findings also illustrate, some capabilities develop over time

(e.g. new social relationships) and complex relational dynamics can lead people to re-evaluate the kind of capabilities and place(s) that matter for well-being over time. A prospective study on relocation could have sampled and probed to investigate these possibilities.

Relatedly, although our biographical approach and foregrounding of the dynamic nature of people-place relationships allowed generation of useful insights, we have not examined the influence of multiple moves. Some research suggests that people who move often acquire environmental skills to adapt (Rowles & Watkin 2003). Future research could be designed to consider the implications of multiple moves (Peace et al. 2006).

As with all research, our methodological choices have implications, not all of which can be fully known. We deliberately gave participants a choice to be interviewed alone, jointly with their partner, or in the presence of a significant other. We were careful in joint interviews to ensure both interviewees' voices and stories were captured, but both the offer of choice and the interview process are complex and include potential for harm through disclosures (Polak & Green 2016). We were not aware of any tension or discomfort during joint interviews, but we did not analytically address couple interactions alongside personal accounts.

Contributions to Theoretical Development

Despite the limitations, our diverse sample and our approach to data generation and analysis (qualitative, biographical design and use of relational conceptions of capabilities and place) allowed us to overcome some of the limitations of studying decisions to move and experiences of moving separately. They generated rich insights into the complexity and variability of relocation trajectories and experiences, going well beyond the considerations explicitly supported by the theoretical models that have guided academic work in this field to date.

For example, our findings illustrate a diversity in trajectories of moves into different settings that is not adequately reflected in Litwak and Longino's (1987) typology. Each move was influenced by some unique combination of the capabilities a person (or couple) valued, the ways in which those capabilities were constituted or threatened by their personal embodiment and social environment, and the feasibility of different housing alternatives for them. This should encourage researchers and policy

leaders to resist the temptation to assume that some kinds of situation or life event inevitably necessitate or render appropriate particular kinds of move. Declining health or widowhood, for example, did not always trigger moves into residential care setting or supported housing, and such moves did not have consistent implications for people's well-being.

The CA encouraged consideration of the plural and open-ended nature of what matters for well-being. This supported identification of a wide range of freedoms and opportunities that mattered to participants, again challenging the value of the more reductionist, deficit-focused approaches that can be fostered by Lawton's (1977) consideration of competences. Deficits in competencies featured as *some* of what could contribute to scope to do things or live in ways that were ultimately important for well-being. Our primary focus on capabilities is consistent with a growing recognition that these are significant and salient for the study of well-being in older adults (Grewal et al. 2006; Jansen et al. 2017).

While broadly reinforcing Lawton's recognition of the significance of people-place interactions, our approach permits richer ecological insights into person-place interactions in two ways. Firstly, our findings captured and reinforced recognition of the relational and social components of interactions beyond personal competencies and physical environment (Cutchin 2001). Secondly, we also highlighted the dynamic, situated and variable interactions of life events with place, showing, for example, how a loss of spouse may threaten someone's capability to avoid loneliness or manage unexpected changes in everyday life, perhaps especially when living in a deprived neighbourhood or experiencing health problems. Our analyses demonstrated the dynamic and complex (hence not entirely predictable) production of capabilities via person-place interactions – confirming the need to consider place and person holistically and relationally.

Our findings also support previous challenges to the idea of a decontextualised independent individual decision-maker that seems implicit in Wiseman's model (1980). Decisions about relocation are significantly influenced by other people and by relationships. They can be both enabled and constrained by socially intertwined biographies, the availability of resources and forms of support that depend on other people, and broader social structures.

Implications for Policy, Practice and Research

To support older people's well-being, practitioners with scope to influence relocation processes need to be responsive and sensitive to individual contexts, identities and valued capabilities. For moves to supported settings, people should be encouraged to identify the kind of things that matters to them so judgements about suitability of accommodation can reflect consideration of support for capabilities important for well-being. We suggest that emergent research into the potential of a dedicated "moving on" service to facilitate relocation (Hillcoat-Nalletamby & Sardani 2019) could usefully adopt a capabilities perspective and be extended to include relocation to supported and care settings.

Our findings add to previous work (Hillcoat-Nalletamby & Ogg 2014) in challenging the idea that moving is always detrimental to older people's well-being. They support caution against presuming that some kinds of residence are universally better than others, and that the advantages and disadvantages of particular settings are the same for all. Policies supporting "ageing in place" may disproportionately and adversely impact people who are socio-economically disadvantaged, as they can not only constrain mobility but preclude achieving even modest capabilities that are fundamentally important for well-being.

Conceptualising relocation as a socio-spatial process allowed us to illuminate how older adults move to secure well-being and continue to actively negotiate and re-shape their experiences of place and well-being. We suggest that future late-life relocation research should (1) consider both the places where older people relocate from and the places they move into and (2) view moving as a relationally, spatially and temporally negotiated process and not as a set of discrete bounded events.

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“I still want to be part of the world...where I belong.” A case study of the experiences of a man with Alzheimer’s of dementia-friendly guided tours at an art museum

By *ELI LEA** & *ODDGEIR SYNNES**

Abstract

There is a growing interest in the role art museums might play in enriching the lives of persons with dementia. The literature has started incorporating the views of persons with dementia in the knowledge production, but in-depth explorations of their art experiences are still rare in the literature. This article adds to the research with a case study of a man with Alzheimer’s, who regularly takes part in dementia-friendly guided tours at his local art museum. The article examines, through a narrative analysis, the role his visits to the art museum might play in the way he navigates life with Alzheimer’s. The authors argue that the art experiences are important cultural resources in the man’s effort to “hold his own” faced with Alzheimer’s. This study is bound to a Norwegian context, but the art programme has similarities with related programmes at art museums in other countries.

Keywords: dementia, art museum, narrative analysis, dementia-friendly art programmes, cultural citizenship, case study.

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Introduction

As the population is aging globally, the number of persons with dementia is growing exponentially. By 2050, an estimate of 131 million persons be living with dementia (World Health Organization 2016). In May 2017, the World Health Assembly approved the “Global action plan on the public health response to dementia 2017–2025” (World Health Organization 2017). One of the seven key areas of action is increasing dementia awareness, inclusion and friendliness. In order to create awareness of dementia and include persons with dementia in society in ways that allow them to live active and meaningful lives, it is important to think of dementia and participation in novel ways.

A growing number of studies have recognised the role that art museums might play in enriching the lives of persons with dementia (Camic & Chatterjee 2013; Johnson et al. 2017; Schall et al. 2018). This emergent field has started incorporating the views and opinions of persons with dementia in knowledge production (Burnside et al. 2017; Camic et al. 2014; Flatt et al. 2015). However, in-depth explorations of persons with dementia’s experiences are still rare in the literature. The goal of most participatory arts programmes tailored at persons with dementia is to create meaningful personal experiences for the participants (de Medeiros & Basting 2014). It is therefore imperative to listen to their voices and opinions in depth to better understand the complexity of the personal experiences such programmes may facilitate. This article adds to this strand of research with a case study of John, a man in his mid-60s with Alzheimer’s disease, who regularly takes part in dementia-friendly guided tours at his local art museum. We adopted an explorative case methodology (Stake 1995), and interviewed John (a pseudonym) about his experiences at the museum over a 2-year period. The case study of John presented in this article is a case within a larger explorative qualitative case study about the encounters of persons with dementia with art at dementia-friendly guided tours at a Norwegian art museum. As far as we know, this is the first article in the arts and health field that attempts to understand how visits to a local art museum by a person with dementia over a longer period of time interconnects with the person’s experiences of living with Alzheimer’s. We chose to present John as a case study because we considered him to be a person we could learn a great deal from about the complexity of the personal experiences that can emerge from participating in an art programme at

a museum. Such knowledge adds to our understanding of the impact community arts programmes may have on how persons with dementia navigate their everyday lives. Our analytical approach is influenced by Arthur Frank's "Dialogical Narrative Analysis" (DNA) (2012a). One central question in DNA is how the storyteller is "holding his own" in the face of illness, which refers to a person's effort to preserve a particular version of the self as she or he wants to believe it can be against forces that threaten to diminish that self (Frank 2012a: 3). Our research questions are as follows: How is John holding his own faced with Alzheimer's illness? What role do his visits to the art museum play in this effort?

To contextualise John's storytelling, John and the narrative approach are presented before we describe the art museum programme. This is followed by the analytical approach and methodological considerations of the study. John's stories are succeeded by a discussion of his stories in light of perspectives on agency, narrative resources and citizenship, to illuminate personal and societal aspects of how John is holding his own.

Methodology and Research Design

The Participant: Why John?

John received his diagnosis in his early 60s. He lives with his wife. He has a university college degree in natural sciences and has a successful career until he was diagnosed. John was not preselected at the onset of the larger study. As noted by Abma and Stake (2014), this is typical with naturalistic cases studies: "The case is not known beforehand but stands out of a set that has been studied and, given its ambiguity, begs for a more detailed understanding" (p. 1157).

The first author met John for the first time on a guided tour at the art museum. During the social gathering after the tour, he told her how he enjoyed the art programme. It made him both proud and happy, he said. He signed up for the upcoming tours in the programme. Based on this first impression of John, the first and second authors inferred that it might be interesting for John to take part in the research where he could explore and share more of his experiences. John has been interested in music and literature for most of his adult life. He has no special experience or training with the visual arts.

John was also recruited because he offered a perspective of great value to understanding the complexity of the larger case study. The main objective of an intrinsic case study is to explore the case in its ordinary situation from multiple perspectives (Abma & Stake 2014: 1150). The present article is the third article from this larger study (Lea & Synnes 2020; Lea et al. 2020). John provided the research with an in-depth understanding of the personal and situational meanings of the dementia-friendly programme.

A Narrative Approach to Understanding John

We have chosen a narrative approach in our analysis of the interviews with John. During the first interview with John, the first author noticed that he often presented himself and his experiences through stories, or what Riessman (2008) calls every-day oral storytelling: “in everyday oral storytelling, a speaker connects events into a sequence that is consequential for later action and for the meanings that the speaker wants listeners to take away from the story” (p. 3).

Whilst Riessman above underscores the verbal aspects of narrative, Cheryl Mattingly (1998, 2007) understands stories also as enacted. She emphasises the close connection between the stories we tell and the active shaping of our lived experiences by seeing stories as something that can be acted as well as told.

Stories, whether acted or told, explore and create possible worlds. When healing means living with chronic illness or disability, it cannot be reduced to matters such as taking away the pain, restoring life, or curing disease. Instead, it involves an active exploration of how life can be lived, how there can still be a way to act, to desire, to participate in the world, even with this body and under these circumstances. (Mattingly 2007: 17)

Mattingly found that the occupational therapists she studied not only constructed stories with their patients to make sense of experiences but also shaped situations and ongoing actions to create enacted stories. In this way, the patient and therapist were “...finding some way to actively construe and connect clinical actions into a larger, cumulative process – making a larger story out of a series of on-going actions” (1998: 83). Referencing Paul Ricoeur, she claims that their actions are driven by “a quest for a narrative” (1998: 46). “Being an actor at all means trying to make

certain things happen, to bring about desirable endings, to search for possibilities that lead in hopeful directions" (1998: 47).

In our analysis, we are especially interested in understanding the dynamic between John's telling and his actions. We investigate how various cultural resources seem to provide guidance for his subsequent actions, and if and how these actions might influence and become part of his storytelling.

After the first couple of interviews with John, the first author's experience was that John's storytelling could be interpreted as an attempt to link his previous life experience with his present situation, which also guided or influenced the coming events, actions and plans he had for the future. Gubrium and Holstein (2009) underscore that storytelling is a collaborative process, created in a particular context, at a specific time, for a specific audience. In the subsequent interviews with John, the first author supported his storytelling by asking open-ended questions that invited him to elaborate on his experiences in a narrative form. In this way, the first author was an active participant in John's effort to tell his stories.

The Context: The Art Museum

It is John's experiences about his encounters with the art at the museum and his life with Alzheimer's that is in focus in our analysis. In order to illuminate John's experiences at the art museums, it is important to understand the context for his storytelling.

The art museum programme consisted of guided tours in small groups led by two art educators who initiated discussions in front of three to five selected artworks. The art tour typically began with the art educators inviting the participants to familiarise themselves with the artwork by visually scanning the surface of the painting in silence for a short while. Then, they asked open questions with no preconceived answers, such as "what do you see?" "what do you think is going on?" or "what kind of relationship might the characters in the painting have?" (Lea & Synnes 2020). The art educators encouraged the participants to use their imagination and share the thoughts and associations that came to mind. They were told that there are no right and wrong answers when it comes to art. The questions from the art educators elicited numerous responses from

the participants. A guided tour lasted 1 hour and was followed by a social gathering with coffee and biscuits.

The artworks were selected by the art educators. They were mainly influential works from the museum collection, including paintings by Norwegian painters such as Edvard Munch (1863–1944), Nikolai Astrup (1880–1928), Christian Krogh (1852–1925), J. C. Dahl (1788–1857), Peder Balke (1804–1887) and Harriet Backer (1845–1932). Many of the motives in the paintings are of scenes from everyday life with recognisable characters engaged in an activity.

Data Construction

The data construction comprises participatory observations and interviews between January 2017 and May 2019.

Interviews

The first author conducted six open-ended interviews with John. The interviews were tape-recorded and ranged in length from 17 to 68 minutes. The files were transcribed verbatim by the first author. Four of the interviews took place at the art museum. Two interviews took place at a day-care facility where John visited a couple of times during the week. Five of these six interviews were conducted immediately after John and the first author had participated in guided art tours at the art museum.¹ The interviewer had a loosely structured interview guide on topics such as discussion of artworks, associations and emotions, the museum space, the art educators and the group experience. The conversations, thus, initially dealt with John's opinions about the art he had seen and his thoughts and feelings about what the experience meant to him. Over time, the first author became increasingly intrigued by how his visits to the art museum were intertwined with a bigger project John seemed to have – to live a good life with dementia. She increasingly followed up on stories he told about how he navigated through the experience of living with dementia in general, and conducted one interview in between two of John's visits to

¹ On one occasion, another person with dementia who had taken part in the guided tour participated in the interview.

the art museum that was more focused on the experience of everyday life with dementia. As the research developed and she and John got to know each other better, the interview style became more open and closer to a natural conversation.

All interviews started with a short recap of the museum tour whilst looking at photocopies of the artworks. The aim of the photo elicitation was to provide John with a non-intrusive way of recalling the experience at the museum (Harper 2002). It was also a way for the first author to tune into John's mood and energy and remind him of the context for the conversation. This also helped her adopt an appropriate conversational style. The photo elicitation was a useful communication tool in all the interviews. Even though the progression of the illness made it increasingly difficult for John to elaborate verbally on his experiences, the images helped him connect with the art that he had just seen and enabled him to share his immediate thoughts and feelings about the guided tour. The images also provided an anchor that helped focus the conversation on the art experience in a subdued way.

John came to the art museum by himself or as part of a group from the day-care facility. On two occasions, the first author drove John to or from the museum. Some of the informal conversations in the data material about art and life took place in the car. They were written down in the first author's field diary at the first appropriate time after the conversations had taken place.

The last interview started at the art museum but evolved into a walking interview. On this particular day, John appeared to be uncomfortable with the sitting-down format. Throughout the research process, the first author was attentive to verbal and non-verbal signs of discomfort or confusion about the research setting. She wanted to avoid situations that could remind him of his increasing cognitive disabilities (Hubbard et al. 2003). She asked John if he preferred walking and talking instead. Walking interviews are a method adopted by researchers working with participants with dementia (Kullberg & Odzakovic 2018). The change of scenery seemed to make John more at ease. It also helped the flow of the conversation. Keady et al. (2017) underscore the importance of adapting the research methods to the needs of persons with dementia when inviting them to participate in research.

Participant Observations

The first author participated in 24 guided tours during the larger case study between October 2015 and May 2019. John was present at 5 of these tours, and he also participated in several other guided tours at the museum at times when the first author was not present.

Participant observation (Fangen 2010) at the art museum was used to help build a more nuanced understanding of John's encounters with the art at the museum. Participant observation involved the first author watching John in interaction with the art educators, the art works and the other participants whilst concurrently taking part in the activities. She recorded her observations (movements, actions, atmosphere and dialogue sequences) and methodological reflections in her field diary. The observations were the useful background information for the interviews as the first author had observed John's actions and heard some of his thoughts and opinions prior to the interview. The fact that the first author had been present at the art exhibitions also gave her and John a shared experience they could tap into during the conversations.

Analytical Approach

Our analytical approach is influenced by Arthur Frank's "Dialogical Narrative Analysis" (DNA) (2012a). DNA is one of many approaches to narrative analysis. A core interest in DNA is to examine the content of a story in relation to what happens as an effect of telling the story (Frank 2010). This means that DNA is concerned not only with the stories people tell but also with what stories *do* for and *to* people. Another key concern in DNA is to understand how people's stories relate to other stories.

A storyteller tells a story that is his or her own, but no story is ever entirely anyone's own. Stories are composed from fragments of previous stories, artfully rearranged but never original. (Frank 2012a: 34)

We use bits and pieces from other people's stories, as well as from larger cultural and societal stories, to make choices about what to include and what to leave out in our own stories. This helps us tell stories that other people recognise and understand. In this particular case study about John, DNA sheds light on how his encounters with art at the museum might be

understood in a broader perspective as well as how the art experiences might act as a resource for John's storytelling.

One central question in DNA is how the storyteller is holding his own in the face of illness (Frank 2012b). It refers to a person's effort to preserve a particular version of the self as she or he wants to believe it can be against forces that threaten to diminish that self (Frank 2012b: 3). In our reading of John's stories, we found this question to be important. When John received his diagnosis, he decided that he was not going to just sit down and wait for things to get worse. Going to the art museum seemed to be one of several things in his life that kept him from "being an Alzheimer's 24/7," as he said at one point. His words reveal the way in which an Alzheimer's diagnosis challenges an individual's sense of himself and how the diagnosis can feel like it threatens to absorb a person's whole being. In order to better understand this tension in John's storytelling better and to gain insight into the role his visits to the art museum played in this dilemma, we decided to focus our analysis on the following research questions: How is John holding his own faced with Alzheimer's illness? What role do his visits to the art museum play in this effort?

When analysing John's stories and how he is holding his own, we have been inspired by how Frank sees stories as acting in people's lives. It is not just people doing things with the stories they tell. Stories do things to people. A key analytical concern in conducting DNA is to ask dialogical open-ended questions regarding the data material rather than following a prescribed formula (Frank 2010, 2012a). Which questions to ask varies depending on the type and aim of the research. In this study, we found it useful to ask the following open-ended questions: Which voices can be heard in John's personal stories? What cultural resources shape how John's story is told? How do the stories he tells inform people about who he is and how does his telling explore who he might become? (Frank 2012a).

Multiple drafts of the emergent analysis of John's stories were composed by the first author. These drafts were read by and discussed with the second author, who has extensive experience in doing narrative research (see, e.g. Synnes 2015; Synnes & Malterud 2019). Two of the drafts were read by an experienced third researcher. The discussions focused particularly on ethical aspects, alternative interpretations and different theoretical understandings.

Ethical Considerations

The Norwegian Centre for Research Data assessed the project. To protect John's privacy, his story is anonymised in accordance with guidelines for anonymising from Norwegian Centre for Research Data. Information or personal traits that could identify John have been rewritten. A written informed consent was collected from John at the start of his involvement with the research project. Formal consent was not acquired from his family, but they were informed that John had agreed to take part in this research project. At the start of each guided tour at the art museum, the participants were informed by the art educator that the first author was taking part in the tour as a researcher. Verbal consent was not sought before each interview, but the research context was mentioned regularly and talked about to re-inform John about the setting for the interview.

Methodological Reflections

The Research Context

John is an open-minded person who embraces new opportunities. One such opportunity was to take part in this research project. As a research participant, John reflected on his past and present life. He said he found the conversations meaningful because they gave him a chance to think and talk about things in a way he rarely did.

As noted in Keady et al. (2017), "the use of social research method(s) can stimulate memories, awareness and growth for all those involved in the encounter, including the person living with dementia him or herself" (p. 3). We are grateful for all we have learned from talking to John and thinking about his stories. Without giving a firm conclusion, our impression is that the participation in the research project played a role in John's striving to live a meaningful life in the best possible way.

Trustworthiness

According to Riessman (2008), there are no established criteria or procedures for validation or trustworthiness in narrative research. Riessman mentions two levels of validity – the story told by the research participant and the story told by the researcher (2008: 184). In our case, the validity or trustworthiness

of John's story is linked to how well it can represent John's experiences and meaning-making processes. We have tried our best to stay true to John's voice and to what we understood to be the points he wanted to convey in his stories. John read a tailored transcript of one of the first interviews. The first author also shared some initial interpretations with him in conversations she had had with him at the museum. Nevertheless, the analysis in this article is necessarily our story based on John's stories. As Riessman also states, trustworthiness in a narrative analysis is grounded in the story told by the researcher, in how reflexive and convincing the researcher presents the analysis. In this process, Riessman recommends, "reliance on detailed transcripts, attention to language, contexts of production [...] acknowledgment of the dialogic nature of narrative." In addition, the researcher should be open and reflexive regarding the methodological decisions and limitations of interpretations (2008: 195). We have tried to be open on how and under what conditions and contexts the stories of John were collected and how we have analysed them. We have strived to maintain an open dialogue between us and also discussed the case of John with other colleagues. One recurrent issue of discussion was our methods for data construction as John's illness progressed. Photo elicitation was a useful research tool throughout the research process. If the research were to be continued, we discussed adopting other image-based research methods. We also considered walking interviews in the museum space as a way of reviewing the paintings on the wall, but this was not possible due to restrictions at the museum.

The second author never met John but discussed each interview with the first author as the interviews took place. The fact that the second author never met John provided an analytical distance in the discussions of John's stories.

John's Stories: "I still want to be part of the world...where I belong"

This presentation of John's story is an attempt to look at how John is holding his own in his situation of living with Alzheimer's. First, we present the stories related to his need and efforts to stay active despite his illness. These stories are followed by narrations of what the participation at the art museum programme meant to John.

The first author met John at the local art museum. John was one of seven persons with dementia who took part in the dementia-friendly

guided tour that day. The theme of the art tour was “Edvard Munch and emotions.” When the group sat down for coffee and biscuits after the tour, John said: “This made me happy. I was touched by Munch. All the things he managed to achieve.” Before he left the museum, he signed up for the coming tours. Previously, when John received the Alzheimer diagnosis, he suffered from a depression:

I got the diagnosis after... after I lost my job. After all, they are not interested in people who cannot “handle things” [he laughs] in such a setting. At that time, I was also very depressed. The depression was worse than having Alzheimer’s. The depression was incredibly tiring for a few weeks. But I don’t go around thinking about Alzheimer’s in the same way.

John is questioning what it means to be “an Alzheimer’s” because he does not feel like one; he feels like himself:

I have an ... Alzheimer’s [he hesitates]. I have an illness. But it’s not something I think about all the time because I have a solid layer over it, in a way. My personality and everything I am, exceeds, overrides that I happen to have an Alzheimer’s diagnosis, I think. I can do a lot with that myself, right. I don’t ... I can do other things [he laughs] than think about Alzheimer’s. My personality is much stronger than the Alzheimer’s [...] I am myself, really. Quite frankly, I think it is a strength.

John does not want the Alzheimer’s to absorb his whole being:

I want to go out of ... what shall I say ... “the dementia room” [he laughs]. I want to step out of that room ... I don’t want to be “an Alzheimer’s.” It may sound very silly saying it like that [he laughs]. But I feel like ... in a way ... embracing the whole world. I do not want to be an “Alzheimer’s” the whole time, to be honest [he laughs]. I am often tired of it. It does not overpower me in any way, but I think that ... I was sitting in a room at [the hospital]. Some nurses were sitting around the same table. I said: I don’t want to be an “Alzheimer’s” 24/7 [he laughs while talking]. That is not ... that’s not my personality. It’s not me, you see. I’m just a person with that diagnosis.

What is particularly striking about John’s commitment not to be an Alzheimer 24/7 is his feeling that his personality overshadows the impact Alzheimer’s has on his sense of self. His strong sense of himself is crucial in his stories as it seems to motivate his efforts to carve out a different life with Alzheimer’s than the one he knows of. John seems dedicated to staying as connected to the world as possible:

I was thinking to myself: Okay, I've got dementia, but I'm not going to be an idiot. [He's laughing]. No! I am going to ... I am not going to resign. I am not going to sit here to rot. I am not going to just sit and look around. I will rather join in, take part. Yes, I still want to be part of the world...where I belong.

John tells of an episode at the doctor's office, where he felt that his decision to stay connected to the world seemed to be challenged. John is participating in a creative group activity where he has been a member for several years. At the doctor's office, the doctor told him that he should tell the organiser of the activity that he has Alzheimer's. John disagrees:

I told the doctor: I'm not going to. I'm not going to tell the leader that I have an Alzheimer's diagnosis. For me, that will be totally wrong. For me, that does not work at all. I didn't want him to know, really ... So I decided that I was not going to tell him. I felt the doctor's opinion was that the leader should know. But for me, that was not the way to go. I didn't tell him. That's how it ended [he laughs]. I am still taking part in the [activity] ... as a regular member. That's how it is.

In this encounter with his doctor, it sounds as John feels that the doctor is displaying an overbearing attitude towards him. John does not want to tell the leader – perhaps because he fears negative consequences. He wants to decide for himself who to tell. Previous research has found that persons with dementia often experience discomfort about disclosing their condition due to the stigma associated with dementia (Xanthopoulou & McCabe 2019). John's way of dealing with the illness at this particular moment appears to be to keep part of his life as ordinary as possible for as long as possible. He actively seeks out experiences that are not “part of the Alzheimer's,” as he says. To be in the activity as a regular member may be one way for John to uphold the sense of self he would like to have. He seems to interpret the doctor's suggestion as an expression of things that keep him in the “dementia room.” He wants something that can nourish him outside of the world of Alzheimer's.

John regularly attends the organised activity and visits the local art museum, and he also stays active in other ways. He exercises and visits the local library. He is also interested in politics. To keep record of the issues that interest him, he has created an archive of news clippings that he uses as a form of external memory. He turns to the archive as a resource in conversations:

It's a bit strange what I'm doing. Creating an archive with news clippings [he laughs]. I do it mostly for myself, though. I do it because I want to participate in the world.

I don't want to be thrown off the merry-go-round. It probably sounds a little ridiculous, in and of itself ... but ... I'd rather be in the world.

Not having a job was a recurring topic in the conversations with John during the first year of his participation in the research:

What I don't like is that I have nowhere to go, a job. I don't have a job at the moment. I really want to try to get a job. When you get Alzheimer's, it's almost like you're not allowed to work at all. Suddenly, you're out of it. It pisses me off because I think there are many Alzheimer's who can manage some types of jobs.

I've been at home quite a lot. But there is something about it ... It is something about being an "Alzheimer's." I don't quite know what is ... I don't **feel** like an "Alzheimer's." I don't. What I feel is ... I feel ...well ...I feel a little useless I am not doing anything for anyone else. Do you understand? I'm at home folding towels [he laughs] ... it's okay, but it does get a little too monotonous. I want to do something different. I want to do something that has value for others.

His yearning for a job says something about John's aspirations to not only participate but also contribute to society. This might relate to cultural expectations of productivity in society. As a community member, John wants to add something of value to others on a societal level. As far as we know John did not get a job, but his visits to the art museum seem to play an important role in this desire to participate in the world as a member of a community.

The first time John came to the art museum, he encountered Edvard Munch's art from the end of the 19th and the beginning of the 20th centuries, including "Sunday at Åsgårdstrand," "By the Deathbed (figure 1)," "Jealousy" and "Women at the Bridge." John felt emotional after the tour. Of all the art he has encountered on his visits to the art museum over the last 2 years, it is Edvard Munch's art that made the strongest impression on him.

I was very intrigued by him [Edvard Munch]. I was actually proud, proud of what he did. All this about death and life that I felt he captured. He opens himself up completely, in a way. He takes it in so deeply. And then he manages to convey it in a painting. It is really amazing. I was touched by him.

John felt a special bond to Edvard Munch because Munch's art connected to his own experiences. In his paintings, John discovered things from his own life. The paintings opened doors into his own mental archive of images, emotions and stories. It was as if they reached out to him.

There is something that comes from the painting. It comes to me. It says something to ... yes, to me. You see the painting, and then it immediately brings something out in you.

One of the life experiences that came to John in the encounter with the art was the loss of his father as a young boy:

It was like ... I felt like I was a kid again, you know? Because I was ... when my father died ... I was a young boy. I drew a lot when I was a kid. When he died I drew the cross everywhere ... I must have done it to get it out of my system. I was so young... still ... I realized I had to do it somehow. I've been thinking about that lately, since we started talking [John and first author]. I kind of ... how did I manage ... how did I manage to get through that period? I was good at school, so I didn't have any problems at school, but I was vulnerable. I had no father. I had to live through such things. How did I survive all that?

It is this feeling of vulnerability that especially draws John to Munch's paintings. Munch's paintings, he says, depict vulnerability.

In people's constant effort to "hold one's own," they need resources and allies, Arthur Frank writes (2012b: 3). Stories can be such companions to us (2012b). By companion stories, Frank means "the collection of stories that accompanies a person through his or her life, guiding decisions of how to act and, perhaps most important, guiding what the person finds it worthwhile to pay attention to" (Frank 2012b: 4). We argue that some of the paintings John encountered at the art museum, especially the paintings by Edvard Munch, became his companions in this way. They seemed to give him a feeling of togetherness - as if they gave him an opportunity to reflect upon losses in life, but they also gave him a sense of connectedness with his past and existential belonging.

He recognised his own vulnerability and seemed to find comfort in the painting. In front of the painting "At the Deathbed," (Munch 1895, Figure 1) which depicts Munch's sister dying with family members standing around the bed, John reconnected with a similar experience. He has also lost close relatives. This was not a negative experience, he said. The paintings accompanied him in his recollections.

Figure 1. *At the deathbed*, Edvard Munch 1895, oil and tempera on canvas.
Photo: Dag Fosse / KODE



Single images are by some literary critics considered low in narrativity compared to written or oral narration because they lack a way of depicting a story's chronology of events in time, which is considered essential in narrative (Schöttler 2016). The narrative potential of single images is to a large extent dependent on stories that the viewer already knows. Single images *evoke* stories familiar to the viewer rather than present a whole story (Varga & Raney 1988). The paintings by Edvard Munch are, thus, not finished stories told or written down; rather they invite the active observer to construct a story in his or her imagination (Schöttler 2016).

To John, some of the paintings, indeed, evoked stories and life experiences. Munch's paintings could, thus, be seen as important companions to John in a continuous assemblage of fragments from his own life story, the suggested narratives in the paintings and the personal life of Edvard Munch

Figure 2. *A warning shot* by Christian Krogh (undated), oil on canvas. Photo: Dag Fosse/KODE



himself. At the art museum, John not only finds consolation and companionship but also wants something more from the art experience. He wants to immerse himself in the imagery, which becomes apparent when he refers to the painting "Vådeskudd" [A warning shot] by the painter Christian Krogh (Krogh undated, figure 2). In the painting, a man is looking around a corner, but we cannot see what he is looking at. Johns says:

I would like to see what is behind that corner. Behind the corner there is a landscape with a lot of exciting things that I would like to see. I want to break that barrier. I want ... I want it to be part of me. I want to get into it.

I want to step into the painting, so to speak. I want to get inside the painting. I think that is ... lovely [he laughs]. I kind of think ... hurrah [he laughs, Mark² also laughs]. Here I can just relax. And that's not a dramatic thing. There are dramatic things in the pictures, but it is not ... it is not dramatic for us as a person in a way. I don't feel it that way. The painting doesn't scare you, it's ... there's something about ... you have to go into it to see...that you are vulnerable in a way.

By immersing himself in the paintings, it is as if he finds shelter or creates some distance from the illness.

I feel relaxed [in front of the paintings in the museum]. I feel like I ... I can just simply surrender. I get into such a relaxed state. I feel I can get away with anything [he laughs]. It provides me with that opportunity. In a way, there are no limits to what it can do to me ... I am very happy that I am allowed to do that.

The programme at the art museum provided John with a space where he could relax, be himself and immerse himself in the art. He used his participation in the art programme, along with participation in other arenas and engagements, to remain an active citizen despite the Alzheimer's diagnosis.

Discussion

In this discussion, we would like to highlight three aspects of John's storytelling that say something about how John is "holding his own." First, we will highlight how John's strong sense of himself is a resource in his efforts to claim his place in the social world. Second, we discuss how he calls upon various narrative resources to shape an alternative narrative of dementia. Third, we focus on the importance of cultural participation for persons with dementia.

An Agent of His Own Life

Alzheimer's is threatening John's sense of self by disrupting his taken-for-granted world, but John does not feel he has lost himself. On the contrary, he expresses a strong sense of himself. Persons with dementia do not

² As mentioned in the 'Methods' sections, one of the interviews was conducted with John and another man. Mark is a pseudonym.

necessarily experience an inherent "loss of self" (Beard et al. 2009). Rather they, as John does, strive to "incorporate a 'manageable disability' into their existing identities" (p. 227). John acknowledges that he has Alzheimer's. Yet, he does not talk about the illness as an enemy to be battled at all costs but as something he tries to get used to.

Alzheimer's is challenging his connection to himself and the world, but he is expressing a commitment to stay as connected as possible. He continues doing the things that make him happy, such as participating in the organised creative group activity and visiting the library. John embraces new opportunities, such as going to the art museum and joining a research project. He finds a way to stay engaged in the social world by creating an archive of news clippings. He is consciously seeking out experiences that can lead his life onto a more positive path (Mattingly 1998). Furthermore, John is creatively engaging with the cultural resources available to him. At the art museum, he encounters art and listens to stories about the art and the artists. These visual and verbal stories act as narrative resources he uses to understand and expand his own narrative.

Narrative Entanglements: Resources and Restrictions

In listening to John's story, we can find traces of different cultural narratives. In parts of John's story, a big threat to him holding his own appears to be the prevailing tragedy narrative of dementia that informs negative attitudes towards persons with dementia. This anticipated loss of identity in the tragedy discourse follows expectations of loss of self and loss of agency (Dupuis et al. 2016). Such a view degrades a person with dementia to a "nonperson" (Lindemann 2014: 18) and confirms the perception of a person with dementia as "socially dead" (Dupuis et al. 2016: 358) and "fading away" (Whitehouse & George 2008: 22).

John talks about feeling trapped in the "dementia room," which we understand as a metaphor for the tragedy narrative discourse. John's effort to hold his own seems to be a struggle between finding ways to enrich his life against forces trying to keep him in the "dementia room." John's actions can be seen as motivated by a desire to create an alternative story "while in the midst of acting" (Mattingly 1994: 812). At the art museum, he participates in the conversations about the art and consciously seeks to immerse himself in the imaginary world of the paintings. He creates

an archive of news clippings to support him in conversations with other people. We regard John's telling as a narrative that points his life in a more hopeful direction (Mattingly 1994, 2007). John wants his life to be more than a life as "an Alzheimer's." His telling can, thus, be understood as a search for a counter-narrative to the tragedy narrative of dementia. Counter narratives are "stories which people tell and live which offer resistance, either implicitly or explicitly, to dominant cultural narratives" (Bamberg & Andrews 2004: 1). The tragedy narrative of dementia can have a strong hold on the lives of persons with dementia because stories that already exist prescribe which future stories will be told and not told about dementia. Stories are not just something people shape and tell in retrospect; they also shape our future lives (Frank 2010). Telling and action are, thus, intertwined. His stories provide guidance for John's subsequent actions, and these actions, again, influence and become part of his storytelling. Hence, the stories John tells intertwine with the experiences he seeks (Mattingly 1998: 20).

Part of John's counter-narrative might also be seen in light of how Frank (2013) understands a quest narrative in illness. Frank (2013) describes the quest narrative as stories that search for alternative ways of being ill (p. 117). The storyteller is proactive and strives through the illness; he perseveres. The illness is reframed as a challenge that might help the narrator grow as a person (2013: 128). John's stories might be interpreted as a quest in his search for a meaningful life after losing his job, suffering from depression and receiving the diagnosis. The quest is about living a meaningful life as long as he lives. By using some of the narrative resources in a quest narrative, John is enabled to uphold a story of his life as moving forward. The narrative gives him a sense of direction; he "discovers alternative ways to experience suffering" (2013: 119).

In John's stories, we also find fragments of alternative stories about life with dementia - stories like the ones told by dementia activist Kate Swaffer (2016). In her book *What the Hell Happened to My Brain* (2016), Swaffer talks about how she refused to subscribe to what she calls the "prescribed disengagement" narrative that she felt was the only option after she received a diagnosis of semantic dementia. According to Swaffer, reinvesting in life is the best prescription for living a full, active life with dementia because the "prescribed disengagement" framework takes away hope and diminishes the power a person has over his/her life

(2016). John's narrative can be read as a continuous negotiation between the tragedy narrative and the living-well-with-dementia narrative, represented by Swaffer. This ties into what Steeman et al. (2007) found in their study of the experiences of persons with dementia living with the illness. The researchers discuss the living-well-with-dementia narratives expressed by many of the participants in the study as an expression of the struggle between feelings of worthlessness and remaining someone of value. The feeling of worthlessness and the wish to participate in society are of particular concern to John.

The Importance of Cultural Participation

There is an increasing amount of research looking into the relationship between citizenship and dementia (Bartlett & O'Connor 2010; Birt et al. 2017; Dupuis et al. 2016; Hughes 2019; Kelly & Innes 2013; O'Connor & Nedlund 2016). In a previous article (Lea & Synnes 2020), we argue that dementia-friendly programmes at art museums, such as the programme in which John took part, can be a way for persons with dementia to perform and practice their cultural citizenship, understood as the possibilities a person has "to be co-producer, or co-author, of the cultural contexts (webs of meaning) in which one participates" (van Hensbroek 2010: 322).

Cultural citizenship as conceptualised by Boele van Hensbroek raises awareness about the importance of giving persons with dementia the possibilities to be "co-producers" or "co-authors" of cultural meaning-making processes. Through the lens of cultural citizenship, persons with dementia are active agents, positioned in the centre of cultural processes that they are part of. By sharing interpretive control, the art educators at the museum gave John and other participants the opportunity to be co-authors of the meanings of the art works (Lea et al. 2020). This was done in a way that helped John connect with his resources rather than remind him of his losses. This opportunity to take part in cultural meaning-making processes seemed to be important to John in his efforts to hold his own. It gave him a place and a space to continue shaping his own life in the world as a fellow citizen.

The notion of cultural citizenship expands the concept of "citizenship" in dementia studies by highlighting the role of art in supporting persons

with dementia's connection to wider cultural discourses. As citizenship is closely linked to a person's rights as members of a community, the idea of cultural citizenship also draws attention to persons with dementia's cultural rights, which is enshrined in article 27 of the Universal Declaration of Human Rights (United Nations 1948).

Strengths and Limitations

It is neither possible, nor is it our aim, to generalise John's story to all persons with dementia taking part in an art programme at a museum. Neither was John chosen as a representative case, nor was it our aim to evaluate the dementia-friendly programme. Our objective has been to highlight different aspects of John's experiences to learn more about the complexity of personal experiences that can emerge from participating in an art programme at an art museum.

It is uncertain how the results from this case study would apply to other participants in dementia-friendly programmes at other museums. The readers can, however, learn from a case based on their familiarity with other similar cases. Such recontextualisation may lead to modifications of old generalisations (Stake 1995). The results of the study can, thus, be discussed in terms of transferability rather than generalisation. In our discussion, we have contextualised John's stories in a way that we hope provide insight into how his stories can have wider relevance. It can of course be argued that John is a unique case. But, we argue that John's effort to hold his own is a challenge shared with other persons with dementia in the early stages of the illness. The progression of an Alzheimer's illness differs from person to person, but we believe that others could experience growth and learning in a similar way, if supported and given the same opportunities. As with many initiatives directed at persons with dementia, the programme at the museum was not meant to be a long-term engagement for the participants. It was John himself who wanted to commit over time, as did a few others. John's long-term commitment was strengthened when he joined the research project where he was given the opportunity to reflect on his experiences in depth. This says something about the value of developing long-term art programmes for this audience group.

Possible Implications for Practice and Research

Our research shows the value of doing longitudinal studies in the field of arts and dementia. A central challenge is adopting a flexible research approach that can accommodate the increasing disabilities inflicted by the illness, as well as keeping in focus the person's capacity to grow, learn and connect. This is a challenge shared by both researchers, and art institutions and arts facilitators.

As part of the effort to strengthen the evidence base in the field of arts and dementia, there has been a growing research interest to better understand how and why visual art interventions work (Camic et al. 2016; Shoesmith et al. 2020; Windle et al. 2014, 2018). Our findings especially support Windle et al. (2014, 2018), who suggest that one of the two key conditions for effective arts programming is a provocative and stimulating aesthetic experience, in an inspiring environment (2014). Our research deepens the understanding of what aesthetic encounters over time can mean to a person with dementia by demonstrating how they support his efforts to stay connected to himself and the world around him. It also underscores the importance of paying attention to the components of aesthetic experiences, and the importance of aesthetic education in dementia care. Stimulating aesthetic experiences trigger mechanisms that may lead to persons with dementia's quality of life and social connectedness (Windle et al. 2014).

Closing Remarks: An Open End

DNA is grounded in an ethical commitment to representing others as unfinished (Frank 2005, 2012a). This means that a research article can never claim the last word about a research participant.

...the research report must always understand itself not as a final statement of who the research participants are, but as one move in a continuing dialogue through which those participants will continue to form themselves, as they continue to become who they may yet be. (Frank 2005: 966-967)

Understanding research as a dialogue means respecting John's capacity and scope for change. In the case of John, we see this study more as an

opening than an end. It is not an attempt to limit John's future by implying what can be expected of him. In a different setting, at a different place and time, John might tell other versions of the stories or completely different stories. In the same way, our analysis of John's stories is just one of many ways to understand his storytelling. This means that others might interpret John's telling differently than we did. John's story does not represent an end. It is a contribution to an ongoing dialogue about ways in which lived experiences of dementia are interlinked with the wider cultural and social context.

In this article, we have attempted to show that John, in his efforts to "hold his own," is mobilising both internal resources (his strong sense of himself) and external cultural resources (narrative resources and cultural arenas and practices). Through his storytelling, he is challenging the dominant negative narrative of life with dementia. As noted by Loseke (2007), socially dominant stories "simplify the complex world" (p. 661). We need more nuanced stories about life with dementia. We need stories that can fashion new and more complex narratives, more responsive to the experiences of people with dementia. We especially agree with Hydén et al. (2014), who emphasise the need to learn from persons with dementia themselves about how to live a satisfactory life with the illness. Over time, such stories expand the cultural resources available to persons with dementia.

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Alison Milne (2020). *Mental Health in Later Life: Taking a Lifecourse Approach*. Bristol: Policy Press, 360 pp. ISBN 9781447305712 (paperback)

REVIEWED BY JANE M. MULLINS*

It has been timely and insightful to review this critical text in light of the coronavirus disease (COVID) pandemic that has profoundly affected the mental health of the most vulnerable in society, including older adults and those living in residential care (Velayudhan et al. 2020). Professor Milne's book draws from a vast source of theory, research and policy documents to explore both mental health and later life through the broad lens of critical gerontology. In doing so, she examines the complexities of mental health, wellbeing and mental illness and successfully challenges the dominant medical nihilistic view that mental illness (with particular reference to depression and dementia) is inevitable as we age. Her major argument throughout the whole text is for mental health in later life to be viewed within the context of lifecourse. Discourses of ageing and mental ill-health are discussed early on in an attempt to add clarity to concepts that have historically been dominated by medicalisation and its negative functionalist perspective. By introducing further concepts of psychological wellbeing and mental health, Milne offers a far broader perspective that mental health is influenced by events, personality and attitudes throughout the

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lifecourse and should be viewed along a continuum from psychological wellbeing through to mental ill health that fluctuates.

Mental health in later life is a comprehensive body of work that challenges previous conceptualisations of "older age" by introducing the term "later life" and successfully dismisses the homogenisation of people based on age. Each chapter builds a coherent and convincing argument to adopt a lifecourse perspective when exploring the complexity of mental health/ill health that avoids viewing older age in isolation. She examines the extent that structural, socio-political, socio-economic and socio-cultural influences impact on a person's mental health and/or mental ill-health throughout his/her lifecourse. Indirect risks such as age discrimination, exclusion and marginalisation are put under the spotlight and prove very relevant in light of the recent policies of social isolation in care homes. Milne goes on to examine the multiplicity of direct risks to mental health, including gender, ethnicity, loneliness and isolation, and its potential to impact on cognition, including disability, chronic morbidity, abuse and pain. By challenging ageist constructs around productivity and dependence and embracing the lifecourse perspective, professor Milne recommends a policy shift away from social structures towards an individualised biographical and lived experience approach. Social justice and human rights provide the framework for professor Milne's study, which is clearly informed by her social work practice. Here, she goes on to identify the importance of involving the voices of older people within scholarship, research, practice and policy.

What I found particularly interesting was professor Milne's discovery of the contrasting views between scholarship of the "third age" (where sociology of risk and psychological theories of personality, adaptation and successful ageing are explored) and the "fourth age," where negative discourse around decline, poor function and frailty dominates. Therein lies the gap, where a lack of sociological and psychological perspectives allows for the medicalisation of ageing for those previously considered the "oldest old" to dominate (Suzman et al. 1995). She draws from key policy discussions and literature that maintain the prevailing view that people within the "fourth age" are an economic burden within society, and the management of their physical condition is solely considered. Here,

she recommends that policy, research and practice once again examine ageing within the context of lifecourse.

Professor Milne's inquiry focuses on dementia towards the end of the book, in light of the rising incidence associated with age, and potentially being one of the biggest perceived risks to psychological wellbeing and mental ill-health. Interestingly, she discovers that subjective direct experiences throughout the lifecourse have more impact on a person's mental health than their physical condition itself. She challenges the view that dementia is a mental illness where people's "management" is under psychiatric services and offers a different emphasis on the neurodegenerative condition and its potential relationship with mental health. A view that I share (depending on the type of dementia considered) as a dementia nurse specialist, having cared for people from diagnosis through to end of life and whose co-produced research with people living with the condition has explored. She goes on to champion the shifting perspectives in scholarship towards a social model of citizenship and personhood, resonating with the views of dementia activists who see their condition in terms of disability and where their human rights, autonomy, sense of self, meaning and purpose in life are respected (see 3 Nations Dementia Working Group, Dementia Engagement and Empowerment Programme). Her overarching argument that lifecourse experiences, personality and attitudes impact mental health also stand up when examining the dementia, quality of life and wellbeing literature. Here, studies indicate subjective quality of life in people who have dementia being more dependent on a person's premorbid ability to adapt and adjust and the extent of their social networks, relationships and environments, than on the condition itself.

Although *Ageing in Later Life* takes on the vastness of the subject, the scope of the book does not stretch to examine chronic severe mental illness or regard given to people living with learning disability or neurodiversity. As professor Milne points out herself that this in itself would require a text of the same breadth and complexity. The final chapter titled "Promotion and Prevention" is a hopeful move towards reviewing models and frameworks of ageing and mental health promotion. By asking the question how can good mental health be achieved in later life?, she draws from Marmot et al.'s (2010) recommendations of the need for

multi-agency involvement, where universal actions to reduce poverty, engage communities and provide targeted interventions are identified. I would like to go a step further and highlight the potential for involving the creative industries within these interventions, as evidence suggests the benefits of the arts and nature having a positive effect on mental health (Thomson et al. 2020).

Milne clearly shows her compassion and extensive experience as a practitioner, “real world” researcher and lecturer within the field of social gerontology who values and invites the voices of older people to inform. Although this critical review is aimed at academia, it is clearly accessible and a recommended resource for all professionals working within health and social care and policy, resulting in a highly readable, extensive review of the subject. As mentioned previously, many of the issues she raises have recently been exposed more widely in the media by the policies enforced due to the pandemic. I would recommend that all people working in policy, practice, research and academia will gain many insights and benefits from the wide angled lens of professor Milne’s book.

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REVIEWED BY MARIA CHESHIRE-ALLEN*

This collection is a welcome newcomer to the study of intersectionality, working on several levels, and its appeal lies in its innovative application of theory, containing contributions from a wide range of disciplines, including sociology, gerontology, psychology and policy studies. The collection does not shy from the challenge of binding the disparate disciplinary approaches into a cohesive collection. Recognisable from the outset is a clear connecting theme of an appeal to, and demonstration of the potential of intersectional theory to ideas of social justice and challenge to new types of inequalities in later life.

Using intersectional analysis, the book comprises of 14 chapters that offer empirical as well as theoretical cotemporary accounts. The chapters are stratified according to four broad themes: part 1 – theoretical interpolations, part 2 – representations, part 3 – dis/empowerments and

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part 4 – health and wellbeing. In chapter 2, Toni Calasanti provides the necessary theoretical anchor points for subsequent chapters by detailing precisely what an intersectional analysis and approach entails and a presentation of these ideas to spousal caregiving. Asserting first that an intersectional analysis is concerned with systems of social inequalities that are explored through a lens that recognises more than one single axis of social division (gender, race and age). Second, an intersectional approach relates groups theoretically identifying the institutionalised activities that maintain inequality. This is an important point that exemplifies the distinctiveness and critical purchase that an intersectional approach can offer, particularly, to those who interested in theories of social justice and social policy. Following from this, Yvette Taylor's though provoking subsequent chapter 3 on queer families, queer care and queer academia applies the concepts introduced in the previous chapter in a distinctive way through her analysis of time. Taylor demonstrates the saliency of normative gendered trajectories that serve to demarcate "normal times" on which to have children for example and introduces through an intersectional analysis the idea of a "time bomb" where these gendered and sexualised expectations are disrupted.

Part 2 of the book is focused on the theme of "representations" and draws upon textual sources including Virginia Woolf, Doris Lessing and Lynn Segal to discuss characterisations of female ageing with a particular focus on the menopause. Chapter 6 by Maricel Oro Piqueras provides an interesting account of how sexuality and ageing have been culturally presented, particularly in relation to female ageing. Kinneret Laha and Karen Hvudtfeldt's chapter brings a contemporary angle to this collection by drawing upon sources of data based on online web columns and magazine articles to analyse ageist stigmas in relation to midlife motherhood in Denmark and Israel.

The book's aim to reflect upon discussions and data drawing from an international perspective is provided in part 3 of the book, which successfully demonstrates the currency of an intersectional analysis that can travel beyond the global north and for this reason, the insights and findings presented are particularly illuminating. A fascinating study of Iranian Muslim menopausal women is provided in Chapter 9 by Elham Amini, who offers rich methodological insight reflecting on, as she does

her role as a researcher of older Iranian women and her identity as a younger woman educated in a western country, as she notes, intersectionality theory, which emphasises the intersection of identities and addresses the power relationships present during the interviews (p. 141). The novel and innovative application of intersectional theory is again presented in preceding chapters by Finn Reygan and Jamil Khan, whose study into care service provision for lesbian, gay, bisexual, transgender and intersex (LGBTI) elders in South Africa is noted by the authors to be the first writings from South Africa on this topic. Part 3 concludes with a study based on original research conducted in a Spanish long-term care facility; the authors reflect on how residents' sexual expressions are limited or problematised by both staff and co-residents that can be understood through an intersection analysis of gender and sexuality.

Part 4 titled "health and wellbeing" begins with Mark Hughes's study of health and wellbeing of older lesbians, gay men and bisexual people. This chapter summarises findings based on quantitative methods and stands alone as the only chapter in the collection to report exclusively on quantitative data. Absent from this collection thus far is studies focused on the male experience. Chapter 13 and subsequent chapters in this section address this imbalance. A mixed method analysis of how medical experts in Italy dealing with male patients sexual health problems is provided by Raffaella Ferrero Camoletto, whose study findings show how medical professionals reproduce and renegotiate what they perceive as "respectable sexuality" and "mature masculinity." This chapter is particularly compelling as it demonstrates how an intersectional analysis can reveal damaging discourses (reinforced by medical opinion and professionals) that, as the authors note, leave older ageing men living up to the ideal of mature masculinity and leave little room for alternative accounts of male sexual ageing. The final chapter of this collection is again focused on the male experience and provided by Julie Fish who explores the gay and bisexual men's narratives of prostate cancer from an intersectional perspective concluding with a series of policy implications which are particularly helpful in grounding the findings within the policy context in the UK.

This is a comprehensive and detailed book, and it makes a distinctive contribution to the field; although some of the authors (highlighted here) do offer policy implications based on the study findings, this is not a

collection that can speak readily to practitioners or policy makers. This is not surprising, given the infancy of some of the theoretical anchor points that the book elucidates. Sparking future debate and discussion amongst a wide audience is the stated aim of the book, and this book achieves this through a lively and disparate collection providing important insights grounded in empirical and critical theory. This book's contribution can be recognised for its novel theoretical and methodological insights, pushing theoretical and disciplinary boundaries, and for this reason, the book stands as an essential and key text for all those interested in ageing and social justice issues.