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Beyond health and well-being: transformation, memory and the virtual in older people's music and dance

By *KATE WAKELING** & *JONATHAN CLARK**

Abstract

Research exploring older people and the participatory arts has tended to focus on notions of biomedical impact, often coupled with appeals to evasive notions of “well-being.” Rather than suggesting such approaches are invalid, this article proposes the need for their extension and proposes an alternative, critical approach to analysing older people's experience of arts participation. Based on ethnographic participant observation and intensive consultation with a cohort of older people engaged in a programme of creative music and dance, we explore the complex processes and possibilities of transformation that the participatory arts can initiate, examining how performance can create intriguing linkages between past, present and future experiences. Taking a phenomenological approach to the study of memory, recollection, reminiscence and future anticipation, we discuss how arts participation can “actualise” potential memories in older participants, examining how and why this kind of expressive activity animates the idea of “virtual” selves (after Bergson).

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Keywords: memory, well-being, temporality, imagined selves, phenomenology, pragmatism, participatory arts.

Participatory arts programmes targeting older people have blossomed in recent years, offering increasingly diverse and colourful opportunities for creative engagement among people aged 60 and over (Cutler 2009). Yet despite this rich array of activity, research into participatory arts activity among older people has been largely restricted to somewhat instrumentalist accounts of health and well-being outcomes.¹ Whilst the field of critical gerontology has for some time fought against accounts of ageing governed by “biological determinism and the narrative of decline,” the majority of ongoing research into older people’s arts participation remains focused on impact-driven, biomedical studies (Twigg 2004: 60).

This article presents an alternative approach to the study of older people’s arts activity, exploring transformational experiences of memory and anticipation among a cohort of older people engaged in a programme of participatory music and dance. Drawing on ethnographic and phenomenological research methods, we argue that important aspects of older people’s experiences of arts activity, particularly concerning more nuanced ideas of temporal perception, have been omitted in contemporary literature on the subject. Rather than suggesting that such studies are invalid, this article demonstrates how these approaches require further extension through a type of methodological switch. This revised methodology, whilst acknowledging the biomedical and psychological benefits of arts activity for older participants, takes a phenomenological approach to the theme. We approach the study of memory, recollection, reminiscence and future anticipation among older people via theoretical constructions concerning the temporality of experience, as provided by classical phenomenology. We furthermore couple this theoretical account with

¹ A number of substantial longitudinal studies and literature reviews explore evidence-based health and well-being outcomes of arts participation among older people, including Castora-Binkley et al. (2010), Cohen (2006), Cohen et al. (2007), Connolly and Redding (2010), Cutler (2009), McLean (2011), Noice et al. (2014), Skingley and Vella-Burrows (2010), and Stuckey and Nobel (2010).

more contemporary accounts of “enacted” and “embodied” cognition. Specifically, we will be interested in how older people’s experience of the participatory arts invokes particular linkages between ideas of past, present and future that fall into three overlapping categories: recollection, trait and “virtuality.” Firstly, we consider standard phenomenological approaches to recollection, which can be summarised, in a Husserlian vein, as the intentional re-enactment of a past perceptual scene, and the “vicarious simulation” (Thompson 2010) of that scene in the present. Secondly, we will introduce a concept from psychoanalytic metapsychology, that of *trait*, to show how arts participation can create unexpected linkages between present and past experience triggered by certain types of perceptual and multimodal fragments that in turn act as markers for experiences in the past that had a certain type of affective intensity, and which are recalled through action of the trait (Leclaire 1998). Traits, which can be encountered in the arts participation through highly random and contingent encounters, can adduce layers of memory that a participant may be unaware of, through a process of “unconcealment.” Thirdly, we use Bergson’s (1990 [1896]) theory of the virtuality of temporal perception, coupled with an extended version of more recent research on “possible selves” (Markus & Nurius 1986), to show how arts participation among older people not only creates forms of potentiality for subjective identities in the present and future but also acts as a causal agent in the construction of “virtual past selves,” generated via the formation of “ideal” memories.

Our research is underpinned by fieldwork examining a series of creative dance and singing sessions with people aged 60 and over, organised through the learning and participation programme of a large conservatoire of music and dance. Carried out over 16 months, this fieldwork combined ethnographic “participant observation” with a phenomenological analysis of group discussion and interviews, alongside a personal diary project undertaken by participants. These fieldwork findings are intertwined with more theoretical material from phenomenological philosophy, and an overarching narrative is formed which connects the phenomenological tradition with the pragmatist philosophy of William James and John Dewey. The key here is that the transexperiential connections and networks which are created through enacted participation in such music and dance sessions are highly “meaningful” considered under a pragmatist

rubric, which gives an account of “meaning” that stresses its somatic, rather than its conceptual or propositional roots (Johnson 2008). It is specifically this account of this particular form of “meaningfulness,” and hence benefit, of arts participation that is missing in alternative approaches that solely stress “health and well-being” improvements among older participants.

The article is structured into three sections. In the first, we give an extensive account of existing research into ideas of well-being “enhancement” through arts activity with older people and contrast these approaches with the argument outlined above. In the second, we give a reading of possible links between the phenomenology of subjective memory and topics derived from other disciplines within the human sciences, such as psychoanalysis, psychology and gerontology, drawing closely on the researchers’ participant observation and intensive consultation with the programme’s participants. In the concluding discussion, we consider the more general problem of ethics. How should the beneficial effects of arts participation for older people be appropriately captured? How can these events be financially sustained in a climate of austerity, and within a funding environment that idiomatically demands the production of quantitative evidence in return for investment?

Current Approaches to Older People’s “Well-Being”

Alongside a continuing emphasis on the biomedical impact of older people’s arts participation, the capacity of the arts to specifically enhance the well-being of older people has been subject to increased investigation and recent years have seen a number of large-scale evidence reviews produced (Cutler 2009; McLean 2011; Noice et al. 2014). Application of the term “well-being” in contemporary impact studies ranges from closely-theorised accounts of “subjective well-being” (Creech et al. 2013; Laukka 2006) to approaches which more readily align with the literature of “successful ageing” in their combination of psychosocial and biomedical factors (McLean 2011). Other studies focused on well-being struggle to situate the term or indeed dispense with defining it altogether (Lally 2009; Ruokonen & Ruismäki 2011). The following section explores the continued use of this fluid notion of well-being, examining its application in the

social sciences as a whole, its use in more recent gerontological studies, and lastly, its continued valency in the study of arts activity among older people.

Defining Well-Being among Older People

Researchers on the topic of well-being have remarked there are as many definitions of “well-being” and “quality of life” measures as the number of people studying the phenomenon (Baker & Intagliata 1982, cited in Wiggins et al. 2007). Well-being thus remains a contentious idea in terms of both its codification and measurement, and the term is conceptualised very differently across different academic disciplines. Economic studies exploring subjective well-being have tended to employ a “hedonic” approach, examining (and quantifying) both pleasure and the avoidance of pain (see, for instance, Huppert et al. 2009). However, studies rooted in psychology have developed alternative measures, judging there to be a number of limitations to the hedonic model, including the observation that the acquisition of material goods, often deemed a source of pleasure, tends not to equate to increased levels of happiness more generally (Ryan et al. 2008; Vittersø 2004). Instead, many psychologists have tended to favour a “eudaimonic” perspective, a concept drawn from Aristotle that combines sensations of satisfaction and virtue, but is, as summarised by Ryff and Singer (2008: 13), “a term that is simultaneously difficult to spell, to pronounce and to understand”. Whilst certainly a slippery concept, the eudaimonic approach to well-being tends to focus on “meaning and self-realisation” and considers the degree to which a person is “fully functioning,” often through the study of such characteristics and sensibilities as autonomy, determination, interest and sense of fulfilment and hope (Aspinwall & Standinger 2003; Ateca-Amestoy & Ugidos 2013; Peterson & Seligman 2004; Ryan & Deci 2001; Shmotkin 2011).

The shift in demographics manifest through Western Europe’s ageing population has placed a growing emphasis on the needs and concerns of older people, including a requirement to address fully the question of sustaining and enhancing older people’s well-being. In the public arena, discussion of this population growth has often invoked disquieting images of “time bombs” or “tsunamis,” but has also prompted an increasingly

vocal movement towards revising such representations of older people, with studies seeking to highlight the wealth of possibilities and opportunities offered by ageing populations (Lloyd-Sherlock et al. 2012). In line with such revisions, researchers have noted the need for well-being research that examines the specific priorities and concerns of older people and which addresses the freedom and opportunity retirement often now brings (Gilleard & Higgs 2000; Vincent 2003). A number of scales and measures have accordingly been created which are regularly used in research into older people's quality of life and well-being. These include the "CASP-19" self-enumerated scale (Hyde et al. 2003) aimed at measuring "quality of life" and which derives from an explicit theory of human needs (see Doyal & Gough 1991) to span four domains of life, namely control, autonomy, self-realisation and pleasure; the extension of 1991 World Health Organization Quality of Life (WHOQOL-100) questionnaire, a cross-culturally comparable quality of life assessment instrument which was further developed in 2005 to enhance its application among older people (Power et al. 2005); and the Older People's Quality of Life (OPQOL) questionnaire which was developed in 2009 as a psychometric test to examine multi-dimensional "quality of life" in older people and which derives from the views of older people themselves (Bowling et al. 2009).

A number of researchers have further challenged the prevailing methodologies used in measuring well-being and quality of life among older people. Researchers have noted the so-called "well-being paradox," constituted when "objectively negative" factors are shown to have relatively little effect on subjective quality of life (Mroczek & Kolarz 1998). McFadden's (2010) gerontological work on the impact of creative engagement on the lives of older people has identified the familiar concept of resilience as a particularly fruitful object of study among older people, suggesting that this term provides a "lived example" of the "well-being paradox". Shmotkin (2011) has similarly addressed the apparent contradiction within self-evaluating well-being studies and proposes the need for a more dynamic, responsive understanding of well-being. The author puts forward a new conceptual model of "the pursuit of happiness in the face of adversity," which considers subjective well-being as an "active agent of adaptation" (Shmotkin 2011: 27).

Older People's Well-Being and the Participatory Arts

Subjective well-being remains a key index in investigating the efficacy of arts activity among older people. Whilst a number of studies have drawn rigorously on gerontological and psychological advances in the field of well-being, a survey of the literature also reveals an array of sometimes disparate and underdetermined conceptualisations of the term and its associated dimensions. Alongside debates concerning the contribution of "sense of identity" and "social interaction" in constructing well-being, a number of studies have explored the notion of "meaning" as a core aspect of subjective well-being, as are outlined below. Discussion of such "meaning-making" tends to be similarly under-theorised, with limited attention given to the precise processes as to how and why "meaning" might be constructed and its implications for participants' experiences of such activities.

Several arts intervention studies in the field dispense altogether with clarifying the term well-being in their analyses. An insightful study by Lally (2009) on a community singing programme for older people is refreshingly honest about the term: "while the concept of 'well-being' was central to the aims of Sweet Tonic, it remained a vague and fuzzy concept" (Lally 2009: 26). In a study of musical activity among older people, Ruokonen and Ruismäki (2011) note similar challenges of definition, describing the concept as "broad and also very subjective," before going on to outline a loosely eudaimonic approach to the term, where well-being is framed as "a subjective feeling . . . related to mood, particularly happiness" (Ruokonen & Ruismäki 2011: 341).

Some studies offer more rigorously theorised approaches to the topic. The Institute of Education's substantial "Music for Life" research project investigated the impact of music-making on well-being among older people, noting that "there has been little research exploring the potential for music-making to make a significant contribution to the quality of life of older people" (Hallam et al. 2011: 2). In response, the project was founded on a closely structured conceptualisation of well-being, including the CASP well-being scale (Hyde et al. 2003; Wiggins et al. 2007), to generate three key factors as comprising "subjective well-being" among older people: the first related to having a positive outlook on life (purpose), the second to lack of autonomy and control (autonomy/control), and the third to positive social relationships, competence and a sense of recognised

accomplishment (social affirmation) (Creech et al. 2013: 95–96). In a similar vein, Laukka's (2006) study of the effects of music listening on older people's well-being also divides the concept into three carefully-defined areas: affective well-being, life satisfaction and eudaimonic well-being, with each measure based on a standardised codes, including the Positive and Negative Affect Schedule (Watson et al. 1988) and Ryff's (1989) Scale of Psychological Well-Being.

A number of art intervention studies working with older people place the notion of "identity" as central to the concept of well-being. Taylor (1987) describes the "identity crisis" that can emerge out of the loss of work status, which in turn leads to diminished perceptions of well-being. To counter this effect, Taylor (1987: 13) advocates the visual arts as a means by which older adults maintain access to "limitless possibilities". Dabback's (2008) study of older people participating in a band draws on theories of identity grounded in the work of Marcia (1966) and Erikson and Erikson (1997). In response to the potential loss of identity occurring through the retirement transition, musical participation was found to facilitate a "strong identity commitment" among participants, in turn eliciting "well-being and a sense of purpose" (Dabback 2008: 282). In an extension of the "Music for Life" research project outlined above, Creech et al. (2014) explore the notion of subjective well-being via ideas of "identity," through imagined conceptualisations of self. Creech draws on Markus and Nurius' (1986) concept of "possible selves" which refers to an individual's imagined selves, desired or dreaded, which in turn may act as incentives or disincentives for certain kinds of behaviour in an individual. Creech's study describes how participative music-making can act as a medium through which older people may develop "possible musical selves" with the potential to contribute to underlying dimensions of subjective well-being.

It is interesting to note an increasing focus on the idea of locating "meaning" and participating in "meaningful activity" as core dimensions to subjective well-being among older people (Bedding & Sadlo 2008; Fisher & Specht 1999; Jonsson et al. 2001; Sinnott 1998). However, the precise role that such "meaningful" or "meaning-making" activities take in enhancing notions of subjective well-being among older people is not yet well understood (Bedding & Sadlo 2008; Rudman et al. 1997). As one example,

a study investigating the “role and meaning” that music plays in enhancing well-being in the lives of a community of older Australian people “[frames] music as a symbol used by people for constructing self-identity [that gives] meanings to experiences and emotions ... [where] participants’ narratives of the meaning of music provides them with the ability to construct meaning in their lives” (Hays & Minichiello 2005: 440, 449).

This process was seen a key contributor in “helping participants maintain a sense of well-being” (Hays & Minichiello 2005: 443). Yet while the study presents diverse and sensitive research findings, it does not explore theoretically how such meaning-making has occurred, or how and why it might contribute an abstract (and in this case otherwise undefined) sense of “well-being.”

Allison’s (2010) ethnomusicological study of songwriting in nursing homes directly challenges the widespread lack of investigation into such processes. Allison explores how the creation and performance of music enables institutionalised older people to transcend their increasing physical, cognitive and social restrictions, focusing on the “how and why” of participants’ responses to creative activities. Allison (2010) notes how the pioneering work of gerontologist Gene Cohen has left us with a challenge; while the field has generated increasing evidence as to the benefits of creative activities, we remain uncertain to “how creativity fits into late life learning and why it is important” (Allison 2010: 276). In answer to this lack of scholarly attention, she advocates the use of ethnographic approaches, highlighting the need for methodologies better able to respond to the “inherently subjective questions” of “process and meaning” (Allison 2010: 277).

In part, this article seeks to answer Allison’s call, presenting an alternative approach to investigating and conceptualising the workings of participatory arts activity among older people. While the various impact studies listed above offer valuable and much-needed advocacy as to the positive effects of the arts, we identify, in line with Allison’s study, a paucity of critical examination which actively unpicks the more complex and nuanced processes at play in such activity (and the concomitant experience and construction of “meaning”), particularly as voiced by older participants themselves. Whether “subjective well-being” is invoked as a hazy and apparently self-evident concept or is more rigorously codified,

it tends to invite somewhat instrumentalist and bounded accounts of arts participation which, as our research finds, may neglect the more complex, transexperiential processes potentially sparked by creative activity. Similarly, where notions of “meaning” and “meaning-making” are cited as crucial dimensions to participant experience, studies have tended not to probe further into how or why this meaning-making might occur, or to explore the relationship between arts practice and the construction of such meaning for older participants.

Prompted by participant commentary and extended participation-observation, our research proposes a series of unexpected temporal connections between past, present and future to lie at the heart of many participants’ responses to arts activities. In turn, these temporal connections, when viewed through a pragmatist and phenomenological lens, suggest a potent form of “somatic meaning” (Johnson 2008) is created for participants while they are engaged in such activities. This somatic form of meaning resists the more conceptual or propositional senses of the term and so challenges the conventional forms of codification often associated with the definition and measurement of “subjective well-being.” In unpicking these processes of temporal perception and somatic “meaning-making” through pragmatist and phenomenological inquiry, we thus hope to bring to light the true complexity and richness at play in participants’ experience of arts engagement.

Introduction to the Participatory Groups

The ‘Retired not Tired’ programme itself offers weekly singing, creative dance, and combined creative dance and singing sessions for participants aged 60+, working with c. 100 participants each year. Commentary will focus on two groups from the programme: a creative dance group called “Dance for Health” and a combined music and dance group called “All Singing All Dancing.”

“Dance for Health” sessions focus on facilitating creative movement while supporting the associated health benefits of movement to the ageing body. The sessions often begin by focusing on alignment, posture and balance, before then taking these principles into creative movement, often exploring the natural swing or rhythm of the body, and frequently

involving work in pairs, trios or in larger groups to travel across the space or to devise movement material together. The group has created a number of richly varied performance pieces, including developing improvised responses and co-devising choreographic sequences drawing on Wasily Kandinsky's dynamic painting *Swinging* (1925) (as discussed below); a playful co-devised work exploring Edwardian etiquette called *Barmy on the Crumpet*, sparked by an invitation to perform at the Horniman Museum and Gardens as part of their "curious tea party" event; and a series of group-devised pieces focusing on a single body part (e.g. hands, shoulders and feet) which was then developed into an exploratory dance film created by Nicolas Kyprianou.

"All Singing All Dancing" combines music and dance-based activities, woven together by a vocal practitioner and a dance practitioner. Sessions place a strong emphasis on vocal and movement improvisation. Creative content is arrived at through a variety of processes: working from a taught starting point (such as a choreographic sequence or a passage from a pre-written song), working from a co-devised starting point, developing work through improvised content, or working from an individual idea contributed by group members. The group has devised a number of exploratory new creative pieces, including *Hear Here* (2013) which featured a soundtrack comprised of "home recordings" participants had made of their day-to-day experiences (using recording equipment provided by Trinity Laban) and also featured a poem written and spoken by a group member, which the group then used as the basis from which to devise an extended movement piece. Other performance pieces have drawn on themes of women's suffrage and the pioneering choreography of Isadora Duncan, while *I Never Dreamed the Sea so Deep* (created across 2013–2014) and saw the development of powerful improvisatory vocal and movement work led by group, inspired by an extract from Allen Ginsberg's poem *An Eastern Ballad* (as discussed below).

A Phenomenological Approach to Examining Older People's Arts Participation

The purpose of this section is to examine more critically the intricate experiential qualities of a participatory arts programme for older people,

notably in terms of temporal perception. Drawing on participant observation and extensive consultation with participants, we explore the intriguing forms of subjective memory occasioned by taking part in creative music and dance, investigating these transformational experiences of temporality from a phenomenological standpoint.

Participant observation was carried out over 16 months, by attending "Dance for Health" and "All Singing All Dancing" sessions weekly, alongside conducting regular semi-structured and informal discussions with participants. In addition, a voluntary 12-week "dance diary" project was conducted with participants from the creative dance class, where volunteers were invited to record personal reflections on each week's session across the term, which were then shared with the researchers at the project's close.

Research findings indicate that the programme provoked a series of potent connections between real and imagined pasts, presents and futures among participants. These connections can be divided into three intersecting categories, which will be discussed in turn: "recollection" as intentional "re-enactment"; the idea of affective "trait" as an unexpected trigger capable of unlocking or "unconcealing" strands of a participant's past; and the notion of "virtual selves," whereby creative participation sparks the construction of both "becoming future selves" and "virtual past selves" through the formation and fusing of "ideal" memories and anticipations. From here, we consider how the discovery of such transformative connections holds powerful implications as to how participants' experiences of arts activity might be more richly and sensitively analysed in the future.

Recollection

This first linkage between past and present can be categorised as "recollection," drawing on a Husserlian account of temporality. Defined as the re-enactment of a past perceptual scene, recollection goes beyond simply recalling a past "that we can grasp and are aware of in some way, as in retention; instead it is explicitly present 'once again', 'anew'" (Bernet 2009: 134).

Participant diary commentary from a "Dance for Health" session aptly captures this sense of embodied re-enactment, where a previous scene is "re-animated" in the present. One participant reflected on an improvised sequence of movement during a creative project responding to Kandinsky's dynamic, colourful painting *Swinging* (1925). Here, participants were

invited to respond individually to the lines, circles and spirals featured in the painting as part of an extended group movement improvisation. This particular participant was given a more solo role amidst the group dance, being directed to “activate” the other group members as she span lightly and playfully across the space as the accompanying music came to life. Her diary entry records the powerful sense of “re-enactment” she experienced in developing these movements:

I cannot help becoming like a pulling horse in the opening of the group dance – [I] can’t identify where this movement comes from except childhood games – ‘Bell Horses’ – pretending to be horses in harness tossing their heads and asserting their freedom. Someone giggled and I tried to stop but could not edit it out.

Through such re-enaction, the past is effectively experienced as another present, the act of recollection affirming “the difference and the identity of two presents that are intimately united despite the temporal difference between them” (Bernet 2009: 136).

Research findings also corroborated the claim that that this type of temporal or horizontal merging constituted a pleasurable and/or potent experience for participants. In one “All Singing All Dancing” session, participants were asked by facilitators to create a pose accompanied by a vocal sound that expressed a “passionate” memory of some kind (which did not need to be disclosed). Responses to the activity proved mixed but powerful. One participant interrupted the task in some distress, stating that she disliked the sensation the activity had aroused in her, asking “what is this meant to do for us? . . . I don’t want to go back into the past. I want to go forward – to think about the future.” Other group members felt differently however, with one stating (in a neat summary of Husserlian recollection): “This is not just about the past. You have to take something from the past and take it out of context – lift it to the future. This is about using an element like that, a memory, and bringing it to life.” Further informal discussion demonstrated that some participants found the recollection of such sensations, often linked to childhood, to be a particularly pleasurable element of participating in the group:

[the sessions] remind me in a way of when I was young. [Then] I was free and wasn’t worrying about things – and as adulthood came I felt restricted with partners, friends,

criticism and so you become very restricted with your movement and your voice and everything. This class is like going back on a journey to when I was young, free and frivolous.

To which another participant responded:

following on from this 'going back into childhood' thing . . . as we get older and our shapes change there's a sort of self-consciousness . . . so I think maybe coming here, it's more to do with how we feel within, not how we are perceived or even how we look but the feelings that it evokes, which can be, as V said, quite sort of light and from days when we were more physically able – it echoes that doesn't it, that sort of freedom of movement.

Here, the re-enactment of past perceptual scenes through voice and movement was indicated by participants to be highly significant, connecting individuals to prior sensations which sparked pleasurable and/or potent feelings, through the creation of transexperiential linkages between past and present.

Traits

More unexpected linkages between past and present can be identified in participant experience through reference to psychoanalytic metapsychology and the idea of "traits." Again, traits constitute certain types of transexperiential linkages between present and past experience, but they have a phenomenology different from recollection. The theory of traits finds its most recent exposition in the work of psychoanalyst Serge Leclaire, who proposes that a particular trait is formed of types of multimodal perceptual fragments, that act as markers for experiences in the past that had a certain type of affective intensity, and which are recalled through action of the trait (Leclaire 1998). Traits, therefore, mark the phenomenological genesis of what are called "drives" in traditional psychoanalytic metapsychology. They originate in the work of Freud where they are termed *der einzige Zug*. The original reference is to the memory of a particular coloured garment, a yellow dress: "Yet I can remember quite well for what was a long time afterwards I was affected by the yellow color of the dress she was wearing when we first met, whenever I saw the same color anywhere else" (Freud 1975: 311–312). Here the experience of affective intensity is "marked" by a visual fragment, in this case a certain colour, that retains its significance for the subject long after

the event in question. Freud and Leclaire thus connect phenomenology with the structural aspects of signification. An object or event, first encountered in an initial moment of affective intensity, provides a purely random, contingent trait whose imprint thereafter functions structurally as a kind of privileged signifier. Similarly, in a reciprocal fashion, the trait thus engendered exercises a power of determination over subsequent object choices (recall Freud's remark about how the "trait" of the yellow dress altered his subsequent colour perceptions and preferences): "A frozen moment of the individual's experience becomes elevated into a transexperiential template, a coordinate establishing a range of eidetic variations for a given drive" (Johnston 2005: 353).

This latter aspect of trait recollection/activation is something that we have found widely in participant observation. The idiomatic activity of arts participation often occurs across sensory modalities: music is accompanied by gesture, or in reference to a painting or piece of text. A certain qualitative aspect of a piece of music, for example, can trigger the recollection of a completely different perceptual scene or activity. Arts participation invokes with certain types of visual, auditory and kinesthetic information, and specifically with activities that organise themselves through experiences that manifest themselves in these different types of perceptual modalities; the proximity of the activity to a particular trait can trigger the actualisation of perceptual fragments from the past of the individual.

A striking iteration of this process was documented in one "Dance for Health" participant's experience of the devising activity based around the Kandinsky painting. The group was asked to explore solo improvisatory responses to the painting, accompanied by a range of different music. Movement across the group varied greatly, with some engaged in more playful and dynamic movements, opting for leaps and mischievous interaction with other dancers, while others opted for more a reflective and slower-paced physical response. One participant's diary entry discussing this session recorded an unexpectedly powerful sensory and emotional response to this improvisation activity, with the "catalyst" described as a streak of colour found within the painting:

I've found myself thinking about intimate experiences, some of which are still vivid. I can't remember which situations made me think of those precious times and to hunger after them. Kandinsky's use of red perhaps was the catalyst for me.

The participant went on to describe the unexpected recovery, or “unconcealment” of buried pleasure concerning a past relationship, which the diary entry suggests was first manifest in her spontaneous movement within the session, then, as the memory itself sedimented, inspired direct associations with a past encounter of particular affective intensity:

Sorry if I embarrassed people and went too far [in the improvisation], but I enjoyed it enormously. Didn't look at the clock but did feel incredibly tired and went to bed after lunch, wanting to think of a long and special relationship that had to end.

An interaction between two participants in the programme's “All Singing All Dancing” similarly highlighted the potency of colour as “aesthetic trait.” During a particular session, the group had worked on an intense voice and movement improvisation, creating a series of movements and a vocal soundscape exploring the sound and meaning of the ocean. The dance practitioner had provided several large expanses of blue silk which had proved particularly evocative of the roll of the waves while also facilitating notably close contact among group members, the cloths initiating a series of passing, tugging and enveloping movements. At the close of the session, participant N draped herself with the cloth in the form of a veil and, as discussion ensued following the end of the activity, appeared reluctant to disengage from the cloth unlike other group members who had been interacting with different pieces of material. Another participant laughingly noted how much participant N looked like “Mary” and asked if she'd ever played this part in the nativity, to which N replied wryly: “No. Never. That's why I'm here now.”

Virtual Selves

The third form of temporal connection articulated by participants can be linked to the concept of “virtual” selves. Several participant commentaries on sessions placed an emphasis on shifting perceptions of “self,” each enacting an intriguing slippage in the boundaries between past and present by stating, for example: “It's like returning to a new self”; “This class is a door back to yourself”; “It's connected me to a younger self. I wasn't a dancer then, but I suppose I am now.”

The capacity of arts activity to prompt participants to create and reflect on “possible” selves (Markus & Nurius 1986) is discussed in depth by

Creech et al. (2014), with a particular focus on the role of music-making in the lives of older adults. Drawing on data collected as part of the “Music for Life” project, it was found that such arts activities offered project participants the means to formulate well-understood and esteemed versions of their possible future selves, including redefining an individual’s identity as “a musician” or rediscovering a lost musical self. In turn, these possible selves were found to assist participants to “navigate the process of ageing in later life with enhanced subjective well-being,” including a sense of purpose, autonomy and social affirmation (2014: 32). However, the theory of “future” possible selves also involves a close interaction between past and present conceptions of self. A critical element of Markus and Nurius’ account is the idea that possible selves may be derived from past selves where, for instance, participants draw on past experiences in conjuring future alternatives, or rediscover “lost” possible selves in their activity in the present.²

While this notion of “possible selves” chimes to some extent with the participant commentaries listed above, it does not fully address the complexity of a statement such as “returning to a new self.” The phrase not only invokes the idea of the past (“returning”) but crucially sees the past itself as constructed afresh in the present, now with new qualities (“new self”) thereby extending Markus and Nurius’ more linear, cumulative conception of “possible selves.” The work of Henri Bergson and his notion of the “virtual” provides a helpful theoretical framework in order to account for this more slippery, instinctual approach to an individual’s chronology. Bergson’s *Time and Free Will* (1910 [1889]) outlines a radical reimagining of time, rejecting the singularity of a mechanistic, linear account of temporality to propose the possibility of “real duration” (*durée réelle*), a dynamic and non-linear form of “inner” time which is “a wholly

²“Past selves, to the extent that they may define an individual again in the future, can also be possible selves. An adult, for example, will never be an 8-year-old child again. Some critical aspects of the child self, however, may remain within the self-concept as a possible self . . . and under some circumstances, this self-view may be activated and become influential in directing behavior, such as in a visit home over the holidays” (Markus & Nurius 1986: 955).

qualitative multiplicity, an absolute heterogeneity of elements which pass over into one another" (Bergson 1910 [1889]: 229).³

In turn, this fluid conception of temporality is closely connected to the notion of the "virtual." Here the "virtual" is placed in contrast to the "possible": where any account of the possible is determined by its being real or not, whereas, "the virtual is not opposed to the real; it possesses a full reality by itself" (Deleuze 1994: 211). The participant commentaries presented above therefore do not suggest that the individuals concerned consider themselves to have been dancers in the past in any real or "possible" sense, but rather that their present experiences have engendered "virtual past selves" where each individual can reimagine themselves as having been a dancer.⁴ This idea of virtual potentialities, as afforded by a Bergsonian reading of time as a intrinsically subjective "duration," is encapsulated by Grosz (2005: 4): "Duration is that which undoes as well as what makes: to the extent that duration entails an open future, it involves the fracturing and opening up of the past and the present to what is virtual in them, to what in them differs from the actual, to what in them can bring forth the new".

As such, the present and a series of non-representational, "virtual" pasts are in a constant state of intermingling, of mutual reconstruction. However, according to Bergson (and Deleuze) this bridging of past and present is not arbitrary. For a "virtual memory" (such as having once been a dancer) to be animated or "actualised" in the present, it requires a certain catalyst: "It is the past itself that seeks to come into the present, to be actualised and made conscious, i.e. to be remembered. But since not all of the past

³ This intersecting relationship between past and present is neatly summarised by Deleuze (1988: 59) in *Bergsonism*: "the past and the present do not denote two successive moments, but two elements which coexist: one is the present, which does not cease to pass, and the other is the past, which does not cease to be, but through which all presents pass".

⁴ Work by Cooper and Thomas (2002) on social dance among older people presents an interesting adjunct to this theoretical approach. The authors suggest how dance might allow the construction of certain "mythic" conceptions of self, suggesting that dance mitigates the public invisibility of the older person and demonstrating that old age does not have fixed consequences but allows real and mythic experiences of aliveness, fitness, fun and flexibility.

can be actualised in each perception and since ‘the choice is not made at random’ (Bergson 1990: 102, 112), something else must be at play – attracting certain memories and certain planes of memory rather than others” (Al-Saji 2004: 214).

Our research indicates that the specifically affective properties of artistic practice are central to this “actualisation.” As an example, an intriguing group enactment of this process occurred during an “All Singing All Dancing” session. The vocal practitioner had brought in the following section of text from Allen Ginsberg’s *An Eastern Ballad* (1945–1949).

I never dreamed the sea so deep,
The earth so dark; so long my sleep,
I have become another child.
I wake to see the world go wild.

The group were taught this text, set to a simple melody and accompanied by a pre-recorded vocal soundscape evoking sounds of the sea and delicate drone-like textures (composed by the session’s facilitator). Although at the time the session facilitator was unaware of the researchers’ interests in Bergsonian virtual memory, the extract (particularly line 3) can be seen to chime closely with the idea of “returning to a new self” and participants, facilitators and researchers each later agreed that the piece sparked an unexpectedly strong emotional and creative response among the group.

In the session, once participants were familiar with the melody they spread out across the space and began to add improvised gestures and free repetitions of certain words and phrases. It was notable that on the first rendition of the song (accompanied by the recorded soundscape), the words “wake” and “wild” were each spontaneously accompanied by a series of dramatic “opening” or “flowering” hand gestures among group members, while the words “I wake” (sung to a rising perfect fifth) inspired a brief call-and-response configuration which looped between two participants. On the subsequent repetition of the melody, group members opted to linger on the words “I have become.” Sung to a simple descending scale, “I have become” was repeated a number of times, with several participants choosing to sing the line in free-meter, creating a vivid wash of sound. In this brief exercise, the group seemed spontaneously to enact the creation of “virtual past selves”: participants began by “waking” and exploring a “wildness” of expression

(one participant even commented afterwards that “I think we were trying to connect again with a certain wildness in ourselves”) from which a new state of “becoming” could unfold, evident in the spontaneous flurry of vocal invention that occurred during the sung line “I have become [another child].”

Informal discussion following the exercise highlighted how affecting the exercise proved for participants and how the text, when sung and moved to, seemed to capture and intensify this idea of reimagined but intimately connected pasts, presents and futures. One participant remarked how she had felt as though “we were shipwrecked. Lying out on the shore, crawling, and we were slowly coming back to life The images were so powerful . . . they had a tremendous sort of momentum.” Another group member highlighted the sense of agency and possibility initiated for him through the text and its embodied performance: “I was singing the wrong words briefly – I sang ‘gone wild’ which is when you suddenly wake up and everything is changed. But ‘go wild’ . . . that’s waking up to find you’re the one changing the world.”

The process of “returning to a new self,” where a “past self” can be remade and then “activated” in the present was evident both through participant commentary and through observation of creative work occurring in sessions. Our findings indicate that the particularly affective properties of artistic practice can offer a powerful prompt in actualising potential, virtual memories as theorised above, and that these, taken together with the types of transexperiential linkage given by recollection and trait activation, motivates what follows in the next section: an account of the *intrinsic meaning* of arts participation.

Pragmatist Accounts of Meaning and Well-Being

We want now to create some connections between the temporal aspects of arts participation, as defined above, and some related ideas in pragmatist philosophy. In the latter, and particularly in the work of William James and John Dewey, we see a different experiential theory of “meaning” which contrasts with the often undetermined invocations of “meaning” and “meaning-making” used in contemporary arts impact studies, while also providing us with a theoretical template for analysing the catalyst and process whereby meaning is constructed. This reformulated account of philosophical meaning stresses the common selections, or “cuts” that we

make out of the flux of perceptual experience that end up as privileged signifiers: “we identify parts of the ‘much-at-oneness’ of our perceptual experience and mark them for use in understanding and transforming our past, present and future experiences” (Johnson 2008: 89).

These selections relate to things that matter to us emotionally, things that have value and significance, such as various qualities, shapes and relations (or, we could add, the colour of Freud’s remembered dress). These have less to do with propositional or conceptual content than interconnecting *qualia* of experience, derived from our “ontological reciprocity” with the world, that create transexperiential networks of significance, linking past and present experience. It is these aspects that motivate the following definition of the *intrinsic meaning* of a particular activity like participation in arts activities. This type of meaning is embodied, rather than conceptual and/or propositional, and stresses, according to Mark Johnson: “the mostly non-conscious aspects of a person’s ability to meaningfully engage with their past, present, and future environments ... the meaning of a thing is its consequences for experience – how it ‘cashes’ out by way of experience, actual or possible experience ... things and events have meaning by virtue of the way they call up something beyond them to which they are connected” (Johnson 2008: 10; 268–9). Given this pragmatist definition, we can now see why arts participation in particular can act as a privileged producer of such forms of intrinsic meaning. Arts participation, as we have observed, provides heightened, intensified and highly integrated sources of experiences that can occasion links between a participant’s past, present and future experience.

This series of linkages also appears to hold a particular charge for the older people consulted: from a delight in activities occasioning sensations of “pure play, as with children” (in one participant’s words) to the value of “bringing all our life experience to [the classes].” In discussion, many participants themselves chose to ascribe a particular value to these experiences based to some degree on their age. One participant from the All Singing All Dancing group remarked on the idea that:

We’ve been grandparents and we’ve been children Our memory is who we are. We have our bank of memories and they can train the images which feed our imagination when we’re doing something improvised. And I mean, memory is not at

all fixed – it's being worked on all the time. And something like this [class] frees it all up – loosens something within – puts you in a different place.

Another participant also commented on the critical value of creative expression in developing this sense of connection and “awareness,” in contrast to interventions focused solely on improving individuals’ physical health. Indeed, this participant commented how it was only through accruing a certain quantity of life experience that saw her understand this difference:

You walk past [the local health centre] and you see them all on the machines – it's all about “keep fit,” it's all about repetition. It's not about quality and not about self expression and not about awareness. It's so sad that the world is so mechanised. They say, “my body's a machine” but I know it's not that . . . because we've lived a few decades, we know that.

The significance of these transexperiential connections between past, present and future for participants, expressed both in participants’ own accounts and in observation of creative participation, thus suggests that such arts activity can give rise to complex and highly enriching experiences that far transcend the matrices of well-being surveys and other potentially reductive accounts of “meaning.”

Concluding Thoughts: Some Ethical Considerations

Enter upon this road of abstraction and the time is sure to come when the appropriate object-of-knowledge is stripped of all that is immediate and qualitative, of all that is final, self-sufficient. Then it becomes an anatomized epitome of just and only those aspects which are of indicative and instrumental import. (Dewey 1925: 106; quoted in Johnson 2008: 270)

The above quote from John Dewey's *Experience and Nature* (1925) is a useful way of concluding this article. As discussed earlier, many current attempts to measure participant benefit in the participatory arts among older people have focused on factors such as health and well-being that can clearly be described as “instrumental” under Dewey's proposal. Whilst we have also stressed that these approaches have contributed much to the discipline, they perhaps do not provide the whole story.

The immediate and qualitative properties of participatory arts activities for older people, through the arts animating new and invigorating forms of temporal perception and through the embodied and intrinsic meaning of such participation, have not received the attention they perhaps deserve. We propose that evaluative methodologies in such participatory arts settings may need to adjust to include not just biomedical factors and the quantitative measurement of well-being (and other hedonic aspects) but dimensions that relate to the rich, embodied meaning of the activity itself. This meaning, owing to its singular and personal nature, is less amenable to generalisation, and any attempt to enact such abstraction or generalisation perhaps always does some damage to the actual object of study. This would perhaps necessitate methods of evaluation that allow activity to be “shown” rather than “abstracted,” which provide a stronger platform for participants’ own reflections and which in turn celebrate the complexity and nuance of such interactions. In an era when funding bodies are increasingly demanding more and more quantifiable mechanisms for the justification of benefit for activities like older people’s participatory arts programmes, Dewey’s words, written now almost a century ago, still resonate. Sources of documentation perhaps need to change to include more qualitative evidence such as personal testimony, film footage and the products of the activity itself (music, dances, visual artworks and poetry) that is left in its idiomatic setting. A balanced approach to evaluative methodologies can reflect the experiential richness of the participatory arts activities, and their benefit to participants, which far transcends the empirically quantifiable.

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Material inheritances: an affective story in the history of elderly persons

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Abstract

Material inheritance is an important theme in old age, tied up to the life story and with shaping the manner in which one will be remembered. This study adopts the self-confrontation method to explore the meanings and affects that elderly persons attach to the material inheritance, taking into consideration their experiences both as heirs and donors. The sample comprises five participants (80–95 years). Main findings suggest a process of transmitting material inheritance characterized by the creation of a material legacy throughout life and from both positions (donor and heir); resolution related to receiving inheritances (heir position); and transferral as a donor later on in life. This process seems to play an affective role at individual (self-autonomy vs. lost love) and familial (union vs. isolation) levels. The transmission of material inheritance represents a lifelong task that connects past, present, and future and links generations.

Keywords: material inheritances, narratives, valuation theory, self-confrontation method, elderly persons, ageing, families in later life.

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Introduction

Legacy is a major topic in old age, since it represents leaving something behind, intimately tied up to the life story and with shaping the manner in which one will be remembered. Three types of legacy have been described (Hunter & Rowles 2005): biological (passing on genes), values (passing on personal values), and material (passing on possessions). This study focuses on material inheritance, which has been described mostly as a process that involves the giving and receiving of material property from one generation to the next, usually within the family (e.g. Finch & Mason 2000; Goodnow & Lawrence 2013; Rowlingson & McKay 2005). This legacy emerges as a particularly challenging experience (e.g. Schaie & Willis 2002; Sousa et al. 2010): it is crucial to elderly people as it is associated with the desire to prolong life, to give meaning to their life, and to maintain a symbolic presence after death. It is also a potential source for family conflicts (mostly between heirs, and/or among heirs and donors). Generally, the giving and receiving of material inheritances takes place between older parents (donors) and their adult children (heirs) and is completed (both legally and emotionally) after the death of the donor. So, during life, each person typically performs two roles (e.g. Sousa et al. 2010): firstly that of heir (who receives) and later on that of donor (who gives). These roles tend to be assumed at different stages of the life cycle: the role of heir is usually assumed during middle age when an inheritance is received, mostly from parents, while the role of donor normally is assumed late in life when one's own inheritance is passed on, commonly to adult children (e.g. Patrão & Sousa 2009; Prieur 1999). While donors have to decide what to give, to whom, when, and how, heirs are confronted with the donors' choices and decisions. For heirs, receiving a material inheritance represents the loss of parents and symbolizes one's anticipated finitude (as one moves up the generational ladder); the inheritance also involves economic gains (the material possessions) and/or affective gains (such as feeling the parents' love even after their death, feelings of belonging, and continuity of family) (e.g. Patrão & Sousa 2009). Donors seem to assume the role of guardian of the family unity, acting as conciliators, peace-makers, and/or protectors. The giving of a material inheritance seems to convey a set of meanings for older donors: loss of control over their assets, real (death) or symbolic (dependence/frailty); affective loss (frailty or death involving less or no

contact with significant others); and affective gains, such as helping the children, being remembered after death, being recognized by the children and the community, and symbolic continuity (e.g. Patrão & Sousa 2009). Donors seem to consider the construction of their material inheritance a life task, that is, an obligation and a necessity that is intrinsically related to their parental role and function (e.g. Patrão & Sousa 2009).

Therefore, the giving and receiving of a material inheritance constitutes a lifelong process, experienced both at an individual and family level, in which the roles of heir and donor succeed each other over time, governed by the principal of the circulating legacy (Prieur 1999). This topic has been addressed from legal, economic, social, psychological, and developmental perspectives. A number of studies draw attention to the underlying individual and family dynamics of this process: for instance, individual and family attitudes toward inheritance and assets, impact of inheritance in cross-generational relationships, decisions and strategies for inheritance distribution, and family-associated conflicts (e.g. Drake & Lawrence 2000; Finch & Mason 2000; Goodnow & Lawrence 2013; Rowlingson 2006; Rowlingson & McKay 2005; Stum 2000). This study assumes the elderly people perspective and takes into consideration their life experiences both as heirs and donors, to examine meanings and affective patterns they ascribed to the process of giving/receiving material inheritances across their life course. The theme of material inheritances, addressed as a lifelong task, claims for viewing the self as a narrative, or continuously unfolding story, refashioning the construct of self from a traditional focus on proprieties and structure to that of process (Baars 2012; Lyddon & Alford 2002; Lyddon et al. 2006). So, this exploratory study adopts the self-confrontation method (SCM) (Lyddon et al. 2006), which is inspired by the narrative/constructivist approach and based on the valuation theory (Hermans & Hermans-Jansen 1995). The valuation theory is a framework for the study of personal experience, its organization into a narrative structure, and its temporal unfolding over time (Hermans 1992). Within the valuation theory, the self is viewed as an "organized process of valuation" (Hermans & Hermans-Jansen 1995: 14). The concept of valuation is key and is defined as "any unity of meaning that has a positive (pleasant), negative (unpleasant), or ambivalent (both pleasant and unpleasant) value in the eyes of the individual" (Hermans & Hermans-Jansen 1995: 248). A valuation is thus anything a person views

as significant when telling his/her life story (such as: a precious memory, a frustrating event); that is, it refers to a process of meaning construction in which the person is telling his or her story about the past, present, and future. The construction of a valuation is both a cognitive and an emotional process; as such, each valuation implies a specific pattern of affect (when people value an experience, they always feel something in regard to that experience) (Hermans & Hermans-Jansen 1995). The SCM over the past two decades has gained influence as a research tool. Researchers have applied SCM in a wide range of topics, including counselling processes (Hermans et al. 1990), self-esteem and psychological well-being (Hermans 1992), midlife crisis (Hermans & Oles 1999), attachment style, and working models of emotion (Alford et al. 2006). The SCM has shown adequate indexes of internal consistency (Cronbach's alpha) in studies involving clinical ($0.83 < r < 0.91$) and non-clinical ($0.83 < r < 0.90$) samples (Hermans 1992).

In Portugal, where this study was conducted, there is no testamentary freedom. The law stipulates that property should be passed on to heirs in equal shares, and the donors may bequeath one-third of their assets to anyone they wish. However, despite the more or less rigid legal determinants, families across countries tend to develop informal strategies for passing on inheritances, based on personal values and attitudes as well family norms and obligations (e.g. Finch & Mason 2000; Sousa et al. 2010).

This exploratory qualitative study focuses on elderly persons (≥ 80 years) and adapts the SCM to examine the meanings and affective patterns they attribute to the material inheritances, considering their life experiences both as heirs and donors. Results will contribute to a better understanding of how elderly people are dealing with the affective and relational processes associated with the material inheritances process.

Methods

In this study, the Portuguese version of SCM (Pereira 2009) was used. The method was adapted to collect participants' narratives on their experience as heirs and donor of material inheritances.

Participants

The study involves a convenience sample, primarily to assure the ability of respondents to adhere the SCM. So, participants are elderly persons previously involved in another study on the topic of material inheritance, who had previously developed a relation with the third author. The inclusion criteria were: (i) ≥ 80 years old (since the study focuses on elderly persons that have experience both as heirs and donors); (ii) men and women; (iii) without cognitive impairments, and oriented in time and space; and (iv) that have already assumed an active donor position (i.e. having started to pass on their material inheritance). Whether these two final criteria were met was determined by evaluating information collected during a previous project, carried out 3 months earlier. Initially, six potential participants were contacted by telephone by the third author to explain the study and the collaboration needed. All agreed to participate. Following their initial consent, a meeting was arranged to provide further details regarding the study. All agreed to collaborate, and each participant signed an informed consent form after which an interview was scheduled. However, one of the participants was unable to complete the interview, due to lack of understanding of the process. So, the sample comprises five participants, aged between 80 and 95 years, of which three were men (two widowers and one married) and two were women (both widows). Participants had between 4 and 12 years of schooling. Three were living in an older person's home, one was living with the daughter and one was living with the spouse. All reported having children (ages ranging from one to five); and four related grandchildren (ages varying from 1 to 10).

Instrument

The SCM invites participants to construct valuations based on self-selected events and life episodes that are meaningful to them and to identify affective meanings associated with those significant experiences. The interviews start with questions aimed at obtaining socio-demographic data such as age, gender, years of formal education, marital status, number of children and grandchildren, and living arrangement. In this study, the interview protocol was designed in accordance to the procedures detailed in the manual (Hermans & Hermans-Jansen 1995; Portuguese version, Pereira 2009), and

included three stages (Table 1): first, gathering the story (to identify significant life events related to material inheritances); second, valuation elicitation (to construct valuations/statements that summarized the events

Table 1. SCM interview protocol

1 Collecting stories (life events) regarding the material inheritances process	
Introductory statement: these questions are intended to help you to focus on one or more aspects related to the material inheritances process in your family that are of great importance to you. We will start by discussing your experience as an heir of your parents' (or others) inheritance and then focus on your present (and/or future) experience as donor of your own inheritance.	
Stimulus questions	
Heir position	Donor position
Please think about your family material inheritance process and choose one or more episodes that occurred when you received your parents' (or others) inheritance that have been important to you. Please describe it as detailed as possible.	Please think about the material inheritance that you have passed on or will pass on to your heirs and, putting yourself in the position of donor, choose one or more events, circumstance or person/s that are connected with this process and that are important to you. Please describe it as detailed as possible.
2 Constructing valuations (meanings): statements that summarize the events previously identified	
3 Attributing affective terms (feelings) to each valuation: using a 6-point Likert scale ranging from 0 (nothing) to 5 (very much)	
P = positive N = negative	Joy, cheer, excitement, and happiness Disappointment, unhappiness, disgust, and impotence
S = affect directed toward self-enhancement	Self-confidence, strength, confidence, and success
O = affect directed toward connectedness and union with others	Caring, love, tenderness, and intimacy

Adapted from Hermans & Hermans-Jensen 1995; Portuguese version: Pereira 2009.

previously identified); and third, affective rating (attributing affective terms to each valuation).

Data Collection

The SCM protocol was administered during a collaborative process between the participant and the researcher/interviewer. For each question, the researcher worked with the participant by reflecting and clarifying his/her responses. In particular, the researcher supported the participants after the recall of life events in order to produce a sentence that captured accurately a particular valuation or set of valuations. Once the participants had verbally formulated the valuations, the researcher wrote these down respecting the participant wording and then asked him/her to read and check for accuracy. Regarding the attribution of affective terms (feelings) to each valuation (meaning), for those participants experiencing difficulties using the Likert scale, the researcher provided a visual aid, a ruler that combined the six levels of the scale with a pictogram of a face – from 0 – no smile to 5 – big smile. Three participants asked to perform this third stage on another day because they were feeling tired. In these cases, the interview continued the following day, and started with the reading of the valuations and checking if the participants would like to make any alteration, which was not the case. All interviews (lasting 120–180 minutes) were voice recorded, performed by the third author, and carried out in a private room at the participants' home or at an office at a community institution.

Data Analysis

Data analysis was performed in two stages (based on Hermans & Hermans-Jansen 1995; Pereira 2009). The first stage involved the content analysis of the valuations to categorize the main emerging themes. Participants' valuations were categorized into a system created through a process of successive refinement, involving two independent coders (first and third authors). Coders independently read all the participants' valuations and developed a list of sub/categories. Then they met to compare the categorization systems. The two coders discussed the system until full agreement was reached. Then they produced a list of sub/categories, which included definitions. Finally, the valuations were classified into the

categories by the first author and reviewed by the second author (full agreement between coders was obtained).

The second stage included the calculation of four indexes to characterize affective patterns of the valuations (see Table 2). PNOS indexes: (i) P (sum of the points attributed to the positive affective terms), (ii) N (sum of the points attributed to the negative affective terms), (iii) O (sum of the points attributed to the terms expressing connectedness and union with others), (iv) S (sum of the points attributed to the terms expressing self-enhancement). Based on these PNOS indexes, each valuation can be classified on a specific affective pattern and be given a specific affective meaning, according to the typology (Hermans & Hermans-Jensen 1995) (Table 2).

Results

The content analysis revealed three categories of material inheritances valuations (each comprising two subcategories): creation, transferral, and resolution (Table 2). The participants expressed a stronger identification with the donor position, since they formulated a higher number of valuations (19) for that position (their current position), in comparison to the number of valuations (11) for the position of heir (a former position). The number of valuations emerging for each sub/category, considering the heir and donor positions, suggests that some meanings are shared (creation), but others are specifically attached to the heir position (resolution), and to the donor position (transferral).

The category *creation of material inheritances* seems to be a meaningful theme for both heir and donor positions, since valuations emerged for both positions. This category involves two subcategories: *feelings of self-worth* (5 valuations: 3 heir, 2 donor) and *desire to protect the family patrimony* (8 valuations: 3 heir, 5 donor). These valuations are mostly associated with positive affective patterns (11). Only two negative affective terms emerged, both in the heir position: – LL (feelings of self-worth: isolation) and – O (desire to protect the patrimony: lost love).

The category *transferral of material inheritances* only received valuations from the position of donor, indicating that as an heir, transfer is not that meaningful. This category comprises two subcategories: (i) *handover of financial management* (8 valuations as donor: 7 positive, all + HH, strength;

Table 2. Material inheritance: valuations' sub/categories and affective patterns

Sub/categories: valuations (n)	Definitions and examples	Affective patterns					
		+ S	+ O	+ HH	- S	- O	- LL
Creation (includes to create own inheritance and to receive material inheritances) (<i>n</i> = 13)							
Self-worth/ worthlessness (<i>n</i> = 5)	Feelings of self-worth and celebration of the material legacy created and received through life, both for its material and symbolic value (acceptance of having received something and have something to pass on).						
Heir (<i>n</i> = 3)	"My wife received an inheritance from her uncles, because she took care of them. That inheritance organized our life!" [Xavier]; "My father sold all the family properties ... there was no inheritance left for us!" [Vicente]	1		1			1
Donor (<i>n</i> = 2)	"I still have some good assets to leave to my heirs; particularly my working tools and some furniture I have made!" [Dinis] "I didn't inherit a thing from my parents but I always wished to have a good inheritance to leave to my children: I took all my life to create it!" [Vicente]	1		1			
Desire to protect the family patrimony (<i>n</i> = 8)	Desire to protect the family patrimony (in particular that related to the donor personal and family history); for example: not selling the legacy; valuing the legacy received by assuming the role of guardian or by finding someone to assume it.						
Heir (<i>n</i> = 3)	"I have inherited a watch from my father, but I would like to have also an object from my mother!" [Dinis]			2			1

Material inheritances

Table 2 (Continued)

Sub/categories: valuations (n)	Definitions and examples	Affective patterns					
		+S	+O	+HH	-S	-O	-LL
Donor (<i>n</i> = 5)	"I didn't spend my inheritance! I have this idea that one should not spoil the inheritance." [Xavier]						
	"I would like that my son preserved and enhance the inheritance to later on pass it on to his children; just as I have done!" [Xavier]			5			
	"My children will take good care of my things, preserve them ... you know ... !" [Amélia]						
Transferral (centered on the passing on of financial responsibilities and the preparation of events associated to death, while the person is alive) (<i>n</i> = 9)							
Handover of financial management (<i>n</i> = 8)	Donors feel the need to transmit financial responsibilities and the control of assets, while assuring both support and autonomy in relation to the heirs; implies emotional detachment from some assets and the desire to transmit them to someone significant.						
Heir (<i>n</i> = 0)	–						
Donor (<i>n</i> = 8)	"When my husband died I distributed the possessions. I didn't want to keep anything beyond my pension; I couldn't manage the things!" [Isabel] "After my wife died I gave all my possessions to my children; only kept some money for my daily expenses." [Vicente]			7			1

Table 2 (Continued)

Sub/categories: valuations (n)	Definitions and examples	Affective patterns					
		+S	+O	+HH	-S	-O	-LL
Preparing death (n = 1)	Necessity of preparing the funeral and other events associated with one's death, to release descendants of burdens and financial expenses (this represents an inheritance).						
Heir (n = 0)							
Donor (n = 1)	"I worried about having money for my own funeral!" [Vicente]			1			
Resolution (includes a positive and a negative pathway in the resolution of inheritance) (n = 11)							
Agreement (positive) (n = 8)	The transmission of material assets and its distribution among heirs was resolved in a positive and fair way; it involved flexibility, support and protection among all those involved; family bonds are maintained, and bring about (reinforce) feelings of protection, support, and union and gratitude among donors and heirs and between heirs.						
Heir (n = 5)	"I never had problems with inheritances: I inherited my parents' house, but I gave it to my nephew; I was his friend!" [Xavier]; "I gave my part of the inheritance to my younger sisters! They needed it most; that's the way it should be done!" [Dinis]		3	2			

Table 2 (Continued)

Sub/categories: valuations (n)	Definitions and examples	Affective patterns					
		+S	+O	+HH	-S	-O	-LL
Donor (<i>n</i> = 3)	“My children achieve a good understanding about the inheritances!” [Vicente]; “I have some money . . . I wish them to use it as they want . . . just want the best for them, no problems!” [Dinis]			3			
Disagreement (negative) (<i>n</i> = 3)	Conflicts during transmission; feelings of disloyalty related to resentments mainly due to the family detachment.						
Heir (<i>n</i> = 3)	“My parents sold all they had; so I didn’t inherit anything from them!” [Vicente] “It hurt me so much . . . that my brother in law kept my father’s books . . . they didn’t belong to him!” [Amélia]						3
Donor (<i>n</i> = 0)	–						
Total		2	3	22	0	1	5

Affective pattern (PNOS indexes) (Hermans & Hermans-Jensen 1995):

+ S (high Self-valuation, and Positive affects) = autonomy and success;

+ O (high Positive affects, and connectedness with Others) = love and union;

+ HH (high Self-enhancement, and connectedness with Others) = strength and union;

- S (high Self-enhancement, with Negative affect) = aggression and rage;

- O (high levels of connection with Others, and Negative affect) = lost or not returned love;

- LL (Negative affect, low Self-enhancement and connectedness with Others) = isolation and impotence

1 negative, $-O$, lost love); (ii) *preparing for death* (one valuation as donor; affective pattern: $+HH$, strength).

In the category *resolution*, more valuations were formulated from the position of heir (8 heir, 3 donor). This category comprises two subcategories: (i) *positive resolution* (5 heir, 3 donor) and (ii) *negative resolution* (3 heir, 0 donor). These valuations are mostly associated to positive affective patterns (8, of which $3+O$, love, and $2+HH$, strength). Three negative emerged in the heir position ($-LL$, isolation).

Altogether, the valuations are characterized (Table 2) mostly by positive affective patterns: 27 positive ($2=+S$, autonomy; $3=+O$, love; $22=+HH$, strength), 7 negative ($2=-O$, lost love; $5=-LL$, isolation), while the $-S$ (aggression) is absent. Valuations from the position of heir reveal five affective patterns ($-S$, aggression, is absent): 9 positive ($5=+HH$, strength; $3=+O$, love; $1=+S$, autonomy) and 5 negative ($4=-LL$, isolation; $1=-O$, lost love). Valuations from the position of donor disclose four affective patterns ($-S$, aggression, and $+O$, love, are absent): 18 positive ($17=+HH$, strength; $1=+S$, autonomy) and 2 negative ($1=-LL$, isolation; $1=-O$, lost love).

Discussion

The results suggest a process of transmission of material inheritances which emerges as a life spanning story in the life histories of elderly persons when they look back over their life. Throughout life and from both positions (donor and heir), by creating a material legacy (includes the inheritances received), it is followed by the emergence of the resolution related to receiving inheritances (heir position), and finally, the transferral as a donor (giving). This process of transmitting material inheritances involves three meanings – *creation*, *transferral*, and *resolution* – in which giving and receiving are components (e.g. Finch & Mason 2000; Goodnow & Lawrence 2013; Rowlingson & McKay 2005).

Creating brings together the two positions (donor and heir) and refers to the process of building a personal material legacy to pass on (donor position), comprising also the material inheritances previously received (heir position). Creating a material inheritance is experienced in the heir position in the past and related to receiving material inheritances expressing

both material and symbolic value (having received something that belonged to a usually significant person). It is associated with the individual's feelings of self-worth (autonomy and success, strength and union) or worthlessness (isolation and impotence), and to the desire to protect the family patrimony (strength and union) or to the inability to do so (lost and unreciprocated love). And creating a material inheritance is experienced in the present in the position of donor by the desire and active engagement in building something valuable and useful to transfer (giving). It is attached to positive affective patterns: self-worth (autonomy and success, strength and union) and desire to protect the family patrimony (strength and union). Creating a material inheritance from the position of donor is mostly perceived in a positive way, while the perception from the position of heir is regarded with ambivalence (both positive and negative). When people assume the position of donors they are probably focusing on what they are passing on (and experiencing positive feelings of satisfaction with what they have built), while when assuming the position of heirs they simultaneously experience gains (material) and losses (of significant relatives) and need to conciliate different perspectives (of the heirs) (e.g. Drake & Lawrence 2000; Sousa et al. 2010; Stum 2000).

Resolution of the material inheritances emerges as meaningful mostly from the heir position. Some participants also reported this meaning as donors because they have discussed their inheritance with their future heirs. In general, resolution (management of what is received) emerges mainly as a task of the heirs (typically after the donors' death). Resolution may take a positive (love, strength, and union) or negative (isolation and impotence) pathway. It has been associated with family conflicts, usually related to differences in perceptions of fairness and justice among heirs (e.g. Drake & Lawrence 2000; Stum 2000).

Transferral of material inheritances only received valuations from the donor position; it reflects the present role of participants in this study and is associated with the handover of the management of their financial issues and with their preparations regarding their death. Typically, this transfer takes place when the elderly feel the need to hand over financial responsibilities and the control of assets, often as a result of increasing feelings of frailty. It implies emotional detachment from certain assets and the desire to transfer these to significant others (e.g. Kohli & Künemund 2003;

Schaie & Willis 2002). This process is mostly attached to feelings of strength and union. Preparing for death refers to the necessity to prepare funeral arrangements and other events associated with their own death, in order to release descendants of burdens and financial expenses. This represents an inheritance attached to strength and union (e.g. Sousa et al. 2010).

Thus, from the older persons' perspective, the process of transmitting material inheritances can be related to different stages in the life span. To the past, primarily characterized by the process of creating and constructing the material legacy, this period also involves the experience of being an heir (receiving). To the present time, during which the donor role is assumed in terms of transferral (giving) mostly in terms of financial responsibilities, and some degree of frailty is usually being experienced. To the future, for which it represents a way of assuring personal care preceding death, and after death when it represents the symbolic presence and contribution to the future of their family (e.g. Schaie & Willis 2002). In terms of the life cycle, it seems that people firstly and throughout their adult lives are involved in creating a material inheritance. Later on, people will have to deal with the resolution, that is, they receive a material inheritance and have to – with other heirs and after the donor's death – resolve the process (in practical, legal, and emotional terms). During old age the main task is to transfer (giving), which will influence the resolution in terms of decisions regarding what to give, to whom, when, and how. This resolution however will not be experienced by the donor as it will be completed only after the donor's death. The donor will aim to avoid conflicts between heirs (protect family relations) and to take care of future generations (Drake & Lawrence 2000; Goodnow & Lawrence 2013). Nonetheless, the donor will die leaving a material inheritance that will need to be resolved by their heirs: the construction of a legacy and the process of transmission start during life but the final resolution (in legal and emotional terms) will occur only after the donor's death. Being a donor seems to create a position that materializes and brings together most challenges (both emotional and practical) associated with old age: care, financial well-being, death, continuity, and life review (Finch 2004; Finch & Mason 2000; Rowlingson & McKay 2005).

Overall, findings suggest that the whole process is experienced emotionally by the elderly person as positive, embedded in a context of positive affective meanings. So it seems that at old age people perceive material

inheritances mostly as a process that brings strength and union to self and family relationships. The literature has shown that even when inheritance presents a conflictive issue, older people tend to omit these problems in an effort to preserve a positive image of the legacy, regulating associated emotions and social interactions in a way that allows them to preserve a positive view of the self (e.g. Carstensen & Charles 1998; Sousa et al. 2010).

Limitations and Research Perspectives

The main limitation of this study is the limited size of the sample. The collection of data from larger samples may reveal additional valuations and affective patterns, but mostly it would allow for comparisons taking into consideration socio-economic and demographic variables (such as gender, socio-economic status, number of children, and grandchildren). There is also a need for research that allows to develop further knowledge about individual's considerations related to particular family structures (for instance, in situations of remarriage, when there are no children or in single parent families), about families with diverse socio-cultural backgrounds (Roma families and bi-cultural families, for instance), and different legal systems (in particular, those with more testation freedom). Further knowledge is also required regarding conflicts on the topic of material inheritances.

Conclusion

This study explores meanings and affects associated to material inheritances by elderly people, considering their life experiences both as heirs and donors. Results suggest a process of transmitting material inheritances involving creation, transferral, and resolution. It represents a lifelong process that impacts both individuals and families. It is a process that connects past, present, and future and that connects members of different generations within a family, including those who have passed away. In narrative terms, it constitutes a story in the history of the individual and his/her family. In a person's life, this story seems to start with the creation of a material legacy, followed by the experiences of receiving and resolving such a legacy, and finally, in old age it is concluded with transferral (giving). It provides new meaning to old age and to death, as it brings about a sense

of symbolic continuity and of continuing influence on the family. The processes of transmitting material inheritances are like a never-ending story, re-experienced from generation to generation.

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Spatial pattern of structural ageing in eastern Croatia: evolution and explanations

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Abstract

This article aims to examine the ageing situation and social policy issues in the Osijek-Baranja County of eastern Croatia. Using historical evidence from census data, research suggests that the evolution of the ageing pattern has been mainly determined by such factors as development of the transport system, changes in political–territorial organisation, supply of jobs in the cities, deagrarianisation and a domestic war in the 1990s. The increased importance of urban centres, through planned industrialisation and administrative centralisation, has accelerated and intensified rural-to-urban migration. Consequently, the spatial pattern of structural ageing has been substantially affected. A significant variation was found in urban and rural areas and also within sub-regional units. The findings suggest that the evolution of spatial disparities in the ageing pattern is because of unplanned migration; spatial differences in the level of socio-economic development; the influence of tradition, such as higher fertility rates historically in some

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areas; and suburbanisation, notably around the city of Osijek. The article concludes that ageing is affecting the country's economic growth and the formal and informal social support systems, including the provision of resources for older citizens in the endangered areas.

Keywords: ageing, Croatia, spatial pattern, demographic transition, Osijek-Baranja County.

Introduction

Croatia has recently been ranked as one of the most rapidly ageing countries in the world after Japan and Italy (Bloomberg 2014). It is now among the top ten oldest nations in the world, with about 24.8% of the population over the age of 60 years. This gives an important message to policy makers to include ageing agenda in national planning and development strategies (UN 2013). Studies show that population ageing is obvious, and it has a profound effect on every aspect of socio-economic development (Khan 2014; McDaniel & Zimmer 2013; UNFPA 2012). Ageing has not received much attention in the population research discourse in Croatia and yet it has intensified during the second half of the 20th century. This has caused overwhelming economic, social and developmental problems, as well as growing disparities between the regions (Jukic & Turk 2010). Research in the past has focused either on the determinants of population dynamics at the national level (Wertheimer-Baletic 2004) or at the regional level (Jukic & Andrakovic 2009; Jukic & Turk 2010). But these studies suffered from insufficient empirical evidence and by the lack of adequate recognition of its consequences. Little is known about the dynamics of ageing by time and space, particularly with regards to the spatial distribution of ageing populations at sub-regional levels in Croatia.

Unlike previous research, this article is unique in employing a comprehensive approach to a better understanding of ageing trajectories. Integrated spatial and temporal approaches are utilised, including the analysis of various demographic and developmental factors. Political, geographical and developmental features are also used as these determine the spatial pattern of ageing. This article thus investigates the spatial and temporal

variation of factors affecting the ageing process and its spatiality over time in Croatia.

The interdependence of population–environment interactions is recognised by international research (Abdel-Rahman & Wang 1995; Antrop 2004) and is because of the development of positive long-term human activities within the society (Higgins & Savoie 2009). Research exploring the aggregate level is often unable to identify the effects of variability at the lower level of data hierarchy, such as at regional or sub-regional level (Khan 1997). The spatial demographic analysis therefore is better suited to understand more precisely the deep-rooted problems in society. According to Voss (2007: 458), “Until roughly the mid-20th century, virtually all demography in the United States and elsewhere was spatial demography, defined as the formal demographic study of areal aggregates,” that is, of demographic attributes aggregated to some level within a geographical hierarchy. In recent years, various authors have applied different modes of spatial analysis in demography. Guilmoto and Rajan (2001), for example, analysed spatial patterns of fertility transition in the Indian districts, using kriging (Gaussian process regression) and spatial autocorrelation, whereas others, such as Chi and Ventura (2011), utilised an integrated spatial approach to analyse population change and its driving factors in rural, suburban and urban areas of Wisconsin.

Another important issue covered by this article is the utilisation of time and space combined together in ageing research. This approach has a long history of application that is particularly evident in ageing research conducted by Japanese economic geographers during the 1980s. In order to understand the ageing situation in Japan in relation to international perspectives, Takayama (1983) classified Japanese prefectures by the different spatial patterns of ageing. Extending the same research discourse, Kaneyasu (1987) applied Klaassen’s method of spatial analysis (Klaassen 1979) to identify inactive areas with the rapid increase of ageing that pose a threat to the socio-economic stability of Japan. In contrast to these approaches, the present research adopts a slightly different framework by drawing on population dynamics that are essentially temporal and on population geography with its dominant spatial approach. By doing so, it is possible to harness the strong points of both disciplines and offer different insights into population processes.

In addition to adopting the perspective provided by the spatial pattern of ageing, in this research we also use a notion of structural ageing. This means moving from the typical notion of “ageing population” that has been most commonly used in Croatian demography in the past decades of the 20th century, to a more useful notion of the age-structural shift. According to Harper (2011), an age-structural change perspective allows for viewing population change in terms of a shift between providers and dependents that is particularly important for understanding the economic impacts of an ageing society.

Before giving a detailed ageing analysis of the selected area of eastern Croatia, a brief overview is provided of the dominant population processes in Croatia as a whole. It is followed by an analysis of the relevant ageing indicators shown at the spatial level and the discussion where we suggest the main causes (factors) of the evolution of the spatial pattern of ageing. The article concludes by discussing policy implications and recommendation for future research.

Setting and Historical Context

Since the mid-20th century, Croatia has been undergoing a deep socio-economic transformation (Jukic & Turk 2010). The main driving forces behind the rapid shifts were agricultural restructuring and industrialisation of the urban centres (Jukic 2007, 2011). Deagrarianisation freed a large number of workers in this traditionally agricultural area and has contributed to the growth and rapid expansion of a few urban centres, particularly the development of manufacturing industries and services. Friganovic (1987) says that these processes have been accompanied with a decline for fertility, out-migration and depopulation across large tracts of peripheral rural areas. All this has caused profound changes in demographic trends and has consequently generated a spatially different pattern of ageing (European Commission 2011; UN 2012). The economic and social significance of this change and its implications are yet to be fully appreciated. So far, researchers have posited strong links between general underdevelopment as well as the factors of peripheral geographic location, weaker employment opportunities, unadjusted settlement network, poor access to health care and education, inadequate availability of transportation and dissatisfaction with quality of life (Jukic 2011).

Osijek-Baranja is a geographical region of eastern Croatia, administratively referred to as Osijek-Baranja County.¹ It is a prime example of spatial unit experiencing demographic, socio-economic and developmental decline that has proved to be much deeper and more pronounced when compared with other parts of Croatia. For the sake of simplicity and consistency, this region will be referred to in this article as “Osijek-Baranja.”

There has been no research carried out in Croatia until now for identifying the aspects of spatial distribution of ageing and their evolution. Such a study is urgently needed in order to provide guidelines for local and regional planning. As pointed out earlier, research efforts have been made but only using macro data, particularly at the state level, which does not provide deeper insights into the evolution and consequences of factors affecting the population. It is only recently that Croatian authors have applied slightly different approaches to their explorations of the population at the local level. For instance, while analysing the determinants of fertility and mortality, Jukic and Turk (2010) discovered and explained significant micro-level variation within Osijek-Baranja. The glaring discrepancies, as noted by the authors, had an unfavourable effect on development at the local level. A hint of similar findings can be seen in the results of a social survey of rural households in Dakovo area that is located in the southwestern part of Osijek-Baranja (Jukic 2007).

Methodology

The analysis is drawn from two major data sources: (1) decennial population censuses of Croatia (1961–2011) and (2) yearly vital statistics (see data). There are strong reasons to believe that this period is of the highest importance in determining the evolution of, and providing an explanation thereof, the spatial pattern of structural ageing. The censuses conducted during the four decades of the 20th century make it possible to capture the effects of all the dominant factors behind the emergence of spatial discrepancies in indicators of ageing. The analysis stretches to the Census of 2011 as we believe that the years between 1991 and 2001, during which

¹ In spatial terms, Osijek-Baranja corresponds to the NUTS3 statistical level of the European Union (Nomenclature of Territorial Units for Statistics), codified as HR04B (CBS 2012).

time there was the war in the Balkans, help to give final shape to the ageing pattern in terms of its spatial structure. The demographic processes in the last available intercensal periods between 2001 and 2011 are characterised by a continuation of negative population trends but without significant changes in the spatial pattern of structural ageing. Therefore, the main analysis here is focused on the earlier periods when a contemporary ageing pattern was formed.

Spatial demographic analysis was made in two ways: the data on ageing was extracted from the censuses/vital statistics and adjusted to spatial units having in mind all the changes in territorial organisation over the period 1961–2011. The interpretation of causes and consequences of changes in the spatial pattern of ageing builds upon detailed empirical analysis of several factors in the same area and period: historical and industrial development, labour supply, urbanisation, agricultural restructuring and the domestic war.

From a methodological point of view, there are some technical constraints in the spatio-temporal analysis provided in this article. This is the case even after statistical and mathematical methods of data analysis have proven to be successful when it comes to their application to spatial analysis (Bailey & Gatrell 1995; Fotheringham et al. 2000; Haining 1990). A spatial dataset of 42 municipalities (with 265 settlements) of the time-constant area of Osijek-Baranja has also been used to examine how factors are associated with these units and how they shaped the spatial pattern of structural ageing from 1961 to 2011. Such analysis allows us to capture variation at the sub-regional level of the county. The advantage of using municipalities, as a unit of analysis, is their relevance to planning as each unit has a solid level of autonomy in raising revenues and provision of services to their population. Municipality boundaries have been changed in the past, but the data were adjusted in accordance with the latest administrative divisions to assure spatial consistency over time. To provide a stronger background to the evolution of the spatial pattern of ageing, the analysis is supported by the examination of ageing indicators for urban and rural settlements, as well as for six sub-regions (areas). These sub-regions are, in fact, groups of rural settlements administratively and functionally oriented to a particular urban centre.

We define ageing population as those aged 65 years and over with ageing index and dependency ratios used to compare ageing situations

over the period 1961–2011. The ageing index is defined as a ratio between the population aged over 65 and under 15 years of age. The spatial level analysis ranges from lower to higher levels – from local level (urban and rural settlements), the medium level (municipalities and sub-regions), to regional level (county) – thus capturing an overview of ageing trajectories and variation at the different levels.

Data

There are at least two major problems with all censuses conducted in Croatia (especially between 1961 and 1991): (1) relatively low level of detail and (2) lack of consistency and comparability in socio-economic variables. The disadvantages are especially exposed when it comes to migration. Croatia does not have well-defined migration statistics (neither in the form of Census or Population Register). The only way to infer about whether some area (spatial unit) has immigration or emigration is by measuring a net migration balance (comparing total population change with the vital statistics). The census data contain age, sex, education, economic activity, primary occupation (main types of job) and ethnicity, but not all of these variables were directly used in this research.

Results and Discussion

Croatian Demographic Transition

In order to understand the evolution of the spatial pattern of structural ageing in eastern Croatia, it is necessary to provide a brief overview of the characteristics of the Croatian demographic transition. Since the end of the Second World War, which was immediately followed by a short “baby boom” period, Croatia has experienced a continuous fertility decline. This decline lasted up to the beginning of the 21st century when fertility levels stabilised at the level of below replacement. The total fertility rate (TFR) has gradually declined since the 1960s, falling sharply from 2.30 in 1961 to 1.99 in 1981. It reached the lowest level of 1.38 by 2001, and according to the 2011 census, has slightly increased again to 1.46 (CBS 2013). This means that during the 1980s, with a much lower level of economic development,

Croatia had a TFR similar to developed European countries. As Sobotka (2011) pointed out, the lowest recorded fertility level at the turn of the century is consistent with fertility trends in other Central and Eastern European countries after the collapse of communism. Mortality in the last half of the 20th century, on the contrary, was already low and similar to other European countries (Svaljek 2011) and so has not played an important role in the demographic development of the country. The life expectancy at birth in Croatia has gradually risen from 66.4 (68.9 Female; 64.0 Male) in 1961 to 76.1 years (80.3 Female; 73.6 Male) in 2011. During the same time period, Osijek-Baranja showed a similar trend of fertility decline but at a significantly lower level of TFR: 1.70, 1.55, 1.16 and 1.20 in 1961, 1971, 2001 and 2011, respectively.

Migration is an important factor that altered demographic development of the Croatian population in the second half of the 20th century because of unprecedented out-migration. Between 1961 and 1971, the net migration balance has been negative by over a quarter of a million (– 258,469). This position recovered slightly during the 1970s (+ 58,689) and 1980s (+ 33,407) and then rapidly dropped in the period between 1991 and 2001 (– 247,355). In the last 10 years for which data are available (2001–2011), the net migration balance is estimated to be around – 146,000. In the earlier research, Jukic (2011) demonstrated that since the 1960s, Osijek-Baranja has experienced a net loss of young people moving mainly to other European countries. It is important to acknowledge that the investigated area belongs geographically to eastern Croatia where the domestic war of the early 1990s additionally accelerated out-migration. In the 1990s, the crude rate of net migration in Osijek-Baranja went down to – 35,518 (nearly 10% of the total population). There is evidence to suggest that those who emigrated were generally of a younger age and higher level of education (Jukic 2011; Jukic & Turk 2010; Turk & Jukic 2010).

In a nutshell, between 1991 and 2011, fertility decline and out-migration both contributed to an overall decline in the size of the Croatian population. At the same time, the ageing has progressed because of a continuous decrease in the numbers of the youngest cohorts (0–14) and a fairly rapid increase in the numbers of the elderly (65+). A future population decline is expected. According to the ageing index, in 2012 Croatia held ninth place in Europe (120), with only Germany (157), Italy (150), Bulgaria (141),

Greece (136), Latvia (130), Portugal (129), Austria (124) and Lithuania (123) being ahead (European Commission 2011). A majority of these countries belong to Southern Europe or to a post-communist Central and Eastern Europe that witnessed a significant decrease in fertility rates. The latter group of countries, including Croatia, experienced a shift from communism to capitalism that included drastic socio-economic changes accompanied by deteriorating living standards, employment uncertainty and a rise in income inequality (Frejka 2008; Kohler et al. 2002; Sobotka 2011).

Population Ageing in Osijek-Baranja

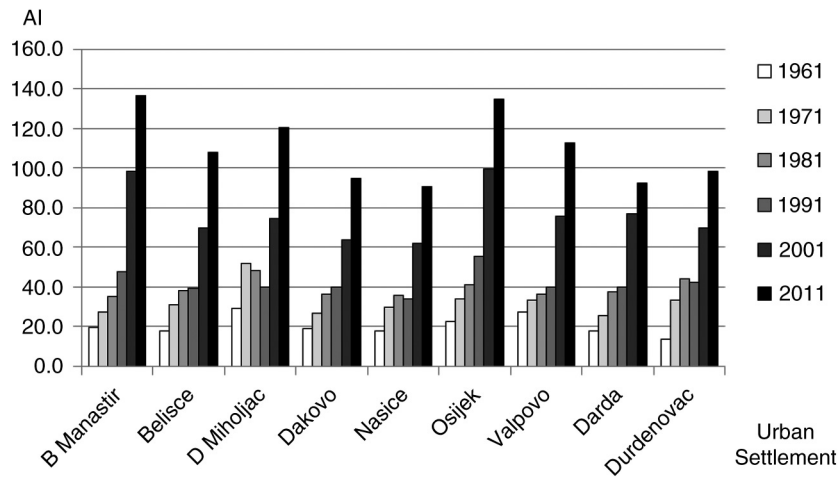
Demographic processes identified at the national level also apply to Osijek-Baranja in the same period. The share of younger population (under 15) has declined from 29.1% (1961) to 15.3% (2011). During the same period, the elderly population has significantly increased from 6.4% to 16.9%, and the ageing index has increased by almost five times, from 22.0 to 110.1. In comparison with the national data, Osijek-Baranja had only a slightly younger population (CBS 2012, 2013).

Previous studies by Jukic and Turk (2010) and Jukic (2007) proved the interdependency between ageing and urbanisation. As the strongest centre for urban-based industrialisation and the central hub for political and territorial organisation, Osijek provided the highest supply of jobs in the manufacturing industry, as well as jobs in services and administrative affairs, while all other urban settlements had only a limited effect. The functional weaknesses of certain urban centres (limited supply of jobs) prompted workforce to emigrate to surrounding rural settlements. In 1961, both urban and rural settlements had a fairly balanced ageing index, with only a slightly higher level in rural (22.2) compared with urban settlements (21.8). The figures have drastically changed within two decades. In 1981, there was an increase of 51.4 and 39.8 in rural and urban settlements, respectively. This substantial difference was mainly a consequence of an intensive rural-to-urban migration that reached a peak during the 1960s and 1970s. By 2001, the difference had disappeared and the data for 2011 show that rural settlements had lower ageing index (101.1) than urban (121.1). The urban immigrants of the 1960s and 1970s mostly entered into old age, while the out-migration of young urban people increased during the 1990s. The differences between particular urban centres and within different rural

areas in this locality were very pronounced throughout the entire recorded period. This finding requires further analysis at lower levels.

Within the study period, all urban centres experienced an increase in the ageing index (Figure 1). In 1961, its values were fairly balanced, with slightly higher levels in the peripheral urban centres near the Croatian–Hungarian border, namely Donji Miholjac and Valpovo. Although the ageing index increased over the next 30 years in all centres, the growth was steady. However, after the 1990s, the value rapidly increased. According to Jukic (2011), such an increase was partially prompted by the selective out-migration of the younger population as a consequence of war. But one of the main reasons behind it was ageing of the immigrant cohorts that had moved to the cities in the 1960s and 1970s. The 2011 Census data show that of those cities highly exposed to war activities in the 1990s, Osijek and Beli Manastir (occupied by Serbian forces from 1991 to 1997) had the highest ageing index. The most striking feature is the ageing index of Osijek that reached 135 (old population exceeding young by 35%). Such advanced ageing in the regional capital that makes up one-third of the total

Figure 1. Ageing index of the urban settlements in the period 1961–2001. *Source:* CBS (2013).

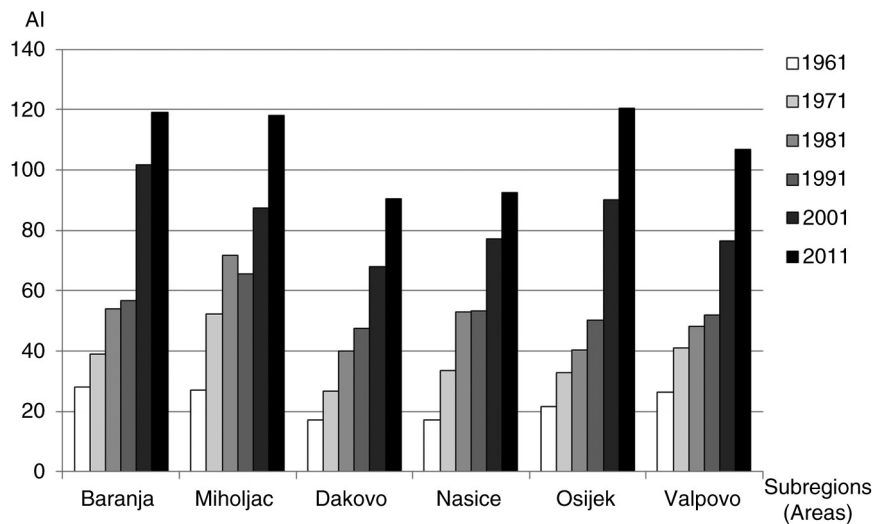


population, heavily weighted the overall ageing of Osijek-Baranja. By contrast, Nasice, Dakovo and Darda maintained the lowest values of ageing index in 2011. Moreover, Dakovo was the only urban settlement where the total population increased in the post-war period (1991–2001), while Nasice experienced the lowest decrease of total population.

A comparison of the ageing indices among six sub-regions of rural settlements is given in Figure 2. It is evident that the ageing process has progressed significantly over time with noticeable local differences. However, huge disparities can be seen between Baranja and especially Miholjac sub-regions on one hand, where both stood out as the “oldest” areas, and Dakovo and Osijek on the other, representing the areas with the youngest population. It is generally well documented that within the population of the first two sub-regions, fertility decline and emigration started earlier compared with the other two sub-regions (Jukic & Turk 2010).

Figure 2. Ageing index in the rural settlements of the six sub-regions of Osijek-Baranja County in the period 1961–2001.

Source: CBS (2013).



Ageing at the Municipality Level

The ageing index at municipality level reveals a spatial dimension of ageing. This helps in understanding the influence of certain factors that caused spatial disparities in the ageing pattern. To examine their effect, we first consider the period 1961–1981. Figures 3 and 4 show the direction and intensity of the changes in these decades. In 1961, when the dominant socio-economic processes just started to shape development and consequently the population, the ageing index did not differ considerably across the county. The peripheral eastern and northwestern areas had a slightly higher value,

Figure 3. Ageing index of the municipalities in 1961.

Source: CBS (1962).

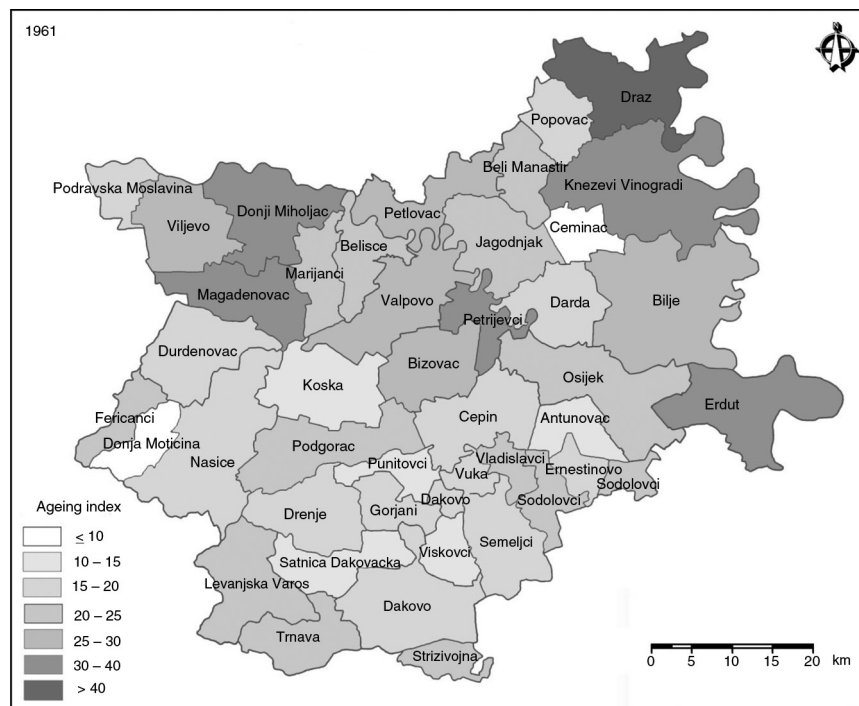
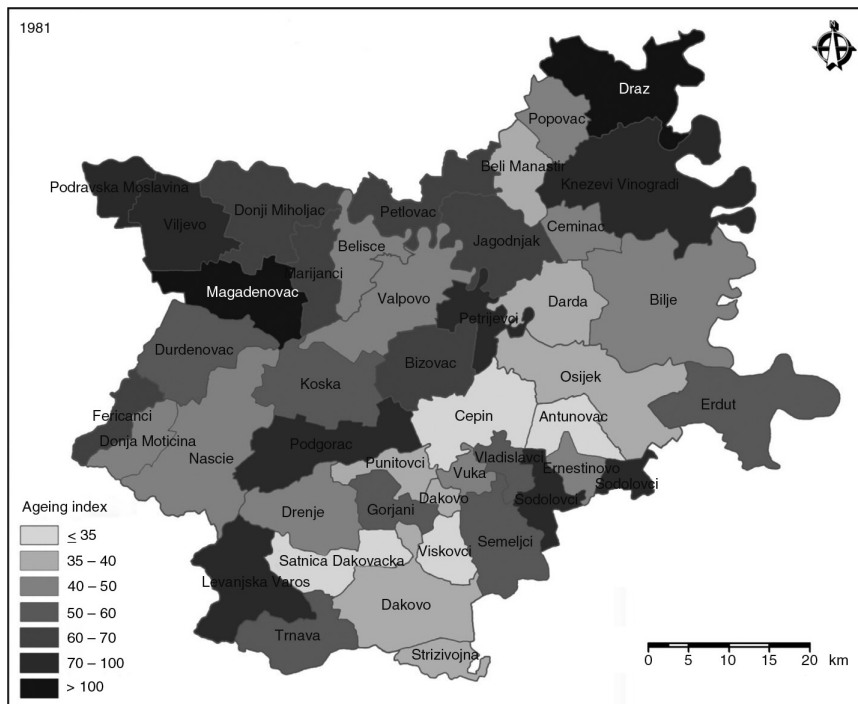


Figure 4. Ageing index of the municipalities in 1981.
Source: CBS (1981).



somewhere between 30 and 40. These parts, especially the rural settlements of Draz municipality (66.8), were already sparsely populated, mostly because of the bordering position and isolation from main traffic thoroughfares. By contrast, the southern areas, especially the settlements of the Dakovo area and the southern part of the Osijek area, had a very low ageing index. Before the Second World War, as these areas were rich in fertile soil, they had been a destination point for the immigration of farmers from other parts of Croatia and surrounding countries, especially from Bosnia and Herzegovina (Jukic 2007). Consequently, larger settlements have formed,

particularly along the main traffic thoroughfares from Osijek to Dakovo, thereby connecting this region with other parts of former Yugoslavia, the state that ceased to exist in 1991.

Figure 4 shows the structural ageing index in 1981. First, ageing index increased drastically across the county, followed by an apparently new pattern of ageing, separating those areas with highly advanced ageing from those areas with a much younger population. The outermost northwestern and eastern areas maintained lead position in the intensity of ageing, but their territorial coverage had been extended by 1981. These areas covered the rural settlements in all municipalities of the Miholjac area, together with the northern part of the Nasice area and almost the entire Baranja area, with the exception of municipalities along the main route that runs from Beli Manastir to Osijek. The western hilly municipalities of the Dakovo area that once had a very young population experienced higher ageing during the 1960s and 1970s. In some municipalities, such as Levanjska Varos, the ageing index doubled during this period.

In contrast, the lowest value in 1981 was recorded in the area stretching northeast to southwest, covering the regional capital of Osijek, its suburban area and the eastern part of the Dakovo area. The reason was not only a better connectivity because of the favourable position on or near the main traffic route that also enabled the establishment of a commuting system for the workforce but also traditionally higher fertility rates that have historically been recorded in the eastern Dakovo area. Wertheimer-Baletic (1995) argues that the higher fertility rate identified throughout the 20th century in the Dakovo area has been a consequence of constant population replacement affected by the migration of farmers. According to this author, while the autochthonous population was leaving, population from other parts of Croatia that were characterised by infertile soil and the high density of the farming population per unit of farming land was immigrating. It is important to note that the eastern parts of the Dakovo area boast the most fertile soil in Croatia (OSPO 2001).

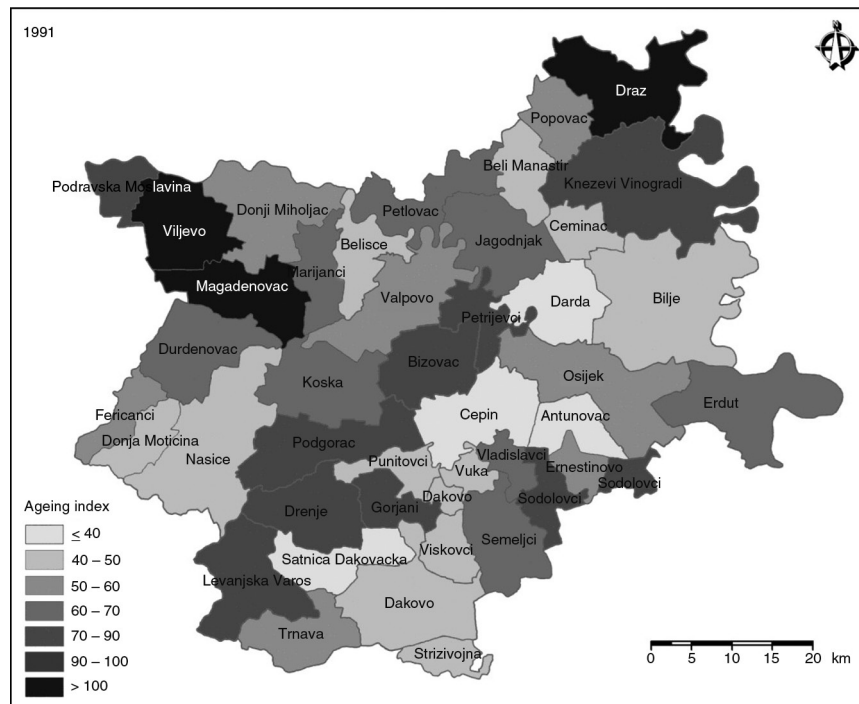
The evolution of the ageing pattern between 1961 and 1981 has apparently been driven by planned industrialisation that took place mainly in the regional capital of Osijek and, to some extent, in smaller urban centres. Together with agricultural changes in the wider region, this process has triggered migration and helped to shape its patterns. Young people

(potential parents) were primarily pulled out of rural areas and directed towards the urban centres, where they found jobs in industry and services. The areas within the reach of urban centres have developed commuting systems for use by their labour force that helped prevent a complete loss of their inhabitants of working age. This can be seen most obviously in Osijek's surrounding areas and the settlements along the main traffic routes connecting the capital with Dakovo, Belisce and Beli Manastir. In the case of other urban centres, political and territorial organisations have contributed significantly by acting as a complementary force to planned industrialisation and by enabling the rise of services. Old municipalities (prior to 1991) were organised around six centres and had complete autonomy in deciding about the future planning of their economies (Zuljic 1982). Planned industrialisation acted as an anchor that prevented the total loss of the younger labour force, released by the agricultural restructuring of adjacent rural areas. However, the reach of their influence was constrained by their weaker economic power and by the lack of quality traffic connections (road and rail).

Rural areas situated away from this "growth axis" were exposed to rapid "ageing in place." The birth rate was already very low and the sex ratio imbalance fuelled its decline further. The men usually stayed on their agricultural properties, while women emigrated in larger proportions to find jobs in the cities. This process is in accordance with the general theory of village communities by Mendras (1976) who claimed that women started to emigrate from rural areas at a later stage than men, but when women joined the process, it was in very large numbers. In Osijek-Baranja, this same process occurred during the 1960s and 1970s. An indication of a further fertility decline in rural areas emerged because of an imbalance in the cohorts ranging from 15 to 34 years old. The sex ratio here oscillated around 90 females to 100 males in 1981, while in some areas, such as the municipalities of the far northwest and northeast, it reached 75 females to 100 males.

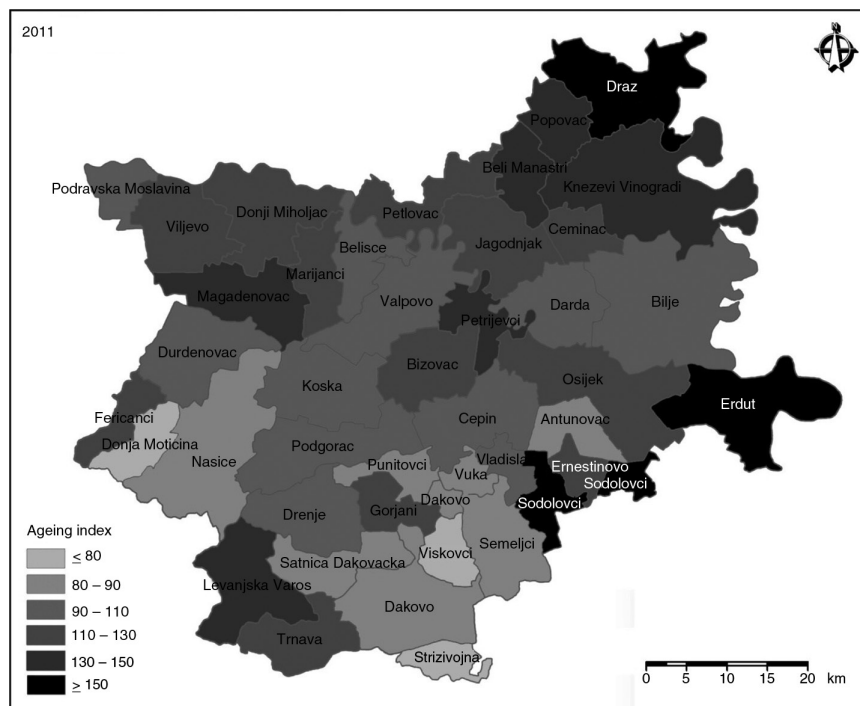
The period between 1991 and 2011 represents a final stage in the development of ageing pattern in Osijek-Baranja (Figures 5 and 6). A comparison of the two ageing patterns reveals an apparent advancing of the process across the county but with significant differences in its intensity. The municipalities with the highest increase of the ageing index are those directly exposed to war in the 1990s. The ageing index in 2011 reached its

Figure 5. Ageing index of the municipalities in 1991 (pre-war state).
Source: CBS (1991).



maximal values in the municipalities of Baranja and the peripheral parts of the Osijek area. The domestic war had a crucial impact on the advancement of ageing in these areas, but to completely support this argument, we must bear in mind three important facts: (1) Baranja and the peripheral parts of the Osijek area were an ethnic mixture dominated by Croats but with significant numbers of Serbs; (2) because of the economic collapse during the occupation period (1991–1997) and after, the Serbs have mainly emigrated to Serbia; and (3) because of the scale of economic devastation, younger generations of Croats decided not to move back to these areas. It is

Figure 6. Ageing index of the municipalities in 2011 (post-war state).
Source: CBS (2013).



also noteworthy that the war was not the only reason for the degraded economy of the region (Jukic 2011). An area of continuously highly advanced ageing, where the effects of war were not so profound, stretches from the northwestern Miholjac area, through the middle of the Nasice area to the western hilly parts of the Dakovo area. The advancement of ageing in these areas is a consequence of the insufficiencies from previous periods, particularly the absence and/or underdevelopment of surrounding urban centres, that triggered the emigration of younger people and ageing in place of older residents.

The areas with more favourable ageing levels, expressed through the ageing index, were spatially reduced from 1991 to 2011 (Figure 6) to include small tracts of the southern Osijek area and the eastern part of Dakovo area.

Synthesis of Spatial Differences

An advantage of the spatial approach in demography is its ability to allow for visualisation and thereby provide explanations from cartographic representations. It is perhaps a powerful tool to identify and tease out the effects of important variables. The evolution of the ageing pattern perceived through the change of the ageing index at municipality level between 1961 and 2011 (Figures 3–6) enables us to make a clear distinction between the areas that ended up in completely different phases of structural ageing in 2011. That particular moment reflects the influence of the main driving factors affecting the change in the ageing pattern and is found to be different from all the previous periods. Given all the above, five areas can be identified showing those with the most adverse characteristics of ageing up to those having the most positive features:

1. Almost the entire Baranja area (excluding Osijek suburban area of daily commuting), together with the peripheral eastern part of the Osijek area (Erdut and Sodalovci), is characterised by very advanced ageing (i.e. the ageing index is higher than 130). The share of older people in many settlements goes well beyond 30%, and some villages have completely lost their population (e.g. Podunavlje, Sokolovac and Suduraz). Ageing in those areas is the consequence of an immersive interaction between poor connectivity (lack of proper roads), proximity of the border (economic underdevelopment of the trans-border area of Serbia and Hungary) and poor supply of labour. These factors laid the foundations, but the war in the 1990s struck a vital blow that accelerated ageing. We should reiterate that the Serbs occupied these areas for 7 years, up to 1997, when peaceful reintegration took place.
2. A continuous area stretching from the hilly municipalities of the western Dakovo area to the lowlands of Miholjac, where ageing is highly advanced (i.e. the ageing index in excess of 110). A share of the elderly in many settlements is higher than in the foregoing area

(often around 50%), which is mainly a consequence of the smaller settlement sizes (some have less than 50). However, a substantive difference between this and the area described in (1) above is that it more or less reached a highly advanced "stage of ageing" long before the 1990s, with some areas doing so in the 1980s. In this area, the war did not have a significant influence. The most important reasons for ageing here was its remoteness from the main traffic corridor and a delay in setting up industrial facilities. It is also because of insufficient diversification of the economy in Nasice and Donji Miholjac, the cities that should have served as a destination for the workforce "released" from agriculture in the years between the 1960s and 1980s. They industrialised during the 1980s, far too late to retain the population in the more distant settlements of their sub-regions.

3. Spatially limited and discontinuous zones around five urban settlements of secondary importance (Nasice, Valpovo, Belisce, Beli Manastir and Donji Miholjac) characterised by a relatively better ratio between the old and young populations, especially when compared with the areas mentioned in (1) and (2) above. The ageing index in these zones increased steadily between 1961 and 2011, reaching its peak in 2011, with the values lying between 60 and 75. These areas are prime examples of the influence of territorial and administrative organisation on socio-economic conditions that had an effect on ageing. Limited industrialisation was mostly carried out in the 1980s while administrative rules adopted by these former centres of municipalities attracted younger people that helped to slow down ageing. The share of the elderly is relatively low, varying around 15%, but it is very likely that it will grow in the future.
4. The regional capital Osijek, which up to 1981 had maintained a relatively young population due to the immigration of working population contingents that arrived during the 1960s and 1970s triggered by an unprecedented growth of industry and services. However, an industrial crisis in the 1980s and the domestic war in the 1990s gave a boost to ageing that resulted in a very high ageing index in 2011 (135). The advancement of ageing in the past few decades is a combination of ageing in place, particularly among the immigrants of earlier periods, and enormous out-migration as a consequence of the war. It is

noteworthy that Osijek lost nearly 20% of its population in the years from 1991 to 2011, with emigration largely comprising younger (working age) Serbs while older Serbs stayed in the city (Turk & Jukic 2010). The emigration of Croats continued between 1991 and 2011, primarily as a consequence of the breakdown of industry and high rates of unemployment.

5. A continuous area of suburban settlements in the southwest of Osijek, including a narrow zone stretching along the main traffic route running from Osijek to Dakovo and further south, as well as the town of Dakovo with its surrounding settlements. This area is characterised by the lowest ageing index in Osijek-Baranja, ranging between 70 and 90, and with a relatively low share of the elderly. According to Jukic (2011), this situation is the result of a recent spatial redistribution of the population within Osijek's urban region. This means that younger people may have moved from the city to these areas, thereby directly decreasing the share of the elderly, and also indirectly through the influence of higher fertility rates. Good connectivity along the main traffic route from Osijek-Dakovo has enabled the workforce to commute daily, which was crucial for the prevention of permanent out-migration. It is noteworthy that the zone of the eastern Dakovo area has been traditionally a high fertility area (Jukic 2007).

An examination of the changes in the elderly dependency ratio (EDR), that is, the ratio of older dependents (65 years or more) to the working-age population (aged 15–64 years), between 1961 and 2011, has shown that the EDR has increased over the years. As Sanderson and Scherbov (2007: 49) underscored, "the old dependency ratio has been used to analyse different aspects of ageing ranging from retirement across the burden of public pensions to the more amorphous concept of old-age dependency itself." However, research on dependency ratios in developed countries, where many people aged 65 and above are living independent and active lives (income coming from a variety of sources, including savings, returns on investments and private and public pensions), cannot be fully applied to Croatia. It is important to keep in mind that the usual retirement age in Croatia is still 65 years for males and 60 years for females, as well as the elderly in Croatia depending on pensions provided by the government.

The majority of the retired population comprises former farmers and their situation is bad as they do not have a full pension funded by the government. The poverty and inaccessibility of goods forces them to keep working on small agricultural properties around their houses. An additional unfavourable factor is that most of them live in the remote and sparsely populated municipalities in the peripheral parts of Osijek-Baranja.

In 1961, before the major socio-economic transformation started, the EDR had been relatively low throughout Osijek-Baranja. Most municipalities had an EDR ranging between 7.5 and 12.5. The exceptions were the municipalities in the far eastern part of Baranja and the northwestern Miholjac where the EDR was much higher (around 20). As mentioned previously, these areas were already sparsely populated in the 1960s because of the long-lasting emigration prompted by their relative isolation from their main traffic routes, bordering position and the lack of work in industry and services. By contrast, the southwestern parts of Osijek area, almost the entire Dakovo area and the central parts of Nasice area had very low EDR (e.g. 6.4 in Osijek). Their age-structure was young because of the very high fertility rates and in some parts, because of the long-lasting immigration from previous periods (particularly the Dakovo area and the suburban area of Osijek city). However, by 2011, the ageing process had changed the EDR dramatically. Its values have increased throughout the county but with a noticeable spatial difference. The area with the lowest EDR covered the suburban area of Osijek city, the eastern Dakovo area and spatially isolated spots around Nasice. On the contrary, the highest EDR was recorded in the Baranja hilly parts west of Dakovo and in the Miholjac area.

Conclusions

The results presented in this article reveal important insights into the main reasons behind the demographic transition and evolution of the ageing pattern in eastern Croatia. The evidence from Osijek-Baranja indicates a strong correlation between the main socio-economic processes that took place between 1961 and 2011 and the spatio-temporal variation in the ageing pattern. The article also demonstrates the causality that is perhaps interlinked with the changing nature of the ageing pattern and vice versa.

The scenarios described are changing along with the pace of development and also over time. The population and development interdependence at various spatial levels provide useful insights for regional and local planning.

The ageing pattern, mainly perceived through changes of the ageing index in the period 1961–2011, has shown the advancement of ageing throughout the county, but the differences between “younger” and “older” areas that existed in the 1960s are still apparent. Highly aged population areas spatially increased until 2011 to cover large tracts of the county, including Baranja, Miholjac area, the central Nasice area and the western Dakovo area. They coincide spatially because of their remoteness from main traffic routes, limited job opportunities in their local urban centres and their close proximity to developments in the domestic war. In contrast, the areas of less evident ageing are located along the traffic route between the Osijek and Dakovo areas and correspond with a higher supply of jobs, strong administrative centres, good connectivity and weaker influence of the domestic war.

We suggest that there are at least five main factors that have influenced the evolution of the ageing pattern: (1) traffic connectivity, (2) political–territorial organisation, (3) supply of jobs in urban centres, (4) deagrarianisation and (5) domestic war in the 1990s. Previous studies have also shown that the population of the selected area was drawn to the “growth poles” where these factors created favourable conditions. Although a detailed examination of each factor is beyond our research scope, it is crucial to posit some important links between them and ageing. When it comes to the first factor, it is noteworthy that during the socialist period (up to 1991) the county became isolated and inadequately connected with the surrounding and mostly underdeveloped areas of Serbia and Hungary. In such a situation, the traffic route running between Osijek and Dakovo became a lifeline that led to more favourable ageing indicators within its proximity. The second factor, noted previously, preordained the economic basis of the county, as during the years 1961–1991, six urban centres – with Osijek as primary city and five other cities as secondary cities – had almost total autonomy in economic planning. However, the territorial reforms carried out with the foundation of modern Croatia and the newly formed Osijek-Baranja County that included 42 municipalities with Osijek as

the capital, caused smaller cities to lose their importance. The third and fourth factors are parts of an inseparable process that most prominently directed population development and imposed a territorial reconfiguration of the population as a rational necessity. Urban-based industrialisation caused spatial inequalities because of the majority of jobs being located in Osijek and other centres delaying industrial development (Nasice, Beli Manastir) or not attracting a supply of trained manpower. The effects of the domestic war in 1991 and occupation of more than 40% of the county's territory has not been felt equally in all areas which was reflected in the ageing pattern. A strong migration outflow in the war period was nowhere as evident as in Baranja and Osijek which experienced most of the damage in terms of destruction. As the war-induced migration predominantly included the working-age population and younger generations, who sought jobs elsewhere, the ageing index in these areas in the 1990s increased sharply.

This research has provided a better understanding of the linkages between socio-economic shifts and population ageing in Osijek-Baranja. The problems deeply rooted in society, which are reflected in the spatial pattern of ageing, become visible through spatially detailed and diverse analysis. The importance is even higher because the county is not only underdeveloped compared with other parts of Croatia but has also been harshly torn by war. Ageing has affected economic growth, formal and informal social support systems and the provision of resources for older citizens. Therefore, local and regional planners should use the evidence drawn from the analysis of the ageing index and dependency ratios at various geographical levels to assure the spatially equitable allocation of services for the aged. The municipality level, which was central to this research, is of crucial importance because of its direct applicability to planning. In broader terms, the findings are also valuable for understanding the interactions between population and development, especially in other countries that have undergone a similar transition but from communism to capitalism.

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Julia Twigg (2013). *Fashion and Age. Dress, the Body and Later Life*. London: Bloomsbury, 174 pp. ISBN 978 1 8748 8696 5 (paperback)

REVIEWED by MARICEL ORÓ PIQUERAS*

In *Fashion and Age. Dress, the Body and Later Life*, Julia Twigg explores how fashion and age “sit uncomfortably together” (p. 1). Despite the exponential ageing of Western population, fashion is primarily related to youthful beauty as opposed to the “greyness” associated with age. Twigg notes that little research has been pursued in fashion studies beyond the age of 40. Still, clothes provide rich information in relation to social position, gender and age and they are key in the social and individual presentation of ourselves. In her study, Julia Twigg looks at what she calls “the tradition of age ordering in dress” (p. 3) in which dress patterns are shaped and associated to both the changes the body experiments with age and also the cultural conceptions of what is acceptable and unacceptable in every stage of the lifecourse. When looking at the question of gender closely, Twigg argues that focussing on dress can actually have a positive side, in which women appreciate the aesthetic pleasure of dress. However, dress can also be related to objectification and, thus, it becomes the best companion of invisibility and marginalisation of women in old age. Although Twigg acknowledges that men also suffer from restrictive socially accepted dress

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styles as they age, she argues that normative femininity is equated to an image of youthfulness which leaves those women who do not comply with it in a kind of limbo that she describes as a “cultural exile from femininity” (p. 5).

Fashion and Age. Dress, the Body and Later Life is especially interesting because of the different points of view and perspectives which Twigg explores in relation to dress, fashion and ageing. The book is divided into eight chapters among which an introduction and conclusion are included. Chapters 2–3 focus on the relationship between clothing and fashion as “age ordering” and explore the meanings attached to an ageing and old body within a cultural framework. Thereafter, chapters 4–7 examine the interrelationship between the previously mentioned items through the voices and life narrations of older women, the discourses of the media through interviewing fashion editors and journalists as well as the voice of the fashion industry with the testimony of design directors for major clothing retailers. Including the first-person narrations, testimonies and answers to specific questions of these consumers, producers and publicists regarding fashion and old age give a three-dimensional perspective and a clearly added value to Twigg’s study. Moreover, the interviews and analysis support Twigg’s initial thesis. According to her, whereas contemporary generations of older people, especially women, as well as media and the fashion industry are engaged in presenting “new ways of being an older person” (p. 5), this new concept of ageing is never completely distanced from normative femininity. In this respect, cultural conceptions of both old age and fashion are still prevalent.

Julia Twigg obtains the voices of older women from an empirical study based on interviews with respondents aged 55 and over, from different social backgrounds and employment circumstances. In chapters 5–6, Twigg is especially interested in exploring older women’s choices of dress and their feelings about these choices in relation to age ordering and social expectations, as well as in relation to the impact and role of bodily changes. Twigg argues that, in general, respondents adopted a “cautious, conservative style” (p. 52) both when attending the interviews but also when choosing their clothes. A common idea that Twigg registered in the women she interviewed was the need to be careful, which brings the

author to the conclusion that cultural ageing “comes upon the individual gradually, operating throughout the life course” (p. 53). Despite the fact that most of the respondents in her study did not feel they had changed that much since their younger years, they adopted dress styles and colours which they believed appropriate for their ages. Appropriateness was either seen as moving away from fashion and, thus, for some of the respondents it meant giving away a pleasurable part of their identity; or, in order to stay in fashion, strict discipline had to be imposed over their bodies. In this respect, Twigg’s studies stays in line with Kathleen Woodward’s (1999) and Margaret Cruickshank’s (2002) earlier studies in which the signs of ageing in women could only be translated in either invisibility or masquerade; thus, leaving very limiting and limited options for women in old age. However, Twigg also senses a shift in women’s attitudes in how they intend to present themselves to the world. Without forgetting appropriateness, Twigg’s respondents also attached the fact of keeping a good appearance with signalling to the outside world their status as respectable older women. In this sense, the author of the study argues that older women are buying more clothes than in the past, they are wearing a wider colour palette and they are sticking to garments which they had worn since their youth such as jeans and tops, which opposed choices their mothers and grandmothers had made in old age.

Through the analysis of four magazines with fashion as a prominent ingredient and aimed at different sectors of the market – Woman & Home, SAGA, Yours, Vogue – the analysis of five British retail chains – Marks & Spencer, George at Asda, Viyella, Jaeger and The Edinburgh Woollen Mill – and interviewing representatives of both sectors, Twigg concludes that, despite being aware of the need of trying to appeal to a growing target of the population over 50, the editorial lines as well as design and marketing strategies of these enterprises are still based on essentially ageist beliefs.

All in all, Julia Twigg’s study is a valuable source of data and worth considering analysis of the intersections between fashion and clothes, the body and identity related to the changes the body experiences with the passing of time and the still limiting and limited cultural and social assumptions attached to old age, particularly in women.

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Liz Lloyd (2012). *Health and Care in Ageing Societies: A New International Approach*. Bristol, UK: Policy Press, 169 pp. ISBN: 978 1 86134 918 7 (paperback)

REVIEWED by DUANE MATCHA*

This review adds to earlier praise of Liz Lloyd's book as essential reading for those interested in health policy for older persons. The wealth of information that is interconnected throughout the book provides a seamless analysis of health and care for older persons. Throughout the book, Lloyd builds on her point "that policies reflect an over-narrow perspective on both health and care" (p. 7). In particular, she addresses the impact of globalization and a neoliberal perspective of health and aging that continues to influence policies toward health and care for older persons. Given the depth of material covered throughout the book, and a desire to be brief yet succinct, I will address the primary chapters and attempt to elucidate the major argument presented.

The foundation of the book is found in the early chapters of the book. Here, Chapter Two "Patterns and trends in ageing and health," Chapter Three "Understanding health and care," and Chapter Four "The policy process in health and care," offer a critique of current policies for health and care of older persons primarily throughout the developed world. An important point in the author's argument is that aging itself has become an economic risk for an increasing number of people. Here, Lloyd discusses the impact of globalization on welfare. A consequence of this trend away

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from public sector engagement is that health policy makers are questioning who should pay for the cost of healthcare for older persons. Lloyd notes that because of the increasing application of a neoliberal economic argument, individuals, rather than society, are being held responsible for costs associated with their health as they age. Furthermore, we know that decreasing mortality rates represent one component of improving life expectancy rates throughout the developed world. However, Lloyd questions whether the increase in extra years lived are being lived in good or poor health. How this question is answered leads to the core theme that frames the rest of the book. More specifically, this theme is that aging populations influence social and health policy and those providing services to them.

The remaining chapters examine more specific aspects of health and care for older persons. Throughout these chapters, Lloyd returns to the fundamental point that older persons are generally viewed as an economic burden and a policy problem. This point is exacerbated when policy success is measured by the increase in life expectancy as well as the prevention of premature deaths.

Chapter Five "Healthy ageing: upstream actions to prevent illness," Chapter Six "Medicine, ageing and healthcare," and Chapter Seven "Care for health in later life," examine health promotion at the primary, secondary, and tertiary levels. Chapter Five examines primary prevention. Here, Lloyd addresses upstream health prevention or the moral message of health promotion in later life. Implied in the expectation of healthy aging is that older people are responsible for maintaining their health.

Chapter Six addresses the restoration of health as the secondary level of health promotion. In doing so, Lloyd introduces the role of healthcare systems. In other words, the restoration of health requires access to the system within which healthcare is provided. For older persons, this may be problematic as they generally require more services than other age groups, thus potentially experiencing greater costs. Furthermore, older persons face problems ranging from the medicalization of old age to feelings of marginalization because of their medical conditions. Thus, efforts to restore health among older persons are highly dependent on public policies toward them and their health needs.

Finally, in Chapter Seven, Lloyd concludes with the tertiary level of health promotion by focusing on potential areas of dependence among

older persons that include long-term care, chronic health, and end-of-life concerns. This chapter is best summed up by Lloyd's statement that "(W)hen policy makers speak of social care for older people their focus is not on the daily activities of helping them to wash and dress or to prepare and eat their meals, but on the economic challenge generated by their dependency and ways of managing this" (p. 124).

In conclusion, this book is essential reading for those interested in understanding the connection between the emerging aging populations throughout the developed world, the provision of health and care, and public policy. The writing style is clear and precise. While the book does not break new ground in its coverage of health, care, and the use of the "other" to marginalize those older persons who do not fit into the "successful" category of aging, it does add its voice to the growing critique of neoliberal economics relative to social policy of older persons and their well-being in the developed world. Lloyd does an excellent job of connecting the intricate web of issues and outcomes associated with the process of aging in a neoliberal economic environment. She effectively lays bare the problems and consequences that aging populations are facing today and will continue to do so in the future. Perhaps the most valuable take-away from the book is the potential that growing aging populations will come to believe that they in fact are a policy problem. However, Lloyd offers us a way forward in our analysis of aging, health, and care. Emphasizing the ethics of care and the creation of an alternative political vision, Lloyd adds her voice to the need for policies that address health and care needs of all older persons.

Harry R. Moody and Jennifer R. Sasser (2012).
Aging: Concepts and Controversies (7th edition).
Los Angeles, London, New Delhi, Singapore &
Washington, DC: Sage Publications, 576 pp.
ISBN 978 1 4522 0309 6 (paperback)

REVIEWED by ANDRZEJ KLIMCZUK*

This book is an unconventional introduction to basic gerontological issues. It is authored by Harry R. Moody and Jennifer R. Sasser, who are developing a theory of critical gerontology. Moody is well known for, among other things, his work with older adult education. He also recently retired as Vice President and Director of Academic Affairs for AARP in Washington, DC. In the seventh edition of *Aging: Concepts and Controversies*, he extended opportunity to work on the book as a co-author to Sasser, who works as a Chair and Associate Professor in the Department of Human Sciences at Marylhurst University in Portland, Oregon.

One of the goals of the *Aging: Concepts and Controversies* is to encourage the reader to think critically about the aging population and socioeconomic issues related to this process, instead of just reporting facts, concepts, and theories. The book also emphasizes an interdisciplinary approach to gerontology, through referring to findings in other fields such as sociology, philosophy, biology, psychology, and economics as well as to public debates. This mix is also reflected in the presentations of practical case studies and the sections "Focus on the Future," "Global Perspective," and

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“Urban Legends of Aging.” In addition, there are exercises for writing, reflection, and debate to foster thinking about ethical and political dilemmas related to aging.

The book consists of three main parts that discuss basic concepts related to (1) a life course perspective on aging, (2) health care issues, and (3) socioeconomic issues. Each of these parts begins with an overview of related theories and data, and then further discusses three to five controversies related to each theme.

All of the twelve controversies or debates in this book do not have a clear “right” answer but are an aid to reflection. They discuss topics and dilemmas regarding older people such as the meaning of old age, the decline of intellectual functioning (including loss of creativity and learning), distribution of health care, protection of older people from bad choices (including elder abuse and neglect), death and dying (including depression and suicide, assisted dying), social security and retirement, aging boomers, and the new aging marketplace (silver industries and silver economy). Each controversy is supplemented by four to six relevant original readings with differing viewpoints. In total, the volume includes excerpts from 53 readings with arguments and counterarguments. The book also contains a student guide for doing research for a term paper in gerontology, a list of important resources on aging, and web-based appendix with an Instructor Site (includes test bank, PowerPoint slides, sample course syllabus) and a Student Study Site (video resources, quizzes, links to websites).

Comprehensive sets of pedagogical features and original organizational approach are the main strengths of this book. Although the book provides a large amount of material, it is also very accessible and fosters reflection on thought-provoking questions. However, the authors did not succeed in using a more narrative, non-polemical tone to contrast with the provocative tone of the readings. As representatives of critical gerontology they, more than the authors of the readings, focus on constructions of aging and the search for a more positive vision of old age and the future of aging. Nevertheless, in using the book for classroom discussion, this added perspective by the authors also makes the book more interesting. *Aging: Concepts and Controversies* may be particularly useful in a class discussion where students can contribute their opinions based on the original

readings from differing perspectives. It is also possible to divide students into small groups during exercises and term paper writing to identify the main issues and points in the readings.

It should be noted that Moody and Sasser mainly focus on issues in the United States. Thus, the book contains basic concepts that may be less interesting for readers in other parts of the world. The US-based data and research on health care and social security may be less useful to a non-American readership. Nevertheless, the described controversies may be considered relevant for a wider international readership as these issues often constitute a taboo and need more local research. This book could thus encourage a more open debate on sensitive issues in classrooms, even outside the United States. Moreover, to those interested in comparative studies, the chapters on analyzing the public policy on aging, the economics of aging, ethical issues, and biases in health and social policies in terms of social class, gender, race, and ethnicity as well as multiple discrimination may be inspiring. The additional value of the future editions may be the use of international and cross-cultural perspectives, materials, readings, comparisons, and practices in non-industrialized countries.

Although this book was written primarily as a textbook for students it could be particularly interesting for scholars focusing on the sociology of aging, the economics of aging, ethics, and health policy who are searching for new or less explored ideas in their countries or regions. It may also be a useful addition to a social gerontology course outside the United States. However, as this book refers to difficult issues and to a significant amount of material, it is rather more suitable for upper-level undergraduates or introductory-level graduates. First-time gerontology students may have difficulties discussing and writing about the controversies. For students new to gerontology, the use of this book should also be complemented by the readings on basic gerontological concepts and theories. *Aging: Concepts and Controversies* definitely encourages critical thinking and may encourage readers' interest in gerontology.

I J A L

International Journal of Ageing and Later Life

The International Journal of Ageing and Later Life (IJAL) serves an audience interested in social and cultural aspects of ageing and later life development. The title of the journal reflects an attempt to broaden the field of ageing studies. In addition to studies on later life, IJAL also welcomes contributions focusing on adult ageing as well as relations among generations.

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