Aging, Society, and the Life Course
Leslie A. Morgan, PhD, codirector of the Gerontology Doctoral Program, and professor in the Department of Sociology and Anthropology at the University of Maryland, Baltimore County (UMBC). Dr. Morgan has 35 years of experience in teaching and research in aging and has published on a variety of topics, from economic well-being and family relationships to assisted living. She has authored or coauthored five books and numerous articles. Dr. Morgan has been principal or coprincipal investigator on several NIH-funded studies of life in assisted living, examining the quality of resident experience and transitions among residents.

Suzanne R. Kunkel, PhD, is the director of Scripps Gerontology Center and professor in the Department of Sociology and Gerontology at Miami University. Dr. Kunkel has 30 years of experience in research and teaching in gerontology. She is the grateful recipient of the 2015 Clark Tibbitts Award from the Association for Gerontology in Higher Education. Dr. Kunkel has published more than 40 articles, books, and book chapters, and more than 30 research monographs on the aging network, innovations in the delivery of home care, population projections, global aging, and gerontology education. Along with colleagues Frank Whittington and J. Scott Brown, Kunkel published a Springer textbook, Global Aging, in 2014.
Contents

Preface xi
Acknowledgments xiii

1. AGING AND SOCIETY 1
Learning Objectives 1
Dimensions of Aging 2
Physical Aging 2
Psychological Aging 4
Social Aging 4
Societal Aging 6
Ways of Categorizing People by Age 7
Chronological Age 8
Functional Age 9
Life Stage 9
The Rise of Old Age as a Social Category 11
Generational Consciousness 11
The Aging Population as a Social Force 12
The Life Course and Old Age 13
Social Perspectives on Aging 14
The Sociological Imagination 15
The Growth of Gerontology as a Field of Study and Practice 18
Summary 20
Web Exercise 21
Key Terms 21
Questions for Thought and Discussion 22

2. STUDYING AGING 23
Learning Objectives 23
Why Do We Conduct Research? 24
The Role of Theory 25
How Do We Conduct Research on Aging? 27
Age as a Variable 27
Separating Age, Period, and Cohort Effects 28
Methods Targeted to Research on Aging 35
Longitudinal/Panel Studies 36
Secondary Analysis 37
Qualitative, Quantitative, and Mixed Methods 38
Event History Analysis 40
Life History and Reminiscence 41
Other Special Issues in Studying Aging 42
Cohort-Centrism, Dynamism, and Limits of Current Knowledge 45
Applying Theory: Cohort Size and Life Chances: The Easterlin Hypothesis 46
Sociology of Science 47
Research Activism 48
Summary 49
TOPOCAL ESSAY. IRONIES OF CRIME: SILVER-HAIRED VICTIMS AND CRIMINALS 51

3. AN AGING WORLD: DEMOGRAPHIC PERSPECTIVES 55
   Learning Objectives 55
   The Aging of Societies 56
   Global Aging 57
   How Do Populations Age? 58
   Applying Theory: Demographic Transition Theory 58
      Measures of Population Aging 60
   Demographic Characteristics of the U.S. Aging Population 73
      Living Arrangements 73
      Geographic Distribution 75
      Gender Composition 76
      Increasing Racial and Ethnic Diversity 76
      Centenarians 77
   Interpreting and Using Demographic Data 78
      The Fallacy of the Demographic Imperative 78
   Summary 79
   Web Exercise 79
   Key Terms 80
   Questions for Thought and Discussion 80

4. THE AGING INDIVIDUAL IN SOCIAL CONTEXT 81
   Learning Objectives 81
   Setting the Stage: Psychology of Aging 81
   Human Development and Aging 82
   Social Context, Life Course, and Individual Aging 84
      Successful Aging: The Role of Social Factors 84
      Environmental Gerontology 85
   Social Context 87
   The Life Course 88
      Social Roles 90
      Age Norms 92
      Structural Lag 97
   Life Course Perspective in Gerontology 99
   Analyzing Theory: The Emergence of Developmental Science 100
   Summary 101
   Web Exercise 102
   Key Terms 102
   Questions for Thought and Discussion 102

TOPOCAL ESSAY. CREATIVITY AND AGE: THE REAL STORY 103

5. AGING AND THE FAMILY: PERSONAL AND INSTITUTIONAL CONTEXTS 107
   Learning Objectives 107
   The Family as an Institution 107
      The Meanings of Generation 108
### Core Norms and Expectations of Family Relationships 108
- Independence and Dependence 110
- Voluntarism and Obligation 111
- Families as Personal Networks 112

### Applying Theory: Family Life Cycle Theory and Individual Dependency in the Family 113
- Strengths in Later-Life Families 114
- Continuity and Change in Later-Life Families 114

### Key Familial Roles and Relationships 116
- Spouses/Aging Couples 116
- Grandparents 121

### Families as Caregivers 123
- Context of Caregiving: Family Norms of Mutual Assistance 124
- Intergenerational Support 124
- Family Members as Caregivers to Frail Elders 126
- Caregiver Burden and Rewards 128
- Involvement of Older Adults in Their Own Care 129
- Family Conflict: Elder Abuse and Neglect 129

### Social Change and the Family’s Future 130
- Changes in Marriage 131
- Changes in the Size and Shape of Families 131
- Future Changes in the Timing of Family Life Events 132
- Growing Complexity of Family Relations 133

### Summary 134

### Web Exercise 134

### Key Terms 135

### Questions for Thought and Discussion 135

---

#### 6. WORK AND RETIREMENT IN THE LIFE COURSE 137

### Learning Objectives 137

### Employment as an Organizing Force in the Life Course 137
- Dynamics of the Labor Force 138
- Employment and Life Chances 140
- The Occupational Life Cycle 142
- Older Workers and the Dynamics of the Labor Force 144
- Skills and Employability of Older Workers 145

### Age Discrimination in Employment: Problems and Policies 147

### Applying Theory: Rocking Chairs or Rock Climbing: Disengagement and Activity Theories 148

### Defining Retirement 150
- The Social Construction of Retirement 151

### The Institutionalization of Retirement in the United States 152
- The Role of Social Security 153
- The Role of Employer Pensions 154
- Gender and Retirement 155
- Race, Ethnic, and Social Class Variations 156
- The Deconstruction of Retirement? 157

### Individual Retirement 158
- Determinants of the Retirement Decision 159
- Employment After Retirement—Encore and Bridge Jobs 160
- Retirement Consequences for Individuals and Couples 161

### Applying Theory: Continuity Theory and the “Busy Ethic” 163
Contents

Rethinking Work and Retirement for the Future 164
  Changes in Policies and Political Attitudes 164
  Changes in the Economy and the Nature of Work 165
Summary 166
Web Exercise 167
Key Terms 168
Questions for Thought and Discussion 168

TOPICAL ESSAY. PORTRAYAL OF OLDER MEN AND WOMEN IN MEDIA 169
Senjooti Roy

7. ECONOMICS AND THE AGING OF SOCIETY 173
Learning Objectives 173
The Role of Economics in Aging 173
  Policy and the Economic Status of Older Adults 174
  Sources of Income for Older Adults in the United States 176
  Economic Well-Being of Older Americans 187
Economic Well-Being and Inequality Among Older People 191
  Effects of Population Aging on the Economy 193
Applying Theory: The Stratified Life Course: Cumulative
  Inequality and Economic Diversity 194
  Prospects for the Future Economic Status of the Elderly 199
Summary 200
Web Exercise 200
Key Terms 201
Questions for Thought and Discussion 201

TOPICAL ESSAY. E-ELDERS 202

8. AGING AND HEALTH: INDIVIDUALS, INSTITUTIONS, AND POLICIES 205
Learning Objectives 205
Physical Aging 205
The Health Status of Older People 208
  Prevalence Rates for Chronic Conditions 208
  Functional Ability 209
  Self-Assessment 211
  Mortality 213
Mental Health and Aging 216
Explaining Gender and Race Variations in Health 217
The U.S. Health Care System 219
  The Medical Model of Health Care 220
Elements of the Health Care System 223
  Access and Utilization 223
  Financing Health Care for Older Americans 224
Applying Theory: The Political Economy of Health Care Access 225
  Long-Term Care in the United States 231
Summary 235
Web Exercise 237
Key Terms 237
Questions for Thought and Discussion 237

TOPICAL ESSAY. ANTIAGING: COSMETICS AND AESTHETICS 238
Senjooti Roy

© Springer Publishing Company
9. POLITICS, GOVERNMENT, AND AGING IN AMERICA 241
Learning Objectives 241
The Social Construction of Old Age and the Welfare State 241
  The Older Americans Act: A Legacy of Compassionate Ageism 245
Policy Debates and the Social Construction of Old Age 246
  Generational Politics: Conflict and Consensus 246
  The Potential for Generational Conflict 247
  The Generational Equity Debate 249
  The Battle Over Social Security 251
  The Debate on Age and Need Entitlements 252
  Rethinking Age-Based Policies? 253
Aging and Political Behavior 253
  Age Norms and Rules for Political Participation 253
  Age, Period, and Cohort Effects on Political Behavior 255
  Working the Political System: Age-Based Advocacy 263
Applying Theory: Age Stratification Theory 265
Summary 267
Web Exercise 268
Key Terms 268
Questions for Thought and Discussion 269

10. GLOBAL AGING With J. SCOTT BROWN 271
Learning Objectives 271
Global Aging and Regional Economies 272
Level-of-Development Designations 274
Demographic Overview of Global Aging 274
Speed of Population Aging 276
Demographic Dividends 277
Cultural Traditions, Population Aging, and Social Change 278
  China: One-Child Policy 279
  Germany: Inverted Pyramid 281
  Kenya: Health Challenges 283
Aging and the Welfare State 285
  History of the Welfare State 286
  Program Types and Eligibility 288
  Welfare State and the Role of the Family 290
Applying Theory: Modernization Theory 291
The Study of Global Aging 293
  Comparative Methods 294
International Initiatives on Aging 295
Summary 297
Web Exercise 297
Key Terms 298
Questions for Thought and Discussion 298

TOPOCAL ESSAY. GREYING OF THE RAINBOW: LGBT AGING 299
Colleen R. Bennett

11. BABY BOOMERS AND THE CHANGING LANDSCAPE OF AGING 303
Learning Objectives 303
Cohort Flow and Changing Aging 304
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who Are the Baby Boomers?</td>
<td>306</td>
</tr>
<tr>
<td>Characteristics of the Baby Boomer Cohort</td>
<td>307</td>
</tr>
<tr>
<td>Generational Characteristics</td>
<td>316</td>
</tr>
<tr>
<td>New Landscapes of Aging</td>
<td>319</td>
</tr>
<tr>
<td>The Third Age: A New Phase of the Life Course</td>
<td>319</td>
</tr>
<tr>
<td>Productive Aging: Expanded Opportunities, Altered Expectations</td>
<td>320</td>
</tr>
<tr>
<td>Workforce Needs for an Aging Society</td>
<td>324</td>
</tr>
<tr>
<td>Lifelong Learning</td>
<td>325</td>
</tr>
<tr>
<td>Summary</td>
<td>326</td>
</tr>
<tr>
<td>Web Exercise</td>
<td>327</td>
</tr>
<tr>
<td>Key Terms</td>
<td>327</td>
</tr>
<tr>
<td>Questions for Thought and Discussion</td>
<td>327</td>
</tr>
</tbody>
</table>

### 12. THE DYNAMICS OF AGING IN OUR FUTURE  329

#### Learning Objectives  329

- Aging in a Changing Social World  331
  - Rethinking Old Age and the Life Course  331
  - Long-Term Changes in Aging: Beyond the Boomers  333

#### Growth and Change: The Aging of the Older Population  334

- Centenarians  336
- Changing Family Structures: Implications for Care and Relationships  337
- Changes in Health: Incremental Changes and Breakthroughs  338
- The Risks of Prediction  339
- The Uniqueness of Aging in Each Cohort  340

#### Challenges and Opportunities for the Field  342

- Disciplinary Frameworks  342
- Micro/Macro Distinctions: Implications for Policy and Practice  343
- Firming our Theoretical Foundations  344
- Addressing Diversity  345
- Transforming Knowledge to Inform Policy and Practice  346

#### Your Future Aging Self  346

#### Summary  348

#### Web Exercise  349

#### Key Terms  349

#### Questions for Thought and Discussion  349

#### References  351

#### Index  391

© Springer Publishing Company
Preface

Each new edition of a textbook provides authors fresh opportunities to sharpen, update, and extend the material, and to include issues that have come to the forefront in recent years. This edition reflects augmented material and significant new topics, while retaining its focus on the life course and sociological aspects of aging. In this edition, we continue to reflect newer scholarship, including more attention to global aging and to the significant changes now underway in population aging in the United States and throughout the world. The resulting 12-chapter book is well attuned to most academic schedules for a “one chapter a week” reading assignment.

CONTINUING THEMES

In presenting knowledge about aging in social context, we focus on five major themes. The first theme is the focus on the life course. This perspective informs our discussions of the movement of people and cohorts through age-related stages and transitions in all major social institutions and provides an organizing theme for new research and theoretical developments in the field of gerontology. A second major theme is the micro/macro distinction in understanding aging as a social phenomenon. Aging of individuals occurs within layers of social context from the family to the political and economic systems. Understanding the complex dynamics among these multiple levels is key to a deep understanding of aging processes and outcomes. The third key theme is social construction. With this approach, which is described in Chapter 1 and revisited in other chapters, we highlight how aging is much more than an individual journey through time; aging is a complex social process that influences each of us on the journey and is, in turn, influenced collectively by those making the journey. The fourth distinguishing characteristic of this text is its emphasis on the diversity of the older population; this stereotype-busting focus carries throughout all of the chapters, emphasizing how notably the experience of aging is affected by social characteristics. Material highlights diversity by gender, social class, race/ethnicity, generation, and even age differences within the older population.

The final key theme is integrating the learning of theory with content about aging. Reading theories without much substance attached is challenging for many students. Instead, scattered throughout our chapters are “Applying Theory” segments that describe a particular theory as it relates to content such as health care, family caregiving, or retirement. In this way the theory is grounded with some application that makes it more relevant and memorable.
PEDAGOGICAL FEATURES

We have continued two features from earlier editions and added a new one. First, we have updated our opportunity for students to explore topics further through the “Web Exercise” at the end of each chapter. These can be used in various ways in classes. Students will find these exercises useful complements to the material presented in the chapter. A continuing feature that is designed to help students relate to the material and deepen their understanding of abstract concepts is the inclusion of questions for thought and discussion at the end of each chapter. Finally, key terms that are useful for review and discussion are highlighted within the text and listed at the end of each chapter. The terms are presented in bold, with a definition within the body of the book, and are among the essential elements of understanding the content presented.

Most of us relate easily to aging through their personal or family experiences. Seldom do students enter a course understanding the implications of an aging society for major social institutions. On the basis of the fundamental expansion of the sociological imagination into the gerontological imagination, we hope to expand students’ perspectives to a bigger picture of aging as a social phenomenon that will reshape their lives well before they themselves are older adults. One way that we attempt to expand one’s view of aging is through our third continued feature, a series of six “Topical Essays,” which are scattered between chapters throughout the book. Our intention with these is to take the lens of aging and look at an array of contemporary issues, reflecting a more engaging way to “think outside the box” regarding the implications of aging for persons and the larger society. Interesting and socially significant topics, such as antiaging medicine, LGBT aging, and creativity across the life course are employed to provide opportunities for discussion, take a further step with knowledge gained in the prior chapters, and connect concepts to our shared real-world experiences.

To supplement the book, two ancillary products, an Instructors’ Manual and chapter-related PowerPoint presentations, are available to qualified instructors by e-mailing textbook@springerpub.com. These two supporting volumes will help integrate this fifth edition of Aging, Society, and The Life Course, into your existing pedagogy. The PowerPoint slides illustrate major themes and concepts from each chapter; they can be used in lectures and as study guides. The Instructors’ Manual is organized to help students understand what they are going to learn, assess their grasp and retention of the material, enable them to apply the major concepts to new problems, and encourage them to imagine their own future in an aging world.

Our original and continued purpose in writing this book has been to provide a new type of textbook on the social aspects of human aging—one that is neither encyclopedic in its coverage of research findings nor overly weighed down with jargon. We hope that we have more closely approached these goals in this fifth edition.
Acknowledgments

With any project of this scope, there are many people who make important contributions of all kinds to its completion. We would like to acknowledge the support provided by the staff at Springer Publishing Company, especially our steadfast and always-insightful colleague and editor, Sheri W. Sussman. We also wish to thank our support systems on our campuses. For Leslie Morgan this includes colleagues in the Department of Sociology and Anthropology at UMBC, most especially the support of Colleen R. Bennett, PhD, candidate in Gerontology. Suzanne Kunkel extends her appreciation to a long list of colleagues and graduate assistants at Miami University’s Scripps Gerontology Center. Special thanks to Karl Chow for his expertise in creating the artful exhibits for this volume; to Senjooti Roy for her careful reading and thoughtful suggestions on this revision; and to Lisa Grant for her conscientious effort on our ever-evolving bibliography of classic and new works in the field.

We would also like to acknowledge our mentors and colleagues (both proximate and remote) who have shaped our professional lives and perspectives. These include Robert Atchley (who contributed to the vision for this book and to the first chapter in the earliest editions), Bob Applebaum, Vern Bengtson, Kevin Eckert, William Feinberg, Joe Hendricks, Norris Johnson, Matilda White Riley, Neal Ritchey, Mildred Seltzer, and Judith Treas, among others. Finally we would like to acknowledge our families and closest friends; these are the people who give us our roots and our wings, and remind us of the importance of balance in our lives.
Aging and Society

The individual does not act alone, although conscious beings will to do and act as if they had control over their lives and could do what best pleased them. . . . No person really acts independent of the influences of our fellow human beings. Everywhere there is a social life setting limitations and influencing individual action. People cooperate, compete, combine, and organize for specific purposes, so that no one lives to him/herself.

—(Blackmar, 1908, pp. 3–4)

LEARNING OBJECTIVES

- Articulating what it means to say that “aging is socially constructed.”
- Describing the concept of generation, and how generations help to shape the realities of aging.
- Illustrating why chronological age is a not a very meaningful measure of aging.
- Explaining how the sociological imagination is important in the study of aging.
- Giving examples of how aging is patterned by social characteristics such as gender, race, ethnicity, and social class.

Aging is something that happens to all of us. It is a natural and virtually inevitable process. Even so, older people are often the subject of bad jokes and negative stereotypes, and many people in our society dread growing old. A quick visit to the birthday card section of your local card shop will confirm our preoccupation with negative views of, and jokes about, aging. Despite this preoccupation, our ideas about what aging really means and why it matters are notably diverse. Consider:

- At age 40, people in the labor force are legally defined as “older workers” by the Age Discrimination in Employment Act.
- A 70-year-old woman in India gave birth in 2010, becoming the oldest new mother in the world. The event sparked extensive scientific and ethical debate about when a woman is too old to have a baby, but there was little discussion about when a man might be too old to become a father.
- In 2009, a U.S. Airways pilot was credited with saving the lives of 150 people when he landed a plane in the Hudson River after a flock of birds flew into the engines. Captain Sullenberger was dubbed the “Miracle on the Hudson pilot.” He was about a week shy of his 58th birthday, and his years of experience were cited as a factor in his ability to respond so effectively to the emergency. He retired the following year.
- Most people who are age 75 do not think they belong in the “old” age category.
At age 16, people are “old enough” to be licensed drivers, at age 18 they are “old enough” to vote, and at age 21 they are “old enough” to drink alcohol.

In some states, an older driver seeking to renew a license must pass a series of tests to demonstrate his or her fitness to drive. For example, in New Hampshire, renewal applicants age 75 and older must take a road test. Georgia, Virginia, and South Carolina are among the states that require vision tests for older license applicants.

In the 2010 NBA playoffs, commentators predicted that the Boston Celtics, who had the highest average age of any team in the league, would be “too old” to win the championship. Others predicted that the team’s years of experience would ensure their victory.

The human genome project could potentially extend life expectancy significantly. What will it mean to be 75 if life expectancy is 200? What will happen to our ideas about education, careers, and grandparenthood?

These examples illustrate two very important points. First, we have many different formal and informal social definitions of age and aging. Second, the meanings and experiences of aging vary across situations, cultures, and time. So, questions about when aging begins, what it is, and why it matters can only be answered by paying attention to the social contexts in which aging takes place.

DIMENSIONS OF AGING

If you ask anyone to define “aging,” she might reasonably respond that it means growing older. But, what does growing older mean? Is it simply the passage of time, having another birthday? Increasingly, scholars argue that chronological age is a relatively meaningless variable (see Ferraro, 2007; Maddox & Lawton, 1988). Age is only a way of marking human events and experiences; these events and experiences are what matters, not time itself. Time’s passing is of concern only because it is connected, however loosely, with other changes: physical, psychological, and social.

Physical Aging

The passage of time for human organisms is related to maturation; there are developmental timetables for the predictable changes that take place as we age, including growth charts for infants and language acquisition for children. In later life, the passage of time is related to a large number of specific physical alterations such as gray hair, wrinkling of skin, and changes in reproductive capacity, immune system response, and cardiovascular functioning. An interesting question about these physical changes is whether they are inevitable, natural consequences of growing older. In fact, research shows that some of the changes we think of as normal aspects of aging are modifiable, preventable, and related to lifestyle choices and cultural practices. For example, while some wrinkling of the skin and some loss of arterial elasticity appear to be related to physical aging processes, the magnitude of change and speed of deterioration are affected by lifestyle choices and culture. We know that wrinkling of the skin is accelerated and accentuated by sun exposure and by smoking, and some of the changes over time in cardiovascular functioning are related to diet, exercise,
and smoking. Similarly, most of us know 70-year-olds who are as active, healthy, and vigorous as an average 40-year-old. Increasing evidence shows enormous variability in physical aging across individuals; this growing evidence of variability has resulted in new ways of thinking about aging.

In earlier eras of gerontology, researchers searched for the “normal” changes that accompanied aging; a most important part of this search was to distinguish normal age changes from pathological or disease processes that became more prevalent with age but were not caused by aging. Knowledge about the modifiability and variability of physical aging processes resulted in a new perspective about aging. Rowe and Kahn (1998) offered us the concept of successful aging, drawing distinctions among usual, optimal, and pathological aging. Their definition of successful aging did not focus solely on physical aging, but health status and functional capacity are two of its major components, along with active engagement with life (cf. Rowe & Kahn, 1997). “Optimal” aging is characterized by minimal loss of physical function and a healthy, vigorous body; “pathological” aging is aging accompanied by multiple chronic diseases and negative environmental influences. “Usual” aging refers to the typical or average experience, somewhere between pathological and optimal. Exhibit 1.1 illustrates this view of the variability of physical aging. The concept of successful aging is undergoing continual refinement, and questions about how it is defined and measured, who achieves it, and how it is attained are being addressed by a flourishing body of research that is discussed in Chapter 4. Even with continuing debate and the need for further research, the distinctions among usual, successful, and pathological aging reflect new ways of thinking about physical aging—as a variable and sometimes modifiable set of processes that often have important social components.

As we continue to find that the changes we call physical aging are merely age-linked and not age-caused and that many are, in fact, modifiable, we are forced to reconsider the question of what aging means as a physical process. The ever-increasing evidence that individuals vary greatly in their experience of physical aging suggests that few (if any) of the significant aspects of aging are purely or even primarily physical.

EXHIBIT 1.1

VARIABILITY OF PHYSICAL AGING

Adapted from Machemer, 1992.
Psychological Aging

Psychological aging processes include changes in personality, mental functioning, and sense of self during our adult years. Some changes are considered a normal part of adult development, some are the result of physiological changes in the way the brain functions, and some psychological dimensions show little change at all in later years. As in the case of physical aging, a wealth of research has explored the complexities of these processes and ways to distinguish distinct disease processes, such as Alzheimer’s disease or depression, from normal aging changes.

For our purposes, several generalizations are important. First, human beings do continue to develop and grow throughout their lives. Some researchers in gerontology are very interested in the unique nature of human development in the later years—the tasks, growth, and adaptations that typically take place through time. Much of this work focuses on opportunities for personal development and contributions to the world around us that can emerge in later life. Concepts such as “gerotranscendence” (Tornstam, 1997; 2005), serving from spirit (Atchley, 2004), “sageing” (Schachter-Shalomi & Miller, 1995), and “elderhood” (Thomas, 2004) offer a glimpse into the positive developmental stages that may characterize late life. We will explore these ideas further in Chapter 4. For now it is sufficient to recognize that human development occurs throughout our entire lives; it does not end with adolescence or early adulthood as was once thought (Cohen, 2005).

A second broad statement related to psychological aspects of aging is that personality does not undergo profound changes in later life; most personality traits, self-concept, and self-esteem remain fairly stable from midlife onward. For example, people do not become wise, grumpy, or rigid in their thinking as a result of growing older; the grumpy old man was very likely a grumpy young man. Although the developmental challenges and opportunities vary through life, the strategies people use to adapt to change, to refine and reinforce a sense of self, to work toward realizing full human potential are practiced throughout adulthood. The simple passage of time seldom requires or causes fundamental changes to these basic personality structures and strategies.

Similarly, loss of cognitive functioning is not an inevitable result of aging. Just as significant loss of physical function is not inevitable or universal, so too memory and other cognitive skills may remain stable or even improve with age. However, it is important to be accurate here about changes with age. One recent study on the prevalence of dementia shows that 5% of people aged 71 to 79 had dementia, compared to 37.4% of those aged 90 and older (Plassman et al., 2007). Based on this pattern, it is fair to say that advanced age is a marker for increased likelihood of dementia, but it is misleading to say that aging causes the impairment.

Social Aging

If aging brings only relatively small universal and inevitable changes in physical or cognitive functioning, in the basic structure of personality, and in the trajectory of adult development, why does it matter in people’s lives? In this book, we argue that age is significant primarily because of the social meanings, structures, and processes attached to it. Gray hair, wrinkles, longer reaction time, and even some short-term memory loss matter only because the social world in which we live has defined those characteristics as meaningful. Much of the social meaning of aging is tied to erroneous beliefs about the effects of aging on physical and mental capabilities. Aging does not inevitably cause us to become rigid in our thinking,
Aging and Society

1. Aging and Society

forgetful, or unable to carry out our favorite physical or intellectual activities. For most people, aging is a process of change that is so gradual that we compensate for most of it and it has little impact on our everyday lives.

However, society uses age to assign people to roles, to channel people into and out of positions within the social structure, as a basis for allocation of resources, and as a way to categorize individuals. In its most benevolent form, using age to allocate opportunities is a reasonable mechanism. For example, our society has rules about the minimum age for employment; these laws were designed to protect young people from being exploited and, according to some, they are good for the labor force because they control the flow of new workers into the labor market. In a more constraining way, however, age artificially and unevenly limits the opportunities of people. Gray hair and wrinkles, perhaps the most visible signs of aging, and the chronological age of 65—the most often-used criterion of old age—have no effect on physical functioning or cognitive capability. They do, however, have profound effects on social interactions and opportunities for individuals in the social worlds of employment, family life, and community engagement. Whether we would seriously consider someone as a possible candidate for a job or as an interesting partner in social interaction is, in fact, influenced by our assessment of the age of that person and what that person’s age symbolizes to us. Again, it is not because age 65 or gray hair are symptomatic of competence or incompetence or of a boring or dazzling personality, or even that visible signs of aging are inherently unattractive or attractive. We make these assessments because we live in a society that has constructed the meaning of aging in particular (primarily negative) ways.

It is important to think about the extent to which the very same processes work at other ages and stages of life. In our culture, it is possible to be “too young,” just as it is possible to be “too old,” for certain roles and opportunities. We have very clear social prescriptions, often in the form of federal and state laws, about when a person is old enough to drive a car, get married, and be president of the United States. In these examples, “old enough” seems to imply the window of opportunity between legally too young and socially too old.

Social aging, then, refers to the ways in which society helps to shape the meanings and experiences of aging. Social aging includes the expectations and assumptions of those around us about how we should behave, what we are like, what we can do, and what we should be doing at different ages. The concept of social aging also refers to the ways in which those expectations influence what opportunities are open to us as we grow older. Later chapters in the book apply the concepts of social aging to the major dimensions of our social lives, including families, work, and health.

SOCIAL CONSTRUCTION OF AGING

The preceding discussion about the ways in which the experiences of aging are largely constructed by society is an example of an important sociological idea introduced by Berger and Luckmann (1966): the “social construction” of reality. This concept suggests that reality does not exist out there, waiting to be measured and understood by us. Rather, reality is created out of interactions among humans and by the social institutions within which people live their lives. For an illustration of the gap between physical reality and peoples’ lived experience of aging, think about witnesses to an unusual event, such as an auto accident. While we know that there are facts in such a situation—for example, the color of the cars, the direction and speed they were traveling—eyewitness accounts often vary greatly on even these details. Human beings pay attention to different things, remember
different things, and report different things. If one of the people in the accident is an older person, the witnesses might be motivated (consciously or unconsciously) to notice and report details based on their assumptions about that driver’s capabilities. You can probably think of many examples from your everyday life in which a conversation, phrase, or gesture has been interpreted very differently, depending on the perspectives of the people involved.

Societal Aging

Beyond the social construction of the experiences of aging for individuals, social forces influence the experience of aging in another important way. Societies themselves experience aging. As the proportion of population in the “older” age categories increases, profound changes in the social structure take place. Societal aging—defined as demographic, structural, and cultural transformations that a society undergoes as the proportion of older adults increases—affects every aspect of social life, from social institutions (such as the family, work, education, and politics) to the experiences of aging individuals. Education and the economy are good examples of social institutions that are affected greatly by the growth of the older population. The impact of population changes on the educational system in the United States can be seen in the growing number of college and university programs targeting the older population. Some of you may have summer Elderhostel or Exploritas programs at your institutions, or free tuition available for students over age 65. The University of Massachusetts at Boston has a certificate program in gerontology; more than half of the hundreds of people who have earned that certificate are over the age of 60. The impact of population aging on our society is discussed in greater detail in the later chapters of this book.

Another impact of the growth of the older population is the increased visibility of aging, which results in more awareness among the general population about older people, and about the diversity and uniqueness among older individuals. As older people become more numerous and visible, stereotypical attitudes and discriminatory practices that disadvantage older people are more likely to be challenged. For example, in comparing magazine advertisements in the year 2014 to those from 1980, we see a marked increase in both the number of ads that feature older people and in the average age of many models. While most people in ads are still young, our images of aging are changing along with heightened awareness of the aging of society. There may be no better example of this trend than the skyrocketing popularity of TV personality Betty White, age 92 at the time of this writing.

The aging of a population influences how aging itself is viewed. As groups of people born at different times (cohorts) move through the stages of aging, they are affected by, but also have an impact on, the experience of being older. The baby boomers will experience aging in a very different way than the current generation of older people. Negative stereotypes are being challenged, age discrimination is illegal, and there is growing recognition of the expanding mature market for goods and services. All of these changes were set into motion by earlier groups of people as they grew older, but are picking up speed as the very large baby boom cohorts enter later life (the youngest are 50 in 2014). When these social changes combine with the political activism that has historically characterized the baby boomers, and with their potential power in the marketplace and in the polling booths, the experiences and definitions of aging are expected to change.

When cohorts born at different time periods move into later life, they also have an impact on social institutions such as the economy and health care, partly
because of the shared life experiences they bring with them. For example, many of the current generation of our oldest adults grew up during the Great Depression. Their investment, purchasing, and savings habits have been shaped by that experience (Elder, 1974); they tend to save at higher rates than other groups of adults, especially the baby boomers, and they are less likely to make risky investments or purchases. The baby boomers grew up during relatively comfortable economic times, are not good savers, and are more likely to make nonessential purchases (McKinsey Global Institute, 2008). In addition, during the past two decades we have seen tremendous growth in the “games for adults” industry; a walk down the games aisle at your neighborhood toy store will reveal a very large number of board games designed for adults, far beyond the number available just 10 years ago. There is also a growing body of research and product development focusing on video games specifically for aging adults; these games are designed to enhance physical fitness, social interaction, and cognitive ability. For example, one recent study showed that video game training can improve the ability of older adults to successfully multitask (Anguera et al., 2013). You will read more about older adults’ use of electronic media in an essay on e-elders later in this book. For the moment, the important point illustrated by the development of new products for aging baby boomers is that this trend is related to the purchasing power, leisure preferences, personal goals, and buying habits of this generation. You can watch for television or Internet ads, or simply use your imagination, to become aware of new leisure, health care, cosmetics, or convenience products for aging baby boomers. Thus, the aging of cohorts has already had an impact on the economy—on product and service development, on savings, and on consumer demand patterns.

With these examples we do not mean to oversimplify societal aging, or social change in institutions such as the economy. Rather, these examples are intended to illustrate how the experiences of aging, and the social contexts in which they take place, change over time as a result of the aging of unique cohorts. As new groups of people go through stages of growing older, they bring with them a unique historical profile, and they alter the meanings and values associated with growing older. The movement of new and larger groups into old age also places new demands on the social system. Changes to the social structure emerge in response to the size, characteristics, and demands of each new group of older people. The intricacies of this dynamic between cohorts and social change will be discussed in further detail in later chapters. For our purposes at this point it is important to acknowledge that societal aging is a significant dimension of the social processes of aging.

WAYS OF CATEGORIZING PEOPLE BY AGE

As we consider the many dimensions of social aging, we need a way to mark or measure the age of individuals. Most often people are categorized in one of three ways: chronological age, functional status, or life stage. Each way of expressing age has advantages and disadvantages, and the decision to use any one of them should be based on the goals of examining age. Keep in mind that whether we use chronological age, functional status, or life stages, we are applying socially constructed labels and definitions, which allow us to treat people as members of meaningful social categories. We use these definitions in many ways. We sometimes make implicit judgments about whether we are likely to have anything in common with someone based on the age group they appear to belong to, and we explicitly use age to select a specific target for social action or policy, or to define
a subject of study. Remember, all these definitions, including chronological age, are human creations. In selecting definitions of aging or age categories, we need to be conscious of our underlying purpose and select our definitions accordingly.

**Chronological Age**

This is one of the simplest assessments of age and thus it reduces administrative complexity. Chronological age is used in our society as the basis for determining many social roles (voting, driving, marrying, holding public office), for eligibility in social programs (such as Social Security, AARP membership, or Older Americans Act services), and inclusion in research about aging.

The use of chronological age to mark major life transitions is taken for granted in modern urban societies. However, it is a relatively recent development coinciding with the rise of large-scale industrialism in the early 20th century (Moody, 1993). The industrial economy required that human lives be ordered efficiently so that work years coincided with the years assumed to be associated with peak productivity. Chronological age was adopted as a simple way to define a worker’s life stage.

The meaningfulness of chronological age is questioned in many ways today, however. The number of birthdays an individual has had tells us little in and of itself. The fluidity and multiplicity of today’s life styles defy the use of boundaries as rigid as numerical age (Moody, 1993). When it is possible to have two career peaks—one at age 40 in your first career, and a second at age 60 in your second career; when it is increasingly common to find people having children when they are 40 (about the age at which others are becoming grandparents)—the usefulness of chronological age as a life stage marker is indeed questionable.

In the world of social policy and programs, the validity of chronological age is being questioned at another level. Even though “age has long stood as a formidable proxy for demonstrable need and, in turn, the receipt of support from the larger society” (Hudson, 2005, p. 1), there are political and ideological debates about the usefulness of age-based policies. The age for eligibility for full benefits under Social Security is gradually being raised, so that by the year 2027 you will need to be 67 to retire with your full benefit. Older Americans Act services, for which people become eligible at age 60, are increasingly being targeted to groups within the older population with the greatest need: frail, low-income, and disadvantaged minority groups. In general, policies seem to be moving away from such a central focus on chronological age. We discuss these policy issues in greater detail in Chapter 9. For now, it is important to recognize that policy shifts away from age as the single most important eligibility criterion reflect broader question about the meaningfulness of chronological age.

*Most modern cultures place emphasis on chronological age.*

*(Credit: Marianne Gontarz York)*
Functional Age

What marker of age will we use if chronological age continues to lose its significance and usefulness? There is considerable difference (on average) between 65-year-olds and 95-year-olds, yet all are considered to be older adults. In the case of policies and programs, “targeting” of services to specific subgroups is increasingly common, not simply on the basis of age but also on the basis of physical changes and need for assistance. For example, if we are interested in identifying people who have physical limitations that require regular assistance, we can use measures of functional status such as activities of daily living, a generic term for several scales that measure an individual’s ability to accomplish, without assistance, routine personal care activities such as bathing, eating, dressing, and getting in and out of bed. Such measures are useful if we are interested in targeting home care programs to those who need them because of physical frailty.

When we use chronological age as a convenient way to determine eligibility for benefits such as Medicare, we are assuming that age is a proxy for the need for those services. Functional status, or functional age, is a way to move beyond that generalized assumption about age, but it is obviously a much more complicated way to grant access to programs and services. The topics of functional status, need for assistance, and services available to provide that help are addressed further in Chapter 8.

Life Stage

As lives progress, people tend to reach certain plateaus of stability (life stages) punctuated by periods of change or transition. Thus, people can be categorized as being in roughly comparable circumstances, such as adolescence, young adulthood, middle age, and later maturity. We can assume that people going through the “empty nest” transition are these people have living adult children and are in the process of launching them into lives as independent adults. We can assume that people in very old age (sometimes called “old-old” age, referring to people 85 and above) are probably physically frail and live simple lives. Life stages are thus broad social categories that describe particular times of life involving new social roles (such as grandparenthood), physical changes (such as physical frailty), or transitions out of some roles (such as leaving one’s job to retire).

Life stages roughly correspond to chronological age ranges, but are much more socially constructed and culturally based than chronological age. For example, when is someone an adult? When they move out of their parents’ home,
reach age 18 or age 21, have a child, have a full-time job, or act mature? Life stages rely on some information about physical changes, but are much more attentive to other traits such as the roles (e.g., parent, employee) that people play. For example, the “empty nest” described above implies something about chronological age, but derives its meaning from the new family roles and relationships emerging during that stage. The complexity of the concept of life stage is also well illustrated by new research on our changing timetables for entry into adulthood, and the subjective definitions that come into play (Settersten, Furstenberg, & Rumbaut, 2005; Shanahan, Porfeli, Mortimer, & Erickson, 2005). These topics are discussed further in Chapter 4, when we explore the sequences of roles people move into and out of as they go through life. We specifically discuss life stages within the family and within the economy, emphasizing the shared expectations about what roles we should be playing at what ages.

**AGEISM**

With all of the possible ways to assess and define age, and the limitations of any single approach, it is fair to ask why we continue to use age in so many aspects of social life. In part, we use age and a variety of social categories to help organize our world so that every situation is not completely new and confusing. Unfortunately, our use of social characteristics such as age, gender, and race to categorize people often leads to stereotypes, prejudice, and discrimination. Ageism is “a systematic stereotyping of and discrimination against people because they are old, just as racism and sexism accomplish this with skin color and gender” (Butler, 1989, p. 243). At the heart of any kind of “ism” (ageism, racism, sexism, classism) is the creation of an “other”; this process (sometimes called “othering”) involves grouping together people identified as different from ourselves because of some characteristic they do or do not possess (e.g., gender, race, class, or age). Ageism or other “isms” make us more comfortable in making sweeping generalizations about members of that other category, stereotyping them (often incorrectly) as sharing common traits or attitudes. These stereotypes often extend to excluding the others from aspects of participation in social life or limiting their opportunities. We are all familiar with the views of older people as lonely, frail, poor, and deserving of our help. This compassionate “ageism” (identified by Binstock [1991a] and discussed further in Chapter 9) now exists side-by-side with other stereotypical views: older people are cute and interesting; older people are wise and funny; or older people are greedy and selfish and economically more advantaged than any other group. While the content of these ageist views does vary considerably, the impact is the same. Older people are seen as other—in either positive or negative light different from us—but all like each other.
We often use visual, informal assessments to decide if a person is “old” or not. Be aware, however, that such categorizations limit the opportunities available, both for formal social participation and for informal interaction, to the person assigned to the “older” category. For example, think about your reactions to someone who seems “old” and strikes up a conversation with you as you wait to cross the street. If you have any kind of automatic negative reaction to that person, you may unconsciously limit the possibilities for interaction. As further illustration of the power of these visual assessments, we can think about why it is considered such a compliment to say to someone, “You don’t look 50 (or 30 or 80)!” Why is it so desirable to look younger than your age? And what should 50 look like?

THE RISE OF OLD AGE AS A SOCIAL CATEGORY

We tend to take for granted the idea of categorizing people by age, but aren’t often conscious of the many ways in which this categorization takes place, or of its impacts. It is often difficult to take a step back from our everyday lives in order to reflect on why we organize our social lives the way we do. Social science, especially sociology, helps us to gain this more reflective attitude. The notion of systematically studying society and its dynamics developed at the time of the industrialization of Western Europe in the mid to late 19th century. The era’s grand masters of social theory—Comte, Spencer, Durkheim, Weber, and Marx—focused on the ideological and cultural shifts that transformed Europe from agricultural, small-scale societies to urban, mass societies. They also observed the shift from the family as the basic economic unit to individually based career achievement and performance in a complex division of the labor market. They either said nothing at all about age, aging, or generations, or referred to these topics only in passing, perhaps because they were more interested in society as a whole than in the details of individual life structure. Populations in these societies were much younger then, before the significant changes discussed in Chapter 3 that brought about societal aging.

Generational Consciousness

Social theorists began thinking and writing about age, aging, generations, and the life course many decades ago. Their work remains relevant today. The first serious attempt to look at the social importance of age groups was made by the German sociologist Karl Mannheim in an essay titled “The Problem of Generations,” which was first published in 1927. Mannheim defined generation as a category of people born within a specific historical era or time period. For Mannheim, a generation was also characterized by a common worldview that distinguished them from other generations. Mannheim was keenly aware that the concurrence of birth timing did not automatically create these common understandings and worldviews; he observed that social and psychological processes led some members of a generation to develop an identity and consciousness with their age peers. Mannheim suggested that generational consciousness arose not from merely being born at the same time but from being exposed to the same kinds of experiences and historical events in a common social and political environment. According to Mannheim, then, belonging to a generation is a combination of a state of mind and an age grouping.
Each generation reacts to its social and historical time, and sharing these experiences gives each generation a unique “character.” In today’s workplace, it is not unusual to have three or four generations working side by side. There is a growing industry of books, organizations, and consultants who help businesses understand the differences in motivations, behaviors, and attitudes across the generations in their workplace. The idea that each generation has its own identity is intuitively appealing, but it is easy (and dangerous) to overgeneralize. Today’s young adults are categorized as technologically savvy, cynical about the materialistic values of preceding generations, committed to work/life balance, and jaded by growing up in a world of violence; but there are certainly different subgroups within this generation. You might reflect on how well this description fits you personally and then generalize that to every age group (teenagers, baby boomers, older adults, etc.) to conclude that these generalizations have limited use in describing individuals. Mannheim suggested that each generation may comprise a number of specific units, each with a unique consciousness, capturing some of the great diversity you see among people of your own age.

The Aging Population as a Social Force

In the late 1920s and early 1930s, Warren Thompson and Whelpton, like Mannheim, drew attention to issues related to aging. However, Thompson and Whelpton used a demographic perspective to ponder the effects of population aging on society. As a student, Thompson had become interested in the interplay between population and social structure. In 1930, the President’s Research Committee on Social Trends gave Thompson and Whelpton the assignment of projecting the population of the United States from 1930 to 1980 and identifying significant population trends that should be taken into account in national planning.

Thompson and Whelpton (1933) identified the rapid growth of the older population and societal aging (discussed further in Chapter 3) as perhaps the most fundamental expected change in the population of the United States. They predicted a dramatic change in age structure in a very short period of time. Even though Thompson and Whelpton had no way to anticipate the post-World War II baby boom, their projections concerning growth in the proportion the older population represented of the total were very much on target. The actual proportion of people age 65 and over in the United States in 1980 was 11.9% compared to their projection of 12.1%.

Thompson and Whelpton assumed that retirement would continue to occur at age 65 and speculated that funding retirement pensions would be a major social challenge for the future. “[T]he problem of old-age pensions is one thing in 1930 with 5.4 percent of the population over 65 years of age but will be a different thing in 1980 when the proportion over 65 years of age will probably be more than twice this large (over 12 percent)” (Thompson & Whelpton, 1933, p. 165). Writing before Social Security was enacted, they were understandably concerned about the potential social disruption that might come when a large proportion of the population would be retired but with no broad-based programs in place to provide continued retirement income. They were also concerned that poverty at older ages could be even greater than they anticipated “if, as is quite commonly believed, industry and commerce are scrapping men at earlier ages than formerly and if they hire older men only at very low wages”
In their discussions of employment and income problems for an aging population, Thompson and Whelpton tended to portray the growing population of older Americans as an imminent social problem. However, social problems refer to difficulties that categories of people encounter not because of their own qualities but because of the way they fare in the operation of the social system. Wright Mills (1959) spoke of the distinction between private troubles that arise from accidents of personal history and social problems that arise from inequities built into the concepts, laws, rules, and procedures we live by. Thompson and Whelpton were writing specifically about the social problem of poverty arising from the practice at that time of compulsory retirement at age 65 in the absence of retirement pensions. But in an entirely different vein, they noted that the processes of adult development could have a beneficial influence on social cultural trends. They wrote:

Youth is more concerned with doing things, forging ahead, and making a place in the world. Age is apt to be more reflective, perhaps because the spur of poverty is less sharp, the inner drive is weaker, or time and thought have brought about a change of ideas as to the goal of life. The mere shift in age distribution, therefore, may lead to more interest in cultural activities and increased support for the arts. Such developments in turn will influence the outlook and taste of the whole population.  

(Thomas & Whelpton, 1933, p. 168)

Here they acknowledged that elders were not simply a social problem or a category toward which policy might be directed, but also people who were continuously evolving and could become social resources and agents for change. This potential role for the older population sounds very similar to an idea that is currently receiving a great deal of attention. Civic engagement refers to the involvement by people of all ages in actions and efforts designed to make a difference in our communities; it is both an activity and a value. As a social value, civic engagement implies a commitment to solving problems and making a difference (Ehrlich, 2000). Recognizing and encouraging the many ways that older people can contribute skills, knowledge, and energy to the common good is a growing topic of research, advocacy, and public policy in gerontology. Thompson and Whelpton foreshadowed this new movement more than 80 years ago with their observation that aging populations might benefit from the unique contributions that older people can make to civic life.

The Life Course and Old Age

A further key step in the development of old age as a social category came through the comparative, cross-cultural work of anthropologist Ralph Linton (1942). Social anthropology is concerned with identifying cultural universals, patterns that appear in all human cultures, as well as links between culture and personality. Linton advanced the thesis that all known societies have been stratified by at least two human characteristics, age and sex. The definitions of age and age categories, the number of age categories, and the rules governing transitions from one age to
another have varied considerably across societies, but in all societies old men and old women have been differentiated from one another and from their younger counterparts. Linton’s very simple and basic statement of fact still appears to be true more than 60 years later.

Another important concept that permeated Linton’s work was the idea of a life course, formed by a succession of age-sex categories. In all societies, males who survived infancy would go on to experience boyhood, ascend to adult manhood, and then either be elevated to or relegated to the position of old man, depending on whether the society was accepting or rejecting in its treatment of old men. A parallel sequence existed for females.

Linton believed that these life course age-sex categories are arranged in a hierarchy of social influence. In most societies, the adult males have been the most influential, although occasionally Linton discovered cases where elder men have had the most influence. He found another kind of variability. In many cases, elder women experienced increased freedom and status when they went through the transition from adult to older woman. “Even in societies which are strongly patriarchal in theory it will be found that a surprisingly large number of families are ruled by strong willed mothers and grandmothers. . . . [Among the Comanche] old women . . . could acquire and use ‘power’ on exactly the same terms as men and were treated as equals by male ‘power’ holders” (Linton, 1942, p. 594).

Linton’s work has been an extremely important resource for the social perspective on aging. He drew attention to the process that connects age to social position and influence and used the sociological concepts of status and role to explicate a complex social structure made up of interconnected role obligations and opportunities. Linton’s work presented the life course as a progression of age grades, thus linking the issue of aging with life stages. The life course perspective is, in fact, one of the most important frameworks in social gerontology today. Finally, Linton drew our attention to the importance of life course transitions and hinted at a human adaptive capacity to deal with life changes.

Since the phrase “life course” appears in the title of this book, it will come as no surprise that this concept has endured long past the work of Linton. In fact, the life course perspective is one of the most important frameworks used in the field of gerontology today. You will find the perspective and its related concepts used in most chapters of this book, and more fully presented in Chapter 4. The basic premise of the life course paradigm is eloquently summarized by Hendricks, who states that, “the experience of life is cumulative, continuous, and never ending. In order to make sense of any given period, we need to consider whole lives in the contexts in which they unfold” (Hendricks, 2012, p. 231). Thus, a life course perspective on aging considers the ways in which historical time, an accumulation of individual experiences and actions, opportunities and decisions, interactions with others, and large-scale social forces all combine to influence the experience of aging. To understand later life, we pay attention to life stages and transitions, what came before, and how individual and societal factors shape any given phase in the life course.

SOCIAL PERSPECTIVES ON AGING

The work of the social scientists described above provides excellent illustrations of understanding age as a social category. Throughout our discussion of old age and aging, we have referred to the way society creates and perpetuates our ideas about
who is old, how they should act, and how we treat them. We will continually return to the ideas of social construction and the life course as we discuss the many aspects of aging. There are several other noteworthy ideas from a sociological perspective that contribute to the study of aging.

The Sociological Imagination

The promise of the sociological perspective has never been more powerfully and eloquently expressed than in Wright Mills’s classic presentation of the sociological imagination. He suggested that the promise and the responsibility of sociology lie in giving individuals the tools to make the distinction between, and see the connections between, concerns we face in our own lives and problems that are rooted in society. Mills advises, “Know that many personal troubles cannot be solved merely as troubles, but must be understood in terms of public issues—and in terms of the problems of history. Know that the human meaning of public issues must be revealed by relating them to personal troubles—and to the problems of the individual” (1959, p. 226). If, in the early 1960s you had an older neighbor suffering because she couldn’t afford health care and then recognized that this was a general problem in your community or your state, you would be seeing the work of the sociological imagination. Solving such problems for individual people is very different than tackling it as a social issue, as the United States eventually did with the Medicare program, making health care affordable for all older adults. We can make this distinction if we have a social context and a sense of history from which to understand the individual’s personal experiences. The ability to shift perspectives, to analyze an experience or an issue from many levels of analysis (e.g., personal, family, community, societal), and to see the intersection of these many levels of mutual influence, is the fruit of the sociological imagination. If you develop a new understanding of your own attitudes about older people because of what you learn about how societies construct meanings of age, you will have experienced the sociological imagination. If you understand how an older individual’s situation of economic disadvantage is a product of social forces rather than simply personal choice or chance, you are applying the sociological imagination.

“No social study that does not come back to the problems of biography, of history, and of their intersections within a society has completed its intellectual journey” (Mills, 1959, p. 5). Mills offers a set of questions one asks in exercising our sociological imagination. One of those questions asks us to think about types of people that prevail in particular societies at particular times. He suggests that social order and historical period actually select in favor of certain kinds of people. This is a profoundly different view of human nature than those most familiar to us. Yet, armed with this understanding, we can go on to understand how, “by the fact of our living, we contribute, however minutely, to the shaping of our society and to the course of its history, even as we are made by society and its historical push” (Mills, 1959, p. 4). Also, defining an issue as “public” creates new ways to seek answers, beyond adopting an “every person for himself or herself” approach. Age-based policies initially developed as a consequence of seeing aging as a public rather than simply a personal issue. Social Security developed as a consequence of the Great Depression, when poverty became seen as a public matter, not an individual problem.
MICRO AND MACRO PERSPECTIVES
Mills’s discussion of history, society, and biography draws our attention to the intersection of individual life experience and broad social forces, including social changes around us, and in doing so points to the micro-to-macro range of perspectives on any topic. A micro perspective in social sciences focuses on the individual level, while a macro perspective focuses more broadly on society. Probably most of us agree that our behaviors, attitudes, and even our feelings are shaped partly by our personalities and partly by the social situation in which we live. There is an interplay between individual actions (micro level) and the social structures (macro level)—organizations and institutions—that create the conditions requiring a response from individuals. The difference between a micro and a macro perspective is a matter of focus: are we looking at close-up levels of details (micro level), or a more panoramic view (macro level)? The zoom function on a camera is in many ways an apt metaphor. A standard view depicts a modest visual field and a modest amount of close detail. The wide-angle view captures a much wider visual field, but the images of specific objects within the field usually show less visible detail compared to images produced by the standard view. The telephoto lens allows the camera to focus on distant objects in greater detail, but the width of the visual field is very narrow. If we look at three photographs of the same general visual field taken with different lenses, we can see that none of the photographs captures everything that the human eye is capable of seeing. Which photograph is the most useful depends on the purpose to which the photograph is to be put. Similarly, different questions about the social context, meanings, and experiences of aging require different perspectives along the micro–macro continuum.

Several major streams of research are concerned with understanding micro-level issues, such as the adaptation of individuals to the changes that accompany aging. This work considers the individual’s adjustment to changes in his or her social situation, such as retirement. A more macro perspective seeks to understand, explain, and predict the social construction of those conditions to which the individual must respond: what is the status attached to being retired, what provisions does society make to support economic and other needs of retirees, and what are corporate rules regarding eligibility to retire? Other questions look at the larger scale (macrolevel) questions without considering the individual (microlevel). How does retirement affect companies? How is retirement related to overall societal patterns of employment and unemployment? How does retirement reflect and affect the overall productivity of a society?

This micro–macro distinction is one of the energizing tensions in the study of aging; each perspective enriches the other and can push the other to greater clarity and applicability. There are many ways of classifying and organizing our experiences of the social world. The micro–macro distinction is one important way of categorizing ideas and information, directing us to different, but equally important, questions about aging in the social world.

PATTERNING OF EXPERIENCE: DIVERSITY AND HETERGENEITY
Looking more deeply and critically at the ways in which society influences the meanings and experiences of aging, some sociologists have focused on how, why, and to what extent the experiences of aging are different for different groups of people—looking for a patterning of experience. For example, poverty is substantially more prevalent among older Black women who live alone than among any
other group of older people. Why does this pattern exist? What social forces have produced this structured disadvantage for older Black women?

Many scholars have warned against using averages to describe the older population, because there is often more variation (heterogeneity) among older people than among younger people on some variables. This heterogeneity is very often acknowledged, but not thoroughly examined. Arguing for the need to really analyze patterns of difference, Dannefer (1988) suggested that research should begin to look for the extent, nature, and patterns of heterogeneity on a wide range of variables. Is the older population as homogeneous on life satisfaction as they are on income? Are the political attitudes of older people as varied as their health status in later life? Does the amount of heterogeneity on health status change as people grow older? What is the pattern of that change? Does heterogeneity increase, decrease, or fluctuate over time? Finding out more about how much heterogeneity exists among the older population, on which variables, and in what pattern are important first steps in understanding the different experiences people have as they age.

But, we need to go even further than that to really understand the many different realities of aging. Dannefer (1988) suggests that the next step is to analyze the sources of heterogeneity. How is heterogeneity produced, and what should be done about it? Calasanti (1996b) further refines this position by distinguishing between heterogeneity as variation among individuals, and diversity. Heterogeneity, the extent to which older individuals are different from each other, is what we have discussed in the preceding paragraph and might also be called individuality. Diversity refers to patterns of difference across groups of people in different social locations. The most common indicators of these social locations are age, gender, race, ethnicity, and social class. Contemporary scholarship on diversity searches for the nature, extent, and causes of differences among groups of older people. In doing so, we acknowledge that the realities of aging are not the same across all groups. Throughout this text we present information and ideas about the diverse experiences of aging, focusing on race, ethnicity, gender, and social class. Race and ethnicity are extremely complex and personal identities. In the most recent U.S. Census (conducted in 2010), respondents could choose one race or more than one race; six separate race categories were listed and people could check more than one. In addition, there were questions about Latino or Hispanic identity. Hispanic/Latino respondents can be of any race, so many combinations of race and ethnicity are possible. The complexities and implications of race and ethnicity are far-reaching. For the purposes of this book, we focused on two major categories of race, and Hispanic or Latino for ethnicity. You will see that we use “Black” and “White” for much of the race data and Hispanic/non-Hispanic in the discussion of ethnicity.

Studying diversity can take one of two directions. We can compare groups to try to understand their different experiences of aging. There is a fair amount of research that takes this approach, and some of it will be referred to in later chapters. This is a useful but limited approach. The disadvantage of the “comparison” model for studying diversity is that there is always a reference group to whom everyone else is compared. For example, we can say that women have higher rates of diabetes than men, or that older Black women have the highest rates of poverty among adults. While this information is instructive, the implicit use of a dominant group as a point of comparison reinforces the reference group’s experience as normal and minimizes the different social reality inhabited by the “other” groups (Calasanti, 1996b). Most typically the comparison group has been White males,
even though women outnumber men at later ages because of the differential in life expectancy by sex.

The limits of the comparison approach are well illustrated by the fact that such analyses often categorize people as White/non-White, or male/not-male. This approach assumes that the complexities of life in a particular social category (Black, female, working class) are somehow captured by not being a member of the reference group. But it is very clear that being female is not the same as not being male (Kunkel & Atchley, 1996).

By focusing on groups of people in particular intersecting social locations (e.g., poor, White, female, baby boomers), we can better understand the different worlds of aging. We would ask different questions that delve more deeply into the lives of the members of the group in which we are interested. Instead of comparing men’s and women’s rates of diabetes, we might ask how the rates of diabetes vary among women, by social class and race; or we might attempt to specify exactly how social forces affect the lives of members of a particular group. Listening to the voices of those groups better illuminates their situation than focusing on how they are different from the dominant group. The questions we ask, the concerns we attend to, and even the items we include on a survey will be more insightful if we begin with a conviction that reality itself is different for groups in different social positions. For example, Gibson (1996) introduced the idea of “unretired-retired” status to describe individuals who are 55 or older and not working, but who do not consider themselves retired. This status is most common among poor Blacks. They do not meet traditional criteria for retirement, and therefore are never included in studies of retirement. This example clearly illustrates how using the experiences and meanings that are relevant for one dominant group completely undermines our ability to understand the experiences of other groups. Some of the new work on successful aging, mentioned earlier in this chapter, is raising questions about the definitions and meanings of successful for different groups of older people.

As social research on diversity in aging matures, more attention is given to diversity as an approach to reality rather than a kind of comparative perspective on various topics of interest; that is, diversity in the aging experience should be understood more deeply and holistically than a simple comparison of one group to another. Calasanti argues for an acknowledgment of the constructed and contextual nature of social reality in all theorizing and research: “Being inclusive requires acknowledging the unique configuration of a group within the matrix of power relations, being sensitive to the importance of these cross-cutting relations, and not making undue generalizations” (1996b, p. 15).

THE GROWTH OF GERONTOLOGY AS A FIELD OF STUDY AND PRACTICE

Despite the significant social changes that helped to create our aging population, the further changes that will come about because of older adults, and the interesting challenges that come with studying aging, you might be wondering why you should care about gerontology. Beyond the fact that all of you are aging and are connected in some way to others who are growing older, consider that virtually every profession is affected by the growth of the older population. Financial planning, nursing, medicine, social work, engineering, and technology all include (or need) gerontological specialties. New jobs and professions have grown up in
response to the needs of older adults, including long-term care administration, senior center management, dementia care, senior housing management, and wellness programs for older adults. There is great need for our technology to be friendly to users of all ages and for housing to support independence of those with health limitations related to aging.

The relevance of gerontology is also reflected in the growing number of educational programs offered at colleges and universities around the world that focus on topics of aging. Some universities offer degrees in gerontology at all levels (baccalaureate, masters, and doctoral); many more offer courses or programs on the topic.

Many social gerontology courses are taught in departments of sociology by sociologists and much of the material included in social gerontology courses consists of research on aging by sociologists. However, social gerontology has a broader range of interests than the sociology of aging. Social gerontology is a multidisciplinary field that includes research, policy, and practice information from all of the social sciences and the humanities (see Exhibit 1.2). A specific example helps us describe its scope.

More and more families are facing the challenge of deciding about long-term care arrangements for relatives or friends who need increasing amounts of help throughout each day. Decision making about long-term care is a topic that has implications for individuals, families, health care systems, and public policy. How, when, by whom, and with what outcome are some of the different questions related to the long-term care decision. Each of these topics can be approached from many different angles, with many different disciplinary perspectives. Psychologists might be interested in the communication and cognitive processes that are involved in negotiations and decisions of this type. Sociologists could consider the hierarchy or differences in power that might come into play as family members, the older person, and professionals negotiate the decision. Professionals from the world of long-term care practice might be interested in ways to more effectively describe options to families; they might also be concerned about making sure that the older person whose life is being discussed has a say in the planning and decisions. Researchers interested in public policy might focus on how the timing of long-term care decisions might be affected by the service options available and the effect on costs to the person or the long-term care system. A social gerontologist would draw on all of these perspectives to fully understand the processes and outcomes of decisions about long-term care.

Both social gerontology and the sociology of aging share an interest in sociological work applied to aging. The sociology of aging is concerned with understanding aging from sociological perspectives and applying that understanding to sociology in general. Social gerontology is concerned with understanding aging from a variety of perspectives and integrating information from various social science and humanities disciplines to achieve an understanding of aging in general, and to apply that understanding to resolving problems and creating policy. Increasingly, social gerontologists are seeking to more fully benefit from the multiple disciplinary perspectives that can be brought to bear on any topic related to age, aging, and the life course by moving to an interdisciplinary approach. While social gerontology is, by definition, multidisciplinary (drawing on multiple perspectives), interdisciplinary research would involve more than working together with respect for, and being somewhat conversant in, others’ disciplines. Interdisciplinary research would mean active collaboration and new ways of formulating the questions we are asking, and new methods for exploring those
questions. The study of the genetic, behavioral, social, and cultural factors that contribute to longevity could be an example of interdisciplinary research. Does this mean that every member of the research team must be trained in all of these specialties, or does it mean that the team works together with new methods and techniques? This question does not have a clear answer yet. In the meantime, social gerontology is continuing to develop as a truly productive multidisciplinary field.

SUMMARY

Gerontology is a broad and diverse field of study, a growing field of practice in its own right, and a growing specialty in many other professions. In recent decades, as the population has aged, the topic of aging has become part of the agenda for many different disciplines and perspectives. It is a very exciting time to be using sociology and social gerontology to study age, aging, and the life course. Enormous social changes are under way, changes that both affect older people and are affected by the aging of our society. Public policy, families, health care, education, and the economy are all changing as our society ages.

The very large baby boom is on its way to joining the ranks of the older population; the oldest baby boomers began turning 65 in January 2011. The sheer size of this group, and its unique generational experience, will doubtless change the meanings and experiences of aging for those to follow. Two publications exemplify the transformations that are underway. Reinventing Aging (Center for Health...
Communication, Harvard School of Public Health, 2004) describes the opportunities for, and promise of, the baby boom generation to continue to be involved in society well into old age. The second report, Reimagining America (AARP, 2005), summarizes the challenges that our nation faces as baby boomers enter old age, and offers suggestions for innovative solutions to those challenges. Throughout this book you will find further illustrations of the idea that “aging isn’t what it used to be.”

Our goal in this book is to illustrate the kinds of work leading to a new understanding of the social context and social constructions of aging. How social theorists and researchers think about, analyze, critique, and investigate questions related to aging is our major focus. In the process we will note areas that have not received adequate attention, and offer some suggestions about why some questions and issues have remained unasked and unexamined. This latter course requires some speculation on our part, but we decided it would be more challenging and interesting, and might inspire some of you to fill in the gaps in our understanding of aging.

In the chapters that follow, we delve much more deeply into the social aspects of aging at both the micro and macro levels, focusing on the changing face of later life within the dynamic context of the social world. Since aging is reshaping the future for us all, we expect you will find compelling issues for yourself, for your family, and for the larger society.

WEB EXERCISE

1. Much of this chapter has discussed the fact that what aging means continues to change over time, with each succeeding cohort of older adults bringing with it their own preferences and values and lifestyles. Find two websites devoted to issues of aging, and think about your reactions. Can you relate to anything on the site? Do you imagine that websites for older adults of your generation will address very different issues? Write a two-page paper documenting your reactions, giving specific examples from the websites to illustrate your points. There are MANY websites specifically designed for older adults; to help you get started, check out www.changingaging.org and www.aarp.org.

2. Find two colleges or universities that offer degrees or programs in gerontology. The Association for Gerontology in Higher Education website can be helpful for this task. In two pages, address the following questions: What does the curriculum cover? Where do students go when they graduate? Does anything about the curriculum seem to be related to the profession you are pursuing?

KEY TERMS

ageism  
civic engagement  
cohorts  
diversity  
generation  
interdisciplinary  
life course  
life stage  
macro  

terminal  

micro  
patterning of experience  
social aging  
social construction  
social gerontology  
societal aging  
sociological imagination  
sociology of aging
QUESTIONS FOR THOUGHT AND DISCUSSION

1. Browse through a birthday card selection, taking note of cards that are designed for different ages. What is your reaction? How are the messages of the cards different, based on the age group for whom they are intended? What makes a birthday card funny?

2. Senator and former astronaut John Glenn completed a much publicized return to space in 1998. His age (he was in his 70s) was a major topic of conversation. Why is the American public so amazed by, and possibly wary of, a 77-year-old astronaut?

3. Respond to the statement that “You are only as old as you feel.” Do you agree or disagree? What are some of the things that influence how old we “feel”?

4. What are some of the causes, consequences, and solutions to ageism? Do you speak up if you hear ageist remarks? Why or why not?