

International Perspectives on Aging 43
Series Editors: Jason L. Powell, Sheying Chen

Jason L. Powell

International Aging

Understanding the Diverse Experiences
of Growing Old

 Springer

International Perspectives on Aging

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Series Editors

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The study of aging is continuing to increase rapidly across multiple disciplines. This wide-ranging series on International Perspectives on Aging provides readers with much-needed comprehensive texts and critical perspectives on the latest research, policy, and practical developments. Both aging and globalization have become a reality of our times, yet a systematic effort of a global magnitude to address aging is yet to be seen. The series bridges the gaps in the literature and provides cutting-edge debate on new and traditional areas of comparative aging, all from an international perspective. More specifically, this book series on International Perspectives on Aging puts the spotlight on international and comparative studies of aging.

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Preface

As the world undergoes huge demographic shifts with aging populations and increasing life expectancy, it is essential to recognize the importance of understanding aging in different international, cultural, social, and economic contexts.

This book aims to explore the diverse experiences of growing older across various regions and societies. By adopting an international perspective, the book critically analyzes the unique challenges and opportunities that arise in different aging populations in Asia, Americas, EU, and Africa.

Through this exploration, the book gains a deeper understanding of aging and develops more effective strategies to support older individuals across the globe relating to pensions, employment, care, and leisure. The purpose of this proposed book is to shed light on the diversity of aging experiences internationally and examine the cultural, social, economic, and public policy factors that shape these experiences.

By adopting an international approach, the book illuminates the variations in expectations, perceptions, and practices related to aging. This book seeks to promote a broader understanding of aging that goes beyond singular narratives and encourages the development of inclusive and contextually relevant approaches to aging and care.

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Chapter 1

Introduction: Importance of Comparative Analysis



Introduction

At the beginning of the twenty-first century, scientific policy at the global level stimulated comparative aging research. This impetus was the practical political result of ongoing processes in academic disciplines as well as in society, all of which have shaped the comparative agenda. Increasing interest in comparing the achievement level of different welfare states, the impact of different socioeconomic conditions on the living situation of the aging populations, and also a higher degree of data availability for the purpose of comparison have all given such a research agenda the appropriate frame of reference.

I believe that the current state of comparative aging research can be likened to a garden full of wildflowers: empirical data sets are flourishing well, but the fields may be in need of some theoretical cultivation. To this extent, the present situation seems to reflect once more the crucial rift between theoretical reasoning and empirical research, which has always characterized the social gerontological field and has been deplored on numerous occasions (e.g., Bengtson et al., 1999). In this chapter, I would like to initiate a theoretical discourse about the possibilities, prerequisites and limits of comparative aging research.

This chapter has four parts. First, we discuss the aims, ambitions, and current state of comparative aging research in general. Second, we sketch some theoretical conceptions that might serve as a basis (or at least as “role models”) for comparative aging research. Third, we present some examples of theoretically based comparative aging research. Finally, we examine epistemological and methodological problems and limitations of comparative designs.

Aims, Ambitions and Current State of Comparative Aging Research

The phase of old age is part of the life course, and aging processes are a subgroup of developmental changes. Individual development over the life course, and especially age-related changes in late phases of life, are not fully explained by endogenous factors like biological maturation and functional decline. Hence, within different disciplines like life-span psychology and life-course sociology, but also epidemiology, conceptions of development and aging have been established, which point to the societal, cultural, and historical embeddedness of change processes in adulthood and old age (Baltes, 1987, 1997). In addition, aging research encompasses how developmental changes over the life course materialize in social positions and the social capital of specific age groups and how this impact, in turn, transforms given institutional settings within society. Comparing different societies and cultures seems especially fruitful for the analysis of societal and cultural factors in life course development (Fry, 1996).

Comparative aging research may be directed towards two—complementary or conflicting—main goals (Daatland & Motel-Klingebiel, 2006). From a nomothetic perspective, the aim of comparisons is the search for similarities and commonalities in different societies and cultures. Questions relating to the similarity of aging phenomena or determinants of change processes are examples of this perspective. Ultimately, this perspective aims to identify “anthropological universals” in aging, which materialize regardless of historical time and geographical space. Examples of universals might be seen in biological processes which proceed similarly across cultures and societies (e.g., skin wrinkles and greying hair). On the other hand, from an idiographic perspective researchers are looking for societal and cultural specificity and distinctiveness. In this perspective, differences between societies and cultures in respect to aging processes are emphasized. The goal of this perspective is the identification of a societal and cultural frame for unique patterns of aging processes. In this perspective, aging is not an autonomous, time-bound process but is intertwined with societal institutions and cultural norms. Examples of culture-specific patterns of aging are retirement regulations and family solidarity in late life.

Despite the obvious differences, both perspectives refer to societal and cultural aspects of aging. Although the constructs of “society” and “culture” are not independent of each other, they point to different systems. With the concept “culture,” we refer to everyday practices, knowledge, and belief systems as well as behavior patterns, which are used by members of a given population (cf. Berry, 2000). With the concept of “society,” we refer to those structures, institutions, and law systems, which regulate as social facts and matter the behavior of members of a given population. Societal structures and cultural belief systems are bound together in a complex nexus of interactions that do not always correspond harmoniously (e.g., cultural beliefs about aging and old age could conflict with institutional retirement rules). However, both societal structures as well as cultural belief systems are relevant to aging and old age. It should be kept in mind, however, that the definitions of culture and society also depend on the theoretical context (and might slightly vary from the definitions discussed here).

A framework for comparative aging research can be found in cultural anthropology. The basic premise of anthropology is to study “humans at all times in all places” (Fry, 1988). As humans are neither exclusively biological beings nor solely cultural constructions, human behaviour and development are shaped both by biology and culture. Hence, anthropological theory is holistic (emphasizing contexts), comparative (looking at a sample of the 3000 ± cultures worldwide), and evolutionary (taking into account the long history of mankind). In so doing, anthropological theory is striving to identify both universals of aging and unique experiences of aging. The methodology of cross-cultural studies also originated in anthropology (Murdock & White, 1969). An early example of anthropology is the work of Simmons (1945), who analyzed the status of aging and old people in nonindustrialized cultures. Simmons could not identify strong relations between economic, social, and political organizations or religious beliefs with the status of old persons. Hence, this early work of cultural anthropology pointed to the influence of cultural and societal characteristics on the living situations of old people as complex, diverse, and context-specific.

Just to give a few examples: Motel-Klingebiel et al. (2004) analyzed the influence of social inequality on subjective quality of life in five countries and reported only small country differences. In the discussion section, they stated that “these findings display a common characteristic of the societies analyzed. This stability suggests specifically life course and not just cohort effects” (p. 13). Ferring et al. (2004) explored life satisfaction in six European countries and stated in the discussion section that “this study explores national, age, and gender differences in life satisfaction ratings. The findings ... are in line with previously reported findings” (p. 23) and later, the results were discussed with reference to the theoretical construct of societal “livability.” Powell (2024) reported on disability-free life expectancy from a cross-national perspective and explicated the hypothesis that there might be a “North–South gradient” (higher levels of disability in the South, p. 38). Only in the discussion section was this “North–South gradient” explained by “socio-economic and cultural differences” (country differences in educational level, in the meaning of dependency, and the availability of family help, p. 42). Mollenkopf et al. (2004) looked at mobility in later life in six European countries. Although country differences were found (see p. 52), there was no explicit theoretical account of these differences on the macrolevel. Börsch-Supan et al. (2005) presented a large study with 11 countries involving a wide variety of topics. Three topics were discussed in the chapter, namely work disability insurance enrolment, volunteering, and self-assessed health. Although there were country differences in all dependent variables, there was little theoretical reasoning to account for them (with respect to disability insurance, the authors point to societal differences regarding the “ease and generosity” in eligibility rules, p. 248).

We should hasten to add that all of these examples have excellent theoretical sections on the particular phenomenon in question (i.e. quality of life, life satisfaction, disability, mobility, volunteering, and self-assessed health). However, theoretical arguments for selecting the countries represented in the projects, as well as a priori hypotheses predicting and explaining cross-societal and cross-cultural differences

(or similarities), are often lacking. Hence, in the following section, I would like to discuss how the theoretical foundation of comparative aging research could be improved.

Theoretical Conceptions Relevant to Comparative Aging Research

Gerontologists have elaborated a variety of theories connecting societal macro and individual microlevels (i.e. individual lifetime and historical time) in *life course conceptions* (Dannefer, 1999). However, there is no real comparable wealth of theoretical ideas available with respect to theories relating to *comparative aging research* (for an exception, see the abovementioned work of cultural anthropology, e.g., Fry, 1999). For the time being, however, we do not see a complete set of theories for comparative aging research. Looking for a theoretical foundation of comparative research question, there are two possible solutions connected with certain limitations. On the one hand, one could choose a genuine comparative theory (which normally does not explicitly refer to old age and aging), or on the other hand, one could choose a genuine aging theory (however, most of them have a limited cross-cultural potential).

In the following, we first discuss some criteria for theories used in comparative aging research. We then sketch some general comparative theories that may be modified with respect to aging and old age to guide comparative aging research. After that, we discuss how genuine aging theories may be modified to allow their use in comparative aging research.

Criteria for Theories Used in Comparative Aging Research

In general, scientific theories strive to organize empirical findings in a frugal manner and allow empirical tests of concrete hypotheses (Salthouse, 2006). Theories serve to organize future research by specifying relevant questions that should be answered in empirical research. In particular, theories also serve to answer questions regarding the causal nexus of aging phenomena and the mechanisms by which a cause exerts its effect. With respect to comparative aging research, this means that theories should not only be helpful in identifying the relevant aging phenomena that can be assumed to vary (or stay constant) across cultures and societies. More important is the function of theories in explicating causal mechanisms for variation (or stability) of aging processes across cultures and societies. Hence, if variation across societies and cultures is assumed, a theory should be able to link macrolevel constructs, i.e., characteristics of cultures and societies, to microlevel outcomes, i.e., behavior of aging individuals, by specifying mediating and moderating factors on