AGING

Concepts and Controversies

10th EDITION

HARRY R. MOODY & JENNIFER R. SASSER

Aging

Tenth Edition

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Preface

As we prepared this 10th edition of *Aging: Concepts and Controversies*, we were keenly aware of the many significant national and global issues that dwell in the background: worsening climate change; the immigration crisis in North America and Europe; the resurgence of totalitarianism, populism, and racism; public health emergencies; and ongoing economic and political instability. While none of these issues are "aging issues" per se, they are inarguably large scale *human* issues that can have immediate and long-term impact at both the individual and collective levels in terms of access to resources, opportunity structures, and quality of life as we travel through the life course.

Since the previous edition of this book, the oldest members of the baby boom generation have begun collecting Social Security, and the process of population aging is well under way. Given current demographic trends, it is likely that tens of thousands of Americans born after the year 2000 will live to see the dawn of another century, the 22nd. Many of you who are reading this book will spend the greatest part of your lives experiencing dramatic changes already evident in telecommunications, biotechnology, and genetics. This ever-accelerating change will produce even more debate and controversy about how we are to live and participate in an aging society and in the 21st century.

In this edition of the book, we use the same unique approach that inspired earlier editions in order to consider and respond to perennial and new public debates and social conditions that shape how we think about and experience aging. This approach entails presenting key ideas and content from gerontology as opportunities for critical thinking. Our aim is to encourage you to not only encounter basic ideas but also reflect more deeply on issues raised by the study of aging.

As we move further into the 21st century with a population growing older not only in North America but also globally, we all have a stake in developing a better understanding of the subject (Perkinson, 2013). In this book we intentionally focus on issues of interest to all of us as citizens and as educated human beings, not just as potential gerontologists or professional service providers. From the opening chapter, we encourage you to see aging not as a fixed period of life but as a process beginning at birth and extending over the entire life course. This open-ended quality of human aging is a theme woven throughout the book: from biological experiments on extending the lifespan to difficult choices about allocation of health care resources, to questions about the meaning of becoming and "older person."

The multiple possibilities for how we might age both as individuals and as a society create complex choices that are important for all of us. New thinking is needed if we are to grasp and respond to the issues at stake. That is why the pedagogical design of this book focuses on controversies and questions, rather than on assimilating facts or coming up with a single "correct" view about aging or older people. We selected the supplemental readings to accentuate contrast and conflict

and to stimulate faculty and students to think more deeply about what is at stake in the debates presented here. In contrast to most textbooks, we direct your attention toward original sources and encourage you and your instructor to construct the perspectives for responding to the claims made in those original texts.

The point is not to find the single "right answer" raised in the contrasting perspectives and debates about the controversies we feature in this book. Rather, as you become engaged in the debates, you will appreciate the need for having the factual background necessary to make responsible judgments and interpretations. That is the purpose of the three major chapters, the Basic Concepts sections, around which the book's controversies are organized. The data and conceptual frameworks offered in these chapters will help you make sense of the controversies, understand their origin, engage in critical thinking, and, finally, develop your own views. The introductions preceding each controversy and the questions that follow reinforce the essential link between factual knowledge and interpretation at the heart of the book. This book, then, can best be seen as a textbook constructed to provide drama and compelling interest for the reader. It is structured to encourage a style of teaching and learning that goes beyond conveying facts and methods. The goal is nothing more, or less, than critical thinking about gerontology.

In this book, we offer an introduction to the major foundational concepts and perspectives in the field of gerontology. In addition, we pose provocative questions about different aspects of aging at the individual and societal levels. These questions point to perennial and contemporary "controversies" about aging.

You will soon notice that there are multiple, often contrasting or contradictory answers to the questions we pose about these controversies, such as rationing health care for older people or the meaning of old age. You might also notice that for many of the topics we discuss, the research is far from conclusive; in fact, knowledge about aging is always emerging and is at best partial and provisional. Why? Because aging is a complex, multifaceted process that unfolds over the entire human life course, and the study of aging is complex as well.

We invite you to approach this complexity as an opportunity to practice critical thinking. When we think critically, we move beyond the surface of the information presented and dig more deeply to discover the underlying assumptions beneath the information, as well as to consider the implications of putting the information into action. Critical thinking embraces open-mindedness about new or confusing perspectives and empathy to imagine how it is that others might come to their beliefs, opinions, and assumptions about aging. Critical thinking can also be used as a tool to reflect on one's own ideas about aging and to be more actively engaged in learning about gerontology.

Other, more specific features of the book reinforce this pedagogical approach. The **Focus on Practice** sections demonstrate the relevance of the controversies for human services work in our society. The **Focus on the Future** sections make us ever mindful of the accelerating pace of change in our society and its implications. The **Global Perspective** and **Urban Legends of Aging** sections provide additional opportunities for expansive and critical thinking. The appendix offers guidance for researching and writing term papers on aging, and the online resources provided as part of the book's ancillary package open up access to many additional digital resources. Whether you go on to specialized professional work or you never take another course in gerontology, our aim is directed at issues of compelling human importance, now and in the future. By returning again and again to those questions of perennial human interest, we express our hope that both teachers and students will find new excitement in questions that properly concern us all, whatever our age.

What Is New to This Edition?

This new edition builds on the unique approach adopted in earlier editions. There is a close link between concepts and controversies in each of the three broad domains of human aging: the life course, health care, and socioeconomic trends. This link proved to be so teachable in earlier editions that this organization has been reinforced in the current edition. We have also updated and augmented the figures and graphics in the book, using effective illustration and current data wherever appropriate. Information cited has been made as up-to-date as possible to reflect the most recent data and perspectives available. In addition, each chapter of controversies contains a feature section highlighting comparable issues in different countries around the world. These feature sections acknowledge the way in which aging is increasingly a global phenomenon with lessons of international significance. We've also included learning objectives at the beginning of each Basic Concepts chapter as well as a separate glossary of key terminology used throughout the book. To support students who intend to work in the field of aging or who want to be well prepared to work in any capacity in an aging society, we've updated the concluding chapter that explores new and emerging careers as well as questions about where the field of gerontology is heading now and in the future. In addition, instructors using this book can now receive at no cost a monthly electronic newsletter, *Human Values in Aging*, which provides resources and insights about the multiple dimensions of the experience of age. A subscription to this e-newsletter is available by contacting hrmoody@yahoo.com.

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—H. R. M.

Over the past decade, I have experienced many major life changes and transitions. One of the constants has been my ongoing collaboration with Harry "Rick" Moody, for which I continue to be so grateful. To all of the students and colleagues across the country who engage with our book, thank you for your generous ongoing feedback and support—I hope you see many of your very excellent suggestions manifested in this new edition! And, as always and forever, thank you to my family and closest friends for their encouragement and support. Where would I be without your love?

—J. R. S.

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Prologue

It is no secret that the number of people 65 and over in the United States is growing rapidly, a phenomenon recognized as the "graying of America" (Himes, 2001). The numbers are staggering. There has been an exponential increase in older people in the United States since 1870: from 1 million up to 52 million in 2018—a number now larger than the entire population of Canada (Mather, Scommegna, & Kilduff, 2019). During recent decades, the 65 and older group has been increasing twice as fast as the rest of the population, and adults 80 and older are the fastest-growing segment of the population globally (Hudson & Goodwin, 2013).

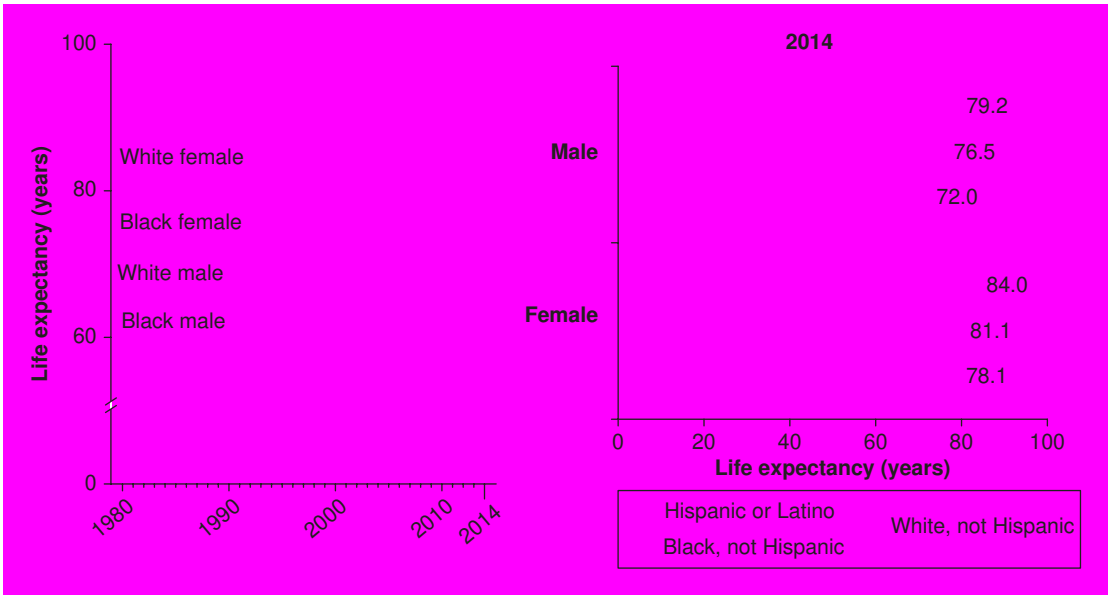
As a result, the U.S. population looks different than it did earlier in the 20th century. In 1900, average life expectancy at birth was 47 but is now close to 79. A hundred years ago, only 4% of the population was over the age of 65; by 2017, that figure had jumped to more than 15%. The pace of growth continued in the first decades of the 21st century, and in 2011 the huge baby boom generation—those born between 1946 and 1964—moved into the ranks of older adults. The U.S. Census Bureau projects that by 2030 the proportion of the population over age 65 will reach close to 20% and there will be at least 400,000 people who are 100 years or older. This rate of growth in the older population is unprecedented in human history. Within a few decades, one in five of all Americans will be eligible for Social Security and Medicare, contrasted with one in eight today; in 2019, 9 out of 10 persons age 65 and older received Social Security (Social Security Administration, 2019a).

We usually think of aging as strictly an individual matter. But we can also describe an entire population as aging or growing older, although to speak that way is metaphorical. In literal terms, only organisms, not populations, grow older. Still, the average age of the population is increasing, and the proportion of the population made up of people ages 65 and older is rising. This change in the demographic structure of the population is referred to as **population aging** (Clark et al., 2004; Olshansky, 2015; Uhlenberg, 2009).

Population aging results from two factors: The proportion of older persons in a population increases because of persons living longer (e.g., longevity), and the proportion of children in the population decreases because of lower birthrates. Both of these trends took place throughout the 20th century and have continued into the early 21st century, but the drop in the numbers of children being born is a more significant factor for population aging than is people living longer. In 1900, the United States had a relatively young population: The percentage of children and teenagers in the population was 40%. According to U.S. Census Bureau data, by 2017, the proportion of youth had dropped to 24%, an all-time low. By contrast, those ages 65 and older increased from 4% in 1900 to 16% in 2017, with larger increases still to come (Kaiser Family Foundation, 2017b). During the next several decades, overall population growth in the United States will be concentrated among middle-aged and older Americans.

The United States is not the only country undergoing population aging (Bosworth & Burtless, 1998; Cherlin, 2010; National Institute on Aging, 2007).

Exhibit P.1 Life Expectancy at Birth, by Sex, Race, and Hispanic Origin: United States, 1980–2014



Source: Figure 18 in Centers for Disease Control and Prevention (2015); CDC/NCHS, National Vital Statistics System.

Note: Life expectancy data by Hispanic origin were available starting in 2006 and were corrected to address racial and ethnic misclassification.

For example, average life expectancy at birth in Japan is currently 84 years (World Population Review, 2020), the highest in the world, and the proportion of the population ages 65 and older there is 27% (World Bank, 2019). In Germany, Italy, and Japan, the population is aging because of low birthrates as well. Think of the state of Florida today as a model for population aging: a population in which nearly one in five people is already over the age of 65. We can ask: How long will it take different nations to reach the condition of "Florida-ization"? The answer is that Italy already looked like Florida by 2003, Japan by 2005, and Germany by 2006. France and Great Britain resembled Florida in 2016, whereas the United States in general will not reach "Florida-ization" until 2023.

Population aging also shows up as an increase in the **median age** for the entire population, that is, the age at which half the population is older and half the population is younger. The median age of the U.S. population in 1820 was only 17 years; by 1900 it rose to 23 and by 2018 to 38. It is estimated that the median age of the American population by 2030 will be 42 years. This shift is a measure of the dramatic impact of population aging.

It is clear, then, that populations age for reasons different than individuals do, and the reasons have to do with large-scale demographic trends. In the first place,

population aging occurs because birthrates go down. With a smaller proportion of children in the population, the average age of the population goes up. Population aging can also come about because of increases in life expectancy—people living longer on average. Finally, the process of population aging can be influenced for a time because of the characteristics of birth **cohorts**. A cohort is a group of people born during a particular time who thereby experience common **life events** during the same historical period. For example, the cohort born during the Great Depression of the 1930s was relatively small and thus has had minimal impact on the average age of the population. By contrast, the baby boomers born after World War II are a large cohort. Because of this cohort's size, the middle-aged baby boomers are dramatically hastening the aging of the U.S. population. Even larger than the baby boomer cohort is the Millennial or Gen Y cohort, the members of which were ages 24 to 39 as of 2020 (Pew Research Center, 2020). How will this large cohort, numbering 72.1 million, impact population aging in the U.S. in future decades?

In summary, then, trends in birthrates, death rates, and the flow of cohorts all contribute to population aging. What complicates matters is that all three trends can be happening simultaneously, as they have been in the United States in recent decades. Casual observers sometimes suggest that the U.S. population is aging mainly because people are living longer. But that observation is not quite accurate because it fails to take into account multiple trends defined by demographic factors of fertility, mortality, and flow of cohorts.

A demographic description tells us what the population looks like, but it does not explain the reason that population trends happen in the first place. We need to ask: Why has this process of population aging occurred? The rising proportion of older people in the population can be explained by **demographic transition theory**, which points to a connection between population change and the economic process of industrialization. In preindustrial societies, there is a generally stable population because both birthrates and death rates remain high. With industrialization, death rates tend to fall, whereas birthrates remain high for a period, so the total population grows. But at a certain point, at least in advanced industrial societies, birthrates begin to fall back in line with death rates. Eventually, when the rate of fertility is exactly balanced by the rate of mortality, we have a condition of stability known as zero population growth (Chu, 1997). The population is neither growing nor shrinking.

The Western industrial revolution of the 19th century brought improved agricultural production, improved standards of living, and also an increase in population size. Over time, there came a shift in the age structure of the population, known to demographers as the demographic transition. This was a shift away from a population with high fertility and high mortality to one of low fertility and low mortality. That population pattern is what we see today in the United States, Europe, and Japan. The result in all industrialized societies has been population aging: a change in the age distribution of the population.

Most countries in the developing world—in parts of Africa, Asia, and Latin America—still have fertility rates and death rates much higher than those of advanced industrialized countries. For the United States in 1800, as for most developing countries today, that population distribution can be represented as a

population pyramid: many births (high fertility) and relatively few people surviving to old age (high mortality). For countries that are approaching zero population growth, that pyramid is replaced by a cylinder: Each cohort becomes approximately the same in size.

As we have seen, the increased number of older people is only part of the cause of population aging. It is important to remember that, overall, population aging has been brought about much more by declines in fertility than by reductions in mortality. The trend toward declining fertility in the United States can be traced back to the early 19th century, and the process of population aging has causes that date back even longer (Olshansky & Carnes, 2002). To complete the demographic picture, we need to point to other factors that influence population size and composition, such as improvements in the chance of survival of people at different ages or the impact of immigration into the United States, largely by younger people. But one conclusion is inescapable: Today's increased proportion of people ages 65 and older springs from causes that are deeply rooted in American society. Population aging is a long-range trend that will characterize our society into the 21st century, driven largely by changes in immigration and the aging of the baby boomers, as well as the even larger millennial cohort. It is a force we all will cope with for the rest of our lives.

But how is American society coping with population aging? How are the major institutions of society—education, health care, government, the economy, the family—responding to the aging of a large number of individuals? The answer, in simplified terms, is rooted in a basic difference between individual and population aging. As human beings, we are all familiar with the life course process of individual aging. It is therefore not surprising that, as a society, we have devised many policies and practices to take into account changes that predictably occur in the later years, such as planning for retirement, medical interventions for chronic illnesses, and familiar government programs such as Social Security and Medicare.

Whether it involves changes in biological functioning or changes in work roles, individual aging is tangible and undeniable, a pattern we observe well enough in our parents and family members, not to mention in ourselves. But population aging is more subtle and less easily observed. We have many institutional policies and programs to deal with individual aging, but our society is just beginning to wrestle with the controversies generated by the population aging trends now emerging, with the prospect of even more dramatic debate and change in the decades ahead. These demographic changes are significant and are stimulating tremendous ferment in our society's fundamental institutions. For that reason, this book is organized around controversies along with the facts and basic concepts that stand behind them.

Our society's response to population aging can best be summed up in the aphorism that generals prepare for the next war by fighting the old one over again. That is to say, in our individual and social planning, we tend to look back to past experience to guide our thinking about the future. Thus, when the railroad was first introduced, it was dubbed "the iron horse." But it wasn't a horse at all, and the changes that rail transport brought to society were revolutionary, beyond anything that could have been expected by looking to the past.

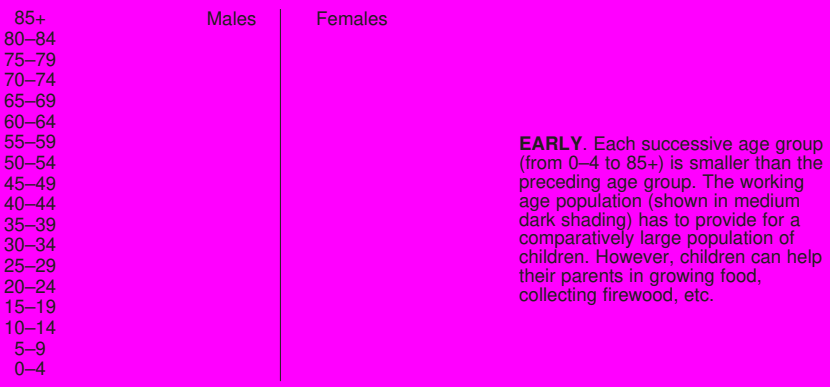
The same holds true for population aging. We cannot anticipate the changes that will be brought about by population aging by looking backward. Population aging is historically unprecedented among the world's societies. Moreover, we should not confuse population aging with the process of individual aging. An aging society, after all, is not like an individual with a fixed lifespan. Why is it that people are so often fearful when they begin to think about the United States' future as an aging society? Part of the reason is surely that many of us are locked into images of decline that are based on prejudice or outdated impressions of what individual aging entails. Because our social institutions have responded to aging as a problem, we tend to see only losses and to overlook opportunities in the process of aging.

An important point to remember is that the solutions to yesterday's problems may not prove adequate for the challenges we face today, or for those we'll face in the future. For example, Social Security has proven vital in protecting older Americans from the threat of poverty in old age. But Social Security was never designed to help promote second careers or new forms of productivity among older people. We may need to think in new ways about pensions and retirement in the future. Similarly, Medicare has proved to be an important, although expensive, means of guaranteeing access to medical care for older people, but it was never designed to address the problems of long-term care for older people who need help to remain in their own homes. Finally, as the sheer number of people ages 65 and older increases—from 52 million in 2018 to a projected 95 million by 2060—the United States as a society will need to consider which institutions and policies are best able to provide for the needs of this growing population (Mather et al., 2019).

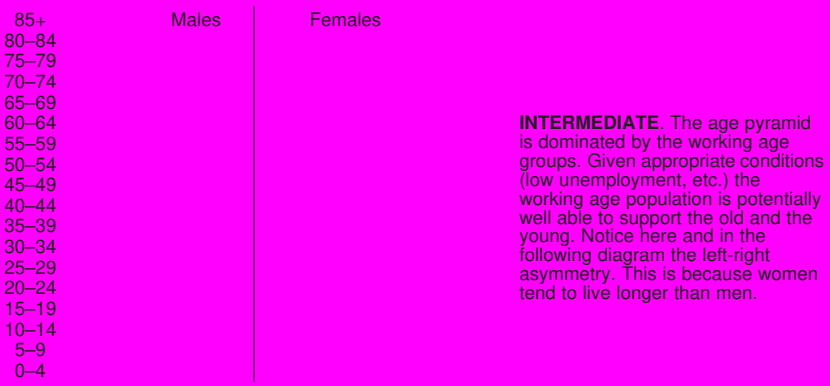
Social gerontologist Matilda White Riley pointed out that our failure to think deeply about population aging is a weakness in gerontology as a discipline. Gerontologists know more about individual aging than about opportunity structures over the whole life course. By "opportunity structures," we mean that the way society is organized or structured affects an individual's chance or ability to gain certain resources or meet certain goals. A good example is the way the life course has been shaped, with transitions from education to work to retirement. These transitions do not seem to prepare us for an aging society in the future. In effect, we have a "cultural lag" in facing the future (Katz, 2005; Riley & Riley, 1994). We know that in this century, the age of leaving the workforce to retire has been gradually going down, whereas the age for leaving schooling has been going up. Riley pointed out that, if we were to project these trends into the future, sometime in the 21st century, people would leave college at age 38 and immediately enter retirement. This scenario, of course, is not serious. But it does make a serious point. We must not take current trends and simply project them into the future.

Part of the problem is that we have less knowledge than we ought to have about the interaction between individual lives and the wider society. During the 20th century, nearly three decades on average were added to human life expectancy. Now more than a third of adult life is spent postwork. People ages 65 and older are healthier and better educated than ever before. Yet we lack opportunity structures to integrate this older population into major institutions of society such

Exhibit P.2 Demographic Transition



EARLY. Each successive age group (from 0–4 to 85+) is smaller than the preceding age group. The working age population (shown in medium dark shading) has to provide for a comparatively large population of children. However, children can help their parents in growing food, collecting firewood, etc.

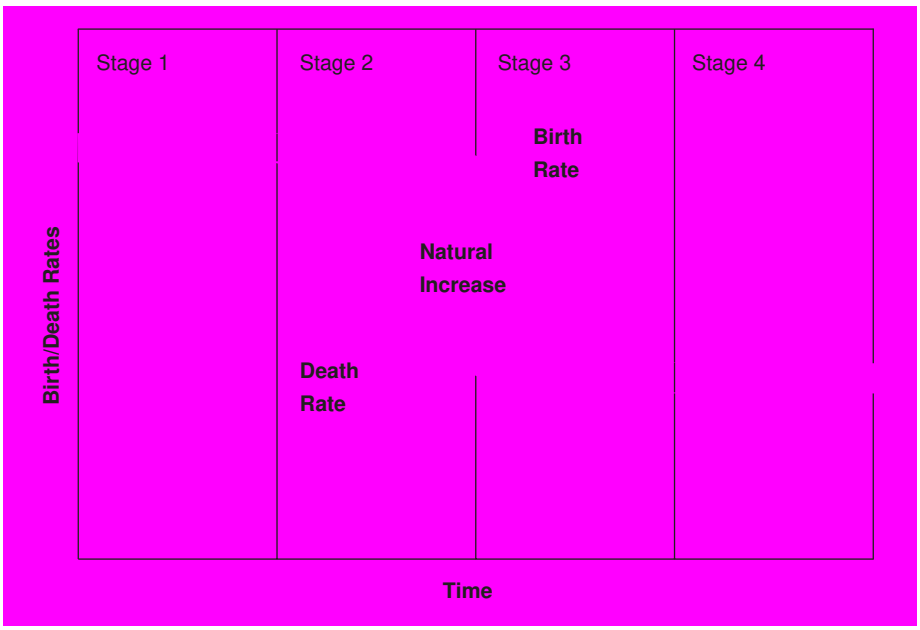


INTERMEDIATE. The age pyramid is dominated by the working age groups. Given appropriate conditions (low unemployment, etc.) the working age population is potentially well able to support the old and the young. Notice here and in the following diagram the left-right asymmetry. This is because women tend to live longer than men.

LATE. Now the pyramid is almost rectangular in shape. The working age population needs to support a large population of older people.

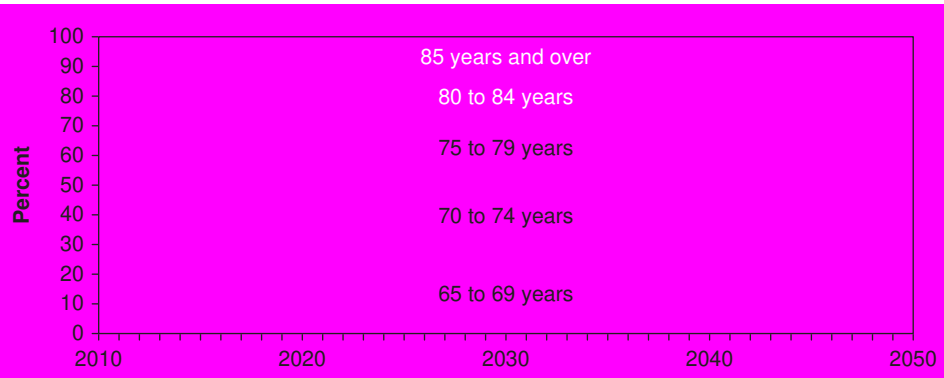
Source: Population: A Lively Introduction, 4th edition, by Joseph A. McFalls, Jr. Population Reference Bureau.

Exhibit P.3 Birthrates and Death Rates



Source: U.S. Census Bureau (2010).

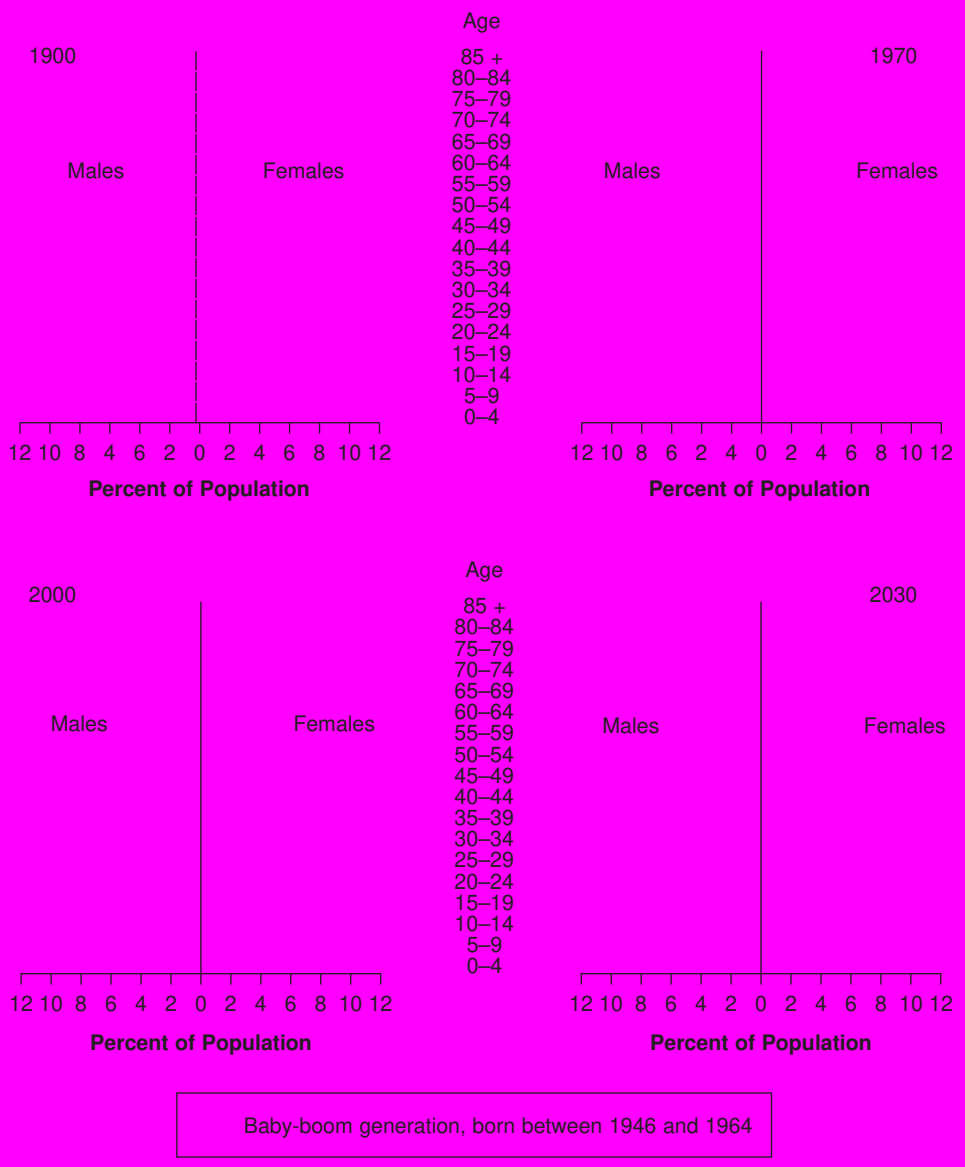
Exhibit P.4 Distribution of the Projected Older Population by Age for the United States, 2010–2050



Source: U.S. Census Bureau (2010).

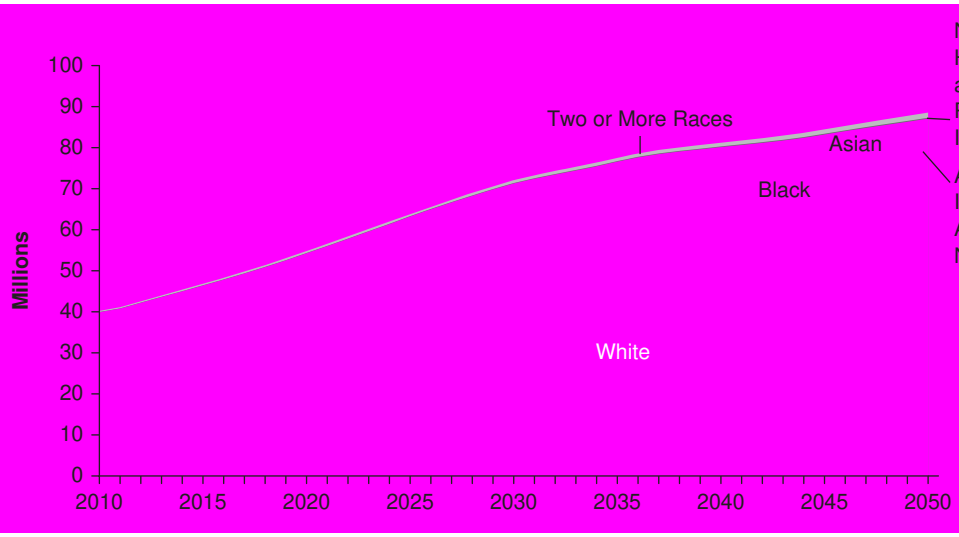
Note: Line indicates the year that each age group is the largest proportion of the older population.

Exhibit P.5 The Dramatic Aging of the United States, 1900–2030



Source: U.S. Census Bureau. Adapted from Himes (2001).

Exhibit P.6 Projected Population of Adults Ages 65 and Over by Race in the United States, 2010–2050



Source: Figure 4 from U.S. Census Bureau (2014).

Note: Unless otherwise specified, data refer to the population who reported a race alone. Populations for each race group include both Hispanics and non-Hispanics, as Hispanics may be of any race.

as education or the workplace. We have yet to design a blueprint for an aging society of the future. And there are important questions to be asking about what such a blueprint might look like. Today, we grow old and experience aging and later life differently than our grandparents did, and in a way differently than will our children, so it does little good to look backward as we move into the 21st century.

The challenge is to change our way of anticipating and planning for the future by thinking critically about our underlying assumptions. This task of critical thinking may be more difficult in gerontology than in other fields because of the familiarity and deeply personal nature of aging. Revolutionary changes took place in the 20th century, but most of us tend to assume that aging and the human life course have remained the same. Despite our commonsense perceptions, however, history and the human sciences tell us that the process of aging is not something fixed, but is both changeable and subject to interpretation.

Taking a more critical and thoughtful stance, we know that "stages of life" have been viewed differently by different societies, in different cultural contexts,

and in different historical periods. Even in our own society, the experience of growing older is not uniform but means different things to individuals depending on their gender, ethnicity, social class, and other dimensions of difference and diversity. From this perspective, a familiar practice such as retirement turns out to be less than a century old and now is in the process of being reexamined and redefined. Even in the biology of aging, scientists are engaged in serious debate about whether it is possible to extend the maximum human lifespan from what we have known in the past.

In short, wherever we look—biology, economics, the social and behavioral sciences, and public policy—we see that aging, despite its supposed familiarity, cannot be taken as a fixed fact of human life. Both individual aging and population aging are socially and historically constructed, subject to interpretation, and therefore open to controversy, debate, and change.

It is astonishing to realize that more than half of all the human beings who have ever lived beyond age 65 are alive today. What aging will mean in the 21st century is not something we can predict merely by extrapolating from the present and the past. Still less can the study of aging consist of an accumulation of facts to be assimilated, as if knowing these facts could somehow prepare us for the future. The changes are too significant for such an approach.

What we need most of all is to consider facts about individual and population aging in a wider context: to understand that facts and theories are all partial, provisional, and, therefore, subject to interpretation and revision. That is the second major reason that the study of aging in this book is presented in the form of controversy and debate, offering all of us an opportunity to reflect on and construct an old age worthy of "our future selves."

About the Authors

Harry R. Moody, PhD, is a graduate of Yale University and received his doctorate in philosophy from Columbia University. He has taught philosophy at Columbia University, Hunter College, New York University, and the University of California at Santa Cruz. For 25 years he was at the Brookdale Center for Healthy Aging at Hunter College of the City University of New York, where he served as cofounder and executive director. With the National Council on Aging in Washington, D.C., he served as codirector of its National Policy Center. He is the author of more than 100 scholarly articles and several books, including *Abundance of Life: Human Development Policies for an Aging Society* (1988); *Ethics in an Aging Society* (1992); and *The Five Stages of the Soul* (1997), a study of spiritual growth in the second half of life. He is known for his work in older adult education and served as chairman of the board of Elderhostel (now Road Scholar). Dr. Moody retired as vice president for academic affairs for AARP in Washington, D.C. He is currently a visiting faculty member in the Creative Longevity and Wisdom Program at Fielding Graduate University, in Santa Barbara, California.

Jennifer R. Sasser, PhD, is an educational gerontologist, transdisciplinary scholar, and community activist. Dr. Sasser has been working in the field of gerontology for more than half her life, beginning as a nursing assistant and senior citizen advocate before focusing on scholarly inquiry and education. As an undergraduate she attended Willamette University, in Salem, Oregon, graduating Cum Laude in psychology and music. Her interdisciplinary graduate studies at University of Oregon and Oregon State University focused on the human sciences, with specialization areas in adult development and aging, women's studies, and critical social theory and alternative research methodologies. Dr. Sasser's dissertation became part of a book published by Routledge in 1996 and coauthored with Dr. Janet Lee—*Blood Stories: Menarche and the Politics of the Female Body in Contemporary U.S. Society.*

For the past 30 years, she has focused her inquiry in the areas of creativity in later life, aging and embodiment, transdisciplinary curriculum design, critical gerontological theory, transformational adult learning practices, and cross-generational collaborative inquiry. Dr. Sasser served as chair of the Department of Human Sciences and founding director of Gerontology at Marylhurst University from 1999 to 2015. She joined the Marylhurst faculty as an adjunct member of the Master of Arts in Interdisciplinary Studies program in 1997 and during the subsequent 19 years was involved in designing many on-campus and web-based courses and programs for adult learners.

An award-winning educator, Dr. Sasser received the 2012 Association for Gerontology in Higher Education Distinguished Teacher award and a Willamette University Distinguished Alumni award in 2014. From 2018 to 2020, she served as an instructor in the Human Development and Family Sciences program at Oregon

State University, and she continues her long-term commitment to the Portland Community College Gerontology program.

In addition to coauthoring *Aging: Concepts and Controversies* with Harry Moody, she is first author (with Moody) of *Gerontology: The Basics* (Routledge). Her other ongoing commitments include convening the Gero-Punk Project (www.geropunkproject.org), serving as a conversation facilitator for Oregon Humanities (www.oregonhumanities.org), and offering consulting, workshops, and presentations throughout North America.

BASIC CONCEPTS

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Multigenerational families provide a vivid illustration of the life course perspective: Aging is a gradual, lifelong process we all experience, not something that happens only in later life.

Learning Objectives

After reading Basic Concepts I, readers will:

1. Understand aging as a lifelong experience that is multifaceted and shaped by the contexts in which individuals live.
2. Be familiar with the central theories developed to understand and explain aging.
3. Identify the main biological processes thought to regulate aging.
4. Appreciate the ways in which social construction and historical factors influence our understandings of age, aging, and later life.

When we think about "aging," we often call to mind the image of an old person. But the process of aging actually begins much earlier in life. We cannot fully understand what *old age* means unless we understand it as part of the entire course of human life, and this approach is called the **life course perspective** (Fuller-Iglesias, Smith, & Antonucci, 2009; Settersten, 2003).

Often our image of old age is misleading. For example, try to conjure a mental image of a college student. Now imagine a recent retiree, a grandmother, and a first-time father. Hold those images in mind and then consider the following facts:

- The majority of college students are adults, not traditional-age students right out of high school.
- Retirees from the military are typically in their 40s or 50s.
- In some inner-city neighborhoods, it is not at all unusual to meet a 35-year-old grandmother whose daughter is a pregnant teenager.
- It is no longer surprising for men in second marriages to become fathers for the first time at age 40 or 50.

Did some of those facts contradict the images you conjured, particularly images related to the ages people are when they fill certain roles? What this exercise tells us is that roles such as "student," "retiree," "grandmother," and "first-time father" are no longer necessarily linked to a certain chronological age or life course stage. Today, what we are learning about aging is forcing us to reexamine traditional ideas about adult development and what it means to grow old. Both findings from biomedical science and social behavior among older adults challenge stereotypical images of what is "right" or "appropriate" for a specific age.

Although we tend to think of old age as a stage at the end of life, we recognize that it is shaped by a lifetime of experience. Conditions of living, such as social class, formal education, and occupation, are determinants of the individual's experiences in old age. In other words, the last stage of life is the result of all the stages that come before it. The implication is that we no longer accept the quality of life in old age, or even the meaning of old age, as a matter of destiny. Rather, we view it as a matter of individual choice and social policy. Whether older people feel satisfaction and meaning may therefore depend on what they do and how social institutions support them in finding new purpose in later life (Kohli, 2007).

Recent biological research demonstrates that indeed people do not suddenly become old at the time we have defined as *old age*. Aging is a gradual process, and many human capabilities survive long past the time when persons living in North America are considered of an age to retire. We are learning more every day about how and why people grow old, with the hope that we can make the last stage of life just as meaningful in its own way as earlier stages are.

Focus on Practice

In a *New York Times* column called "The New Old Age," author Judith Graham asked: "What language do you think we should use to describe people who have advanced beyond the middle of their lives, and why?" She conducted informal interviews with several experts in the field to see what they had to say, and what she found speaks to the complexity of this issue. *Senior citizen, elderly, older adult, older person,* and *elder* are the most common terms used to refer to such a person. And there are arguments for and against using each of these terms. But what do persons who are in the later years of the life course call themselves? What do they want to be called? What might your future older self want to be called? These are important questions to ask in the context of the study of aging, as the focus of our research and practice is "people who have advanced beyond the middle years of their lives."

Graham (2012).

Age Identification

A central concept in any discussion of aging is the meaning of age itself. Age identification is partly an acknowledgment of chronological age or years since birth, but it is also a powerful social and psychological dimension of our lives.

From early childhood, we are socialized to think about what it means to "act your age," a process described as **age differentiation**. We learn that different roles or behaviors are considered appropriate—and inappropriate—depending on whether we are a toddler or a teenager, an adult or an older person. **Age grading** refers to the way people are assigned different roles in society depending on their age (Streib & Bourg, 1984). Theorists of **age stratification** emphasize that a person's position in the age structure affects behavior or attitudes.

People also come to define themselves, at least in part, in terms of their age. Consider when you started thinking of yourself as an adult instead of a child. Did you suddenly lose interest in some of the things that had once fascinated you because you considered them "childish" interests? Do you anticipate that when you become "middle-aged" or "old" you will no longer be quite the same person you are now? Where do these ideas regarding what is "appropriate" at a particular age come from?

People in a culture have widely shared expectations about the "right time" for an event to happen. In Western society, for example, marriage at age 13 or retirement at age 30 would be considered off time, but graduation from college at 22 or retirement at age 65 would be on time. In other words, we all have a shared, socially constructed **social clock** concerning the appropriate age for certain life events (Helson, Mitchell, & Moane, 1984). However, the timetable for life events varies somewhat with social class based on ethnicity, and occupation; the career timetable of a medical student, for instance, is quite different from that of a migrant farmworker. In addition, age norms change over time. For example, Americans today tend to first marry in their mid- to late 20s, but a century ago, people that age (particularly women) would have been considered rather old for a first marriage.

Cultural understandings about what is "age-appropriate" are part of a tradition going back to antiquity (Falkner & de Luce, 1992). In the comedy of ancient Rome, for example, older adults are often ridiculed for unseemly behavior, and hostility is expressed toward old men who take young lovers, a theme often repeated in medieval literature (Bertman, 1976).

What do we think is appropriate for "older people" in our culture today? For one answer, we can look to the images in our symbols, rituals, and myths. Storytellers and minstrels have expressed traditional societies' concepts of age, but today in advanced industrial societies, those concepts are frequently transmitted and reinforced by advertising, entertainment, and social media. As a rule, people on TV are young and good-looking; older people are not visible on TV in anything like their proportion of the actual population (Davis & Davis, 1985; Peterson & Sautter, 2003). When they are depicted, they tend to be one step removed from the action. Even when advertisers try to appeal to the "gray market" of older consumers, they present idealized images of good health and vigorous activity. It seems sometimes that we are trying to ignore the inevitability of old age.

Beyond age (and other) stereotypes, advertising, entertainment, and social media have a latent effect that is both more subtle and more pervasive. Media

occupy a perpetual present dominated by novelty and momentary images (**Meyrowitz,** 1985). The effect is to weaken any sense of continuity over the life course and to undercut any authority or meaning for old age. Traditional cultures tend to prize their older members as links in a historical chain reaching back to the ancestors. But the contemporary culture of communication technology and social media tends to put all age groups on an equal footing (Gilleard & Higgs, 2000). The result is the "disappearance of childhood" and perhaps of old age too (Postman, 1982).

Mythic images of aging are of course oversimplified and based on fantasy. But sometimes they provide insight into the deeper meaning of the last stage of life. The Western view of old age tends to be ambivalent. In the Hebrew Bible, for instance, old age is venerated as a reward for righteous living: The Fifth Commandment to honor one's parents contains a promise of long life. In contrast, there is a realistic dread of frailty and a fear that children may reject aged parents (Isenberg, 2000). The book of Job even questions the assumption that old age brings wisdom and recognizes that the wicked can live just as long as the righteous.

Greek and Roman views of late life also reflect profound ambivalence. In the first great work of Western literature, Homer's *Iliad,* we find worship of youth in the figure of the young, strong warrior Achilles, but the aged Nestor is revered for his wisdom. In the philosophical tradition, Plato and Aristotle took opposing views on aging. For Plato, later life offered a possibility of rising above the body to attain insight into the eternal nature of reality. In contrast, Aristotle saw middle age as the summit of life, a time when creative intellectual powers were at their peak, with later life as a time of decline (Minois, 1989).

In our culture today, we explore similar issues, especially in feature-length films. The myths of aging range from the quest for rejuvenation through the fountain of youth (*Cocoon*) to the psychological self-fulfillment of the aged hero returning home (*Wild Strawberries* or *The Trip to Bountiful*). At its best, film can present images of the older person as a genuine hero triumphing over circumstance (*Driving Miss Daisy* or *The World's Fastest Indian*) or living later life with zest and openness to new adventures (*The Best Exotic Marigold Hotel* or *The Book Club*). The images of old age purveyed by mass media have a profound effect on attitudes toward aging in all industrialized societies (Featherstone & Wernick, 1995).

The Stages of Life

Since the dawn of civilization, human beings have recognized a progression through the life course, from infancy through old age. The overall progression appears universal, yet the time between birth and death has been organized in distinctive ways by different societies (Boyle & Morriss, 1987). The simplest division was into two stages: childhood and adulthood. But as societies become more complex and as longevity increases, they tend to develop a greater number of life stages.

Greek and Roman ideas were influential in shaping how we think today about aging and the life course. One of the greatest Greek tragedies is the three-part

Oedipus cycle, the last play written when its author, Sophocles, was nearly 90 years old. In this story, Oedipus becomes king because he solves the famous riddle of the Sphinx: "What creature walks on four legs in the morning, two legs at noon, and three legs in the afternoon?" The answer is the human being at successive life stages: infancy (crawling on four legs), adulthood (walking on two), and old age (using a cane, a third leg, to support the other two). The Greek medical writer Hippocrates described four stages of life, or ages, corresponding to the four seasons of the year. Similar ideas were put forward by the Roman physician Galen and by the astronomer Ptolemy. Ptolemy developed an idea of seven stages of life, which had great influence during the Middle Ages.

During the Middle Ages, Christian civilization balanced the image of multiple stages with the metaphor of life as a journey or spiritual pilgrimage. From that standpoint, no single stage of life would be viewed as superior to another. Just as the natural life cycle was oriented by the recurrent cycle of the seasons, so the individual soul would be oriented toward the hope of an afterlife (Burrows, 1986). The human life course as both cycle and journey was thereby endowed with transcendent meaning and wholeness (Cole, 1992).

With the coming of the Reformation and the Renaissance, ideas about the life course changed into forms we recognize as modern. Writing in this epoch, Shakespeare expressed the traditional idea of the "Seven Ages of Man":

All the world's a stage

And all the men and women merely players,

They have their exits and entrances;

And one man in his time plays many parts,

His acts being seven ages.

(As You Like It, Act II, Scene 7)

To Shakespeare, the periods of life were merely roles acted out on the stage of society, and the role losses of old age appeared as the final act of the play. Thus, a theatrical metaphor replaced the ideal of a cosmic cycle or a spiritual journey.

At the dawn of modern times, a generation after Shakespeare, drawings and engravings began to depict the stages of life in a new way. The traditional image of a completed circle became an image of a rising and falling staircase, where midlife occupied the peak of power. That image promoted the idea of life as a "career," in which individuals could exercise control over later life through, for example, extended education, good health care, and capital accumulated through savings during earlier stages.

During the 16th and 17th centuries, the stages of life began to be demarcated in ways we recognize today. Childhood became a period of life in its own right, separate from adulthood and old age (Aries, 1962). By the 20th century, as the practice of retirement became well established, old age became a distinct phase as

well. Some sociologists argue that such stages reflect patterns of socialization tied to dominant institutions such as the school or workplace (Dannefer, 1984; Kohli, 2007); in other words, retirement exists as a separate phase of life partly because society needs to make way in the workplace for younger workers.

Today, a person will spend, on average, at least one fourth or even one third of adulthood in retirement (Kohli, 1987). Partly as a consequence, distinctions are made between the **young-old** (ages 65–74), the **old-old** (ages 75–84), and now the **oldest-old** (ages 85 and over). Demarcating a stage of life following the working years is more important to us than ever, yet we have simultaneously become less certain about what it means to grow older or to "act your age" at any point in life. Issues around the potential for new forms of self-expression and contributions to society in later life are discussed later in this book.

The Life Course and Aging

The study of aging as a historical phenomenon reveals a variety of views about the stages of life, about when old age begins, and about what it involves (Troyansky, 2015). When we read about aging in the Bible or in works by such writers as Shakespeare and Cicero, we might imagine that "old age" is a fixed stage of life, always part of the natural pattern of things, such as birth and death. But now, in the first part of the 21st century, it has become clear that human aging is far more ambiguous than might have been imagined in earlier epochs. We can most fruitfully understand old age not as a separate period of life, but as part of the total human life course from birth to death.

Increasingly, aging is seen from this life course perspective (Bernardia, Huininkb, & Settersten, 2019; Dannefer & Phillipson, 2010; Markson & Hollis-Sawyer, 2000; Mortimer & Shanahan, 2003). In other words, we look at old age as one phase of the entire course of life and the result of influences that came from earlier periods. We distinguish here between the span of a lifetime, which is the total number of years we live, and the course of life, which refers to the meaningful patterns seen in the passing of time. Gerontology is enriched and broadened by the life course perspective. Instead of merely describing the limited characteristics of old age, which are tied primarily to biophysical changes, we shift the framework to include all phases of life, from childhood, adolescence, and adulthood right up through the last period of old age. We also view the complex interaction of age, social status, cohort effects, and history; the contexts in which aging occurs; and the timing of events and transitions in individuals' lives (Elder & Johnson, 2003; Riley & Riley, 1994). **Longitudinal research**, which follows individuals over long periods of time, is a key methodological design to reinforce the life course perspective because such an approach allows researchers to view developmental changes as they unfold over time within the same people.

The life course perspective insists that, to make sense of old age, we need to understand the entire life history. As people move through the life course, they

are socialized to act in ways appropriate to successive social roles: student, parent, worker, retiree, and so on. But these structural factors only set boundaries; the meaning and experience of aging vary significantly by culture and are influenced by powerful factors such as gender, socioeconomic status, and ethnicity. There is also room for individual variety and freedom of choice as human beings interpret age-related roles in distinctive ways.

Life Transitions

A life course perspective recognizes markers of the passage through life: important normative life events or transition points, such as graduation from school, first job, marriage, and retirement. In some respects, life transitions have become more predictable than was true earlier in history. For example, today people commonly die in old age, whereas in an earlier era, death was not unusual at any time of life. Thus, an event such as the death of a spouse or a parent is now a more predictable marker of later adulthood than it once was.

At the same time, however, certain transitions are less often tied to a particular age or stage of life than they might have been in earlier times. For example, during the 1950s and 1960s, college students were expected to graduate at the age of about 21. But today's college students graduate at any age from the early 20s to the 30s and beyond, and news photos of a gray-haired grandparent wearing a cap and gown are no longer uncommon. Graduation may occur at any point in the adult life course. Whatever the age or circumstance of the graduate, however, the transition still marks a major role change.

Special events that mark the transition from one role to another—such as a bar mitzvah, confirmation, graduation ceremony, or wedding—are known as **rites of passage** (Van Gennep, 1960). These rituals reinforce shared norms about the meaning of major life events. Some traditional rites of passage, such as the sequestration of adolescents prior to induction into adult society, are no longer commonly observed in our society. However, we continue to observe a great many, including markers of old-age transitions such as retirement parties, 50th wedding anniversaries, and funerals.

How are we to understand the significance of life transitions? As the human life course became an object for scientific study, the stages of life were no longer seen as part of a cosmic order of meaning (Cole & Gadow, 1986; Katz, 1996). Instead, psychology tried to explain change over the course of life as a natural process unfolding in individuals as they travel through time. The result was the rise of a new field: lifespan development psychology. Erik Erikson (1963), an influential developmental psychologist, depicted the life course as a series of psychological tasks, each requiring the person to resolve conflicting tendencies. For middle age, Erikson posited a conflict between stagnation and generativity: roughly, being trapped by old habits versus going beyond self-absorption to nurture the next generation (Kotre, 1984). For old age, Erikson saw a conflict between ego integrity and despair—that is, accepting one's life versus feeling hopeless and depressed about the limited time remaining.

Related to Erikson's basic ideas has been the attention on psychological changes during midlife transition, a time when people in middle age confront facts about mortality and the limits of youthful dreams (Jacques, 1965). Psychologist Daniel Levinson (1978) has described life transitions characteristically associated with ages such as 30, 40, and 50. These are times when people at midlife reassess themselves and ask, "Where have I come from, and where am I going?" Many of these psychological "passages" or changes of adult life have been popularized by journalists. However, doubts have been raised about just how universal such passages and age-related transitions actually are (Braun & Sweet, 1984). Midlife, just like old age, turns out to be a time of life that is different for different people (Brim, Ryff, & Kessler, 2004).

In contrast, many theorists today see personality in terms of continuity or flexible adaptation over the life course. These theories are more optimistic than those that see old age as a time of loss resulting in either passive adjustment or dependency and depression. Today, most gerontologists believe that people bring positive resources to aging, including a personal sense of meaning, which in turn can promote resilience or adaptation to losses in later life (Bolkan & Hooker, 2012). Empirical studies show that people generally cope well with life transitions such as retirement, widowhood, and the health problems of age. When problems come, styles of coping tend to remain intact, and people adapt. Because of this capacity for adaptation, old age is not usually an unhappy time.

Nevertheless, many behavioral or psychological problems come about because of the difficulties of preparing for transitions without the help of widely observed rituals for rites of passage and institutional structures. For example, the transition from adolescence to adulthood is typically marked by events such as marriage, parenthood, and employment (Hogan & Astone, 1986). Although schools, job orientation, and marriage counseling help people make transitions to adulthood, the situation is different in later life. Few social institutions exist to help people with the transitions in the second half of life.

In addition, we currently have no consensus about how people are supposed to act when in later life they confront events traditionally linked to younger ages (Chudakoff, 1989). For example, how are older widows supposed to go about dating? How much help should older parents expect from their children who are themselves at the point of retirement? When confronted with a 70-year-old newly-wed or a 60-year-old "child," we recognize that norms are unsettled when it comes to transitions in later adulthood (Featherstone & Hepworth, 1993).

Traditional Theories of Aging

Modernization Theory

How do we make sense of the contradictory images of aging found in contemporary culture? One influential account that tries to do so is the **modernization**

theory of aging (Cockerham, 1997). According to this theory, the status of older adults declines as societies become more modern. The status of old age was low in hunting-and-gathering societies, but it rose dramatically in stable agricultural societies, where older people controlled the land. With the coming of industrialization, it is said, modern societies have tended to devalue older people. The modernization theory of aging suggests that the role and status of older adults are inversely related to technological progress. Factors such as urbanization and social mobility tend to disperse families, whereas technological change tends to devalue the wisdom or life experience of elders, leading to a loss of status and power (Cowgill, 1986). Modernization may thus be related to the declining status of older people in different societies (Clark, 1992–1993).

This account strikes a responsive chord because it echoes the "golden age" picture of later life, which depicts the old as honored in preindustrial societies (Stearns, 1982), a version of the "world we have lost" syndrome (Laslett, 1965/1971). But imagining that elders were all well treated in "the good old days" is a big mistake, and modernization theory has been widely criticized (Haber, 1983; Quadagno, 1982). As we have seen already, in ancient, medieval, and premodern societies, older adults were depicted and treated in contradictory ways: sometimes abandoned, sometimes granted power. The history of old age includes variations according to race, gender, social class, and culture. Modernization has clearly reshaped the meaning of old age, yet the image and reality of old age have never entirely coincided, as the cross-cultural study of aging confirms (Ayalon & Tesch-Romer, 2018; Holmes & Holmes, 1995).

At the core of the history of old age, there has always been ambivalence: both resentment and guilt, both honor and oppression. The psychological basis for ambivalence is understandable. Why shouldn't adults feel disillusionment and dread at the sight of vulnerable old age stretching before them? Why shouldn't we harbor ambivalent feelings toward those who accumulate power and wealth over a long lifetime? We see the same ambivalence today. Older people as a group receive many benefits from the government based on their age, yet they are sometimes depicted, perhaps unfairly, as selfish or unconcerned with other generations, as well as out of touch with contemporary perspectives and issues. The truth is different from and more complex than what popular images convey.

A decisive change with industrialization was growing rationalization and bureaucratization of the life course—a greater rigidity among the "three boxes of life" of childhood, adulthood, and old age (Bolles, 1981). At the same time, as we have seen, mass media and rapid flux in cultural values have begun to erode any special qualities linked to distinctive life stages. With increasing longevity, more people are living to old age, and older adults as a group are becoming a larger proportion of the total population. The political power of older people as a group has grown because of their sheer numbers. Meanwhile, the achievement of old age has been devalued simply by becoming more familiar. Perhaps most important, old age has been stripped of any clear or agreed-on meaning because the entire life course has changed in ways that will have unpredictable effects on what aging may be in the 21st century.

There is a big problem with constructing an overall theory of aging for social gerontology. The problem can be compared to a parallel challenge in the biology of aging: Is aging truly something inevitable (Olshansky & Carnes, 2002)? Evolutionary biology begins with a paradox: Why should old age appear at all? From the standpoint of survival of the fittest, there seems to be no reason for organisms to live past the age of reproduction. Old age, in short, should not exist. Yet human beings do live long past the period of fertility; indeed, human beings are among the longest-living mammals on earth.

Thus, the meaning of old age is a problem even for biology, and biologists have put forward a whole variety of theories to explain it: somatic mutation theory, error catastrophe theory, autoimmune theory, and so on. No single theory has proved decisive, but all have stimulated research enabling us to better understand the biology of aging. Similarly, the changing conditions and meanings of old age have provoked a variety of theories in social gerontology. Just as with the biology of aging, there is no clear agreement that a single theory is best. But some early theories of aging are still worth closer examination because they demonstrate how deeply held values affect all theories of aging and how these theories are related to enduring questions about the meaning of old age: disengagement theory, activity theory, and continuity theory.

Urban Legends of Aging

"Respect for elders was higher in the past."

This is a common myth, debunked by historian Peter Laslett (1965/1971) 50 years ago in his classic *The World We Have Lost*. Maybe there's a reason why the Bible contains the Fifth Commandment, "Honor thy father and thy mother." It's the only Commandment that carries a reward for following it.

Disengagement Theory

One of the earliest comprehensive attempts to explain the position of old age in modern society is the **disengagement theory of aging** (Cumming & Henry, 1961). The disengagement theory looks at old age as a time when both the older person and society engage in mutual separation, as in the case of retirement from work. From the perspective of this theory, the process of disengagement is understood to be a natural and normal tendency reflecting a basic biological rhythm of life. In other words, the process of disengagement is assumed to be functional, serving both society and the individual. Disengagement theory is related to modernization theory, which posits that the status of older adults must decline as society becomes more modern and efficient, so it is natural for older adults to disengage.

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Becoming a grandparent can be an important life course transition.

Disengagement theory grew out of an extensive body of research known as the Kansas City Study of Adult Life, which was a 10-year longitudinal study of the transition from middle age to old age (Williams & Wirths, 1965). The idea of disengagement presented itself not only as an empirical account based on those findings but also as a theory to explain observations about modern societies; for example, why has the practice of retirement spread? But gerontologists have criticized disengagement theory (Hochschild, 1975); some have pointed out that the theory evolved during the 1950s and reflected social conditions quite different from those of today as well as distinctions between different societies.

Although the original disengagement theory is no longer often accepted, the pattern of disengagement does describe some behavior of some older people—for example, the seductiveness of the idea of early retirement. But there are growing numbers of older people whose behavior cannot be well described as withdrawal or disengagement from society. Disengagement as a global pattern of behavior can hardly be called natural or inevitable.

Another problem arises when we describe disengagement as "functional," which is a synonym for "useful." The same process that might be functional or useful for an organization—for instance, compulsory retirement at a predictable age—may not be at all useful for individuals, who might prefer flexible retirement or need to continue working because of economic necessity. In fact, it was widespread resentment at being forced to retire at a fixed age that led Congress to end mandatory retirement for most jobs in 1986.

There is also a lack of clarity about what behavior is actually being described by the concept of disengagement. For example, individuals might partially withdraw from one set of activities, such as those in the workplace, to spend more time on other activities, such as family and leisure pursuits; total withdrawal is quite uncommon. Although advancing age at some point is usually accompanied by losses in health, physical ability, and social networks, those who age most "successfully" adjust to and compensate for these losses by putting the changes of later life into a wider perspective, an attitude sometimes described as "wisdom." Later life today, at least for those who are able to adapt to changes that come with aging, is often filled with a rich range of activities. The Kansas City Study investigators also found that with advancing age, there is, in fact, a trend toward greater *interiority,* meaning increased attention to the inner psychological world (Neugarten, 1964). Individuals appear to reach a peak of interest in activity and achievement in their middle years. As they anticipate later life, they may