

A critical perspective: Towards a broader understanding of ‘active ageing’

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Abstract

The current paper explains the origin of the active ageing discourse and addresses the diverging definitions that have been used since its introduction. Generally speaking, a differentiation is made between a narrow view of active ageing (i.e. focusing on labour, care and other “traditional” activities) and a broad perspective. The hazards of applying a narrow point of view are addressed, as such approaches are primarily concerned with the young-old and the distinction between active and passive behaviours is ambiguous. Research and policy implications of broadening the active ageing discourse are discussed.

Keywords: Older adults; Active ageing; Adaptation

Introduction

In the 1950s, the sociogerontological literature was predominantly organised around the idea that a positive relationship exists between an active lifestyle at an advanced age and personal satisfaction with life (Katz, 2000). This point of view later came to be called activity theory. In 1961, disengagement theory presupposed an opposite conception of old age: the gradual and inevitable mutual withdrawal between ageing people and society benefits both individuals and community (Lynott & Lynott, 1996). Despite the criticism launched against both theories, the underlying theme of how to portray older adults within society has remained.

The sociogerontological literature and the societal debate have traditionally emphasized the limitations of older people. From this perspective, learning, working and resting were portrayed as three strictly successive stages throughout the life course, known as the tripartitioning of life (Kohli, 1986). The third stage was conceived as one of dependence, decline and loss (Townsend, Godfrey, & Denby, 2006). This negative depiction of older adults fits within the so-called deficit model that served to legitimize the trend towards early exit from the labour force, which was apparent amongst older men in most developed countries during the post-war period (Jacobs, 2004; Verté & Dewitte, 2006; Walker, 2006). For example, in the 1970s and 1980s, public policies in many European countries encouraged early withdrawal from the labour market as answer to the increasing (youth) unemployment (Van den Heuvel, Herremans, van der Hallen, Ehrel, & Courtioux, 2006). During the 1990s, the issue of global greying resulted in

the dismantling of the schematic conception of the life course that equated the oldest phase of life with rest. Such a rest-phase was no longer feasible within the changing demographic landscape. Within this context, the concept of active ageing emerged. Rooted in activity theory, the active ageing discourse focuses on encouraging the continued participation of older adults in society. It involves an element of “competence thinking”: instead of emphasizing what older adults can no longer do (i.e. their deficits), it focuses on the competence and knowledge that older adults possess (Daatland, 2005; Jacobs, 2004).

The World Health Organization (WHO) adopted the term active ageing in the late 1990s and can be credited for its rapid diffusion in research, policy and practice (Walker, 2006; WHO, 2002). In their principal reports, the WHO explicitly suggests a broad approach in which “the word “active” refers to continuing participation in social, economic, cultural, spiritual and civic affairs, not just the ability to be physically active or to participate in the labour force. (WHO, 2002, p. 12)” While the concept has now come into common usage, there is still no general agreement on what the term actually means (Ranzijn, 2010). This paper highlights several approaches that are used to define active ageing, and it explains the hazards associated with some of the prevailing conceptions. In doing so, the paper aims to fulfil a prerequisite for effective policymaking by clearing the path towards consensus regarding what exactly constitutes active ageing.

From narrow definitions on active ageing

Exploring the literature on active ageing clearly indicates a problem of definition. Authors do not correspond in their attempts to define the concept. The interpretation of active ageing in an exclusively economic framework is prevalent. Many researchers focus solely on labour market participation (e.g., Guillemard & Argoud, 2004; Van den Heuvel et al., 2006) and also the national governments of many industrialized countries continue to place economic aspects at the centre of their active ageing policies (Clarke & Warren, 2007; Walker, 2010). This comes as no surprise, given that the concept is rooted in the greying of the population and the related concerns about the sustainability of our social security systems. Nevertheless, an exclusive focus on employment is problematic, as it reduces the complexity of ageing to a

single component (Giorgi, 2005). In doing so, people who do not hold paid employment are excluded from the possibility of ageing actively, and the valuable contributions that they could still make to society are at risk of being ignored. The use of active ageing in such a restricted manner basically reduces the discourse to its precursor “productive ageing”. While varying definitions of productive ageing exist, most are restricted to the promotion of economic contributions by older adults by focusing on their production of goods and services (Walker, 2006). This narrow scope is exactly what the introduction of active ageing had intended to overcome.

Several ageing experts do consider the unpaid work in which older people engage. For instance, at the Denver Summit in 1997, active ageing was defined as the desire and ability of many older adults to remain engaged in both economically and socially productive activities (U.S. Department of Health and Human Services, 1997). Also McKenna (2008) addresses volunteering, caregiving and supporting social service organisations as active ageing activities, in addition to professional labour. While these definitions succeed in countering stereotypes of older adults as unproductive and dependent, they continue to be too closely related to the discourse on productive ageing, as some authors (e.g., Rowe & Kahn, 1997) apply a somewhat broader definition by considering an activity productive if it creates societal value, whether or not it is reimbursed. A restricted focus on productive activities neglects leisure as an important allocation of time, especially for older adults, and it therefore leaves little space for alternative pathways for self and social development other than through paid and unpaid work (Biggs, 2001), in spite of the beneficial effects of leisure in later life. Increased engagement in leisure activities has the potential of improving physical health, protecting against cognitive impairment and enhancing life satisfaction. It may even compensate for social and physical deficiencies: increasing participation in leisure activities is more beneficial to quality of life for older adults in the context of death of a spouse, low family interaction or declining functional abilities (Silverstein & Parker, 2002). The prevalent exclusion of leisure in definitions of active ageing indicates that the concept is often approached primarily with the interest of society in mind. In fact, qualitative research on active ageing shows that productive activities are not necessarily beneficial to older adults themselves: “Freed from certain responsibilities, such as work or caring for family members, many participants had re-engaged with the present. (Clarke & Warren, 2007, p. 481)” This finding is also supported by quantitative studies on the impact of caregiving. While individuals vary greatly in their response to caregiving – and some caregivers do experience positive effects (e.g., enhanced purpose in life) – many studies find that caregiving has negative effects on physical and mental health, depending on such contextual factors as the extent of work-family

conflict and the relationship to the care recipient (Morrow-Howell, 2000). In summary, “there can be a tension between a policy agenda centring on aging and an agenda centring around seniors. They are not the same thing. (Carstairs & Keon, 2007, p. 13)”

From this perspective, we support the approach advanced by Avramov and Maskova (2003), who include not only the productive activities mentioned above, but also housework and active leisure, the latter of which can be accomplished through hobbies, sports, travel, creative activities, education and social contacts. Houben, Audenaert and Mortelmans (2004) supplement productive activities with sports and active recreation outdoors (e.g., participation in club life, attendance at cultural activities, taking courses). As such, they aim to include activities that require physical and/or mental effort and that have a social dimension, as in-home leisure is explicitly excluded. While limiting the range of leisure activities to “active” ones might seem reasonable in studies concerning active ageing, a closer and more critical examination of the precise meaning of the word active can provide valuable insights. The distinction between active and passive leisure is characterized by a certain degree of ambiguity. Many researchers tend to preserve the label active for elite uses of leisure, while designating low-status, non-physical activities as passive (Ruuskanen, 2004). The most common example is watching television. Both Avramov and Maskova (2003) and Houben et al. (2004) regard this behaviour as passive, an attribution automatically made by many researchers (e.g., Gauthier & Smeeding, 2003; Sayer & Gornick, 2009), although this practice can be questioned. Watching television can be active if the television programme is informative or mentally stimulating, as in the case of educational programmes (Katz, 2000; Ruuskanen, 2004). Qualitative research shows that older adults also differentiate according to the content of the television programmes they watch. News programmes occupy a particularly special place (Pettigrew & Roberts, 2008). The arbitrary nature of a priori classifications manifests itself in other examples as well (e.g., reading). Avramov and Maskova (2003) consider reading active and thus part of the active ageing discourse. Several other studies on the time use of older adults also label reading as active (e.g., Gauthier & Smeeding, 2003). In contrast, Houben et al. (2004) exclude reading from their active ageing index. The designation of reading as passive is made by a range of other researchers as well (e.g., Allen & Chin-Sang, 1990). Such discrepancies clearly illustrate the decisive influence of the interpretative criteria of researchers in constructing these distinctions (Katz, 2000). It is interesting to note that older adults perceive reading as an active rather than passive pastime (Pettigrew & Roberts, 2008). One might wonder whether the active-passive distinction is actually a false dichotomy. According to the definitions developed by Houben et al. (2004) and by Avramov and Maskova (2003), going to the opera should be

classified as active. Compare, however, a stockbroker monitoring profit warnings on television and a stockbroker attending the opera and wonder which activity seems the most “active” (Ruuskanen, 2004). In other words, “the same activity may have different meanings for different people or even different meanings for the same person at different times. (Hooker & Ventis, 1984, pp. 478-479)” Discovering the value of activities from an individual’s perspective is therefore informative (Allen & Chin-Sang, 1990).

At this point, we have distinguished three main conceptualisations of active ageing. The first approach focuses exclusively on increasing labour market participation, while the other two specify that active ageing refers to the continuous participation of older adults in several domains of life. Given that the health and financial situation of older people in industrialized countries have generally improved in recent decades, the resources that older adults have for continuing to participate in society have substantially increased. At first glance, active ageing might therefore seem to fit “well with the profile of older persons. (Jacobs, 2005, p. 3)” This conclusion changes, however, when we take the age variation within this group of older adults into account. One crucial criticism that applies to all of the approaches discussed here is that they are primarily concerned with the young-old – the third age (Daatland, 2005; Jacobs, 2005), a stage of life that begins around the age of 55 and ends somewhere between the ages of 75 and 85, when older adults progress into the fourth age and their probability of experiencing sizeable losses in cognitive and physical potential increases substantially (Baltes & Smith, 2003). With regard to the narrowest definition of active ageing, this critical viewpoint is self-evident. While current policy measures aim to raise both actual and legal retirement ages, the envisioned targets remain far below the age of 75. Although time devoted to child-care and elder-care, volunteering, sports and entertainment away from home may stabilise or increase during the early retirement years, several studies point to a decline thereafter, which tends to accelerate around the age of 75 (e.g., Broese van Groenou & Van Tilburg, 2010; Erlinghagen & Hank, 2006; Jacobs, 2005; Verbrugge, Gruber-Baldini, & Fozard, 1996; Wilson, Spoehr, & Mclean, 2005). As health has been shown to exert a decisive influence on participation in all of these activities, it is safe to say that poor health is one of the main inhibiting factors. In addition to shifts in abilities and health, people’s activities also change with increasing age due to alterations in preferences and constraints (Verbrugge et al., 1996). For example, the continuing existence in many countries of mandatory retirement ages and upper age limits for volunteers are also contributing factors (Gill, 2006; Walker, 2006). It therefore comes as no surprise that Houben et al. (2004) found that men and women aged 75 and above spend on average less than 3 hours a week on the activities included in their index (i.e. sports, care, paid labour, voluntary work and active

recreation outdoors). Promoting these demanding activities as the only way of ageing actively is hazardous. Not only are active ageing policies at risk of neglecting the potential of the discourse for the more vulnerable older adults, the latter may even experience a sense of “failure” and lowered self-esteem as a result (Ranzijn, 2010), which may in turn decrease their participation in society. When coping with impairments, several studies have indeed stressed the importance of downward relative to upward social comparisons for well-being (Kessler, Rakoczy, & Staudinger, 2004).

Towards a broad understanding of active ageing

Notwithstanding our criticism directed against the activities traditionally included in definitions of active ageing, they remain an important part of an active ageing policy as previous research points to the beneficial effects of for instance sports and socio-cultural participation on maintaining mental and physical health and quality of life (Carstairs & Keon, 2007). This preventive potential can be exploited in two ways. Firstly, healthy lifestyles should be promoted right from childhood. Contrary to popular belief, the active ageing discourse does not only apply to older adults, but to all age groups. This implies the adoption of a life course perspective, which acknowledges the important influence of earlier life experiences on the way individuals age (Walker, 2006). Secondly, the interpretation of these traditional activities should be broadened. For instance, instead of holding on to age limits for volunteers, volunteer activities should be adapted to fit the ability of the older person. A good practice of creating volunteer opportunities for frail older people can be found in Camden, UK where a telephone befriending service was established. Isolated and house bound older adults were originally phoned by volunteers, after which more than two thirds became telephone volunteers themselves. In this way, even the most frail older adults can still enjoy the benefits often associated with voluntary work (e.g., increased psychological well-being) (Gill, 2006).

In addition to reconsidering traditional activities, the active ageing discourse should also incorporate alternative activities. As argued before, the active-passive distinction is somewhat ambiguous. In many current definitions of active ageing the arbitrary decision is made in such a way that precisely those activities that are important for the old-old are overlooked. The old-old devote significantly more time to home-based and family-related leisure (Gauthier & Smeeding, 2003; Verbrugge et al., 1996). This is not necessarily a negative condition. Quantitative research indicates that the shift from large social networks towards the maintenance of emotionally close relationships does not necessarily affect life satisfaction as quality of social contacts, instead of quantity, is of paramount importance amongst the oldest old

(Berg, 2008). Also qualitative research shows that older adults perceive taking pleasure in everyday activities (such as solving crosswords and reading) as a more important marker of their involvement with life than highly social or physical activities (Clarke & Warren, 2007; Ranzijn, 2010). Their most important strategy to avoid feeling “old” – which can be considered as the antithesis of active ageing (Jacobs, 2005) – is “maintaining an interest, even if getting out and about was less possible. (Townsend et al., 2006, p. 893)”

Hence, the promotion of the traditional “active” activities should not be obstinately held on to, especially not amongst the heavily impaired who are incapable of performing them. Instead, active ageing should comprise a strategy which allows older adults to age happily despite their limitations. In this regard, it is useful to pay special attention to activities with the potential to compensate for age-related losses. Internet use may serve as an example. As physical prerequisites for internet use are largely restricted to fine motor skills, we expect that also many of the frailest older adults are capable of performing this activity. Data from the 2006-wave of the Health and Retirement Study (HRS, 2011; RAND HRS, 2009), a multidisciplinary panel research representing all persons over 50 in the United States, support this assumption. Table 1 presents regular internet use by physical functioning, as measured by the number of Activities of Daily Living (i.e. bathing, dressing, eating, getting in/out bed, walking across a room) the respondent reports having any difficulty with. While we notice a clear descending trend with deteriorating physical functioning, even within the less fit groups a substantial portion is still using the internet regularly. The discrepancies between the most and least fit groups are expected to attenuate in the future, as physical functioning and age are significantly related ($p < .001$) and internet penetration within the oldest age segments will continue to increase due to the higher internet penetration among the currently younger cohorts.

Table 1.
Internet use of older US adults by ADL-summary
($n=16,008$)

ADL	Internet users (%)
0 ($n = 13,423$)	49.8
1 ($n = 1,404$)	25.4
2 ($n = 590$)	20.6
3 ($n = 313$)	21
4 ($n = 176$)	19.5
5 ($n = 102$)	13.3

Interpretation: 25.4% of the respondents with difficulties in one of the Activities of Daily Living uses the internet on a regular basis (weighted). The total number of respondents with difficulties in one of the activities of daily living is $n=1,404$ (unweighted)

Source: Health and Retirement Study, 2006-data (wave 8), authors' own calculations

Those who use the internet expose themselves to a range of opportunities. Traditional forms of communication and social support may be sustained and augmented by means of contact applications such as e-mail and social network sites (Czaja & Lee, 2007). A small-scale experiment by Fokkema and Knipscheer (2006) points to the potentially loneliness-reducing effects of internet use among lonely, impaired older adults. The internet also offers cognitive opportunities, for instance by providing its users with low barrier access to education by numerous e-learning organisations. Recent research indicates that surfing on the internet may be mentally stimulating in itself, even more so than reading a book. When experienced surfers search actively for information online, a high level of brain activity appears in brain regions which are not activated while reading text pages (Small, Moody, & Siddarth, 2009). The internet may thus stimulate mental and social well-being, while overcoming physical limitations.

Once one becomes acquainted with this way of thinking and the emphasis on adapting to what is possible, a range of alternative activities emerges, even for people in nursing homes, classically perceived as a challenge for active ageing (Jacobs, 2004). A good practice can be found in a Belgian nursing home, where older adults are enabled to stay in touch with their family through a social networking site (SNS). To lower the barriers to internet use, the SNS is offered to the residents through the television in their room, where they can consult photos and messages from non-resident family members by using their remote control, as this is a device with which they are more familiar than a keyboard (Van Braeckel, 2011). As such, social activity is promoted despite dependency.

Discussion

This critical overview on active ageing shows that diversity-thinking must work both ways. The negative portrayal of older adults, for a long period dominant in both policy and research, has been criticized for being ageist and for neglecting the great heterogeneity among older adults. The idea that older adults constitute a single, homogeneous, passive group is too pessimistic. The shift towards positive approaches to ageing was meant to enable a more inclusive policy (Townsend et al., 2006). In conceptualising active ageing, however, researchers and policy makers should be wary of going to the other extreme by voicing an overly optimistic view of older adults. For many older people, sports, labour and other traditional activities are out of reach. Policies that focus solely on these types of activities ignore the diversity that exists amongst older adults as well, although in the other direction. Paradoxically, such a narrow approach essentially amounts to the glamorisation of youth – usually entrenched in negative approaches to ageing – concealed within a positive discourse, as the activities emphasized are more

commonly associated with middle age than with old age.

Throughout this article, we have tried to confront several traditional conceptions of active ageing derived from research and policy with older people's own perceptions, as studied in some recent qualitative research. This juxtaposition reveals a clear discrepancy between what older people think constitutes active ageing and how it is translated by many policymakers and scholars. While the latter set relatively high standards for active ageing, older adults – and especially the oldest old – tend to be less ambitious: they mainly wish to stay interested in the world around them and thus involved with life.

In our view, a prerequisite for active ageing is the recognition of the variations that exist amongst older people. As people from different subgroups (e.g., different ages, ethnicities) are likely to have different needs and priorities and live in different circumstances, the perception of what makes a life active is likely to be different too. In addition, variations within older people should be taken into account. For example, physically disabled older people may continue to seek mental challenges and enjoy social contact. Policies on active ageing should enable these people to fulfil their psychological and social needs despite their physical limitations, instead of further excluding and marginalizing them from society by applying a narrow vision on active ageing (Ranzijn, 2010). In this way, some form of “successful frailty” may emerge (Kribernegg, Maeirhofer, & Mörtl, 2011). We identified internet use as an exemplary activity with the potential to empower older people (including the more frail and dependent) within communities. Further qualitative research into the ways in which older adults, especially those in the highest age brackets, interpret active ageing may be a particularly useful source of insight into how this notion evolves throughout the life course. Future research should therefore try to include the oldest old and the institutionalised, as people from these groups are excluded from samples of most current researches (e.g., Cloos et al., 2010; Jacobs, 2004).

Conclusion

In compiling these arguments, we advance the following key notion: If the active ageing paradigm is to be an effective policy tool, it should represent a dynamic, life course-driven concept that taps into people's perceptions and enables them to create their own forms of activity, instead of focusing on a predetermined, limited number of domains, usually developed from an “expert” perspective (Bowling, 2005; Walker, 2010).

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