Qualitative Sociology Review

Researching Aging & Comparative Reflections

edited by
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Editorial Board

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Introduction To The Special Issue:
Researching Aging and Comparative Reflections

This special edition of Qualitative Sociology Review explores and introduces some of the main issues of researching aging through a comparative lens. The four articles in the special issue explore aging in different ways but have a commonality of the qualitative importance of bringing together theory, aging and comparative reflections of places such as US, China and across the globe.

The first paper by Murphy, Arxer and Belgrave uses the important issue of biography and inter-links it to the importance of researching the lifecourse to develop an interpretive gerontology. The paper has implications for understanding aging identity and point to the construction of aging as a 'life project' with fluid representations of older people whose lives are rich, varied and authentic.

Following on from this, the second paper by Carr and Manning has a formidable argument. They explore the notion of the 'third age' and how it can be theorised and understood in a phenomenological context. They suggest that ethnographic research provides 'meaning development' in gerontology. They look to develop social theory on aging through the appropriation of sensitisation of meanings of aging in the USA.

The third paper by Chen takes a different journey. His focus in on China and aging and the implications for qualitative understanding of social policy and its effects. Chen suggests that qualitative research in gerontology illustrates the complex experiences of older people in China and illustrates the comparative lessons for gerontologists to bring together qualitative data with quantitative analysis.

The final paper by Cook, Halsall and Powell explores the gerontological problems and issues associated with global aging and implications for qualitative theorizing and analysis. They attempt to explore the problems of health and pensions in comparative context but illustrate how particular research studies have used qualitative theories to understand global social trends.

The key theme of the special edition has been on researching aging and comparative reflections. The lesson is that analysing aging cannot be analysed as a feature of quantification but that qualitative understanding unravels meanings, motives, policy effects and experiences that epitomise the commonalities of everyday life for older people across the world in general.

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The Life Course Metaphor:
Implications for Biography and Interpretive Research

Abstract

This paper reviews qualitative research in the United States, highlighting the ways research has changed in the era of the third age. With growing attention to positive and uplifting aspects of aging, qualitative research has played a critical role in the exploration of the ways in which older adults are engaging in meaningful ways with others. We describe two key methodological approaches that have been important to examining positive aspects of aging and exploring the extent to which a growing number of years of healthy retirement are redefining the aging experience: ethnographic research and grounded theory research. We also review key topics associated with qualitative research in the era of the third age. These topics fit within two dominant frameworks – research exploring meaning-making in later life and research exploring meaningful engagement in later life. These frameworks were critically important to raising attention to meaningful experiences and interactions with others, and we propose that the agenda for future qualitative research in the United States should continue contributing to these frameworks. However, we note that a third framework should also be developed which examines what it means to be a third age through use of a phenomenological approach, which will assist in the important task of theory building about the third age.

Appreciating that persons have a "life course" has changed the field of gerontology. Since the emergence of this construct, persons are imagined to have biographies. Rather than passing through discrete stages, in a somewhat linear fashion, their life experiences are cumulative and reflect many changes. Instead of sequenced, the "vocabulary of the life course"—with stages, transitions, and plateaus—suggests that a personal history is integrated but multidimensional

(Holstein, Gubrium 2007: 1-18). At any phase of a person's life, accordingly, a confluence of factors are presumed to be operating. In all, the complexity of any station in a person's life is thought to be revealed through this style of imagery.

The conceptual themes that emerge from a life course paradigm are considered to be important in making gerontological studies more holistic. In point of fact, multiple causes, or influences, are now commonly accepted as contributing to a behavioral episode, as well as a course of action (Elder 1978: 17-64). The life of a person thus represents a pattern, with recurring themes and many beginnings. Indeed, a life course is variegated and malleable, but coherent (O'Rand, Kreckler 1990: 241-62).

Such a description of personal development, at first glance, appears to be consistent with qualitative or interpretive research. If anything, interpretive researchers strive to be holistic and avoid the reductionism linked traditionally to positivism and other styles of crude empiricism. The idea is that persons are better understood when the myriad of considerations that shape and give meaning to behavior are grasped, along with the context of these elements (Harris, Parisi 2007: 40-58). Especially in the social sciences, such sensitivity has considerable appeal. How persons define themselves and their environment, and integrate these experiences, provide the texture of a life course. According to interpretive researchers, ignoring this wisdom has dire consequences in terms of analyzing adequately the nature of aging, or for that matter any other social phenomenon.

But there are problems with the life course analogy that may contradict the aims of interpretive research. The focus of this paper is the metaphors that have been used to describe the life course. These descriptive devices, even after much critical work on this topic, tend to reify personal and collective existence. In other words, the life course is portrayed in such a way that the stages or trajectory of a person's existence can be viewed as natural or inevitable. And when conceived in this way, a life course can be reduced easily to a series of events and a matrix of causes. The unique manner in which this pattern has been constructed and regularly modified can thus be easily obscured. In fact, this strategy is considered to be the state of the art by many quantitative researchers.

Such an outcome is inconsistent with gaining insight into the existential character of a person's life. Clearly interpretive researchers are interested in knowing how the various factors that comprise a life course are defined and organized to become a coherent and meaningful existence. At the same time, there is another factor related to reification that contravenes interpretive methods but is not often discussed. Stated simply, the political side of interpretive research is muted! The existential character of the life course presupposes that social reality is not necessarily fixed or stable. This lack of stability, accordingly, has very interesting and powerful political implications with respect to the social impact of interpretive research.

These issues, however, have not gone unnoticed by gerontologists (Holstein, Gubrium 2007). Some critics have scrutinized the potential of life course metaphors to reify a person's biography. Nonetheless, their reformulation does not necessarily change anything substantially. Particularly noteworthy is that the *ad hoc* character of the life course is not clearly illustrated. In this respect, time is treated as a medium rather than the capacity of persons to organize their biographies. The result is that the political promise of interpretive methods is not given any serious attention. Persons may modify their lives, but within very narrow confines. They may be restricted, for example, to acting simply within the contours supplied by the natural transition points (Hittlin, Elder 2007: 170-91).

The purpose of this paper, accordingly, is to extend beyond how the life course has been rethought by these critics. How time has been discussed by writers such as Husserl and Schütz is central to this task. And following this reconceptualization of time, the truly existential thrust of a life course should become clear. Additionally, the politics of interpretive method, which are relatively unexplored, should become apparent.

The Life Course

The life course perspective or model is eclectic in many ways. This outlook tries to incorporate a variety of disciplines, such as biology, psychology, and sociology. Additionally, persons are assumed to adopt many, and often conflicting, roles during their lives (Karp, Yoels 1982). And finally many transitions are thought to occur throughout a person's life. What the life course orientation does, simply stated, is give a somewhat reasonable portrayal of the aging process. A person's existence is an integrated and dynamic event (Russel 2007: 173-92). Many other theories have existed that include various stages and transitions, such as those in psychology and child development. For the most part, however, they are insensitive to the actual social or contextual conditions of persons. Everyone is presumed, for example, to pass through identical stages at approximately the same time. Specifically, the onset and nature of adolescence or old age is not thought to vary appreciably among persons.

Although the aim of life course analysis is to be more holistic than in the past, normative prescriptions have been linked to this model. Assumptions are made regularly, for example, about how persons are expected to behave at any particular stage. Furthermore, violating these norms is often treated as indicative of illness or deviance. Human development is thus considered to follow a particular path, which everyone must traverse with few exceptions. For example, the life course of women is often messier than for men, due to obligations that regularly pull them "off time" (O'Rand 1996). But in both cases, strong norms are implied.

The originators of this theory wanted to emphasize the malleability of the life course, but they presupposed a theory of time that would compromise this aim. As will be demonstrated, the life course has been associated, nowadays in a subtle fashion, with a Newtonian theory of time (Arxer, Murphy, Belgrave 2006: 51-60). Within a Newtonian framework, time is imagined to be an independent measure of the location of events and people. Based on the logic of discrete succession, time assigns *what was*, *what is*, *and what will be*. Persons, in the end, are free to make evaluations and adjustments in their lives, but only within an autonomous timeline. Specifically, a base-line is available to orient all people because everyone is located *in time*. Aging, therefore, is said to be a cumulative event that results from the addition of experiences, changes, and interventions. Again, persons are left to confront a mechanically inspired aging process. Within this temporal viewpoint, aging unfolds along exact and thus universal guidelines, because life now represents a fairly rigid pattern or timetable of events.

What this outlook tends to obscure, however, is how aging is a fundamental commitment to potentially different interpretations of existence and not a cumulative process. But because aging is considered a chronological phenomenon, only so much personal variation is possible—namely, moving forward (progress) through time. And if persons' interpretations deviate too much from these natural stages, their views are dismissed as inappropriate or misinformed. How persons might define themselves, therefore, does not affect appreciably how age is understood. Similar to

previous theories, a developmental path is clearly prescribed that everyone is expected to follow.

The life course, in the end, reifies development. Because of the image of time that is adopted, "age norms" are introduced with little critique. In fact, due to the dualism that supports the Newtonian position, serious reflection on the life course would not be expected. Rather than situational or contextual, the life course transcends these limitations and thus has universal application. How human growth should proceed, accordingly, is not relative to culture or contingent in any other respect. Although recognized as varying at different stages, times, and places, in any given period or location behavioral norms are unambiguous and applied with little critical analysis.

When conceived in this manner, the life course is consistent with the thrust of Western philosophy. This approach to human development, in other words, provides a standardized basis for making comparisons between persons. That is, behavior can be evaluated against a particular course and judged to be either adequate or deficient. But gradually this course becomes a template that overlooks the uniqueness of persons. In more sociological terms, the life course becomes an ideology that disregards how persons perceive and assess their own development.

The aging process is thus not viewed as discontinuous and multivalent. Indeed, Bury's (1982) discussion of "biographical disruption", due to chronic illness, highlights the expectation of a smooth life course. Most of the emphasis is placed, instead, on persons conforming to the demands of an institutionalized path. Special emphasis, in fact, is placed on adjustment and so-called productive or successful aging (Butler, Gleason 1985; Rowe, Kahn 1998). In effect, what the life course does is provide a blueprint for effective and appropriate adaptation and gradual decline. At each stage of the life course, roles are provided that detail how this end should be realized, expect perhaps the very last phases. Persons can thus begin to envision where they should be on the aging continuum and make the necessary adjustments. As might be expected, life becomes relatively predictable.

Within the context supplied by the life course, the study of aging is straightforward. A person's health characteristics or behaviors are compared to the norms operative at a particular stage in life. Any interpretations are treated as subjective opinions that blur the facts. Hence personal or collective experience is dismissed as a distraction. Rather than a life project that reflects commitments and decisions, aging proceeds like a clock. There are no jumps or reverses, but only continuous and unrelenting moments.

At this juncture a particular issue becomes important. That is, what about human agency? While this theme is not necessarily the focus of life course theorists, this ability is presupposed by themes such as malleability (Elder 1994: 4-15). But with respect to the assumed Newtonian backdrop, persons do not invent their lives. Those who are intelligent and resourceful, instead, learn how to age gracefully. They internalize the demands of the life course and make rational decisions within these parameters. Persons try their best in an age-appropriate manner and make the most effective use of the time that is available. Any existential angst is thus calmed by the predictability of the life course. In line with the design of the life course, social existence becomes routine and narrow. Of course, such a description is antithetical to the original intention of supporters of life course imagery. And because of the promise of this theory, some writers have tried to reconstruct the life course. The question is whether or not their efforts have truly animated the life course.

A Constructionist Turn

Holstein and Gubrium (2000) understand this issue of reification. They recognize that the life course can be transformed easily into a naturalistic development path. Therefore, they strive to avoid terms such as stage, phase, or progression when describing the aging process. What they want to overcome is precisely the sort of reductionism these ideas can encourage, whereby a person's existence is little more than an evolving scheme. These authors do not want to make the error of portraying the life course to be autonomous, so that everyday life becomes a faint image of a more fundamental course of development. In order to avert this problem, they try to link the life course with constructionism. Specifically, their strategy is to embed the life course in the *Lebenswelt*, or "life world" (Husserl, 1970: 113). To borrow from Habermas (1984, 1987), aging is forged from within the constellation of meanings and practices that comprise a community. The idea of a life world suggests that the life course represents a socially grounded discourse, as opposed to an obtrusive object that guides the aging process.

In pursuit of this aim, Holstein and Gubrium (2007: 2-3) rely on phenomenology, particularly writers such as Berger, Luckmann, and Schutz. Basic to phenomenology is intentionality, which Husserl defines as "consciousness is always consciousness of something" (Husserl 1975:13). Although this phrase sounds trite, his point is to undermine the Cartesian distinction between subjectivity and objectivity. With consciousness linked to whatever is known this dualism is passé. Now the influence of consciousness on the production of knowledge becomes the focus of attention. Facts are thus no longer objective, but, as constructionist like to say, a social production.

Instead of dealing with the objective or empirical features of phenomena, importance is given to their meaning. Persons do not simply reflect reality, if they are properly trained, but ascribe significance to behavior and events. The emergent reality of human values, beliefs, and commitments is referred to as the life world. This world is living because conscious activity cannot be extracted from reality to reveal a purely independent material realm. All phenomena are material and experienced, but only through the activity of meaning construction.

Accordingly, the life course should not consist of stages that are naturally disposed or socially imposed. Each stage, as Holstein and Gubrium (2007: 4) declare, is implicated in this process of ascribing meaning and can be defined or experienced in a host of ways. The result is that age-specific criteria become elusive and gain relevance only as a consequence of particular decisions and commitments.

Each stage of life may thus have multiple meanings, none of which should be considered natural. One version may become a "paramount reality", according to phenomenologists, while other possibilities fade into the background, at least momentarily (Schutz 1962: 207-59). This prominent interpretation, furthermore, may eventually be treated as a natural stage in life, but there is nothing inevitable or ultimately real about any phase. Which interpretation becomes relevant pertains, for example, to the social organization of power and the resulting consensus or conflict and the enforcement of age norms. Nonetheless, Holstein and Gubrium are not entirely successful in their attempt to abandon the Cartesian base of the life course. Specifically, their depiction of time may permit the life course to retain a sense of autonomy and re-emerge as a natural progression or series of behavioral expectations.

Although language use is difficult and imprecise, Holstein and Gubrium use phrases to recast time that rely on familiar dualistic imagery. They repeat often that the life course behavior exists "through time" (Holstein, Gubrium 2007: 3; 2003: 836;

Gubrium, Holstein 1995: 209), "across time" (Holstein, Gubrium 2007: 17), and "in relation to time" (Holstein, Gubrium ibidem). In each case, time appears to be either a medium that carries persons along or a referent that serves to unite a person's life. Time is presented as a phenomenon that remains autonomous, as in the Newtonian tradition, and continues to provide a natural background or logic for aging.

Holstein and Gubrium are sensitive to this issue, for they understand that if the life course is autonomous, the ability of persons to construct their lives is severely truncated. Nonetheless, they seem to be uncertain about the role of human action. Contrary to phenomenology, their description represents a weak constructionist position because meaning-construction does not touch the existential core of reality. In Holstein and Gubrium's approach, speech acts are not allowed to "go all the way down", in the manner intended by Stanley Fish (1989: 344), and give shape to reality. In this sense, these two authors seem to retain a measure of dualism that phenomenologists reject.

In fact, often Holstein and Gubrium seem to equivocate on this point of dualism. At times language is given its full constructive nature, while at others speech is only given the capacity to describe the world. Sometimes critiques of the life course are invoked to make sense of behavior, while at others behavior is understood as simply conditioned by circumstances (Holstein, Gubrium 2007: 10). In the end, the point is whether their constructionist position allows for behavior to be merely interpretively described or constituted. Can a life's possibilities be merely modified, recast, or relabeled, or do persons have the latitude to (re)invent themselves and construct their lives? (Holstein, Gubrium 2007: 7, 32, 183-84, 205; Gubrium, Holstein 1995: 210). The nature of the life course changes significantly depending on how this question is answered.

Some of this confusion could have been avoided, however, if Holstein and Gubrium provided an alternative conception of time. Instead of simply softening the traditional imagery, they could have applied a phenomenological version of time to aging. If this were the case, there would be no justification for the autonomy of time and the accompanying life stages. In fact, adopting the idiom of the life course would not make any sense. If time is constituted, simply put, life is neither progressive nor digressive, but represents a socially maintained montage of possibilities, some actualized and other not.

Time and Biography

Rethinking time from a phenomenological perspective begins with intentionality. Due to the primordial connection between consciousness and reality, the dualism that supports the autonomy of time is undercut. Hence in view of intentionality, a Newtonian vision is no longer justified. Time, in other words, should not be treated as a medium that traverses space, has direction, and unites locations. Such a decontextualized time is now fictional and, as will be discussed, a viewpoint that frustrates an interpretive account of life experiences such as aging.

As Husserl notes, time must exist within the realm deployed by consciousness. The position advanced by phenomenology is more radical than the proposal advanced by Bergson (1967), for example. His notion of durée, although different from the passage of clock time, seems to have an inherent flaw and implied directionality. While Bergson challenges standard chronology, he introduces primarily the possibility of a subjective perception of objective time. Bergson, for example, highlights how persons are often heard saying that today passed a lot faster than yesterday, even though both are twenty-four hours in length. Objective time,

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however, is left relatively intact, although modified to include the human experience of this phenomenon.

A more social example of not going far enough to overcome dualism is supplied by Flaherty's (1999) important work on lived time. His emphasis on protracted and compressed duration, for example, is based on so-called subjective deviations from an implied objective standard. The inability to overcome the Newtonian backdrop, accordingly, prevents him from appreciating how lived time is the measure of personal and collective experience.

Husserl's rendition precludes such dualism because temporality emerges from the vast field of consciousness. When associated with consciousness, time is not first based on notions of "extension" and "length", but shifts in interpretation. What is interesting is that consciousness does not have any inherent divisions, such as inside/outside, back/front, and, especially important for this discussion, past/future. Consciousness, in a word, is never fragmented and must be intentionally demarcated in order to appreciate these differences. The past and the future, for example, are merely the products of consciousness engaging in an activity of self-demarcation. Husserl refers to the resulting experience as "immanent time", because temporality is dependent on human activity for stabilization. In this way, the domain of consciousness is unending, and any fundamental distinction between a subjective realm, and a more real one referred to as objective, is impossible to justify.

Contrary to typical chronology, conscious time does not progress, with certain elements falling in to the past. Likewise, the future is not a period that has not yet appeared in the present. If this description were true, as even Bergson recognized, time would fail to exist. All that could be known would be a very faint remembrance of some incredibly slim presents—the "knife-edged" presents identified by William James. But persons make distinctions between the past, present, and the future without this kind of discontinuity. Accordingly, these differentiations are made in the already integrated expanse of consciousness. As a result, there is no split between the past and the present, but a difference in commitment to certain experiences. The past does not fade away, in other words, but refers to experiences that have been reduced in priority and relegated to the background of other options.

Time, in this sense, represents divisions in consciousness. But because time is the work of consciousness, the past can never fall away or out of this field of experience. The past does not shift backward one or two stages following the arrival of a new present. The passage of time is not this mechanical. The appearance of the movement of time is created, instead, by persons making a shift in conscious orientation that generates a sense of "forward motion." An artificial, and often temporary, fissure is made in consciousness that allows persons to differentiate blocks of experience.

As Husserl (1966: 48-49) states, rather than separate states, temporal moments "run-off" into others and constitute a shift in time. His point is that in order for the present to be known, this dimension must be compared to the past through shifts in conscious attention and interpretation. Therefore, the past and present co-exist in consciousness, in that they represent an effort to organize experience through thematic relationality. What is important to note is that the differentiation between past/present/future is still "real", but only in terms of generating behavioral consequences. The past, for example, can now carry a different sense of urgency than the present and foster shifts in behavior. In other words, the past is still retained and contrasted to the present in the field of consciousness. In sum, the past, present, and future reflect boundaries erected within consciousness for the purposes of establishing a world of meaning.

According to this phenomenological description, the reason why time is not a medium or any other mechanism can now be understood. Simply stated, time does not carry a life along or cause persons to act. What time encompasses, instead, is the activity of persons organizing their lives for the sake of specific purposes. For this reason, Heidegger (1962) argues that time is the most fundamental philosophical principle, even more profound than "Being", in that temporality constitutes how people organize their senses. Time, therefore, does not pass, but entails persons making meaning through *difference* (i.e., as the past/past/future) in order to give purpose to their lives.

Obviously this new version of time has implications for the life course. Quite noticeable is that lives no longer have a course or stages. Such terminology is simply too naturalistic and deterministic, and thus obscures the ontological role of consciousness and human agency. Instead of naturalistic portrayals, persons can be thought of as creating any number of possibilities for organizing experience, some of which may gradually become less relevant and relegated to the past. Rather than thinking of time as passing or fleeting, temporality should be viewed as the composite of existential shifts made by persons, or possibly the result of power relations that demand the elevation of certain temporal modes over others.

In this temporal framework, persons do not age, as if time is running a natural course. After all, persons of any age can be seen as simultaneously declining and growing in reference to specific personal and social norms. Age suggests, in large part, the way a society interprets the utility of persons to do socially valued tasks. Therefore, the life course might be abandoned altogether as an inappropriate metaphor to describe how persons conduct their lives. More appropriate, perhaps, would be to say that persons continue to make choices and create identities or biographies with others until death intercedes. What are commonly called stages merely represents a naturalistic cast given to this creative activity. Their reification, nonetheless, justifies relegating some persons to positions that deprive them of utility or value.

Research and Politics

The rendition of time associated with phenomenology is indicative of a strong constructionist position. Human action does not simply flirt with reality, but rather is instrumental in differentiating fact from fantasy. In this matter, dualism is clearly untenable and a poor resource for conceptualizing time and aging. Following the advent of intentionality, human conscious activity is inextricably united with all constructed realities. *Any talk about constructions conditioning behavior, for example, already has attributed too much to a construction and obscures the capacity of human agency to self-develop.* A constructed reality can never gain such authority, since the power of legitimation rests within the field of human activity. At the same time, people do experience these constructions as a collective or intersubjective reality.

A researcher, therefore, never confronts or even investigates a reality. Within the context of strong constructionism, situational exigencies and interpretations do not vie for inherent recognition and legitimacy. Such a description of the knowledge acquisition process is replete with dualism and convoluted, due to the assumed hierarchy of knowledge. In other words, certain knowledge bases could be viewed as less subjective than others and given more consideration because of their epistemological legitimacy. This differentiation, however, would certainly link power to knowledge; in short, those modalities identified as objective would have no reason to

defer to perspectives viewed to be subjective. But constructionists do not typically separate knowledge bases in this manner, or deal with absolute epistemological foundations. Holstein and Gubrium (2008: 379), nonetheless, seem to waver on this issue, when they appear to make the distinction between situation and interpretation.

The validation of knowledge occurs, for constructionists, through a process of co-interpretation. Those who undertake a research project must reinterpret, in an appropriate manner, a cultural reality that is already socially constructed, experienced, and shared, possibly in several ways. What appropriate means in this context refers to the manner intended by those who are studied and have constituted their reality. In such a scenario, one interpretation may hold sway, while others loose intensity. At another time, a confluence of interpretations may be relevant. The important point is that no reality is simply recorded, but is always co-interpreted and thus shown to be relevant through human action.

What co-interpretation assumes is that researchers engage those who are studied. And at this nexus is where politics becomes important. This process of co-interpretation must proceed in a way that allows those who are studied to speak. Holstein and Gubrium also note the importance of encouraging multiple voices to speak during the research process, such as respondents recognizing their multiple social positions (mother, daughter, poor, young, old, etc.). In their terminology, "multivocality" allows for the possibility of "narrative linkages", which illustrate to respondents the multiple ways they are connected to one another and to themselves (Holstein, Gubrium 1995: 69). Clearly a wide range of power is operative at this juncture. Class, race, and gender, for example, may play a role in intimidating research subjects and researchers. Accordingly, co-interpretation may be transformed into a researcher monologue by any one of these considerations. A privileged position will thus influence the credence that is given to one interpretation or another. Such coercion, however, can be somewhat overt.

But one factor that is often overlooked relates to privileged knowledge bases. If one is thought to be fundamental, although modifiable, the stage is set for realism to infiltrate research. That is, what research subjects say may begin to be interpreted by norms or categories assumed to be more profound or valid, thereby undermining these persons' claims. Holstein and Gubrium, for example, do not discuss how "narrative linkages" can "demonstrate the reach of the political into areas typically assumed to be personal" (Reinharz 1992: 249-50). In other words, Holstein and Gubrium do not consider how even "co-construction" is implicated in "relations of ruling," or the dominant interpretations of reality (Smith 1987). Holstein and Gubrium make a compelling case for how the life course is "unavoidably collaborative", however saying that reality is co-constructed does not automatically address how even social constructions can unwittingly reinforce (un)equal power relations, or other institutionalized symbol systems.

Take the life course, for example. If the life course is thought to be a social construction, but is constrained by practical contingencies, possible favoritism is introduced pertaining to how any so-called stage should be interpreted (Holstein, Gubrium 2008: 379). For example, co-interpretation may be overshadowed by these empirical or practical requirements that restrict the focus of research to a technical description of the life course. The use of a participant-anchored-time-line to collect life-history data comes to mind. In this scenario, a "soft realism" guides the research agenda that emphasizes the *characteristics of constructions* at the risk of downplaying the *praxis of constructing*. As a result, authentic co-interpretation is undermined and an inappropriate interpretation occurs that ignores the process of how persons give meaning to their world. In short, when dualism is left in-tact, coercion can assume new forms.

The politics of interpretive research are subtle but profound. Indeed, claims about sensitivity and care may be sidetracked by (often well intentioned) metaphors and descriptions that carry a hint of realism. And once this fundamental predicate is accepted, interpretations may suddenly be arranged in ways that betray co-interpretation. Put differently, a subtle framework is available and grants autonomy that may subvert the intentions of those who are studied. That life is presumed to have any direction at all, for example, may begin to infringe on how persons constitute their lives and how their biographies are interpreted.

An important problem is that often researchers live according to reified categories of time, and thus impose these during the research process. What is necessary, therefore, is that this critique of time becomes a part of the sociological discourse, particularly methodology. But such philosophical work is regularly overlooked nowadays, due to the emphasis that is placed on technique. Without such reflection, however, the stories people tell about their lives will be distorted by unexamined assumptions related to time or other issues. The point of interpretive methods is to determine, instead, how certain age norms are constructed and possibly eventually taken-for-granted. Only real co-construction can reveal this activity.

Given that interpretation is uncertain, furthermore, suggests that the life course is far more than malleable. In short, there is no basic orientation of a life course that may be reworked or reorganized. Such a reality is never merely encountered but constituted, even when a so-called traditional portrayal is enacted. The basic concern here is that a person's life may be coerced by various unwanted interpretations. Care should be taken, therefore, to avoid any equivocation about realism that may overshadow co-interpretation and persons' ability to make themselves *for themselves*.

Conclusion

Fundamental to the problems with the original formulation of the life course and the constructionist remake by scholars, such as Holstein and Gubrium, is dualism. Consistent with the traditional thrust of Western philosophy, certain knowledge is assumed to be unaffected by the human presence. In the case of the earlier position on the life course, an autonomous temporal and evolutionary scheme went unchallenged. And with respect to their constructionist position, Holstein and Gubrium (2003: 215) leave relatively untouched so-called "practical exigencies." To justify this omission, they cite Marx's claim that persons make their world, but not under the conditions they always choose. Marx may have been able to tolerate such realism, but subsequent to the onset of phenomenology, and certainly postmodernism, this sort of lapse is very difficult to sustain.

With everything mediated by conscious experience, even the world into which a person is born is not encountered as a brute datum. This world of interpretation, for example, must be consolidated and transformed into a normative requirement, before this reality begins to seem rational and adopted. The point at this juncture is that an interpretation can become a dominant reality and be described as natural, but this process is replete with human action. But this philosophical maneuver does not destroy the possibility of persons living a coherent life or adhering to particular norms. A person's life may even appear to constitute a course. Nevertheless, all dominant norms represent interpretations that are given priority over others; a course, accordingly, is manufactured out of choices that are not inherently connected.

Unless this critique of realism is truly appreciated, historical or contextual residues will be provided with a rationale for restricting human possibilities. Even though the traditional life course may lose some appeal, persons can be reminded subtly, and even with a measure of concern, that certain behavior is naturally beyond the pale. Although philosophically such a conclusion may not be warranted, so-called practical realities are often invoked to enlist conformity from persons.

Rather than the life course, social gerontologists might want to borrow from existentialists and start referring to a "life project." Indeed, this designation seems to be more accurate. No matter what persons inherit, they must (re)construct these realities and their biographies (if only to maintain them). This project, furthermore, is ambiguous with no obvious direction. In this regard, social gerontologists must not subvert these life prospects through (albeit subtle) political acts that limit how persons can define themselves. Even so-called realist considerations are not exempt from this command to respect human agency.

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Citation

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A New Paradigm for Qualitative Research in the United States: The Era of the Third Age

Abstract

This paper reviews qualitative research in the United States, highlighting the ways research has changed in the era of the third age. With growing attention to positive and uplifting aspects of aging, qualitative research has played a critical role in the exploration of the ways in which older adults are engaging in meaningful ways with others. We describe two key methodological approaches that have been important to examining positive aspects of aging and exploring the extent to which a growing number of years of healthy retirement are redefining the aging experience: ethnographic research and grounded theory research. We also review key topics associated with qualitative research in the era of the third age. These topics fit within two dominant frameworks – research exploring meaning-making in later life and research exploring meaningful engagement in later life. These frameworks were critically important to raising attention to meaningful experiences and interactions with others, and we propose that the agenda for future qualitative research in the United States should continue contributing to these frameworks. However, we note that a third framework should also be developed which examines what it means to be a third ager through use of a phenomenological approach, which will assist in the important task of theory building about the third age.

Keywords

Third age; Qualitative gerontology; Meaning making; Meaningful engagement

Early research in gerontology in the United States was spotted with the postulates of theories explaining the causes for decline and disengagement, which consequently led to a field of study and camps of researchers intent on fixing problems associated with old age, i.e., aging being synonymous with decline and disease (Rowles and Schoenberg 2003). However, during the last four decades, gerontology has observed a shift in focus whereby there has been growing interest in

examining the positive aspects of aging. One of the major factors contributing to this shift is the emergence of a new social group of healthy and retired older adults who are poised to experience a wide array of opportunities related to personal development and societal contributions in later life. The third age is often understood to be the period following retirement but prior to the point that health problems interfere with one's independence (Weiss and Bass 2002). This new life phase emerged in response to demographic and societal changes during the course of the 20th century. These changes, such as those related to public health advances, overall improvements in standards of living, and the institutionalization of retirement, resulted in a larger, healthier older population (Carr 2009). With a growing proportion of the U.S. population able to expect to retire and have a number of years in which they are healthy, the third age has taken shape as an important new life phase in later life during which the positive aspects of aging are particularly visible.

We argue that the intersection of the societal changes that restructured the life course to include a lengthy period of healthy retirement and a shift in the intentions and the approach to inquiry on the part of qualitative researchers has articulated a new paradigm and a new agenda for qualitative research in the United States. This new era of qualitative research, which we refer to as the "era of the third age," has reoriented gerontological study to begin renegotiating the meaning of being "old" through explorations of positive aspects of aging. There are two ways that qualitative gerontologists have witnessed, through thoughtful exploration, the many opportunities associated with aging. First, in their attempts to address more than just the problems associated with aging, qualitative gerontologists have begun to utilize methods that allow them to more effectively serve as agents for change by providing an ethic of acceptance and openness to new voices and experiences of older adults. Second, qualitative gerontological research has introduced and provided important contributions to a wider array of topics that recognize that later life is not merely a period of disability and decline prior to death, but a period in which people continue to develop as individuals and engage in meaningful ways with others in later life.

In this article we review the methodological changes and key literature that exemplifies the changes that have resulted in this new era of qualitative research in gerontology within the United States. We in no way attempt to capture the entire spectrum of qualitative inquiry occurring in the U.S. that highlights positive aspects of aging, but rather we seek to provide a comprehensive review and critique of qualitative research in the U.S. as it pertains to gerontological study in the era of the third age. Our review is divided into three major sections. First, we review changes in the approach to qualitative research through the use of particular methodological tools that have been critical to orienting gerontological research towards explorations of positive aspects of aging. Second, we review topical areas of qualitative research that highlight positive aspects of the aging experience and capture the way the emergence of the third age has changed what it means to be an older adult in the United States. Third, we propose an agenda for future qualitative gerontological research.

Changes in Qualitative Methodology and the Era of the Third Age

In tandem with the societal changes associated with the emergence of a third age, gerontology has observed a shift in the approach to inquiry, of which, qualitative researchers have played a crucial role. Specifically, qualitative researchers in gerontology have, in recent years, broadened the scope of what we know about the process of aging and the lived experience of elders. Similar to that of other

disciplines such as anthropology, there has been a paradigmatic shift in gerontological scholarship marked by a growing reflexivity on the part of gerontologists. The trend toward reflexivity is a conscious move away from conceptualizing old age as a problem. The intentions of qualitative researchers to re-consider assumptions about the uniformity of the problematic aging experience while locating themselves as researchers in that experience has provided a catalyst for the development of new methodological tools with which to examine later life. This new approach to research within qualitative gerontology is characterized by greater openness and acceptance to the potential that aging and a lengthening of the life course has to offer (Rowlesa and Schoenberg 2002). Arguably, this conscious expansion of inquiry can be credited to the contextually and conceptually appropriate philosophical underpinnings that characterize these endeavors by qualitative researchers who are seeking to explore and redefine the nature of being in late life.

Rowles and Schoenberg (2002) describe three major methodological trends for qualitative inquiry that pertain to gerontology which illustrate the reorientation of gerontological research to more authentically examine the positive aspects of aging. Early qualitative inquiry in gerontology mainly used qualitative inquiry to strengthen quantitative approaches, a triangulation of methods. Although some qualitative research continues to utilize this approach, it has often been used to support research that seeks to measure the factors associated with the problems of aging. Groger and Straker (ibidem), after using this design, discuss the challenges and opportunities of combining qualitative and quantitative methodologies. They suggest that although this continues to be a useful method for bringing together multiple sources of measurement in a research study, it often does not provide an opportunity to capture changes in the way people navigate the aging experiences from the perspective of older adults' themselves. The pushes and pulls regarding intention behind the qualitative paradigm are sometimes problematic. For example, the intention of qualitative methods to strive for contextual validity is not necessarily harmonious with quantitative goals of generalizability. This poses a challenge in attempting to inquire into the richness of the lived experience of elders. For these reasons, the first trend of qualitative research does not facilitate research associated with the positive aspects of aging.

A second trend, which has emerged over the last decade, encompasses the importance and recognition of *context* to achieve a deeper understanding of aging. For example, qualitative researchers are recognizing the importance of place in shaping the meaning of age. Groger (2002) described the importance of a nursing home setting in African-American's conceptualization of the portability of home. This study provides an example of how *context*, in this case, environment and understanding the relation of the elder in their environment, is crucial to understanding how a population of individuals define home. A third trend is described as an approach that uses an "almost universal acceptance and increasing sophistication of our understanding of the roles of reactivity and reflexivity in qualitative gerontology" (Rowles and Schoenberg 2002: 16). This approach recognizes that researchers' interpretation of older adults' experiences are influenced by their own personal experiences and perspectives. Rienharz (1997) has encouraged qualitative researchers to recognize the multiple selves present when conducting qualitative research, particularly the multiple selves of the researcher and how that shapes the meaning and interpretation of the data.

These trends have been important in changing the landscape of gerontological qualitative inquiry in the United States. We review two key methodological approaches which have been salient in facilitating changes in the approach to qualitative inquiry, both of which reflect the influence of the second trend of

gerontological qualitative research. The first, ethnography, has been used to highlight positive aspects of aging through capturing the nuanced culture of aging infused with the meaning-making process. The second methodological approach, grounded theory, is a method that imbricates theory building into the process of data collection and analysis, and has contributed to the re-conceptualization of what it means to be an older adult in an era whereby people can expect to experience a period of healthy retirement and thus, a third age.

Ethnography

Ethnography is an approach that stems from an anthropological tradition, and has its purpose mainly in the description of culture and the meaning of human behaviors within a specific cultural context. Typical of the second trend of gerontological qualitative research in the United States, ethnography emphasizes the importance of context in shaping the meaning of age and aging. Ethnography has a long history of methodological relevance in studies of aging in the United States, beginning with the early work of researchers such as Kevin Eckert's (1980) *The Unseen Elderly,* Vesperi's (1985) *The City of Green Benches,* and others who revealed unique cultural aspects of aging in the United States. Through the work of ethnography, researchers become immersed in the experiences of elders in a way that the researcher becomes a participant, not just an expert observing from the outside. For this reason, this method has provided a powerful approach for understanding the ways in which seemingly problematic aspects of aging are interleaved with positive and uplifting experiences.

Through the work of foundational ethnographic research in the United States, the field of gerontology as a whole has been forced to reconsider assumptions about older adults' ability to continue growing, developing, and engaging in meaningful ways with others. Kauffman's (1986) seminal work *Ageless Self* and Myerhoff's (1979) ethnographic classic *Number Our Days* demonstrate a paradigmatic shift that reoriented research to focus on aspects of growth and meaning-making in later life. This research recognized the richness of the aging experience through celebration of the outliers in the data and acceptance of inconsistency. Kauffman (1986) and Myerhoff (1979) both describe groups typically overlooked in mainstream gerontology research.

Important ethnographic research like this in the United States provided the impetus for further explorations of positive aspects of the aging process. However, during recent years, ethnographic research in gerontology has not remained a prominent method used by qualitative researchers seeking to explore positive aspects of aging. We propose that this method is ideal for expanding our understanding of the cultural context of the growing number of healthy post-retirement years people can expect to experience in the United States. Ethnographers are positioned to empirically explore the nuanced meaning of the third age and the experiences of those occupying the role of a third age.

Grounded Theory

The goal of grounded theory is to inductively develop a "theory" that emerges from a process of patterns and themes within the data being analyzed, data obtained through direct observation, interviewing, and fieldwork (Glaser and Strauss 1967). Grounded theory has been a very prominent methodological approach used by qualitative researchers in the United States who have sought to understand the

experience of aging. By allowing older adults themselves to articulate their experiences, data is derived through the voices of a truly lived aging experience, which is analyzed for dominant themes. For these reasons, grounded theory has provided gerontologists with tools to understand the ways older adults experience positive aspects of aging dealing with issues of meaning and purpose in later life.

A number of research articles have emerged in recent years which use grounded theory to explore how older adults engage in society in meaningful ways as they negotiate the growing number of years in which they can expect to be healthy and retired. Price (2000) examines the challenges facing professional women, proposing different ways that women in her study define a new identity as they move into their retirement years. Slevin (2005) describes the retirement activities of African American women, determining that the meaning and their perception of responsibility and obligation to give back to others has been shaped by their social location. Kleiber and Nimrod (2008) examine the dynamics of generative expressivity of individuals in a learning retirement group, identifying the motivations for engagement in later life and how personal agency contributes to participation in "valued life activities" among older individuals. Research using grounded theory provides researchers with the opportunity to give older adults the opportunity to articulate their experiences and the meaning of those experiences. However, as is characteristic of the third trend in gerontological research, the interpretation of these observations are shaped by the lens of the researchers as they seek to construct meaning through a theoretical explanation of the findings.

Grounded theory is a useful tool that allows researchers to derive a greater understanding of the aging experience, and has the potential to uncover the process of transitioning into a third age of life, and how this period of life introduces a unique set of opportunities and experiences not present during other periods. Future research can and should continue to utilize this methodological approach to build theory about the third age of life.

Qualitative Research Topics and the Era of the Third Age

A growing number of topics are emerging in qualitative research that contribute to our understanding of the positive aspects of aging. The first is related to the changing meaning and purpose of aging and old age in the era of the third age. We identify and describe two dominant frameworks that guide the ways in which the positive aspects of aging are being examined. Specifically, the first framework includes research that examines meaning-making, focusing on issues related to identity in later life and the cultivation of meaning in later life. The topics within this area highlight some of the characteristics associated with a third age identity, especially factors shaping the way older people manifest meaning and purpose in later life. The second framework includes research focusing on meaningful engagement in later life describing the roles associated with later life and activities in which individuals who are healthy and active engage.

Meaning Making: Identity and the Cultivation of Meaning in Later Life

Against the backdrop of a dramatic increase in the number of individuals living longer, researchers have begun to explore and examine the intersection of meaning making and identity in an effort to understand and appreciate the myriad of ways in which older adults make meaning of their lives and to understand how this affects

their lived experience. We know that aging emphasizes existential questions about, self, death, family, loss, and love. Today, new questions are being raised about what it means to be old as the third age becomes articulated as an important and unique life phase. For example, questions such as: *What are the benefits of aging?; What are the health outcomes for those who lead lives of purpose?; and What is the correlation between quality of life, the meaning of life, and personal identity?* are the kinds of questions that are taking on a new meaning as we begin to understand the aging experience in the era of the third age.

In examining the aging identity through the lens of social constructivism, several scholars have pointed out the ways that age is socially, historically, politically and culturally constructed. An aging identity encompasses an even wider range of roles for older adults today than during any other period of history, particularly regarding how older adults spend their time during their post-retirement and pre-disability years. Although the concept of meaning-making in later life involves a great degree of pliable explanations, we highlight three areas of research that are exemplary of how gerontologists describe ways that older adults are constructing meaning in their lives in a positive way: identity, spirituality, and creativity.

Identity

What it means to be "old" in U.S. society reflects a fair degree of fluidity and mutability. Age-identities, particularly those of third agers, are not exclusively matters of private conservations and intimate dialogues, but rather experiences that take place in a larger societal context, reflecting a larger meaning-making process that impacts our everyday experiences (Coupland 2009). At the heart of identity is the concept of relationality, or how age-identities are negotiated between individuals and those larger macro-institutions to which they relate – the intersection between public and private domains (Coupland 2009). As the emergence of the third age brings with it new roles associated with later life, identity is becoming an increasingly important topic. This blossoming of a new kind of age-identity requires gerontologists to consider what it means to be a third ager and how individuals cultivate meaningful experiences in later life.

An essential part of identity as it pertains to the third age experience is the potential individuals have to "create meaning through their own decision-making and their own projects" (Everingham 2003: 246). For example, Adams-Price and Steinman (2007) describe how jewelry making provides women with a connection to their cultural identity, and facilitates opportunities to reflect on life's meaning. Flynn (2001) describes the role of service work on the part of older religious sisters in maintaining a sense of community and individual identity. This kind of research highlights the ways in which individuals craft an identity through engaging in meaningful activities and the cultivation of a meaningful sense of self and purpose.

As research begins to articulate the key components of a third age identity, research that encompasses the culmination of experiences that are made manifest in later life are being examined in a new way. For example, roles related to work and retirement, and widowhood or entry into a late life relationship are being explored in ways that appreciate and direct attention to the myriad of ways older adults experience this new life phase. For example, Noonan's (2005) qualitative exploration of identity in later life based on work behavior found that older adults continuing to work are doing so in an effort to maintain purpose and meaning in life through their identity as a member for the labor force. Lee and Bakk (2001) used qualitative inquiry to explore how older women navigated the transition to widowhood, illustrating the importance of meaningful relationships in later life for women as key components in

helping women to adjust to this new phase, creating a new sense of self as third agers. This research indicates that the process of creating an identity in later life is strongly tied to the way people interpret their movement through the life course and experience related transitions. As individuals reflect on the significance of salient life course transitions, they begin to explore their roles as members within a community and their presence as a participatory member of a larger society.

Spirituality

Spirituality can be thought of as context for the formulation of a meaningful sense of self and identity (Hall 1985). There is evidence that as individuals age their level of spiritual growth gradually increases, especially with the increase in self-acceptance and perceptions of one's life having integrity or despair (Atchley 1997; Scott-Maxwell 1968). Some argue that the natural process of aging, the passage of chronological time with a finite, foreseeable end, creates a context whereby older adults become self-reflexive and self-accepting, opening the mind/body/spirit to an expansion and deeper sense of knowing one's self (Atchley 1997; McFadden 2005). During recent years, the ways individuals make meaning of their spiritual selves are changing as they negotiate the implications of a lengthening of the life course. As a result, researchers have recognized the importance of exploring how older adults respond to both late life challenges *and* opportunities.

McFadden (2005: 172) points out, "for many, but certainly not all older people, faith communities, religious beliefs and experiences of the sacred will contribute to life quality and meaning." In other words, spirituality has the potential to be a major resource for older adults as they age and they expand their spiritual consciousness. In the context of a growing amount of time for growth and development in later life, researchers have explored the universality of spiritual resources and how it helps off-set challenges associated with aging. For example, MacKinlay (2001), while investigating the spirituality of healthy older adults, finds that all individuals have a spiritual dimension and through the process of aging, there are certain common tasks associated with spiritual growth which are used to foster growth and development in later life. Nelson-Becker (2004) describes older Jewish and African-Americans' spiritual resiliency in coping with stress associated with aging and aging related changes. These findings are particularly revealing of the role of spirituality in constructing meaning during later life, which is an important finding in lieu of the claim that spirituality is a basic human capacity, and the majority of individuals are capable of having spiritual experiences (Atchley 2009; Moberg 2005).

In the era of the third age, older adults face new challenges in cultivating purpose and meaning in life. Spirituality is vital to understanding the meaning making process in later life, and provides a framework for our sense of self in the larger context (Sinnott 2009). The longevity revolution and the changing experience of what it means to be old in today's society requires researchers and practitioners to continue to engage in discussions about meaning and purpose in later life (Butler 2009). As we continue to unravel the complex meaning of spirituality during the era of the third age, it is important to allow elders to use their own words to articulate the process of meaning-making in the context of spirituality.

Creativity

Creative engagement among older adults has been examined by qualitative gerontologists in the United States for more than 40 years. Much of the early research on creativity tended to include descriptions of ways that creative pursuits

gave older adults opportunities to remain *active*. More recent research recognizes the role of creativity in meaning-making whereby artistic engagement is used as a vessel for examining the unique experience of aging and the meaning people attach to the aging experience (Carr 2009). The focus on the meaning and purpose of creative engagement is related to the increasing number of years of healthy retirement, whereby individuals have the opportunity to become active participants in the meaning-making process through engagement in particular activities. In this way, creativity is viewed as a process of development, as opposed to a finite activity in which older adults remain occupied. Thus, a growing emphasis within gerontological research on creativity involves lifelong learning, discovery, and innovation on an individual level. For example, Hickson and Housley suggest that "characteristics of curiosity, inquisitiveness, wonderment, puzzlement, and craving for understanding are critical ingredients" for older adults to adapt to the ever changing world and their place in it, which they describe as fundamental components of the creative process (1997: 545). Creative engagement is critical to the way older adults formulate their sense of self and purpose in life during the era of the third age.

Recent qualitative inquiry on creativity in the United States focuses on ways that creative processes encourage opportunities for older adults to form meaningful bonds with others while also cultivating personal development. For example, Cheek and Piercy (2008) describe the use of quilting as a form of generativity that promotes development in old age whereby older adults connect with the cultural significance of passing down techniques from previous generations, as well as fulfilling an important role in their respective communities. In their words, older adults describe the ways in which quilting and artistic engagement promotes development of selfhood in later life through the articulation of a sense of purpose and meaning associated with being an elder quilter in their community. Similarly, Coffman (2002) and Carr (2006) describe the role of music participation in the formation of meaningful interpersonal relationships through a shared commitment to high quality musical engagement. These articles describe the complex interactions between the individual and the social as music performances facilitate intimate interactions with others through group performances. Fisher and Specht (1999) contextualize the individual experiences of creative engagement by describing the relationship between creative processes and successful aging. Successful aging, a concept popularized by Rowe and Kahn (1998), is often used to explore factors that contribute to positive health outcomes in later life. Fisher and Specht's findings, however, suggest that creativity contributes to successful aging by providing a sense of purpose, as well as facilitating interactions with others, personal growth, self-acceptance, autonomy, *and* by contributing to positive health outcomes.

Through the lengthening of the life course, old age is being redefined such that individuals no longer view old age as the period preceding death, but rather as a time to continue to participate in personal growth and development. Creative engagement is an important way in which older adults have an opportunity to communicate and generate meaning, materializing experience into expression. Future research on the third age should explore linkages between creativity as it's interwoven with the identity of being a third ager.

Meaningful Engagement

In addition to the focus on what it *means* to be an older adult in the era of the third age, a second dominant research agenda within qualitative gerontology is examining what people *do* in later life. The demographic and social changes

associated with the emergence of the third age resulted in a lengthier, healthier post-work period, and one in which older adults have greater opportunities to remain engaged in meaningful ways for a longer period. There are two dominant frameworks within qualitative gerontological research that examine issues related to meaningful engagement. The first is related to the meaning that people attach to activities or the benefits they receive from that participation. Historically, this kind of research has included observations and attempts to understand the ways in which older adults remain engaged in social roles that replace the loss of a work role by remaining active (e.g., older reference). However, with greater attention to opportunities for growth and development during later life, this theme has expanded to include the ways older adults engage in personally meaningful activities such that, rather than facilitating busyness in later life, the individually beneficial aspects of activities are emphasized.

The second dominant theme focuses on the benefits society receives from older adults' participation in activities. The threat that the "tsunami" of baby boomers moving into retirement during the first three decades of this century may result in an economic collapse of industrialized nations like the United States (e.g., Gee and Guttman 2000); this threat has contributed to an ideological shift in what is expected of older adults in an era whereby later life will potentially claim almost a third of the life course. Because a growing group of older adults have the time and the capability to remain actively engaged in society, scholars are beginning to explore the ways that older adults can engage in economically valuable activities during later life to help offset some of the costs of population aging and demonstrate their social value. This perspective appears to provide much of the rationale for explorations into ways in which industrialized nations can better utilize the experience and expertise of older adults (Freedman 1999; Harvard School of Public Health/Metlife Foundation 2004). Qualitative researchers have played an important role in these discussions through explorations of what older adults can and should be doing, and through critical explorations about the implications of such expectations which is described below.

These dominant themes, those focusing on the personally meaningful aspects of engagement and those focusing on the socially beneficial aspects of engagement, are infused into the research on meaningful engagement and are often present simultaneously as research examining personally meaningful activities are sometimes justified by the socially beneficial aspects of that engagement. A review of two broad topical areas within qualitative gerontology, productivity and health and well-being, illustrate the influence and role of these themes and how they articulate a meaningful engagement framework in this new era of qualitative research.

Productivity

The early introduction of retirement in the United States functioned as a mechanism to remove older adults from the labor force and make room for workers of younger ages. In recent years, population aging in coordination with increased longevity threatens to create a labor force shortage. As a result, productivity in later life has become an important topic of research within gerontology with retirement being redefined as a period of productivity, not just a period of leisure. A growing focus on maximizing the economic and social contributions of older adults, who are increasingly thought of as an "untapped resource" (Cnaan and Cwikel, 1992), has led to the formation of three major areas of research within this topical area: work in later life, lifelong learning, and volunteerism, or unpaid work. Qualitative researchers have contributed to discussions about work, lifelong learning, and volunteerism through

explorations of individual experiences and descriptions of late life productivity as well as through critical explorations about the implications of productive aging rhetoric.

Qualitative researchers have examined aspects of the growing focus on the role of work in shaping late life productivity. For example, qualitative researchers in the United States have explored the factors that influence work participation patterns (e.g., Rocco, Stein and Lee 2003), the influence of work history in shaping the extent to which leisure is defined in a productive way (Allen and Chin-Sang 1990), identifying and describing the work force experiences of older workers (Noonan 2005), and the extent to which bridge employment (i.e., part-time work between work and full-retirement) redefines the meaning of retirement (Ulrich and Brott, 2005). These kinds of studies are largely descriptive in nature, and have been particularly useful in raising attention to the ways in which later life employment in the United States involves a very different set of experiences and opportunities than those earlier in life. Qualitative explorations on this subject have noted that people of traditional retirement ages may be interested in working in different kinds of jobs, working fewer hours, and may work for different reasons than younger workers (Barth, McNaught and Rizzi 1995).

Lifelong learning has become a key theme of qualitative gerontological research in the United States due in part to the growing popularity of Institutes for Learning in Retirement (ILR) programs, interest in training for a new career during later life, and, although less popular, the presence of policies like "Program Sixty" in many states that allow individuals age 60 and older to audit college courses for free[1]. Qualitative researchers have examined both the individual experience of being involved in learning communities as well as the societal benefits associated with lifelong learning. For example, Kleiber and Nimrod (2008) examined generativity among individuals participation of learning in retirement communities. They noted that civic participation was very high among such participants, and that there was a link between generative behaviors and the extent to which individuals felt that they received personal benefits from participation of the learning in retirement communites. Brady, Holt, and Welt (2003) examined the unique challenges faced by lifelong learning institute instructors who are themselves, third agers. Their positions, which are voluntary in nature, require an ability to effectively communicate knowledge about a subject in which they are viewed as an expert, to individuals with diverse educational backgrounds and knowledge of subject matter. Instructors felt as though their hard work was not always appreciated and they note the limitations of the ILR program structure such as the location of classes and the lack of consistency in the format for classes.

The third theme related to productivity is volunteerism, which has been examined predominantly through critical analyses, a less traditional but increasingly accepted form of qualitative inquiry. For example, Holstein and Minkler (2003) propose that a growing body of quantitative literature on volunteerism may demonstrate positive outcomes like expanding role options in later life, but that there are fundamental problems associated with the formation of normative paths for later life that include expectations of unpaid work. Specifically, they suggest that the meanings implied by new roles described as civically responsible, have political and economic dimensions that may create confining expectations for what makes a "good" old age. In another article, Minkler and Holstein provide a personal response to address similar concerns regarding productive aging initiatives whereby they raise questions about the extent to which volunteerism should be promoted as a way of filling the "gaping holes in the safety net" of social support in later life

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[1] For more information about Program Sixty, see http://www.csus.edu/registrar/sixtyplus/index.stm.

(2008:197) Martinson and Minkler question: "If our governments are taking away resources that support the community good, is the answer to have older people–many of whom have already been negatively and disproportionately affected by these cutbacks—step in to fill those unmet needs, thereby releasing government of long-term responsibility?" (2006: 321). Critical research of this nature has been very powerful in raising important ethical questions about the way the third age is developing as a period of productivity through "voluntary" unpaid work. Critical gerontologists propose that although volunteerism in later life may provide meaningful experiences to some older adults, not all older adults have access to opportunities to engage in this variety of meaningful engagement.

Health and Well-being

A very important factor associated with the emergence of the third age and the growing focus on more positive aspects of aging is the recognition that individuals are living longer, healthier lives. However, what has been of particular interest in gerontology are ways to improve the quality of later life and support a "good" old age. The tenets of activity theory, which are fundamental to discussions about positive outcomes in later life, were built on the belief that those who remain active age more successfully than those who disengage (e.g., Palmore 1979). Although activity theory paved the way for explorations of ways to age in a positive way, in the current era, activity theory has been transformed through paradigms such as the wellness model (Montague et. al 2001) and discussions about what it means to age successfully (e.g., Rowe and Kahn 1998) that examine how engagement in certain activities produce positive health outcomes. As a result, the link between what people *do,* and their overall wellbeing in later life has become an important topic in third age literature, particularly with regard to the role of individual behavior in producing positive late life outcomes. Qualitative researchers have sought to capture the meaning and value of activity in producing positive health outcomes through the lens of older adults themselves.

Some research has been more directly focused on participation in activities and perceived improvements in health. For example, Wilcox and associates (2009) examined older adults' perceptions of the role of physical activity and nutrition in maintaining cognitive health. This research focused on participant description of knowledge rather than participants interpretation of positive health outcomes. Grant (2001), on the other hand, examined the extent to which physical activity in later life is inhibited by ageist conceptions of what older adults can and should do. He suggests that the physically active body represents a conscious, feeling, thinking, and reflective self, and that the benefits of continued physical engagement in sports and exercise during late life are vast. However, perceptions of being "too old" to engage in such activities create barriers to continued activity, and inhibits individuals from choosing to engage in meaningful, healthy ways. Other qualitative research on health and wellbeing focuses more directly on individual interpretations of the positive connection between engagement in meaningful activities and improved well-being. Rossen and associates (2008) examined older women's perceptions about what it means to age successfully, determining that personal, social and behavioral issues contribute to one's ability to positively manage the stresses associated with transitions that occur in later life such as the loss of a spouse. Hutchinson and associates (2008) research support these findings, indicating that social participation in an organized group like the Red Hat Society provides women with a resource for coping with challenges and losses in later life and promotes positive physical and psychological health and improved quality of life. In particular, Son, Kerstetter,

Yarnal, and Baker (2007) note the benefits reaped from participation in this group includes psychosocial health benefits such as the facilitation of happy moments, helping with transitions and negative events, and enhancing the self. Together, these findings indicate that participation in activities that are meaningful to older adults produce a broad array of positive outcomes that contribute to improved well-being in later life.

Qualitative research has enhanced our understanding of the role of meaningful engagement in producing positive health outcomes by allowing older adults to use their own language to describe their experiences. This kind of research has broadened the way health and well-being is conceptualized, and has opened the door for conversations about what it means to older adults to engage in activities associated with "third age lifestyle," or the activities and roles associated with being a third age (Gilleard et al. 2005).

An Agenda for Future Research

As we reflect on the implications of the emergence of the third age and its impact on the field of gerontology as a whole, we consider the areas in which qualitative research in the United States has contributed in innovative ways to our understanding the meaning-making process in later life. As this review describes, qualitative research in the United States has provided important contributions to our understanding of the positive aspects of aging and the implications of the growing number of healthy retirees. Qualitative researchers have begun emphasizing the importance of understanding the way older adults cultivate meaning in their lives, and the implications of changes in roles and expectations associated with the emergence of the third age. As baby boomers enter retirement, issues related to the third age of life will become increasingly important, and the meaning and purpose of this period will continue to evolve.

Qualitative researchers have played an important role in revealing the positive aspects of aging in the face of negative stereotypes of aging in the past, and future qualitative research in the United States should build on this momentum. Therefore, we propose that the agenda for future qualitative research on third age issues in the United States should include research that continues to contribute to the two dominant frameworks described in this review: meaning-making and meaningful engagement in later life. We also propose that the agenda for future qualitative research on the third age should include a third framework which includes research that examines and defines what it means to be a third ager. The topics under the purview of this framework will include the ways individuals define their own identity as a third ager, what third agers view as their roles in society, and the characteristics that are uniquely associated with being a third ager. In the following section, we describe ways this important framework can be developed.

Development of a New Framework: What it Means to be a Third Ager

Through critical explorations of the changing normative expectations of older adults, Minkler and Holstein (2008) encourage us to consider the way social location and individual interests and preferences produce a variety of identities in later life. Likewise, the experiences associated with the third age should also be recognized as multi-faceted and shaped by both internal and external forces. As is emphasized in the third trend of qualitative research in gerontology, as aforementioned, understanding what it means to be a third ager requires recognition of the role of

reactivity and reflexivity in interpretations of older adults' descriptions of what it means to be a third ager. Currently, there are no dominant qualitative research methods or approaches that reflect this trend which seek to examine positive aspects of aging or issues associated with the third age. For these reasons, we propose that future research should build knowledge about what it means to be a third ager through the lens of older adults themselves; a phenomenological approach is well suited for this task.

Phenomenology is not a particularly common research method among qualitative gerontologists in the United States, though it is emerging as a key mechanism by which gerontologists can produce theoretically rich understandings of aging experiences that authentically represent the experiences of older adults themselves. The phenomenological approach involves the systematic investigation of consciousness or the enriching work of understanding the particular human experience as phenomenon. This approach has been valuable in gerontological research in the United States by shedding light on the ways that older adults construct meaning in their lives, allowing researchers to articulate aging phenomenon that has not been previously examined. Phenomenology is useful in helping researchers unlock the human consciousness, and understand what it means to be a human situated in a particular life course with a particular experience (Longino and Powell 2009). These authors explain that phenomenology reveals critical consciousness, personal identity, and social meanings. Regarding the experience of aging, phenomenology is useful in illuminating how "human aging is implicated in the production of social action, social situations, and social worlds" (Longino and Powell, 2009: 386). For these reasons, phenomenological research is an ideal approach for examining the lived experiences of third agers because it involves focusing on them as objects rather than subjects, appreciating their abilities and desires to construe a purposeful existence, and their attempts to be social actors rather than problematic spectators.

By inviting older adults to tell their stories and explain the reality of the experience of being a third ager using methods like phenomenology, gerontologists can begin developing theory that explains the meaning and purpose of the third age category and how third agers interface with society. Although the implications of an increasingly healthy and financially secure older population has been explored for more than thirty years in the United States (e.g., Neugarten 1974), agendas that target third agers as ideal contributors to society through participation in unpaid, economically valuable roles have become prevalent. For example, Civic Ventures is an organization that encourages older adults to contribute their lifetime of knowledge and experiences back to society through volunteerism. However, despite the push to redefine the third age with uniquely different roles, opportunities, expectations, and experiences from other periods of adulthood, there has been little theoretical development with which to understand this life phase over the last three and a half decades. If individuals in the early stages of old age in fact have uniquely different needs, experiences, opportunities, and expectations from other adults, as was proposed by Neugarten, these needs cannot be appropriately addressed without theories to guide research and accumulate knowledge about third age phenomenon. Theories should provide a set of lenses through which to view research findings, a cognitive map to make sense of our world. In the context of qualitative research on the third age, theory building should be derived from older adults' descriptions of their life experiences and narrative accounts related to observations of human experiences, as is emphasized in phenomenological research.

There are very few examples of research that has utilized a phenomenological approach to understand issues related to the third age with the purpose of building

theory. However, the small amount of phenomenological research that has emerged provides a starting place for building theory associated with the era of the third age. For example, Adams-Price, Henley, and Hale (1998) used a phenomenological approach as they examined the meaning of aging defined by older adults. They determined through their analysis of in-depth interviews that older adults were inclined to view aging as a positive experience and described the everyday experiences of aging in ways that revealed the kinds of uplifting experiences that mark later life today. This kind of research illustrates how this methodological approach captures the way that older adults make meaning of their lived experience through the stories that they tell (Kahn 2000), and explains aging phenomenon associated with the era of the third age. Future research can take the lead from research like this to continue to carefully examine the nature of aging, with the intention of understanding and seeking to explain the nature of aging through the experiences of third agers themselves.

As we look to the future, we contend that qualitative researchers have not only the opportunity, but the responsibility to take the lead in understanding what it means to be an older adult in the era of the third age. Research using methodological approaches like that of phenomenology provides the unique opportunity to develop theoretical frameworks that can be utilized to understand how the experiences of third agers differ from that of other social groups. As we accumulate knowledge about this period of life, gerontologists can more appropriately address the unique needs of this group, and support older adults' growth and development in later life.

Summary and Conclusion

In this review of qualitative research in the United States, we highlight the way research has changed in the era of the third age. With growing attention to positive and uplifting aspects of aging, qualitative research has played a critical role in exploring the ways in which older adults are engaging in meaningful ways with others. In particular, two key methodological approaches that have been important to revealing positive aspects of aging and exploring the extent to which a growing number of years of healthy retirement are redefining the aging experience: ethnographic research and grounded theory research. Ethnographic research highlights the role of context and environment in shaping the lived experience of elders. This research raised attention to positive aspects of aging at a time when most gerontological research focused on the problems associated with aging. Grounded theory has become a particularly important method for understanding the way older adults engage in society in meaningful way. This approach set the stage for understanding growth and development that is occurring in later life.

In addition to the use of particular methodological tools, we also review the key topics associated with the qualitative research in the era of the third age. These topics fit within two dominant frameworks – research exploring meaning-making in later life and research exploring meaningful engagement in later life. Within meaning-making research, we describe research on three topics that are most salient: identity, spirituality, and creativity. Within meaningful activity research, two dominant themes of research exist – that which describes the individually meaningful aspects of engagement in activities and that which describes the socially beneficial aspects of individual activity. These themes are embedded in two topical areas: productive aging and health and wellbeing. Within the topic of productive aging, the sub-topics of work, lifelong learning, and volunteerism are most prominent. These two frameworks were critically important to raising attention to meaningful experiences

and interactions with others, and we propose that the agenda for future qualitative research in the United States should continue contributing to these frameworks. However, we note that a third framework should also be developed which includes a clear exploration of what it means to be a third ager. In the future, greater emphasis of a phenomenological approach will assist in the important task of theory building about the third age.

Qualitative research in the United States has played an important role in facilitating a shift in perspective about aging whereby old age is no longer synonymous with decline and disengagement. Rather, qualitative researchers have emphasized the important ways in which the growing number of years individuals spend in healthy retirement has changed what it means to be an older adult in the United States by creating new opportunities for meaning-making in later life. Future qualitative research can continue to serve as a vehicle aiding in our ability to fully explore and celebrate the richness of meaningfulness embedded in what it means to be a third ager.

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Citation

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Qualitative Research and Aging in Context: Implications to Social Study in China

Abstract

This article begins with a review of methods that gerontologists use in social and behavioral research. The value and focus of qualitative research are highlighted with their epistemological roots. Qualitative approaches and their uses are summarized in terms of "interpretive" and "critical" social sciences that draw the insights of sociological paradigms. With a further review of qualitative research on aging and gerontological studies in China, the article focuses on an integrated micro-macro model by illuminating the ideas of clinical sociology and the general public policy framework of an "economic state in transition." Implications to social policy study (particularly on aging in China) are discussed.

Keywords
Qualitative Research; Gerontology; Clinical Sociology; Social Policy and GPP; Aging in China

Qualitative approaches to aging

Social and behavioral gerontologists as scientists are interested in patterns of regularity in later life. Influenced by the advancement of quantitative methodology in the history of science,[2] many tend to see human life and aging as constituted by variables. The specification of key variables and their values lead to effective scientific reduction by "condensing" large-scale data and focusing research attention on narrow, specialized interests. Reducing real life to a set of variables has been a leading and powerful approach to establishing a regular pattern, relationship, or causal/descriptive model via quantitative means (Chen 2004).

Nevertheless, scientific reduction based on objectivity has seen its limitation in behavioral and social research. Concerned with the danger of losing valuable information in quantitative data collection and analysis, qualitative researchers try to fully understand the meaning of various facts by illuminating their situations, which helps to explain human behavior and the social environment at deeper levels. They

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[2] Quantitative social research traces its roots to natural science methods developed under the tradition of logical empiricism or positivism. Key elements of this paradigm are: deductive logic, empirical observations, quantification, and validation. For a long time, these were considered by most researchers as the requirements for the scientific method, which indeed represented a breakthrough to the old, nonscientific ways of knowing by authority, tradition, common sense, and own experience.

endeavor to enhance rather than reduce data in order to establish authenticity within context, and they acknowledge the presence of values and the involvement of themselves. This approach to the understanding of meaning and "social construction of reality" has helped to improve the gathering and use of data by supplementing and complementing positivist-empiricist methods. Its orientation, unlike the positivist-empiricist approach, is more practical than instrumental, emphasizing not just the external or observable behavior of people but also their intention and the meaning of social action. While scientific methods have typically stressed validation via hypothesis testing, attention has also been paid to discovery. In this regard, qualitative approaches have been gaining greater and greater popularity (Chen 2004)[3].

Qualitative Methods in Social and Behavioral Sciences

Major sources of contribution to qualitative research have ranged from constructionism to phenomenology, hermeneutics (the study of meaning), and ethnomethodology (Chen 2004)[4]. Along with cognitive, idealist, and subjectivist approaches, they are given a general name of "interpretive social science," which is often equated with qualitative research (Neuman 1997). In sociology, the interpretive approach is closely associated with symbolic interactionism, which can be traced to the work of sociologist Max Weber (1864-1920). The interpretive paradigm is also widely used in the humanities including language and literature, history, and philosophy (Chen 2004; Cole and Ray, forthcoming). Taking hermeneutics for example, researchers conduct a "reading," or detailed study, of a text to discover the embedded meaning. According to Neuman, the interpretive approach in social research is "the systematic analysis of socially meaningful action through the direct detailed observation of people in natural settings in order to arrive at understandings and interpretations of how people create and maintain their social worlds" (1997: 68).

There is another paradigm called "critical social science," which also has to do with qualitative research. Originated from conflict theory in sociology, it can be traced to the work of Karl Marx (1818-1883) and was associated with the Frankfurt School in 1930s' Germany. Variants of this approach include class analysis, feminist perspective, dialectical materialism, postmodernism, radicalism, and critical theory (Chen 2004). As a research paradigm, it criticizes social and behavioral research conducted under some other paradigms for their subjectivism and tendency to maintain status quo. The central theme of this paradigm is to change the real structures of the world. As Neuman narrates, the critical approach defines social science as a "critical process of inquiry that goes beyond surface illusions to uncover the real structures in the material world in order to help people change conditions and build a better world for themselves" (1997: 74). On the other hand, the commitment

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[3] In the past few decades, a number of alternative approaches emerged with the revitalization of some "primitive" methods in human inquiry under the rubric of qualitative research. Instead of talking about operationalization and statistical hypothesis testing, qualitative methods emphasize interpretive, descriptive, narrative and other artistically grounded approaches to research. In many cases, qualitative research has helped to frame the situation and ask the question, if not generalize the conclusion.

[4] Garfinkel's (1967) suggestion that people are continually trying to make sense of the life they experience and create social structure through their actions and interactions opened a new path to social and behavioral inquiry, i.e., ethnomethodology, under phenomenological philosophy and social constructionist perspective.

to the humanizing of society and its institutions leads to an interdisciplinary pursuit of value-based and value-affirming "humanistic social sciences" (Warmoth 1998).[5]

Qualitative Research on Aging and Gerontological Studies in China

Qualitative research was acknowledged as coming of age in gerontology about two decades ago (Gubrium 1992), when the qualitative approach to ageing studies was carefully justified by gerontologists (e.g. Murphy and Longino 1992). Since then, researchers have continued the effort to develop qualitative research in social gerontology, from revisiting epistemological paradigms in theory (e.g. Powell and Longino Jr. 2002; Dillaway and Byrnes, 2009) to expanding applied research to guide practice (e.g. Kuder and Roeder 1995; Isbister, Poses and Levitt 2000; Dionigi 2006; Martínez-Maldonado, Correa-Muñoz and Mendoza-Núñez 2007; Pohlmeyer et al. 2009). Gerontologists have studied a wide range of issues using such popular qualitative methods as case study (e.g. HAN Evaluation Committee 2006; Marshall 1999) and single subject design (e.g. Smith and Hibbler 2007), focus groups (e.g. O'Donnell et al. 2007; Duggleby 2005), and historical-comparative study (e.g. Chen 1996; Kreager 2004).

Gerontology was largely nonexistent in China before the 1980s except for some scarce geriatric research in medicine (Tao 2001). In practical terms, China's aging policy and administrative system were not developed until the First World Assembly on Aging in 1982 (Chen and Chen 2009). However, as Sankar (1989) pointed out, "...this is a particularly compelling subject; for it allows us to critically examine the almost mythical Chinese gerontocracy standing as it does for a 'golden age' when families 'really' took care of the elderly. This myth informs the policy ideals of Western governments and its critical examination is long overdue..." (1989: 200). Only a few years later, gerontological research was shown to be rapidly developing in a comprehensive review conducted by the author, which included major aging studies in China with a summary of the primary findings as well as some generalizations (Chen 1996). Overseas research on Chinese aging, including that conducted by some Chinese scholars studying abroad, had touched upon a wide range of topics, including the demographics of population aging, the relationship between the process of modernization and aging, age stratification and patrilineality, living arrangements and formal/informal support systems, the country's "one child" policy, care of the childless and single elderly, illness and health care, disability, long-term care, and death (Chen 1996). Chinese scholars at home (the Mainland) also conducted a good number of gerontological studies by themselves, such as: the 1982 Five-City Household Survey in Beijing, Tianjin, Shanghai, Nanjing and Chengdu on the relationship between fertility and household/marriage patterns; the 1987 national survey of the Population Institute of the Chinese Academy of Social Sciences (CASS) with a total sample of 36,755 persons aged 60 and above drawn from all large Chinese cities and some of the middle- and small-sized cities and towns (223 in total), as well as 830 counties (except those in Tibet); the 1988 survey in nine large cities (Beijing, Tianjin, Harbin, Shanghai, Wuhan, Chengdu, Guizhou, Xian, and Lanzhou) sponsored by China National Social Science Fund; the 1992 study by the Chinese Scientific Research Center on Aging (P22 Survey), which covered twelve provinces and the municipalities directly under the central authorities; etc. Chinese researchers conducted far more investigations in smaller scales, including those carried out in Beijing, Tianjin, Shanghai, Chengdu, Wuhan,

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[5] Qualitative research is also featured as naturalist and heuristic (Chen, 2004).

Changsha, and Lanzhou (Chen 1996). In addition to the general surveys, there were also studies focusing on the impact of family change on living conditions of the elderly, older persons' psychological adaptation to life after retirement, life satisfaction of the retired veteran cadres and professionals, life conditions of the retired elderly, care of the childless elderly, reform of the retirement system, family support of the elderly, and community services for the elderly (Chen ibidem). China also engaged in international cooperative research projects, such as the 1986 International Seminar on Old Age, the UNFPA-assisted project entitled Development of Research on the Aged for Policy Making Purposes, the Guizhou-Japan JOICFP project, the Wuhan Medical College-University of Michigan Institute of Gerontology collaborative study, the Shanghai Institute of Mental Health collaboration with American researchers on dementia, the 1992 China-Japan comparative study (in Tianjin, Hangzhou, and Wuxi,) the 1990 Zhongshan University-Linnan College of Hong Kong study on the changing status and role of the elderly, and the 1990-91 cross-national study by researchers from the University of California at Los Angeles (UCLA) in cooperation with colleagues at the Beijing Medical University, the Sun Yat-sen University of Medical Science, and the University of Hong Kong (Chen 1996). A recent review of aging research in China is provided by Chi and Du (forthcoming), which identifies the following major research foci by examining a total of 328 Chinese and 219 English research articles published between 2005 and 2009: social welfare and social security for older adults; elder care (how independent living ability affects the care giving for older adults; the changes in living arrangements and aging-in-place; future development of residential care; disability conditions and family care for older adults with disabilities); health and mental health; social support; economics, politics and life conditions (causes and solutions of poverty among older adults; issues related to income resources and intergenerational financial supports; theory of "getting older but not richer" and the influence to the public policy; family and social life studies including old age marriage, life quality and social classes); population aging; immigration and influences to older adults; issues related to older women; value (e.g. "filial piety" tradition), culture and late life education; public policy.

In the phenomenal development of aging research in China over the past three decades, qualitative methods undoubtedly have played a role in providing important information, knowledge, and understanding. Early examples include anthropologist Charlotte Ikels' field study in China (Ikels 1989), Sinologist Elisabeth Croll's policy analysis (Croll, Davin and Kane 1985), and sociologist Deborah Davis' gerontological exploration in China (Davis-Friedman 1983). Later efforts include placing China in the larger picture of diverse conceptualizations of aging and intergenerational relations within Asia (Croll 2006; Traphagan 2007) as well as comparing Chinese experience with that of the West (Chen 1996). The methodology of qualitative research, however, has not been fully explored and utilized by Chinese gerontologists. In fact, some of its epistemological foundations used to be criticized as anti-Marxism or incompatible with communist ideology in the pre-reform era. Specific methods of qualitative research such as case studies, focus groups, and historical-comparative analyses have been utilized in various forms but good methodological examples are still hard to find. The following will not recap the importance of qualitative research in general terms but focus on exploring an integrated micro-macro model of qualitative research as well as examining the quantitative-qualitative connection in data collection and analysis in the hope to shed some light on the subject.

Clinical sociology and general public policy: an integrated micro-macro model of qualitative research

Canadian sociologist Robert Sévigny and the author delineated an integrated micro-macro approach to qualitative research in the field of mental health in China (Sévigny, Chen and Chen 2009), which also suggests a way to develop qualitative research in the study of Chinese aging. Two very different levels of inquiry were involved, that is, clinical sociology and the study of a general public policy.

Clinical Sociology Research

According to Gordon Marshall (1998), clinical sociology is a term, analogous to clinical psychology, introduced in 1931 by Chicago sociologist Louis Wirth, for the work of sociologists employed in clinical settings alongside social workers, psychologists, and psychiatrists. Clinical sociology involves the use of sociological knowledge to aid diagnosis, treatment, teaching, and research, although the practice of employing clinical sociologists is not widespread (Marshal ibidem). As clinical sociologist Jan Marie Fritz (2006) indicates, Auguste Comte (1798-1857) and Emile Durkheim (1858-1917) were among those who frequently are mentioned as precursors to the field. Especially, "Emile Durkheim's work on the relation between levels of influence (e.g. social compared to individual factors) led Alvin Gouldner (1965: 19) to write that 'more than any other classical sociologist (he) used a clinical model'" (Gouldner ibidem).

Assuming the role of sociological practice, action is a key word in clinical sociology. Though, the advantages of creating and maintaining a research orientation to problem-solving are noted (Hall 2005). Clinical sociology is often put side by side with applied sociology, with the latter emphasizing "method" (Association for Applied and Clinical Sociology, http://www.aacsnet.org/wp/?page_id=59). Clinical sociology, however, has its particular methods. As action research, narrative is the vital methodology in clinical sociology. "Narratives are defined as clients' spoken accounts of their thoughts, feelings, ideas, and ideals about their social worlds" (ibidem). Through narratives, clinical sociologists summarize patterns of behavior experienced and observed in families, religions, social classes, cultures and society at large. "History, social systems, and cultural trends are examined to discover ways to de-construct false narratives and to re-construct realistic, dependable narratives" to influence clients' decision-making and behavior (ibidem).

Single-case studies have always been a basic feature of clinical sociology (Sévigny, Chen and Chen 2009). It focuses on individual experience as well as people from the person's immediate social environment (ISE) – relatives, friends, neighbors, colleagues and leaders at workplace (called *Danwei* in Chinese), and hospital or nursing home staff in the case of an institutionalized person. A case study in mental health research explores in what terms a patient and people from his or her ISE speak of his or her encounter with a mental illness. Likewise, a case study in gerontological research would inquire in what terms an older adult and people from his or her ISE speak of his or her experience with the aging process. Clinical sociology emphasizes understanding the relationship between the individual and the society. However, as Sévigny and colleagues have indicated, the clinical sociology approach still struggles with the "individual-society" problem (Sévigny, Chen and Chen 2009).

While clinical sociology favors case study by focusing on individual or personal experience,[6] understanding the relationship between the individual and the society requires an adequate understanding of the society. The society consists of not only the ISE but also a larger social system (LSS) (ibidem). It is the LSS that is more likely to pose a challenge to clinical sociologists alongside clinical social workers, social psychiatrists, etc. in their struggle with the "individual-society" problem. The following is a real case exemplifying the kind of struggle in the study of aging.

As one of the first sociology graduate students in post-Mao China 25 years ago at Zhongshan (Sun Yat-sen) University at Guangzhou (Canton), I started doing aging research by visiting and interviewing elderly individuals in welfare institutions and at their homes. I was mindful in targeting their needs, which was luckily the right thing to do according to a reflective American scholar (Ikels 1989). Some unmet needs were identified, but how to meet the unmet needs became a more and more outstanding question as I began to see the limits of the clinical approach (or something like that since I wasn't systematically trained as a "clinician" even though I was among the first of my generation to take case study and case work courses in mainland China). Soon, the new leaders of the Civil Affairs Administration in Beijing started pushing for studying the "community" and its potential support functions. By virtue of my affiliation with a leading sociology department specializing in community study (thanks to the late Professor C.K. Yang and his team members from the United States and elsewhere), I helped to lead the intellectual side of a nationwide "community service" movement (first implemented in large cities). After publishing a national lecture series, I conducted research on community service (with a focus on aging) in China vis-à-vis community care in the West (particularly the United Kingdom as the leader), teasing out major parameters from the latter to construct a systematic, comparative framework for my China case study (Chen 1996). With all the promises and enthusiasm among Chinese policy makers, scholars, and practitioners at the time, however, I soon found myself (and the country) in a position not very different from "community care" in the West that was regarded at best as stagnant (Chen ibidem). Why, as a socialist country, was China not doing better but rather seemed retreating dramatically behind capitalist welfare states? Could we sense a direction from the past to the future amid its (sometimes very turbulent) sea changes? My "clinical," community, and even social policy study approaches could not provide a satisfactory answer. In spite of various scholars complaining from outside at the time, I realized that Chinese social policy might not be understandable from a Western welfare state (mainstream social policy) standpoint. Studies missing the "big picture" in the particular historical context might not help the elderly and other needy people in terms of showing them the real possibilities and ways (including opportunity windows) to effect major changes. On the other hand, the momentum of Chinese economic reform could get lost with mounting misunderstanding or misguidance (or both) in the social aspects. After all, few desired to roll back to the poor (abject) and politically intense (if not all vicious) pre-reform era even though it had been marked with notable socialist protection hyped as a major "superiority."

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[6] "Field research" is a term used to summarize such case or small group studies that last some length of time and go into some depth. Field researchers gain access to the group and community, adopt a social role and interact with the members, and observe in the field setting. The observation may continue for several months or a few years, with the focus being possibly modified or refined in the process. The interactions can be personal and interviews informal. Data are obtained in the form of detailed daily notes, and their analysis yields findings about the true meaning and significance of various concepts, relationships, and events (Chen, 2004).

It was with such fundamental and pressing research problems that I chose (over a more clinically-oriented curriculum offered by an Ivy League institution) to study (on full scholarship-fellowship) in the School of Social Welfare (which later became a part of a new School of Public Policy and Social Research) at the University of California at Los Angeles. I was systematically exposed to the theories and methods of social policy as a discipline born in the West and grown with the welfare states. Robert Morris (1985) might not be the best known author but the notion of a policy system in his book struck me with the broad perspective my research badly needed (Dr. Fernando Torres-Gil assigned the readings who taught the doctoral social policy class before becoming the first Undersecretary for Aging in U.S. history). I liked Morris' term of a "general public policy" (i.e. a guide to the priority aims and preferred means of a policy system), though I was disappointed that it seemed to have been ignored by numerous scholars and practitioners alike (Morris himself did not elaborate on it either). However, social policy as one of the "sectoral policies" required an adequate understanding of the entire policy system (i.e., the context) to make full sense. To assess the real possibilities in aging, social services, and other fields of social policy, I had to relate to economic and political issues and rise to the level of the general public policy (GPP). My work demonstrated that the GPP (instead of various traditional, pure ideological "-isms") was the key to a germane interpretation and critique of particular policy measures in drastically changed times. It also identified a de-politicized Chinese "economic state" as a unique GPP pattern, in contrast with the typical Western welfare state as another, arguing that the latter was a particular rather than a universal model for all.[7] It endeavored to illuminate the historical-cultural and economic-political-social context so that major social policy issues including aging and community service could be better understood (Chen 1996). My main points were that the de-politicized Chinese state's almost exclusive focus on the economy, no matter how negative it had been on the provision of social welfare etc., was determined by its structure and driven by a desperate need for the economic state to seize the last chance to prove itself and survive the serious challenges in the post-Mao era. Nevertheless, economic reform immediately started undermining the economic state structurally and functionally (if not yet ideologically). This would help the state with its various social service functions in a new process of de-economicization, including "caring for" the community to deal with its increased responsibilities shifted from the former *Danwei* or occupation-based welfare system. However, an opportunity window would not open unless and until a major decision is made to "transfer" the emphasis of the GPP again, since the lesson of past politicization (deviation from its economic mandate) was so painful that the Chinese took the GPP more seriously than any other nation in terms of national agenda setting (some of the points were elaborated in my subsequent publications).

As a first-time writer in English, my use of the language was certainly flawed but the first book was sold out in three months and attracted wide attention including that from leading experts (e.g. Croll 1997; Ikels 1997). A younger scholar wrote me that he had followed the classical "state socialism" paradigm until he read my works (e.g. Chen 2002). The novel kind of "qualitative" inquiry plus a bold departure from the conventional wisdom of welfare state-based social policy was not understood or appreciated by all, though. As a former lecturer-turned-research student in Hong Kong (before I relocated to the U.S.), for example, my original work was held up by a challenged yet powerful chairperson (for whatever the need) and, naturally, its

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[7] Although my subsequent analysis (e.g., Chen, 2009) indicates that the welfare state and the economic state seem to have been approaching each other, it is different from simply labeling such a country as China as a welfare state without regard to its socioeconomic contexts and its unique history.

publication met a hasty slighting (Chow 1997). However, the concern here is less about ethical issues than a scholarly failure to see (or refusal to recognize) the importance of analyzing the context (LSS) by seeing the "forest" in order to understand issues with the "trees." Without clarifying GPP as a key issue and identifying its different patterns, particularly the "economic state" and its transition (firstly de-politicization and then de-economicization), I would never have made good sense of China's economic reform, community service (or community construction as called more recently), social and aging policies, family responsibilities, and eventually, the elderly's individual experience.

An Integrated Micro-Macro Model

Sévigny and colleagues (2009) warned against a deterministic view in understanding the "impact" of the LSS on personal experiences, in favor of becoming more alert in exploring and identifying representations and meanings of a person's experience and that of the people around her or him. With that clinical sociology approach, they focused on so-called explanatory models of illness (EMI) used by nonprofessionals regarding the causes and meanings of experiencing such a severe mental illness as schizophrenia (Sévigny, Chen and Chen 2009). The research on explanatory models among psychiatric patients and other people suggests a unique approach to the social processes in which a mental illness is recognized, interpreted, and treated (Kleinman 1980).

An integrated micro-macro model, however, helps with a more thorough understanding of such personal experiences in the country's unique and rapidly changing social environment. Therefore, the study of social rehabilitation of schizophrenic patients and the role of the workplace (*Danwei*) by Sévigny and colleagues (2009) was guided by the following assumptions about China's LSS (Sévigny, Chen and Chen 2009): (1) Mental illness/health in general, and schizophrenia and its rehabilitation in particular, must be understood with reference to the larger political, social, economic and cultural systems and not only to personal or individual dimensions of experiences. (2) Rapid social change in China, particularly the change of the *Danwei* system, had a major impact on psychiatric patients and their significant others, with new issues for social care and rehabilitation including difficulties for people to resort to old *Zuzhi* (organization) or *Guanxi* (relationship) to get help. (3) Chinese social policy response had been to shift the burden from the *Danwei* to neighborhood *Shequ* (community). There were some achievements yet more stagnation with "community service" and "community construction," which were part of a worldwide experience under various themes such as "community care" and "social support." (4) Large-scale social changes are both compelling and enabling the Chinese state to undertake a more responsive approach to various social issues including the above, although what it faces is an international dilemma that requires serious and innovative initiatives to effect a breakthrough. (5) Mental health as a movement, including health education, has yet to gather momentum to create a favorable social environment for the well being of the people in China. The prevention and rehabilitation of mental illness in general and schizophrenia in particular will require Chinese mental health institutions, local communities, and various enterprises or *Danwei* to work together under the guidance and requirements of public policy and law. (6) Clinical research and intervention strategies should be formulated based on the needs of the psychiatric patients and their families within the broader social context, including the situation of the *Danwei*. The improvement of the larger political, social, economic and cultural systems must be relevant to and reflected in a positive experience of the individual people. A social

perspective is essential for understanding schizophrenia cases in terms of various actions and meanings related to schizophrenic patients and their families.

Detailed case studies provided an excellent opportunity to validate or falsify these assumptions[8] The point is to gain a thorough understanding of the meaning of experiencing a target process (e.g. mental illness, or aging) within the particular context. Sévigny (2004) conducted a contextual analysis of the development of psychiatric rehabilitation in urban China by comparing to my earlier work (Chen 1996). Five analytical dimensions were used in such theoretical and methodological considerations with regard to mental illness and aging, respectively (Chen 1996; Sévigny 2004): a) epistemological choices and research paradigms, b) community care/rehabilitation as an idea, c) community care/rehabilitation as a social, political and cultural matter, d) factors of change in the recent history of China, and e) aging/mental illness as a personal experience. By presenting materials on the general context of psychiatry and rehabilitation in China in a period of rapid change, and some data from empirical research in Beijing in the 1990s, Sévigny concluded that the development of social rehabilitation in psychiatry can be seen as one aspect of sweeping changes in the whole Chinese society (Sévigny 2004). This is similar to my conclusion in the aging field (Chen 1996). In our joint research later, "While the coauthors differ along the micro-macro typology of analysis, they share a common view about the necessity to take a multi-level and comprehensive approach to studying such a complex issue" (Sévigny, Chen and Chen 2009: 4). The GPP was used to illuminate the direction of fundamental social change to help understand Chinese policy responses as reflected in the states of the mental health system and the *Danwei.* "Such a macro context also helps to understand personal experiences at the micro level. In this methodological context, all levels of society-culture are viewed as being part of the personal experience" (Sévigny, Chen and Chen ibidem: 3). While such an approach could be criticized as attempting to cover too much, the importance of the context cannot be overstated. The same is true with the study of Chinese aging.

Conclusion and Discussion

The introduction of scientific methods including quantification in social and behavioral research was a major historical advancement. Logical empiricism/positivism has offered much for social and behavioral researchers to learn and has contributed significantly to the progress of social and behavioral sciences (Chen 2004). However, the complexity of human society has offered qualitative researchers unique opportunities to make up the loss of valuable information in scientific reduction. Interpretative, critical, and humanistic social sciences promise to enrich our understanding of human society with detailed data, unique approaches, clear values, and firm commitment to its betterment. In other words, qualitative research is "not what you do when you don't have data or don't know statistics" (Abel and Sankar 1995)[9]. Gerontologists as social and behavioral scientists have embraced qualitative methods and see aging as having multiple biological, psychological, and sociological components. As such, neither the behavior of older

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[8] Qualitative methods such as ethnography have been long characterized by their concern with descriptive matters, or matters of particularity, in framing the research situation. Yet recent trends have indicated a growing interest in linking qualitative research with theory, not just description or storytelling.

[9] Quite different from quantitative studies, qualitative researchers often begin with a loosely formulated idea or topic, then select a site and target a social group or community for study.

people nor the status of older people can be understood without attending to the primary need for explication of contexts and for multiplicity of methods (Abel and Sankar ibidem)[10]. Social and behavioral gerontologists must also be aware of the value issues involved to qualify as qualitative researchers.

Research on aging in China has included qualitative studies such as case studies and historical-comparative analysis. Addressing a need for more methodological exploration and reflection on qualitative inquiry in this area, this article explored an integrated micro-macro model by illuminating the ideas of clinical sociology and the general public policy framework of an "economic state in transition" (Chen 1996; Chen 2009). Clinical sociology plays a key role in sociological practice, which emphasizes on action and heavily involves case studies. Historical-comparative methods, on the other hand, call for a broad perspective and provide an opportunity for theoretical exploration. Implications to social policy study are shown by revisiting the circumstances that led to the expansion of research views and identification of different GPP patterns/models, as well as their role in determining the directions of the states and their services (including provision for the aged). The Chinese economic state established in 1949 had not been fully realized until three decades later when the post-Mao era began with a strategic decision to de-politicize, or to re-focus the state's work on the economy. "Economicization," however, did not bode well for social services. The "iron rice bowl"-like *Danwei-* or occupation-based welfare system broke up while the "community" was totally unprepared to take over the huge responsibility as expected. Fortunately (also ironically), economic reform and "open door" immediately led to structural changes, of which the "de-economicization" of the state was the most significant. Thanks to the results of a booming economy, the opportunity window for another major "transfer" of the state's focus in terms of a more socially oriented GPP is now open (not only structurally but also ideologically) (Chen 2009). Some of these points are applied in the integrated micro-macro model of research on mental illness in China in comparison with the study of Chinese aging. Both indicate the importance of contextual analysis in order to fully understand aging or mental health issues in the particular historical, cultural, and socioeconomic settings. The study of "community"-related ideas (e.g. informal care, social support, etc.) also requires such contextual understanding as clinically-oriented research does.

Due to space limitation this article is unable to include other related topics such as more ways of "triangulation" that is extremely important to a discerning study (e.g. Weitzman and Levkoff 2000; Stadtländer 2008). A qualitative understanding of quantitative research is also important, since there is no pre-determined single best way of measuring a construct (Chen 1997).[11] The researcher's judgment and purpose will affect the analytical results, whatever tools are used, especially in a relational type of research (Chen 2004; Chen and Sullivan 2000). In that sense, researchers, both qualitative and quantitative, have the tasks of not only trying to

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[10] Field research is not the only approach adopted by qualitative researchers, as are experimental designs by quantitative researchers. Sometimes the research scope for both types of researchers is so broad that it may span over a past historical era or across different cultures. While in such cases quantitative researchers resort to such sources as existing statistics and such techniques as content analysis, qualitative researchers have termed their pursuit broadly as historical-comparative research. This kind of research combines literature review and theory with data collection, which examines a mix of evidence including documents, observations, and interviews (Chen 2004).
[11] The author has demonstrated a multiple measurement approach via the Chen Approaches to Unidimensionalized Scaling (CAUS) (Chen 1997; Chen 2004) and challenged the conventional notion of validity with a modified validity (MV) requirement that leads to the idea of a measurement effectiveness (ME) principle (Chen and Sullivan 2000).

understand the meaning of the research subjects and their situations but also the meaning of various research designs in terms of specific research purposes and particular ways in which the data are collected/measured and analyzed/interpreted (i.e. research results as scientific facts: What do they mean? What were the research circumstances?).

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Comparative Aging and Qualitative Theorizing

Abstract

The principal aim of this argument is to analyze the swift expansion in the proportion of older people across the globe, and to highlight the main social and economic forces causing this through methodological challenges especially through the lens of qualitative methodology. We recognize the enormity of the task. Drawing from a range of qualitative research studies provides enriched meanings about aging identity that can be used to shed light on how aging is experienced in equal to how it has been defined in macro or populational terms. Balancing micro and macro levels of understanding is key to open up broader level of explaining what it means to be an older person in different cultures Whilst this is a noble aim, there is no doubt that the rapid increase in population aging across the globe is signalling the most astonishing populational changes in the history of humankind that qualitative levels of understanding are uniquely placed to balance the huge figures in describing complex demography in that qualitative methodology unravels the facts and instead reveals the narratives, meanings and identity formation of research subjects; whereas statistical research has pre-dominantly made its findings looking at people as research objects or as a 'number' (Gruber and Wise 2004). The balance is key but this paper explores the issue of comparative aging underpinned by what Powell and Cook (2001) call 'qualitative theorising' in making sense of statistical and experiential aging.

Keywords

Aging; Global understanding; 'Qualitative theorizing'; Nation states

Introduction

The principal aim of this argument is to analyse the swift expansion in the proportion of older people across the globe, and to highlight the main social and economic forces causing this through methodological challenges especially through the lens of qualitative methodology. We recognise the enormity of the task. Drawing from a range of qualitative research studies provides enriched meanings about aging identity that can be used to shed light on how aging is experienced in equal to how it has been defined in macro or populational terms. Balancing micro and macro levels of understanding is key to open up a broader level of explaining what it means to be an older person in different cultures. Whilst this is a noble aim, there is no doubt that the rapid increase in population aging across the globe is signalling the most astonishing populational changes in the history of humankind that qualitative levels of understanding are uniquely placed to balance the huge figures in describing complex demography in that qualitative methodology unravels the facts and instead reveals the narratives, meanings and identity formation of research subjects; whereas statistical research has pre-dominantly made its findings looking at people as research objects or as a 'number' (Gruber and Wise 2004). The balance is key but this paper explores the issue of comparative aging underpinned by what Powell and Cook (2001) call 'qualitative theorising' in making sense of statistical and experiential aging.

Global aging and implications

While today's proportions of older people typically are highest in more developed countries, the most rapid increases in older populations are actually occurring in the less developed world (Krug 2002). Between 2006 and 2030, the increasing number of older people in less developed countries is projected to escalate by 140% as compared to an increase of 51% in more developed countries (Krug 2002). A key feature of population aging is the progressive aging of the older population itself. Over time, older people will survive to even more advanced ages. The forecast rise in the number of older people aged 75+ over the next 20 years will lead to an expansion of demand for health, housing accommodation and pensions for aging populations and is thus of crucial importance for governments, policy makers, planners, and researchers in all nation states. On a global level, the 85-and-over population is projected to increase 151% between 2005 and 2030, compared to a 104% increase for the population age 65 and over and a 21% increase for the population under age 65 (Bengston and Lowenstein 2004). The most striking increase will occur in Japan: by 2030, nearly 24% of all older Japanese are expected to be at least 85 years old. As life expectancy increases people aged 85 and over will outnumber children under age 15.

There are nine factors that illustrate the nature and extent of population aging across the globe:

(i)   The overall population is aging. For the first time in recorded history, and almost certainly for the rest of human history, people age 65 and over will outnumber children under age 5;

(ii) Life expectancy is increasing. Most countries, including developing countries, show a steady increase in longevity over time, which raises the question of how much further life expectancy will increase;

(iii) The number of oldest old is rising. People age 85 and over are now the fastest growing portion of many national populations;

(iv) Non-communicable diseases are becoming a growing burden. Chronic non-communicable diseases are now the major cause of death among older people in both more developed and less developed countries;

(v) Some populations will shrink in the next few decades. While world population is aging at an unprecedented rate, the total population in some countries is simultaneously declining;

(vi) Family structures are changing. As people live longer and have fewer children, family structures are transformed, leaving older people with fewer options for care;

(vii) Social insurance systems are evolving . As social insurance expenditures escalate, an increasing number of countries are evaluating the sustainability of these systems;

(viii) New economic challenges are emerging. Population aging will have dramatic effects on social entitlement programs, labor supply, trade, and savings around the globe and may demand new fiscal approaches to accommodate a changing world;

(ix) Patterns of work and retirement are shifting. Shrinking ratios of workers to pensioners and people spending a larger portion of their lives in retirement increasingly facilitate existing health and pension systems (Bengston and Lowenstein 2004; Krug 2002; Estes and Associates 2001).

Health care in the United States of America has been at the forefront of the political agenda since the election of Barack Obama. The newly elected president is determined to change the health care system in the United States because the current health scheme results in inequality between different social groups. Health care in the United States has always been seen as a problematic area of the political agenda and consequently provides an insight into the qualitative social research agenda (Lau and Kirby 2009; Peek and Fothergill 2009; Whalen 2003).

This debate on America's health care focuses on how the system functions as presently health care is provided by the private sector. There are currently two lines of argument, on the one hand that the private sector is making substantial improvements in the health care system and as Doughery (1988: 15) has suggested the American health care system is seen to be a 'resounding success' in terms of the quality of access to care is high and national statistics are 'good and generally improving.' However, there is the counter argument that the private health care system causes social inequality and that there is a substantial amount of waste in the context of 'health insurance and medical uncertainties that encourage the production of inefficient and low-value services' (Bentley et al. 2008: 629).

The social groups that have been in the past, and are currently, disadvantaged in this health care system are ethnic minority groups and the elderly. There have been numerous studies in the past claiming racial divide and problems with the elderly in America's health care system (Marmor 2005; Smedley et al. 2003). As Dychtwald (1981: 43) notes 'Minority group elderly live in a condition of double jeopardy because of the combined effects of ageism and racism.' There is one particular group that has experienced racism in the American Health care system and that is African Americans. A qualitative study by Benkert and Peters (2005) discovered that African American women were experiencing racial discrimination at

their local health providers. Turning to elderly health care the same story emerges. De-Ortiz (1993) discovered that there was a clear class division in elderly health care and this division had a fundamental impact on the quality of care delivered to the elderly population.

At the same time, for the future, there is no safety guarantee that private pension schemes are protected and pay out for people who invest their savings in such provision. In a de-regulated US pension system, the issue of corporate crime has highlighted the continuing problem of private pension provision. In one example, this was seen clearly with the energy corporation of Enron's embezzlement of billions of dollars of employees private pension schemes (Powell 2005). This debate amounts to a significant global discourse about pension provision and retirement ages, but one which has largely excluded perspectives which might suggest an enlarged role for the state, and those which might question the stability and cost effectiveness of private schemes. The International Labour Organisation (ILO) concluded that investing in financial markets is an uncertain and volatile business: that under present pension plans people may save up to 30 per cent more than they need, which would reduce their spending during their working life; or they may save 30 per cent too little - which would severely cut their spending in retirement (Phillipson 1998; Estes, Biggs and Phillipson 2003).

Holtzman (1997), in a paper outlining a World Bank perspective on pension reform, has argued for reducing state pay-as-you-go (PAYG) schemes to a minimal role of basic pension provision. This position has influenced both national governments and transnational bodies, such as the International Labour Organisation (ILO), with the latter now conceding to the World Bank's position with their advocacy of a mean-tested first pension, the promotion of an extended role for individualized and capitalized private pensions, and the call for Organisation for Economic Co-operation and Development (OECD) member countries to raise the age of retirement. The problem however is the lack of comparative research studies which attempt to understand how this plays out for older people and their narrative history in relation to pensions and retirement.

There is also the impact of (Intergovernmental Organizations) IGOs on the pensions debate in South America. The function of such arguments is to create a climate of fear, of inevitability and scientific certainty that public pension provision will fail. In so far as this strategy succeeds it creates a self-fulfilling prophecy. If people believe the 'experts' who say publicly sponsored PAYG systems cannot be sustained, they are more likely to act in ways that mean they are unsustainable in practice. Certainly, in Europe and elsewhere, the state pension is an extremely popular institution. To have it removed or curtailed creates massive opposition. Only by demoralising the population with the belief that it is demographically unsustainable has room for the private financiers been created and a mass pensions market formed.

Increasingly, the social infrastructure of welfare states is being targeted as a major area of opportunity for global investors. Asia has the fastest increase in the aging population in the world. China in particular has been identified as having four 'unique characteristics' of populational aging (Du and Tu 2000). First, they suggest 'unprecedented speed'. The proportion of aging population is growing faster than Japan, the country previously recognized as having the fastest rate, and much faster than nations in Western Europe for example; second, they claim an 'early arrival of an aging population' before modernization has fully taken place, with its welfare implications. 'It is certain that China will face a severely aged population before it has sufficient time and resources to establish an adequate social security and service system for the elderly' (Du and Tu 2000: 79); third, they posit 'fluctuations in the total

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dependency ratio'. The Chinese government estimates are that the country will reach a higher 'dependent burden' earlier in the twenty-first century than was previously forecast; and fourth, they suggest a 'strong influence of the government's fertility policy' and its implementation on the aging process: the SCFP means fewer children being born, but with more elderly people a conflict arises between the objectives to limit population increase and yet maintain a balanced age structure.

Coupled with this, Kim and Lee (2007) claim the growing elderly population is beginning to exert pressure on the East Asian countries economies. Three decades ago, major industrialized countries have begun to grapple with the similar problem. With increasing drop in fertility rates, more East Asian economies such as Japan, Hong Kong, South Korea, Singapore and Taiwan are expected to turn into "super-aging societies" by 2025 (Kim and Lee 2007). However, the magnitude of the future impact depends on the (in)ability of individual economies to resolve the demographic changes problem through increased privatization, pension reforms, a migration on more productive countries and extension of retirement age. Like western countries, Asia will ultimately have to tackle issues related to pension reform and the provision of long term health care services (Cook and Powell 2007). However, Cook and Powell's analysis suggests that such gloom must be tempered due to the internal variability of the elderly.

For example, in a number of studies through the 2000s, Cook and Powell have developed what may be termed 'qualitative theorising' of populational change in China as it impacts on older people (Cook and Powell 2003, 2005a, b, c, 2007a, b; Powell and Cook 2000, 2001, 2006, 2007). In their first paper (Powell and Cook 2000: 80) they developed a 'Foucauldian "toolkit" for the analysis of contemporary China as it has been characterized in relation to population formulation and control...to gain an understanding of how "governmentality" came to be the focus of the Chinese state'. Within an increasingly marketized and consumerist society, governmentality relies more on subtlety rather than force, and the withdrawal of the state (in the form of the work unit) from direct support for older people to indirect support via the family structure, but within a legalistic framework that can be enforced in the courts, an issue that is taken further in their second article (Powell and Cook 2001). Here, they develop a critique of the "surveillance" of the aging body by the Chinese state, in which the body as a biomedical entity becomes the site for intervention, as in other societies, in which "its your age" is the main authority response to the elderly "customer".

The next paper (Cook and Powell 2003) examines representations of the elderly in China, in terms of the role of the sometimes paradoxical role of the Chinese Communist Party in which elder statesmen such as Deng Xiaoping can call for the promotion of party cadres. Multiple narratives and discourse become the focus of attention, developed further in much of their later work, as is the theme of the "active" versus the "vulnerable" elderly. Here, they develop more of an advocacy perspective, calling for a sophisticated health policy that contemporaneously seeks to prolong the active elderly while at the same time supporting, via welfare provision, the vulnerable, a point taken up recently by Chen and Chen (2009).

In Cook and Powell (2007), they refer to the way in which the official agenda highlights, via the biomedical model, age to the exclusion of other variables that combine with age to affect the individual's life course, such as location, ethnicity, gender and poverty for example. Drawing upon Moody's (1998) quip about the "wellderly" and the "illderly", they point out that in 'China, some elderly will not only be "illderly" or "wellderly", but "poorderly", "richderly", "femderly", "malederly", "Handerly" or "nonHanderly". Their use of qualitative theorisation thus moves beyond the narrow

confines of the quantitative analysis of many experts to suggest a richer, more varied, interpretation of the multiple realities of Chinese aging.

The future challenge of providing for the elderly is especially urgent in the world's two biggest nations - India and China. Only 11% of Indians have pensions, and they tend to be civil servants and the affluent. With a young population and relatively big families, many of the elderly population still count on their children for support. However, if the analyses presented by Cook and Powell for China can be applied to countries like India and Japan too then it may be that the sheer diversity of the aging population in such countries will temper the most pessimistic and economistic models of aging dependency.

European countries, including France, Germany , Greece , Italy , Russia , and the Ukraine , already have seen an absolute decline in the size of their workforce. And in countries where tax increases are needed to pay for transfers to growing older populations, the tax burden may discourage future workforce participation. The impact on a Nation States gross domestic product will depend on increases in labor productivity and that State's ability to substitute capital for labor. Less developed countries can shift their economies from labor-intensive to capital-intensive sectors as population aging advances. Options for more European nation states may be more constrained. The 'rolling back' of pensions promises is just one symptom of a shift in European history: the 'graying of the baby-boom generation' (Phillipson 1998). The percentage of 60-year-olds and older are growing 1.9% a year. This is 60% faster than the overall global population. In 1950 there were 12 people aged 15 to 64 to support each one of retirement age. Currently, the global average is nine. It will be only four-to-one by 2050 (Powell 2005). By then numbers of older people will outnumber children for the first time. Some economists fear this will lead to bankrupt pensions and lower living standards. It is interesting that in Germany this fear is becoming a battleground for political electioneering. For example, Germany has the highest population in Europe and the third oldest population in the world, which presents both critical questions on public finances to provide pensions and healthcare and an opportunity for innovations in the marketplace. Currently, aging has started to figure prominently in political discussions prior to 2009 elections, as political parties vie for the elderly vote. The current Merkel administration (2007-) has been criticized for increasing pensions while opponents talk about a "war of generations" requiring young people to pay for taxation for elder care.

The trend has drawn further attention across Europe, where the working-age population will decline by 0.6% this in 2010. By 2025 the number of people aged 15 to 64 is projected to dwindle by 10.4% in Spain, 10.7% in Germany and 14.8% in Italy. But aging is just as dramatic in such emerging markets as China - which is expected to have 265 million 65-year-olds by 2020 - and Russia and Ukraine (Cook and Powell 2007). Using evidence from the UK, the percentage of people of working age, that is 16-64, will drop from 64% in 1994 to 58% in 2031 (Powell 2005). As the number of workers per pensioner decreases there will be pressure on pension provision. This is evident now, in such areas of pensions and long term care, the retreat of the state made evident in the erosion of State Earnings Related Pay are forcing people to devise their own strategies for economic survival in old age (Phillipson 1998). In the British context that also impinges on global societies in general, private pensions are slowly being introduced in order to prevent the 'burden' of an aging population. These are ways in which the State continues to rely on apocalyptic projections such as 'demographic time bomb' about aging populations in order to justify cuts in public expenditure (Powell 2005). Hence, the population of Great Britain, like that of other European countries, is aging rapidly. There are only enough young people to fill one in three of the new and replacement jobs that will

need to be taken up over the next decade. Older people take much of the responsibility for our social and civic life and for the care of children, the sick and the very old in the community. Yet the gap between wealth and poverty, choice and the absence of choice for older people is stark and growing wider (Phillipson 1998). The UK government is at the time of writing seeking to promote a debate over what they envisage as a multi-billion pound deficit that will be found in care for the elderly in future. At different scales, a feature of this debate is the use of qualitative methods such as focus groups or panels to discover what older people actually wish to prioritise. Recent policy documents from local authorities (Lancashire Partnership, 2005-6) and central government (DWP 2009; NW Forum on Ageing/5050 Vision 2009) written in the light of demographic change locally, regionally, nationally and have emphasised, for example, the need to "age-proof services" via an "age-proofing initiative to challenge conventional thinking and promote new ideas" (Lancashire Partnership 2005-6: 39). Also, "much more needs to be done to ensure we are hearing the voices of more diverse groups who are often excluded from engagement through issues such as language difficulties or mobility issues" (DWP 2009: 29). Such issues are developing within a context in which "Demand for health and social care is predicted to outstrip supply" (NW Forum on Ageing/5050 Vision 2009: 40).

Located on the least developed and poorest continent, African economies are still heavily dependent on subsistence agriculture, and average income per capita is now lower than it was at the end of the 1960s. Consequently, the region contains a growing share of the world's poor. In addition, reductions in fertility and child mortality have meant that, despite the huge impact of the HIV/AIDS epidemic across much of the region, both the absolute size and the proportion of the population age 60 and over have grown and will continue to grow over the next 30 years (Estes, Biggs and Phillipson 2003).

Since the 1970s there has been extensive discussion on the different variations of qualitative and quantitative research. A research paper from this time would be entirely dependent on quantitative research methods. Whereas the current trend of social research is to apply a qualitative research approach. In qualitative research there are various methods ranging from documentary data sources, interviews, discourse analysis, participant observation and focus groups. The justification for this approach is that utilizing a qualitative methodology allows the researcher to gain a deeper insight by engaging with more meaningful aspects of the research. As Kitchin and Tate (2000) have argued qualitative research accesses the very core of a situation or problem. Therefore, by referring to various qualitative research findings this paper has drawn together a holistic understanding of the current challenges that are being faced globally with regard to comparative aging.

While global aging represents a triumph of medical, social, and economic advances, it also presents tremendous challenges. Population aging strains social insurance and pension systems and challenges existing models of social support. It affects economic growth, trade, migration, disease patterns and prevalence, and fundamental assumptions about growing older. Older people's living arrangements reflect their need for family, community, or institutional support. Living arrangements also indicate sociocultural preferences—for example, some choose to live in nuclear households while others prefer extended families (Estes, Biggs and Phillipson 2003). The number, and often the percentage, of older people living alone is rising in most countries. In some European countries, more than 40% of women age 65 and older live alone (Walker and Naeghele 2000). Even in societies with strong traditions of older parents living with children, such as in Japan, traditional living arrangements are becoming less common. In the past, living alone in older age often was equated with social isolation or family abandonment. However, research in many cultural

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settings illustrates that older people, even those living alone, prefer to be in their own homes and local communities (Gilleard and Higgs 2001). This preference is reinforced by greater longevity, expanded social benefits, increased home ownership, elder-friendly housing, and an emphasis in many nations on community care.

Global aging will have dramatic effects on local, regional, and global economies. Most significantly, financial expenditures, labor supply, and total savings will be affected. Changes in the age structures of societies also affect total levels of labor force participation in society, because the likelihood that an individual will be in the labor force varies systematically by age. Concurrently, global population aging is projected to lead to lower proportions of the population in the labor force in highly industrialized nations, threatening both productivity and the ability to support an aging population (Krug 2002).

Different countries age groups have different levels of pace of growth. It is possible for the elements of production—labor and capital—to flow across national boundaries and mitigate the impact of population aging. Studies predict that, in the near term, surplus capital will flow from Europe and North America to emerging markets in Asia and Latin America, where the population is younger and supplies of capital relatively low. In another 20 years, when the baby boom generation in the West has mostly retired, capital likely will flow in the opposite direction (May and Powell 2007). Traditionally, labor is viewed as less mobile than capital, although migration could offset partially the effects of population aging. Currently, 22 percent of physicians and 12 percent of nurses in the United States are foreign born, representing primarily African countries, the Caribbean, and Southeast Asia (OECD 2007). The foreign-born workforce also is growing in most OECD countries. Over the next 10 years, the European experience will be particularly instructive in terms of the interplay of aging and migration (OECD 2007).

Retirement resources typically include public and private pensions, financial assets, and property. The relative importance of these resources varies across countries. For example, a groundbreaking study revealed that only 3% of Spanish households with at least one member age 50 or older own stocks (shares), compared to 38 percent of Swedish households (Walker and Naeghele 2000). The largest component of household wealth in many countries is housing value. This value could fall if large numbers of older homeowners try to sell houses to smaller numbers of younger buyers. How successfully this transition is managed around the world could determine the rise and fall of nations and reshape the global economy in the era of the post-credit crunch. Two key vehicles of growth are increases in the labor force and productivity. If nation states cannot maintain the size of their labor forces by persuading older workers to retire later then the challenge will be to maintain growth levels. That will be a particular challenge in Europe, where productivity growth has averaged just 1.3% since 1995. By 2024, growth in household financial wealth in the U.S., Europe, and Japan will slow from a combined 4.5% annual reduction now to 1.3%. That will translate into $31 trillion less wealth than if the average age were to remain the same (Cook and Powell 2007).

As a consequence of the global demographics of aging, the changing societies of the post millennium are being confronted with quite profound issues relating to illness and health care, access to housing and economic resources including pension provision. This aging of the global population is without parallel in human history. Aging is also a positive outcome of combined health, social and economic advancements and that should not be forgotten. Yet, if demographic trends continue to escalate by 2050 the number of older people globally will exceed the number of young for the first time since formal records began (Bengston and Lowenstein 2004).

This has profound consequences for older people that more qualitative data be generated and disseminated about global issues of aging.

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The Discourse of Politics in Action. Politics as Usual by Ruth Wodak.
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The Discourse of Politics in Action. Politics as Usual is yet another thought provoking and elegant book by Ruth Wodak, a famous representative of critical discourse analysis (CDA). Being a prolific researcher and author, Ruth Wodak has been addressing a wide variety of topics such as discursive (re)production of racial discrimination, xenophobia and anti-Semitism, communication aspects of gender relations, the construction of organization and policies through discourse, the discursive representations of migration and migrants, nationalist discourse and rhetoric, populist politics – to name a few. This time her research focuses on a finely formulated problem of the discrepancy between public perceptions and actual practices of everyday politics in contemporary western democracies. The structural, temporal, cognitive and other limitations of doing politics by politicians as real people are situated within the wider context of discussions on democratic deficit.

The book *The Discourse of Politics in Action. Politics as Usual* consists of six chapters, the content is evenly divided between the discussion of theoretical and methodological issues and three case studies of everyday life of politicians – both real and fictional ones.

In the first chapter "Doing Politics" Ruth Wodak lays the theoretical grounds of the book by introducing the problem of performative character of doing politics as well as fictionalization of politics in the media. Doing politics is presented through a six-dimensional model that includes 1) staging or performing politics on the "front stage", 2) everyday life of politicians (the "backstage"); 3) the impact of the personality of individual politicians of their performance; 4) the mass production of politics and politicians (e.g. advisers, spin etc.); 5) recontextualization of everyday politics in media fiction; 6) participation in politics (power, gatekeeping, legitimacy etc.) (p. 24). The attention of the author is centered on the dimensions 2, 4 and 5, in example she poses the question about the impact of the everyday practices of politicians (affected by the processes of professionalization of politics) as well as the fictionalization of politics in media on the democratic process. Wodak masterfully integrates several theoretical approaches, including Pierre Bourdieu's, in order to set the key categories for the analysis such as performance, community of practice and identity. In a way, this chapter makes a good illustration of the thesis that critical discourse analysis is a problem oriented approach: a social problem that is discursively constructed or maintained is chosen as a focal point of the research project, while the theories and categories of analysis are selected freely, integrated and adjusted to the problem (cf. Fairclough 2000).

In chapter two "The (Ir)rationality of Politics" Wodak suggests to view politics through the lens of Discourse-Historical Approach in CDA. Some aspects of the methodological framework of the approach are presented (p. 41) in the form already known from earlier Wodak's work (cf. Reisigl and Wodak 2001: 38). The link between the field of (political) action, discursive or communicative genre and discourse topics is emphasized. This framework is enriched by the figure (p. 44) presenting the relations between discursive strategies (i.e. nomination, predication, perspectivisation, argumentation and mitigation) and *topoi* on the one hand, and social and political context on the other. Moreover, Wodak suggests to include presuppositions as a category of analysis following the insights from an Erving Goffman's article (1983). Last but not least she calls for the use of ethnographic methods in discourse analytical research, since only extensive field work allows researcher entering the practices of the "backstage". In this chapter the presentation of methodology is not an end in itself, the author formulates her research problem more precisely and accentuates power and knowledge management as a crucial aspect of doing politics.

Chapters three and four are the case studies of the workings of the European Union institutions. In chapter three the author focuses on the construction of "European identities". She briefly presents the history of the emergence of the European Parliament (EP), including references to myth and identity narratives that were systematically invoked in the process, and draws a scheme of national composition of the EP as well as the role of EP in European decision making processes (pp. 68-69). In this very chapter she refers to pioneering studies of the French political anthropologist Marc Abélès (1992), who conducted research in European institutions, and made a documentary entitled *La tribu exotique* (i.e. the exotic tribe) about European parliamentarians. With the help of the ethnographic work of others as well as on the basis of her own field research Ruth Wodak reconstructs the EP as a physical and material space with its own temporal and organizational routines and limitations. Thus she de-mystifies it and shows it as a concrete setting for "doing politics". She then presents the findings concerning the identities of the Members of European Parliament (MEPs) based on her research (28 interviews with 14 MEPs). She focuses on their articulations of the role they assign to themselves, their views of Europe writ large and the EP as an institution working alongside national parliaments as well as their narratives of being European, i.e. the meanings attached by the MEPs to Europeanness. All these aspects of their identity are analyzed by discourse analytical tools. Wodak comes to the conclusion that MEPs represent a rather wide variety of identities, which is functional to the way the EP works. This variation in identities is viewed as an outcome of the multiplicity of communities of practice the MEPs are involved in. Being a convincing picture of the formation of identities of politicians in the processes of multiple communicative acts designed for and competed within different audiences, this chapter also raises two further questions. Both of them are methodological. First, can binding conclusions be drawn on the basis interviews with a relatively little number of MEPs? Second, how can the effects of the reflexivity of the research subjects be dealt with, i.e. how can the researcher actually link the everyday practices of doing politics of MEPs with their statements on their identity.

To an extent chapter four entitled "One Day in the Life of an MEP" addresses the latter question by presenting an ethnographic study of everyday life of a politician. At the same time, it has to be noted that the term "ethnography" is used somewhat freely by Ruth Wodak in order to refer to short (several weeks long) and rather ordered (e.g. by interviews schedules) stays in the field; some social anthropologists insist that only longer stays in the field can be termed ethnography proper, since only

longer stays allow eliciting hidden or unexpected aspects and various "backstages" of the practices studied (cf. Hann 2000). In this chapter Wodak concentrates on the ways in which an Austrian MEP attempts to reconcile the pressures stemming from the need to follow up on many issues, time limitations and mobility requirements, on the one hand, with the necessity to professionally and effectively perform on the front stage, on the other. She emphases the structural limitations put on an MEPs work (such a loads of paper to be processed) and gives a detailed analysis of an MEP and his assistant discursive strategies (e.g. strategies of positive self- and negative other-presentation, *topoi*, interruptions, comments, professional vocabulary and the like). By following a MEP from morning till evening through a briefing with an assistant, committee meetings, lunch and a lecture, Ruth Wodak aims at depoliticizing politics, i.e. she tries to demonstrate the complexity of the political environment and the numerous challenges politicians have to deal with both at front stage and backstage of doing politics. At the same time in some of the concluding remarks of the chapter the author calls for the legitimization and acceptance of professional/bureaucratic politics on the grounds of 1) their complexity and 2) similarity to other organizational practices such as corporate practices (pp. 154-155). On the one hand, this call is understandable if it has been intended as a remedy to overcome the dissatisfaction with political sphere that negatively influences participation in contemporary democracies and is an impediment to democratic politics. On the other hand, however, this call backgrounds numerous negative practices that constitute the backstage of doing politics at both national and European level. Moreover, it underestimates the power dimension of the political field which distinguishes it quite significantly from economic field or field of cultural production. Therefore, it appears that these disclaimers need to have been made more explicitly by the author to her call for the legitimation of politics on the basis of their complexity and "business as usual" quality.

In the fifth chapter the author turns from real to fictional politics and offers a detailed analysis of the discursive and narrative strategies used in the political drama series *The West Wing*, in which White House staff and the President of the United States himself are the core characters. In this chapter Wodak pays particular attention to the fact that "boundaries between politics and specific aspects of popular culture are blurred and transcended" (p. 157). She chooses the TV series since it is not focused on crises and catastrophes solely, but allows viewers to follow everyday life of fictional politicians. Wodak aims at comparing the everyday routines she has traced during her research in EP with the fictional political routines of *The West Wing*. The popularity of the series and the fact that its producers often reacted to current problems such as terrorist attacks on World Trade Centre on September 11, 2001, solidify her opinion that media representations of politics are used to set an ideal type of doing politics and create a myth of good politics and politicians. The author turns to Vladimir Propp's (1968) structural analysis of a folk tale and its later applications to the analysis of Western movies by Willy Wright (1977) for insights. She demonstrates that that fictional politicians act according to the schemata set for literary heroes. The main function of the series is thus to establish order and demonstrate that the good win and the evil ones are punished. At the same time the series producers address the actual problems and in that way aim at setting the modes of behavior, e.g. the need for tolerance and avoidance of hasty generalizations on the basis of one's ethnicity or religion after 9/11 attacks (pp. 180-183). Thus the series has an ambiguous role in social and political life of the citizens/viewers: 1) it is involved in the process of fictionalization of politics, i.e. producing the idealized representations of politics that cannot be matched by real politicians in their everyday conduct, and thus its functioning in popular culture leads

to the disappointment with politics and cynicism among citizens/viewers; 2) it can serve as a forum for discussions concerning the variety of attitudes to politics, politicians and policies and thus be instrumental in addressing some of the important societal problems such as racist prejudice.

The final chapter "Order or Disorder – Fiction or Reality? The Implications of 'Power and Knowledge Management' on 'Politics as Usual'" is designed as a synthetic conclusion to the book. The author binds her empirical analysis with the core problem that has been set at the beginning of the book: the discrepancies and "missing links" between the public perceptions of politics and the everyday practices of doing politics. On an analytical plane this problem is replicated as a gap between the macro-analysis of institutional and decision making processes and micro analysis of concrete political events and individual politicians. In the sixth chapter Ruth Wodak draws a conclusion that political order is being created out of daily fragmentation and multiple routines by practices of knowledge management; those who share common agenda form alliances, those who do not are excluded (p. 200). The importance of discursive practices and prevalence of intersubjective discourses over individual efforts of meaning making and position attainment is emphasized. She also concludes that media representations of politics contribute to the fictionalization of politics and politization of fiction, thus the vicious circle of the problem of the dissatisfaction and distrust to real life politics is not aided. The contribution of discourse analysis to solving this problem according to Wodak lies in its de-mystifying function: discourse analysis allows to see the complexity of political processes more clearly and this clear vision could be the first step in departing from cynical approach to politics.

The book is a valuable contribution to the analysis of everyday political routines. Its subject matter borders political anthropology, thus the use of ethnographic methodology comes as no surprise. From the perspective of critical discourse analysis the task of demystifying or disenchanting politics while at the same time not oversimplifying or scandalizing it is of utmost importance. Ruth Wodak has managed to make a variety of theories and concepts work towards unraveling the routines of "politics as usual". At the same time – as the author mentions herself (p. 194) – the interdisciplinarity that manifests itself in the use of categories and theories from different disciplines is potentially laden with the risk of superficiality. Although the book itself is far from being superficial, its reception may well be: many readers of the book will have far less knowledge of some concepts and categories that were briefly introduced by the author and not explained thoroughly and placed in the context of their emergence. This may result in some misconceptions since the meaning of many theoretical concepts stem from their relation to other concepts within the same theory. Or else, some concepts are very complex – e.g. the concepts of myth or power – and have various interpretations, thus without sufficient explanation they can rather complicate the understanding instead of facilitating it. This problem accompanies discourse analysts in most of their endeavors. Another problem that is not fully solved by the proposals of the author in chapter two and six is of methodological nature, yet it has important critical consequences. The access of a researcher to the realms of politics where actors are actually openly pursuing their partisan or private interest (e.g. the secret meetings, the party committees where observers are not allowed, nepotism ridden practices of the politicians, relations with business and interest groups outside of legally acceptable settings etc.) is very limited if not impossible. Therefore the research results presented in chapters three and four cannot be seen as fully representative of "politics as usual", and can only be applied to some political practices. For the further research one might be interested in incorporating these shadow practices and thus searching for the new

methods through which they can be grasped. A separate and fascinating research could also be undertaken by trying to compare Western European and North American "politics as usual" with doing politics in South Asia or Africa, or by comparing democratic and non-democratic "politics as usual". In comparative research much attention would have to be paid not only to the difference of political, social and cultural systems but also to the linguistic diversity.

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Citation

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Author-Supplied Abstracts & Keywords

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The Life Course Metaphor: Implications for Biography and Interpretive Research

Abstract

This article examines how much of qualitative research in gerontology in the United States is undertaken in the context of life course theory. Some critics, such as Gubrium and Holstein, have criticized the naturalism in life course studies, particularly how such realism might divert attention away from the activity whereby persons constrict their lives. Nonetheless, critics continue to use metaphors to describe how a life is constructed that are consistent with this underlying naturalism. As a result of retaining this idiom, the life course can be easily reified. In this sense, this paper focuses on the likely problems caused by the use of these metaphors, while invoking some more recent theories, such as phenomenology, to demonstrate alternatives to constructing personal biography.

Keywords: Life course; Interpretive research; Politics; Constructionism; Biography

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A New Paradigm for Qualitative Research in the United States: The Era of the Third Age

Abstract

This paper reviews qualitative research in the United States, highlighting the ways research has changed in the era of the third age. With growing attention to positive and uplifting aspects of aging, qualitative research has played a critical role in the exploration of the ways in which older adults are engaging in meaningful ways with others. We describe two key methodological approaches that have been important to examining positive aspects of aging and exploring the extent to which a growing number of years of healthy retirement are redefining the aging experience: ethnographic research and grounded theory research. We also review key topics associated with qualitative research in the era of the third age. These topics fit within two dominant frameworks – research exploring meaning-making in later life and research exploring meaningful engagement in later life. These frameworks were critically important to raising attention to meaningful experiences and interactions with others, and we propose that the agenda for future qualitative research in the United States should continue contributing to these frameworks. However, we note that a third framework should also be developed which examines what it means to be a third ager through use of a phenomenological approach, which will assist in the important task of theory building about the third age.

Keywords: Third age; Qualitative gerontology; Meaning making; Meaningful engagement

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Qualitative Research and Aging in Context: Implications to Social Policy Study in China

Abstract

This article begins with a review of methods that gerontologists use in social and behavioral research. The value and focus of qualitative research are highlighted with their epistemological roots. Qualitative approaches and their uses are summarized in terms of "interpretive" and "critical" social sciences that drew the insights of sociological paradigms. With a further review of qualitative research on aging and gerontological studies in China, the article focuses on an integrated micro-macro model by illuminating the ideas of clinical sociology and the general public policy framework of an "economic state in transition." Implications to social policy study (particularly on aging in China) are discussed.

Keywords: Qualitative Research; Gerontology; Clinical Sociology; Social Policy and GPP; Aging in China

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Comparative Aging and Qualitative Theorizing

Abstract

The principal aim of this argument is to analyse the swift expansion in the proportion of older people across the globe, and to highlight the main social and economic forces causing this through methodological challenges especially through the lens of qualitative methodology. We recognise the enormity of the task. Drawing from a range of qualitative research studies provides enriched meanings about aging identity that can be used to shed light on how aging is experienced in equal to how it has been defined in macro or populational terms. Balancing micro and macro levels of understanding is key to open up broader level of explaining what it means to be an older person in different cultures Whilst this is a noble aim, there is no doubt that the rapid increase in population aging across the globe is signalling the most astonishing populational changes in the history of humankind that qualitative levels of understanding are uniquely placed to balance the huge figures in describing complex demography in that qualitative methodology unravels the facts and instead reveals the narratives, meanings and identity formation of research subjects; whereas statistical research has pre-dominantly made its findings looking at people as research objects or as a 'number' (Gruber and Wise 2004). The balance is key but this paper explores the issue of comparative aging underpinned by what Powell and Cook (2001) call 'qualitative theorising' in making sense of statistical and experiential aging.

Keywords: Aging; Global understanding; Qualitative theorizing; Nation states

QSR

For all sociologists for whom interpretative paradigm and qualitative research methodology are basic perspectives of studying social reality. In order to enable a free flow of information and to integrate the community of qualitative sociologists.

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"Researching Aging & Comparative Reflections"