This chapter includes both historical and cross-cultural views related to:

- The role of older people in stable, preliterate, or primitive societies
- Elders in some non-western cultures
- Changes in the social roles of older persons
- Societal norms regarding aging
- Older adults’ expectations of society
- Contrasting perspectives regarding the impact of modernization on the relationship between older persons and the larger society

The experience of aging is dramatically different from earlier historical periods. The social and economic roles of older persons, their interactions with families and the larger social system where they live are in many ways profoundly different today from previous generations. Until relatively recently, only a minority of people lived long enough to be considered old. As the number of older people has grown and as social values have changed, the authority and power of older adults in society have also shifted.

The experiences of older adults differ cross-culturally as well as historically. That is, in addition to historical changes, significant cultural variations affect the social position of older persons. Perhaps the greatest differences in the status of older adults are between traditional societies and those of the modernized world, with its rapidly changing values and norms. Examining the different ways that other societies, both historical
and contemporary, have dealt with issues affecting their elders can shed light on the process of aging in our society. The emergence of “comparative sociocultural gerontology” or an “anthropology of aging” has served to refute some of the myths of the “good old days” presumed to exist in historical times and in contemporary nonindustrial societies. It begins to differentiate what aspects of aging are universal or biological as opposed to which factors are largely shaped by the sociocultural system (Sokolovsky, 1997; Infeld, 2002).

Understanding how aging in contemporary American society differs from that experienced elsewhere, and which factors are socioculturally determined, can also suggest strategies for improving environments in which to grow old. Within the constraints of this one chapter, we can only glance at a few other cultures. For a more complete view, we urge you to turn to the available literature on the anthropology of aging, including the *Journal of Cross-Cultural Gerontology*. While this chapter explores aging cross-culturally and historically, Chapter 14 focuses on the cultural diversity represented by older ethnic minorities, including recent refugees and immigrants, within contemporary American society.

Old Age Historically

Old Age in Ancient Cultures

Although our knowledge of aging in prehistoric and primitive societies is limited, we know that people of advanced age were rare, with most dying before the age of 35. Nevertheless, there were always a few people perceived to be old, although they were probably chronologically relatively young, since maturity and death came quickly in the lives of people struggling to survive in harsh environments. Those few elders were treated with respect, in a manner that reflected a sense of sacred obligation. During ceremonial occasions, elders were seated in positions of high honor and served as the clan’s memory. The belief that an older person was a mediator between this world and the next gave added prestige to elders by conferring on them the role of witch doctors or priests.

Even though positive attitudes toward the young-old were widespread, nonsupportive or death-hastening behavior was shown toward those who survived beyond an “intact” stage of life. This stage of old-old age was often referred to as the “sleeping period.” No longer able to contribute to the common welfare and look after themselves, older people were then viewed as useless, “overaged,” or “already dead,” and were sometimes treated brutally. Those who outlived their usefulness were a heavy burden in societies that existed close to the edge of subsistence, particularly those in harsh climates with little agriculture, or with no system of social stratification (Barker, 1997; Glascock, 1997).

The practice of geronticide or senecide—the deliberate destruction of older community members—was viewed as functional and, for many traditional societies, was often performed with great reverence or ceremony. In a minority of primitive tribes, the frail were killed outright; in most, they

EXAMPLES OF DEATH-HASTENING BEHAVIOR IN HISTORICAL PERIODS

In some rural areas of ancient Japan, older people were carried into the mountains and left there to die. It was not unusual for aged Eskimos to walk off into the snow when famine and disease placed great burdens on the tribe. In other cases, Eskimo families moved to other areas and left their frail elders behind.

GERONTICIDE WITH REVERENCE

Ritual sacrifice was used to kill the oldest members perceived to be a burden among the Ojibwa Indians of Lake Winnipeg and the Siriono of the Bolivian rain forest.
were abandoned, neglected, or encouraged to commit suicide, and the burial place was often converted into an ancestral shrine. Consistent with the coexistence of positive attitudes toward the old along with their nonsupportive treatment, geronticide in many societies often occurred under the older person’s direction and by a close relative, usually a son. Examples of geronticide, abandonment, and forsaking support to the oldest-old were reported in remote cultures as recently as the twentieth century (Glascock, 1997).

Old Age in Greek and Roman Cultures

In Greek and Roman classical cultures, 80 percent of the population perished before reaching the stage of life that we now consider to be middle age. Nevertheless, our chronological conception of age, with old defined as age 65 and over, began during this period. Age implied power in the ancient cities, which were ruled by councils of elders who derived their authority from their years. Within the family, the eldest male’s authority was nearly absolute, and the young were dependent on the old by custom and by law. However, only the elite members of society, not the peasants, benefited from the respect accorded age by the community.

Some idea of the changing status of older people in ancient Greek society can be obtained by analyzing how old and young were depicted in Greek tragedy. In her book, *Time in Greek Tragedy*, de Romilly (1968) points to an evolution of views about age from Aeschylus in the late sixth and early fifth centuries B.C., to Euripides in the mid- to late fifth century B.C. For Aeschylus, age brought with it wisdom, especially about justice and prudence. Although he refers to the destructive influences of age, particularly loss of physical strength, Aeschylus insists that such physical decline has no impact on the older person’s mind or spirit. In contrast, Sophocles’ tragedies, which were written during the middle of the fifth century, depict old age as distasteful, a time of decline in physical and mental functioning. For Sophocles, youth is the only period of life characterized by true happiness. Later, in Euripides’ plays, older people are both wise and weak. Older characters of Euripides long for eternal youth; old age is described as miserable, bitter, and painful. The shift from Aeschylus’ admiration of old age to the exaltation of youth and denigration of old age by Sophocles and Euripides may be a reflection of the growth of democracy in fifth-century Greece (and, consequently, a growing belief in social equality) as well as of the heroism of young men in the wars of that era.

This coincided with the Classical period, when beauty, youth, and strength were idealized in the visual arts. Greek mythology also depicts the old as tyrannical and wicked, the ultimate enemy in many myths. The gift of immortality was cherished only if it meant rejuvenation or eternal youth. Greek and later Roman mythology contrasted the eternal youthfulness of the gods with the gradual deterioration of mortals. Many philosophers and physicians in ancient Greece, such as Plato, Aristotle and Galen, sought to explain the meaning of old age, the place of elders in the social order, and how to maintain health as the body aged. Human development was described by Hippocratic writers as being divided into four stages, although Aristotle suggested three stages of youth, a fourth stage that he labeled the “prime of life,” and old age (Warren, 2002). These stages are in some ways precursors to the developmental phases proposed by modern psychologists, as described in Chapter 6.
Old Age in Medieval Europe

Little is known about the role of older people during the medieval period, except that life expectancy was even shorter than in the Greek and Roman eras. To a large extent, increasing urbanization and related problems of sanitation and disease were responsible for the high death rates before people reached old age. Nevertheless, older people were more likely than the young to survive the Black Plague and other epidemics, creating a disproportionate population of elders and arousing bitterness among the young.

The nobility lived longer than the common people during the Middle Ages, largely because of better standards of living. Furthermore, the general populace was more likely to die of war or the numerous diseases that plagued this era. The nobility had the freedom to flee such conditions. For the small proportion of poor people who did manage to survive, old age was a cruel period of life.

To the extent that the prevailing attitudes toward older persons in that historical period can be inferred from art, one would have to conclude that old age was depicted as ugly, weak, and deceptive.

Old Age in Colonial America

In seventeenth- and eighteenth-century America, old age was treated with deference and respect, in part because it was so rare. This attitude has been described as one of veneration, an emotion closer to awe than affection and a form of worship deeply embedded in the Judeo-Christian ethic of early America. The Puritans, for example, viewed old age as a sign of God’s favor and assumed that youth would inevitably defer to age. Old men occupied the highest public offices, as well as positions of authority within the family, until they died; fathers waited until their sixties before giving their land to the eldest son. Church seats were given to the old. The primary basis of the power enjoyed by older people in colonial times was their control of property, especially productive farmland. In this agricultural society, such control amounted to the ability to dominate all key institutions—the family, the church, the economy, and the polity.

Even though the oldest members of society were exalted by law and custom in colonial times, they received little affection or love from younger people; in fact, most were kept at an emotional distance. In reserving power and prestige for older persons, society in many ways created this separation between young and old. Elders frequently complained that they had lived to become

SHAKESPEARE’S VIEW OF AGING

In Shakespeare’s play, *As You Like It*, youth evolves from an impulsive boy to soldier, to the fifth age “full of wise saws and modern instances.” The sixth age is depicted as weak, with “his big manly voice, turning again toward childish treble.” The seventh and final stage “is second childishness and mere oblivion, sans teeth, sans eyes, sans taste, sans everything.” Thus, Shakespeare’s view of old age is that of decline and uselessness; this may reflect the attitude of sixteenth-century Europe that the old were a burden to a community struggling with food shortages and high death rates among its infants and young soldiers. Perhaps most striking is Shakespeare’s attribution of wisdom and perspective to middle age, in contrast to the beliefs of pre-Classical and Hellenistic Greek playwrights and philosophers that old age is the time of greatest wisdom.

During the Renaissance, artists and poets reestablished links with Classical Greece, contrasting the beauty of youth with the unattractiveness and weakness they, like the ancient Greeks, saw in old age. Many of Shakespeare’s plays, including *Hamlet*, *Othello*, and *As You Like It*, portray a contrast between the vitality and energy of youth versus the weakness and immobility of old age.

Nevertheless, discussions prevailed on how to avoid deterioration in old age. One of the first “handbooks on aging” was written by Arnaldus of Villa Nova in 1290, and recommended “moderation in all things,” as well as maintaining cleanliness of the body and one’s home (Warren, 2002).
strangers in their communities. Old age was not a time of serenity, but rather anxiety about adequately fulfilling social obligations and keeping faith with God (Achenbaum, 1996).

This pattern persisted until about 1770, when attitudes toward the older population began to change and the relative status of youth was elevated. Indications of this change included:

- Church-seating arrangements that had favored the old were abolished.
- The first mandatory retirement laws for legislators were passed.
- The eldest son no longer automatically inherited the family property.
- New fashions were introduced that flattered youth—a change from the white wigs and broadwaisted coats that favored older men.
- New words appeared that negatively portrayed elders, such as *codger* and *fuddy-duddy*.
- Family portraits of all members were placed on the same horizontal plane rather than positioning the oldest male members to stand over women and children (Fischer, 1978).

A major demographic change occurred in approximately 1810, when the median age began to rise, creating a greater percentage of the population older than the typical “old” age of 40 or 50. This was due primarily to a declining birth rate, not a falling death rate. After 1810, the median age advanced at a constant annual rate, approximately 0.4 percent per year, until about 1950 (Fischer, 1978); this has been attributed to reductions in the impact of diseases. A dramatic change was that parents began to live beyond the period of their children’s dependency, for the first time in history experiencing relatively good health at the time their children left the family home.

The Effects of Modernization

As the foregoing historical examples suggest, definitions of old age—as well as the authority exercised by older people—largely rested on the material and political resources controlled by older members of society. These resources include:

- traditional skills and knowledge
- security bestowed by property rights
- civil and political power
- food for communal sharing
- information control
- general welfare from routine services performed by older people such as child care

Within the constraints set by the social environment and its ideology, older people’s social rank was generally determined by the balance between the cost of maintaining them and the societal contributions they were perceived to make. As age became a less important criterion for determining access to and control of valued resources, older members of society lost some of their status and authority.

A number of explanations have been advanced for the declining status of the old in our society. Modernization theory is a major explanation. One of the first comparative analyses that raised this issue was reported by Leo Simmons in
The Role of the Aged in Primitive Society (1945). He noted that the status of older persons, as reflected in their resources and the honor bestowed upon them, varied inversely with the degree of technology, social and economic diversity, and occupational specialization (or modernization) in a given society. As society becomes more modernized, according to this theory, older people lose political and social power, influence, and leadership. These social changes also may lead to disengagement of aging persons from community life. In addition, younger and older generations become increasingly separated socially, morally, and intellectually. Youth is glorified as the embodiment of progress and achievement, as well as the means by which society can attain such progress. Modernization theory has been advanced primarily by Cowgill (1974a, 1974b, 1986), and is defined by Cowgill (1974a) as:

The transformation of a total society from a relatively rural way of life based on animate power, limited technology, relatively undifferentiated institutions, parochial and traditional outlook and values, toward a predominantly urban way of life, based on inanimate sources of power, highly differentiated institutions, matched by segmented individual roles, and a cosmopolitan outlook which emphasizes efficiency and progress (p. 127).

The characteristics of modernization that contribute to lower status for older people were identified by Cowgill as:

- health technology
- scientific technology as applied in economic production and distribution
- urbanization
- literacy and mass education

According to Cowgill, the application of health technology reduced infant mortality and maternal deaths, and prolonged adult life, thereby increasing the number of older persons. With more older people in the labor market, competition between generations for jobs intensified, and retirement developed as a means of forcing older people out of the labor market.

Scientific technology creates new jobs primarily for the young, with older workers more likely to remain in traditional occupations that become obsolete. The rapid development of industries that rely on high technology today and the gap between generations in the use of computers illustrate this phenomenon. Unable to perform the socially valued role of contributors to the workforce, many older workers feel marginalized and alienated.

In the early stages of modernization, when the society is relatively rural, young people are attracted to urban areas, whereas older parents and grandparents remain on the family farm or in rural communities. The resulting residential segregation of the generations has a dramatic impact on family interactions. The geographical and occupational mobility of the young, in turn, leads to increased social distance between generations and to a reduced status of the old.

Finally, modernization is characterized by efforts to promote literacy and education, which...
tend to be targeted toward the young. As younger generations acquire more education than their parents, they begin to occupy higher-status positions. Intellectual and moral differences between the generations increase, with older members of society experiencing reduced leadership roles and influence (Cowgill, 1974a, 1974b).

Some social historians have criticized modernization theory, arguing that it idealizes the past and ignores the fact that older people in many preindustrial societies were treated harshly and at the whim of younger family members (Albert and Cattell, 1994; Kertzer and Laslett, 1994). However, there is considerable empirical support for this theory. For example, rapid urbanization in many developing countries has dislodged the tradition of family support for many older people. Modern migration programs in India, while providing resources for young and old, have resulted in younger people obtaining more education and creating a sense of superiority over their illiterate elders. Rapid urbanization has left almost 30 percent of old people in rural areas in India without family nearby to care for them (Dandekar, 1996; Vincentnathan and Vincentnathan, 1994). Meanwhile, families who eke out a meager living in urban areas have little with which to assist their elders who live with them. In the economically more successful countries of East Asia, such as Japan and Taiwan, older people have benefited from improvements in health care, income, and longer life expectancy, but at the cost of power and prestige that was accorded previous generations of older adults (Silverman, Hecht, and McMillin, 2000).

Occupation and education appear to have a reversed J-shaped relationship to modernization. In the early phases of rapid social change (illustrated by nations such as Turkey and the Philippines), the occupational and educational status of older adults shows a decline, but then later improves (exemplified by New Zealand, Canada, and the United States). This suggests that, as societies move beyond an initial state of rapid modernization, status differences between generations decrease and the relative status of older people may rise, particularly when reinforced by social policies such as Social Security, which have helped to improve older adults’ financial status. Societies in advanced stages of modernization may become more aware of the older population’s devalued status. Through public education, social policies, and the media, they then attempt to create more opportunities for and positive images of older people. This has already begun in the United States, in part because of the aging of the baby boomers, who have the political clout and resources to change popular stereotypes of aging. Advertising and television programs increasingly portray older persons as vital, active, and involved.

**Alternatives to Modernization Theory**

More recent analyses of older people’s status in nonindustrial societies have found that conditions for high status did not always apply. For example, differences often existed between the prestige of the old and the way they were actually treated; over 60 percent of the 41 nonindustrial societies examined by Glascock (1997) had some form of nonsupportive treatment (ranging from insults to killing) for the old, even though older members were also respected in many of these cultures. Death-hastening activities are often justified by claims that they are directed toward elders who are no longer active and productive and are a liability to society and their families. Most societies have some norms of favorable treatment toward their elders, but considerable variability exists in practice. For example, filial piety in China and Taiwan was not always manifest, but was affected by family resources and the number of living children (Ikels, 1997). The coexistence of high status and bad treatment in many traditional societies can be partially explained in terms of differential behavior toward the young-old versus old-old, noted in our earlier discussion of traditional societies that abandoned or murdered their frail elders.
Class and gender differences also come into play. For instance, the norms of filial piety were more often practiced by wealthy families in traditional rural China. Despite the Confucian reverence for age, older people in lower-class families had fewer resources to give them status. The importance of women’s household responsibilities throughout life may explain their relatively higher status in old age than men’s (Cool and McCabe, 1987).

Turning to contemporary China, there has been a major transformation of life for older people on the mainland. The “political economy” has had an impact on elders’ status as government policies have been altered. For example, women have benefited from changes such as not having to submit to arranged marriages or having their feet bound. Their work opportunities have expanded by opening up more jobs to women. National social insurance also benefits older Chinese citizens. But not all changes have had positive effects. Rules limiting family size and the breaking up of communes have had negative consequences for the childless older population in particular. Both the Chinese government and entrepreneurs have begun to build group housing for childless elders. These effects are expected to continue as future cohorts of older people contend with fewer children to care for them in times of need. These changes will also reduce multigenerational living arrangements in China (Ikels, 1997).

Another alternative to modernization theory is that the development of state or nation represented a shift in older people’s roles (Dickerson-Putnam, 1994; Fry, 1996). With the movement from kin-based societies to modern states and capitalist economies in the nineteenth century, labor became a commodity that was sold in exchange for economic security rather than for the security of an extended family. Such marketplace exchanges also created competition between old and young for jobs; this led to the emergence of retirement laws in nineteenth-century Europe that served to formally remove older people from competition for jobs and increase opportunities for the young. The emergence of social security programs in capitalist economies was intended to provide a safety net for retired people that could reduce their dependence on kin and prevent the older person from reentering the job market (Achenbaum, 1996).

**Ideal of Equality Versus Status of Age in America**

In his classic historical analysis, Fischer (1978) formulated reasons other than modernization for explaining changes between generations in American society. He argues that these changes cannot be attributed to modernization, because the decline in elders’ status occurred before industrialization and urbanization. He also contends that the increase in numbers of older people does not fully explain the shifts in attitudes toward the old. Instead, he suggests that the emphasis on youthfulness that characterizes our society can be partially attributed to our cultural values of liberty and equality. Both of these values run counter to a hierarchy of authority based on age.

According to Fischer, the elevated status of older persons in earlier historical periods gradually became supplanted in the late eighteenth and early nineteenth centuries by an emerging ideal of age equality. The fundamental change was caused by the social and intellectual forces unleashed by revolutions in America and France. The spirit of equality was dramatically expressed in public fêtes borrowed from the French Revolution, where a symbolic harmony of youth and age was celebrated in elaborate rituals of young and old exchanging food.

However, although our society’s ideology was egalitarian, economic inequalities actually grew in the nineteenth century. For example, economic status became the basis of seating arrangements in public meetings. Individualistic pursuits of wealth created countervailing forces to a sense of community that had previously been founded on the power of elders. Thus, the age equality that had initially replaced veneration of elders was later supplanted by a celebration of youthfulness and a derogation of age. Inequalities based on age
reemerged, but this time to the advantage of youth. Growing contempt toward older people in the mid-1800s is vividly illustrated by Thoreau’s (1856) conclusion, “Age is no better, hardly so well qualified for an instructor of youth, for it has not profited as much as it has lost.” Heroes and legends centered on younger men, such as Daniel Boone. Social trends in the early twentieth century, such as the development of retirement policies, mass education, and residential segregation of generations, furthered perceptions of older people as useless, with the cult of youth reaching its peak in the 1960s. A common expression of the time was “Don’t trust anyone over age 30!” One irony was that as the economic and social conditions of many older adults declined, their ties of family affection, especially between grandparents and grandchildren, often grew stronger. In addition, adult children assumed responsibility for the care of their parents, who were living longer than at any other time in history.

Other Perspectives on Historical Change

Historians and gerontologists have questioned whether a critical turning point in age relations occurred between 1770 and 1830 (Achenbaum, 1996). Achenbaum, for example, has taken a position somewhere between Fischer’s view and modernization theory regarding the change in status of older adults in the United States. He has identified social trends similar to those documented by Fischer, stating that prior to the middle of the nineteenth century, elders were venerated because of their experiences and were actively involved in socially useful roles. A decline in their status, Achenbaum asserts, occurred during the post–Civil War era. The growing emphasis on efficiency and impersonality in bureaucracies, along with increased misperceptions about senility, furthered a perception of old age as obsolescence. Both Fischer and Achenbaum suggest that it is not possible to establish a firm relationship between modernization and older people’s status; rather, they maintain that Americans have always been ambivalent about old age. Shifting beliefs and values are viewed as more salient in accounting for loss in status than are changes in the economic and political structures that occurred with modernization.

These contrasting perspectives of social gerontologists and anthropologists suggest that there is not a simple “before and after” relationship in the meaning and significance of old age between preindustrial and modern societies (Achenbaum, 1996). People in preindustrial societies who, by reason of social class, lacked property and power undoubtedly suffered from loss of status, regardless of their age. For such persons, modernization brought less improvement in status than for older people who were better educated and of higher socioeconomic background. Such inequities continue to be problematic, particularly among persons of color within our society. Cultural gerontologists have emphasized that modernization is not a linear process, but proceeds at different rates and through varied stages, each of which may have a different impact on older people’s status (Fry, 1996).

In addition, cross-cultural evidence shows that cultural values can mitigate many of the negative effects of modernization on older people.
This is illustrated in modern, industrialized, and urban Japanese society. Confucian values of filial piety and ancestor worship have helped to maintain older persons’ relatively high status and integration in family life, as well as their leadership in national politics. Traditional values of reciprocity and lifelong indebtedness to one’s parents are a major reason for continued three-generational households in Japan, with 54 percent of older adults in metropolitan areas living with an adult child. Nevertheless, fewer Japanese elders live with their children today than in the past—55 percent in 1995 versus 90 percent in 1960 (Akiyama, Antonucci, and Campbell, 1997; Kinsella and Velkoff, 2001; Maeda, 1998).

Filial piety also plays a dominant role in family attitudes and government policies regarding care for aging parents in Korea, where the number of people 65 and older has increased threefold in 25 years. Surveys of young Koreans reveal that more than 90 percent believe that adult children must care for their older parents, and in fact 90 percent of older adults cite family as their primary source of support. These values are supported by the high proportion of people aged 65 and older—65 percent—who live with their adult children, even in urbanized areas like Seoul (Kim, 1998; Levande, Herrick, and Sung, 2000; Sung, 1998, 2000, 2001). In particular, daughters-in-law are expected to provide most of the day-to-day care for their aging parents-in-law. The government of Korea promotes family-based caregiving by sponsoring a “Respect for Elders Day” and a “Respect for Elders Week,” as well as prizes to honor outstanding examples of filial piety. These initiatives help reduce Koreans’ expectations from the government, although changing demographics today have placed a greater burden on families, with average family size down to 3.0 and with 46 percent of all married women in Korea working outside the home.

Other Asian countries where filial piety has been maintained, despite changing work and family patterns, are Singapore, Thailand, and the Philippines, where 91 percent, 69 percent, and 67 percent of women 60 and older, respectively, live with their children (Kinsella and Velkoff, 2001). The importance of filial piety—a sense of reverence and deference toward elders—supersedes modern social demands in these Asian countries.

Political ideology may also be an intervening variable. This is illustrated by the effect of Communist party policies in Maoist China, which at first vilified older people but eventually sought them to work with the young to promote the Cultural Revolution. Despite their emphasis on collectivization, the Communist leaders did not provide a comprehensive welfare program for older people, especially those in rural China. Families were expected to provide care for their elders, except for those who were childless in their old age. However, as modernization and especially urbanization continued in China after the 1950s, societal views of and governmental benefits to older persons improved (Ikels, 1997).

In sum, the effects of modernization historically do not appear to be uniform or unidirectional. As shown in the next section, many contemporary cultures are still struggling to define meaningful roles for their rapidly increasing populations of older people. Changing values and declining resources result in conflicting attitudes toward their older members in many transitional societies.
A Cross-Cultural View of Old Age in Contemporary Societies

As we have discussed, every society defines people as old on some basis, whether chronological, functional, or generational, and assigns that group a particular set of rights, privileges, and duties that differ from those of its younger members. For example, older persons in our society today qualify for Social Security and Medicare on the basis of their age. In some religious groups, only the oldest members are permitted to perform the most sacred rituals. Societies generally distinguish two, sometimes three, classes of elders:

- those who are no longer fully productive economically, but are physically and mentally able to attend to their daily needs
- those who are totally dependent, who require custodial care, and who are regarded as social burdens and thus may be negatively treated
- those who continue to participate actively in the economy of the social system, through farming or self-employment, care of grandchildren, or household maintenance, while younger adults work outside the home

Consistent with social exchange theory discussed in Chapter 8, older people who can no longer work but who control resources essential to fulfill the needs of younger group members generally offset the societal costs incurred in maintaining them. In some social systems, political, judicial, or ritual power and privileges are vested in older people as a group, and this serves to mediate social costs. For instance, in societies such as those of East Africa, politically powerful positions are automatically assigned to men who reach a certain age (Keith, 1990). In other societies, the old do not inherently have privileges, but gain power as individuals, often through diplomatic skills and contacts with powerful others. The following examples from other cultures illustrate the balance between the costs and contributions made by older adults:

- Older Sherpas in Nepal today must cope with the indirect effects of modernization. Job opportunities for young adults in Darjeeling and other parts of India have increased in recent years, as young men have found jobs as porters for climbers in the Himalayas. As a result, adult children are not available or interested in living with their aging parents, resulting in many older adults who live alone and express a sense of abandonment (Goldstein and Beall, 2002).

- In Australia, the traditional respect accorded to older people in the Aborigine culture has resulted in a valuable role for older women. In one Aborigine community in central Australia, a group of women, all over age 70, have formed a night patrol that intervenes to stop rowdy parties and disco activity that result in excessive drinking and violence. These peacekeepers receive more cooperation from the young perpetrators than do police, and community leaders report a decline in assaults and arrests for drunken behavior over the past ten years since this group began its work (AARP, 2000).

- Older women play a valuable role in Zulu culture. Their pensions are a steady source of family income, and grandmothers provide an important caregiving function. Despite their contributions, these older women reported feeling that younger Zulus did not respect them. Grandchildren reported a schism between their new values of individualism and traditional tribal values of kinship held by their grandmothers (AARP, 1999).

TRADITIONAL EXTENDED HOUSEHOLDS IN CHINA

The position of the aging father in the Chinese family depends almost entirely on the political and economic power he wields. Elders in wealthy Chinese households and those with substantial pensions to contribute to family expenses enjoy higher status within the family and are better able to control the lives of their adult children than those in poor households.
In other cultures, respect toward intact elders may be promoted, but a subtle acceptance of benign neglect may result in the demise of older persons who are physically and/or cognitively impaired. An ethnographic analysis of Niue, an independent Polynesian island, revealed significant discrepancies between the status of older people who were in good health and had important social and political functions, and those who were too frail to care for themselves. Although medical services are free on Niue, families and neighbors did not summon visiting doctors and public health nurses, even for infected sores, painful joints, and other treatable conditions in these frail elders. The basic needs of cognitively impaired elders were even more frequently ignored. This may stem from values of reciprocity. Like other societies where reciprocity is crucial for intergenerational exchanges, the frail elders of Niue can no longer contribute to the group’s well-being. Therefore, such neglect may be seen as a way of merely hastening the inevitable death of these weaker members of that society (Barker, 1997; Glascock, 1997).

**Importance of Social Position and the Control of Property**

Consistent with social exchange theory, control of property is a means to achieve power in most societies. In both past and present times, older people have used their rights over property to guarantee their security by compelling others to support them or to provide them with goods and services. For example, among the Etal Islanders in Micronesia, the old try to keep enough property to ensure continued care by younger members who hope to inherit it (Nason, 1981). In the Gwembe Tonga tribe in Zambia, males were formerly able to secure their positions by accumulating land and livestock. As their lineage land became covered by water, however, forced relocation cost many older people their exclusive control of property, and the old became dependent on sons and nephews, who acquired better land at the time of flooding (Colson and Scudder, 1981). In other societies, the leadership of males derives from their positions within the family.

Substantial class differences exist in elders’ power in many countries. In addition, the extended family structure confers status on older members, even in the face of modernization. As economic resources decline and class differences disappear in such traditional cultures as China, with increasing modernization, filial piety may become undermined. For example, the growing pressures of limited housing and low income in China appear to be having a negative effect on younger generations’ attitudes toward old people. In such instances, increased provision of public housing, health care, old-age pension plans, and policies that support family care of elders may serve to reduce tensions between generations. Some demographers have suggested that the improving health and financial status of older populations have resulted in more older adults choosing to live independently. In contrast to this concept of a normative trend toward individualism in traditional societies, other demographers have found that increases in older persons’ income or that of their adult children do not result in significant changes in traditional family structures and the value of family interdependence (Cameron, 2000; Kinsella & Velkoff, 2001).

Older persons from traditional cultures who immigrate to Western countries face even more problems adjusting to the loss of power. In the past 30 years, waves of Indochinese refugees have come to the United States from countries experiencing political strife and unrest. Older relatives who arrived with younger family members have had more difficulties in adapting to American culture. Property and other resources in their native lands that afforded them importance and power have been stripped from them. Being in the United States has brought them a different life than the one they might have expected for their later years. These older refugees do not have the ability to provide material goods, land, or other financial support, which has traditionally given them status (Yee, 1997). Accordingly, traditional power has
be en eroded as families have started new lives in
this culture. Indeed, financial self-sufficiency is a
major determinant of adjustment to life in the
United States among older Indochinese refugees,
regardless of education, gender, and English pro-
iciency. Refugees from Russia and other coun-
tries of the former Soviet Union are also
struggling with the adjustment to their loss of sta-
tus in their host country.

When older adults immigrate to the United
States, it is often to join younger family members
who moved here previously. They usually help
their adult children in family-owned businesses
and as caregivers for grandchildren. Many of
these older immigrants lack economic and educa-
tional resources and are not proficient in English,
thereby making acculturation more difficult. For
all these reasons, immigrant elders are more likely
than their U.S.-born counterparts to live in multi-
genерational households (Angel et al., 1999; Wil-
moth, 2001; Wilmoth, DeJong, and Himes, 1997).
In an analysis of U.S. census data on almost 64,000
older immigrants, Wilmoth (2001) compared the
living arrangements of Latino (mostly Cuban and
Mexican), Asian (mostly from China or Southeast
Asia), and non-Hispanic white (mostly from Eu-
rope) immigrants. Significant differences emerged
across immigrant groups, with the highest rates of
independent living among white, Japanese, and
Cuban immigrants. Living in another family
member’s home was more common among other
Asian groups and elders from Mexico, especially
among those who were unmarried, with lower in-
comes and less than a college education, and those
with a physical disability. Therefore, immigration
by people aged 60 and older may reduce their in-
dependence and personal control.

**Knowledge as a Source of Power**

Control over knowledge, especially ritual and re-
ligious knowledge, is another source of power. The
aged Shaman is an example, revered in many so-
cieties for knowledge or wisdom. The importance
of older members of society in maintaining cul-
tural values is illustrated in India, where tradи-
tional Hindu law prescribes a four-stage life cycle
for high-caste men: student, householder, ascetic,
and mendicant. In the last two stages, older reli-
gious men are expected to renounce worldly at-
tachments to seek enlightenment in isolated retreats. This practice ensures that the pursuit of
the highest form of knowledge is limited to older
men of higher castes (Sokolovsky, 1997).

Knowledge as the basis of older people’s
power has been challenged as traditional societies
become more urbanized or assimilated into the
majority culture. Over the course of the twentieth
century, American Indian elders lost their roles as
mentors and counselors to younger tribal mem-
bers. Their knowledge of tribal customs and stori-
es, agricultural skills, and folk medicine was no
longer valued as family structures changed and
people migrated away from the reservation (Baldridge, 2001).

Among some cultural groups, however, in-
cluding many American Indian tribes, a revival of
interest and pride in native identity and religion
has occurred, thus raising the esteem of elders who
possess ritual knowledge. For example, they are
the only ones who know the words and steps for
many traditional songs and dances. Knowledge of
the group’s culture, particularly its arts and hand-
crafts, native songs and epics, has enhanced the

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**GAINS AND LOSSES WITH INCREASED WORK ROLES**

Women in Ganga in Papua New Guinea have as-
sumed a larger role in local coffee production. How-
ever, these changes in their work lives have affected
their traditional control over the rituals of educa-
tion and initiation for younger girls. This was once
an important part of their knowledge base and
power. What was previously provided by a group of
older women is now acted out by a young girl’s
closest relatives. Consequently the power base of
older women in shaping the lives of young women
has eroded (Dickerson-Putnam, 1994).
social status of older persons in these societies; furthermore, the traditions of reverence for old age and wisdom remain strong, overriding the impact of modernization on older people’s roles. The timing of such a revival is critical, however. A similar revival among Plains Indians did not have comparable positive consequences for the tribe’s older members who were no longer expert in traditional ways (Keith, 1990).

The growing desire for ethnic or tribal identity among many Native Americans, which has led to a conscious restoration of old forms, illustrates that modernization does not automatically erode the status of the elders. Similarly, the search for one’s heritage or roots has led to increased contacts between younger generations seeking this information from older persons who often are a great repository of family histories.

Indeed, modernization has not resulted in the disintegration of extended families in most non-Western societies, including the rapidly developing Asian and Third World countries. Extended families in rural Thailand have adapted to the need for adult children to migrate to the cities for jobs by creating “skip-generation households,” where grandparents remain in their rural homes, caring for grandchildren, while their adult children work in urban settings. This reciprocal dependency has also proved useful for many Asians and Eastern European refugee families in the United States where grandparents have immigrated with their adult children to provide regular child care to grandchildren in the extended family. At the same time, however, immigration by older people for the sake of their children and grandchildren can severely disrupt their lives and psychological well-being at a time when their own health may be declining (Dossa, 1999; Ikels, 1998; Pang, 1998).

In some countries, societal changes have placed unexpected burdens on elders. Older people in many African countries face multiple challenges created by major sociodemographic shifts, poverty, and the AIDS epidemic. Although much smaller in proportion than in other regions of the world, people aged 60 and older make up a growing share of the population in most African countries, from 6.8 percent in South Africa to 4.3 percent in Zimbabwe. Most still reside in rural areas, but a growing number in countries like Kenya and South Africa live in urban settings. With increasing migration of younger family members to urban centers, older adults in rural parts of Africa cannot rely on family caregivers. In fact, many provide a critical role as caregivers to grandchildren left behind by parents who seek employment in distant cities. In recent years, this responsibility has been compounded by the growing number of AIDS orphans, especially in sub-Saharan Africa. Of the 2.5 million deaths due to AIDS worldwide in 1998, two million occurred in sub-Saharan Africa. Given that the population aged 15 to 49 has been hardest hit by AIDS, older adults are often left to care for their grandchildren as well as extended family members. In most cases, they receive very little government support for their surrogate parenting. To make matters worse, most African countries provide little if any social security or pension benefits for their older citizens (Darkwa and Mazibuko, 2002; Kinsella and Ferreira, 1997; UNAIDS, 2000).

The way that older people react to change can serve to maintain or improve their position. Among the Sherpa in Tibet, for example, as younger sons move away from the community, and are not available to share households and care for the old, the old resist the traditional division of

### Points to Ponder

Think about immigrant and refugee groups in the United States. In what ways are elders in such families involved or not involved in the lives of their children and grandchildren? What impact do a common language and shared cultural values have on their interactions? To what extent have cultural differences created family conflicts and reduced the status of elders?
property and tend to keep the younger sons’ shares for themselves. Sherpa elders are also becoming proponents of birth control; since they cannot count on sons to take care of them as they wish, they prefer to share their property among fewer children, keeping more for themselves (Keith, 1990).

Effects of Culture and Modernization: The Case of Japan

In other situations, the buffering effects of culture on modernization are less distinct. For example, the issue of modernization and aging in contemporary Japan is particularly complex. Older adults traditionally have had high status and prestige. Values adopted from Confucianism are viewed as linking the old to a family system that emphasizes filial devotion, in which the dependence of elders in this “second privileged period” is accepted (Ogawa and Retherford, 1993). This perspective has been criticized, however, as being based on cultural values and census figures that reflect intergenerational harmony rather than systematic anthropological or social research (Sokolovsky, 1997).

Indeed, the rapid demographic shifts in Japan that have made it one of the world’s oldest populations (as described in Chapter 1) and the growth in the numbers of employed women (41 percent currently) have altered traditional conceptions of old age and reduced the positive influences of cultural values on intergenerational relations. For instance, the modernization of Japanese society has resulted in increased economic demands on the nuclear family. This is compounded by the fact that the unprecedented numbers of older people in Japan today have increased the societal costs of maintaining older members, and have created dilemmas for younger family members who are responsible for their support.

The majority of middle-aged persons in Japan still believe that care of older parents is the children’s responsibility. Indeed, negligence toward one’s parents is a source of great public shame in Japan. Society also assumes responsibility for the care of Japan’s elders; all those over 70 receive free basic medical services, which is often viewed as a model by other Asian countries. The Japanese government provides incentives for home care by families; they can receive subsidies to remodel their homes in order to accommodate joint households as well as a tax credit for providing elder parent care (Maeda and Shimizu, 1992). For these reasons, the proportion of older parents living in multigenerational households is higher than in any other industrialized nation. In 1995, 55 percent of people over age 65 lived with their children and grandchildren, but this is a decline from 1985, when 69 percent of older households were multigenerational. Meanwhile, the number of households consisting only of the older couple has grown. In 1995 they made up 26 percent of older households, compared with 19 percent in 1985 (Jenike, 1997; Kinsella and Velkoff, 2001).
The number of nursing homes and long-stay hospitals in Japan has also grown, but more options are needed. These trends suggest that traditional customs of caring for aging parents in adult children’s homes are slowly changing. The percentage of parents living with children has declined, due to urbanization, industrialization, the growing number of employed women, and the declining number of children since 1950. Urban–rural differences in family expectations are demonstrated by the fact that 25 percent of people age 75 and older in Tokyo live alone, compared with 15 percent in rural regions. Despite the growth of long-term care facilities, institutionalization in any form is still viewed as abandonment by many older people. As a result, most elder care still takes place in private homes.

Middle-aged women are the primary caregivers to Japanese elders, as in most other countries. As more older adults live longer, they may increasingly require goods and services at the perceived expense of younger members and may place even greater demands on middle-aged women in Japanese society. With the increased proportion of educated, professional women and newer cohorts influenced more by Western values than by Confucianism, many women do not want to leave their jobs to become caregivers to their parents or parents-in-law. Because of public concerns about long-term care needs for its growing population of oldest-old, the Japanese Diet passed the Public Long Term Care Insurance Act in 1997 (Maeda, 1998). This national policy guarantees comprehensive long-term care for all Japanese persons aged 65 or older, and for those aged 40 to 64 who may require long-term care. Funding is provided by a combination of mandatory insurance premiums paid by older persons (estimated to be approximately equivalent to $19 per month in 2000 and $27 in 2010) and taxes that will be paid to federal, prefecture, and municipal governments. Users of this service also must co-pay 10 percent of all incurred expenses.

This bold new legislation in Japan was implemented in April 2000, so its impact cannot yet be determined. The current shortage of long-term care options needs to be addressed to fully implement this program. Nevertheless, if it succeeds, this universal long-term care program is expected to relieve somewhat the burden on Japanese families and hospitals, where most long-term care occurs. The program is being watched closely by policy makers in other developed countries to see if it can serve as a model for caring for their increasing populations of oldest-old.

Implications for the Future

These brief examples from diverse cultures around the world illustrate how each society responds to its aging members within the constraints set by both the natural environment and the larger human environment of social and technological change. A basic principle governing the status of older adults appears to be the effort to achieve a balance between older people’s contributions to the society and the costs of supporting them. As will be discussed in detail in Chapter 10, however, the family plays an important role in supporting the old in most societies. Historical and cross-cultural evidence also suggests that maximum social participation of older adults in society results in greater acceptance and respect of elders by the young in most cultures.

The extent to which older citizens are engaged in society appears to vary with the nature of their power resources, such as their material possessions, knowledge, and social authority. In most of their exchanges, older people seek to maintain reciprocity and to be active independent agents in the management of their own lives. That is, they prefer to give money, time, or other resources in exchange for services or materials. This theoretical perspective, described as social exchange theory in Chapter 8, suggests that modern society should seek ways to increase older people’s exchange resources so that they are valued by society. For example, maximizing the social value
and productivity of the old in our society might include retraining older adults, developing innovative educational programs for older learners (see Chapter 5), and creating opportunities for part-time employment (see Chapter 12).

Control of resources as a basis for social interactions between members of a society is important throughout the life cycle. However, it becomes even more crucial in old age, because retirement generally results in a decline in one’s level of control over material and social resources. As their physical strength diminishes and their social world correspondingly shrinks, many older people face the challenge of altering their environments and using their capacities in ways that will help them to maintain reciprocal exchanges and to protect their competence and independence. This may be an even greater problem for older refugees who may still have full physical and cognitive functions, but have lost material resources in their homeland that would have given them power and prestige. Older people who immigrate to the United States often do so to be with their adult children and generally help with child care or the family business. Although this may represent a reciprocal exchange, immigration in the later years can also deprive elders of their independence and opportunities for active aging. These attempts to maintain control over one’s environment in the face of changing personal capacities and resources are consistent with the person-environment model presented in Chapter 1. This issue will be discussed in detail in subsequent chapters on biological, psychological, and social changes with aging.

The growth of Japan’s older population, combined with the effects of modernization and economic demands on the nuclear family, has resulted in major legislation to support long-term care for frail Japanese elders. Efforts to provide options in long-term care for U.S. elders are described in Chapters 11 and 17. The dearth of information on cross-cultural issues in gerontology suggests a need for more anthropologists to direct their research toward comparing culture and countries in how the aging process and elders are viewed in different settings.

GLOSSARY

filial piety a sense of reverence and deference to elders that encourages care for one’s aging family members.

geronticide (or senecide) inducing the death of old persons, as practiced in some ancient cultures

modernization theory advances in technology, applied sciences, urbanization, and literacy which, in this context, are related to a decline in the status of older people

social stratification divisions among people (e.g., by age, ethnic group) for purposes of maintaining distinctions between different strata by significant characteristics of those strata

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