

# **Thesis**

## **Growing Old in Easington: A Life Course Study of Ageing and the Social Environment in the Former Mining Villages of Easington, County Durham**

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## **Abstract:**

**Title: Growing Old in Easington: A life course study of ageing and the social environment in the former mining villages of Easington, County Durham**

This thesis examines the lives of older people in the former mining communities of the East Durham coalfield (the former District of Easington). The study considers whether there are unique challenges faced by older adults in an area that is classed as deprived in national measures of socio-economic disadvantage. This qualitative research explores the quality of later life for older people in Easington and, against the backdrop of the life course theory, addresses the broad question: what has the Easington context, with its historic mining culture, contributed to older residents' experience of ageing?" The study found that the "lived experience" of older people in Easington is influenced by their own personality, family structure and life opportunities (in education, employment and retirement), each of which have contributed to participants' experience of ageing. Study results also confirmed the positive and negative effects neighbourhood, "place" and social networks have on older peoples' overall quality of life. The sense of social connectedness is an important factor relating to a positive quality of later life. An important finding was that loss of community infrastructure resulting from closure of the mines has profoundly influenced the ageing experience of older people in Easington. This research confirms previous studies which highlight the fact that older people residing in such socio-economically deprived areas are at increased risk of social exclusion. The thesis ends with a discussion of some implications from the study for ageing policy and service development.

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## Chapter 1. Introduction

*One day children will ask “What was a pit? – Hopper (1984)*

Along the beautiful East Durham coast, the site of Easington Colliery is commemorated with a monument made from the pit cage that once took generations of men underground. The visitor driving past can scarcely imagine the buildings that formerly occupied the grassy hill on which the monument rests. Older Easington residents, however, can still see the colliery and others like it in their minds eye. It was a hive of industry, a place of work and residence, the heart of a mining way of life that, though it is no more, continues to bind a region together and have lasting consequences for older area residents. Easington area history is rich but complicated, from the social cohesion that characterised mining culture, to current socio-economic challenges which followed on the heels of local colliery closures in the 1980s and 1990s.



Easington Colliery, County Durham 1983 © *John Davies, Used by Permission*



Site of Easington Colliery, County Durham 2004 © *John Davies, Used by Permission.*

The idea for this thesis was developed during MSc studies which examined the provision of social activities for older people in the former mining villages of Easington. This researcher was intrigued with the ways in which individuals perceive their ageing experience in Easington, and desired to explore this concept further. In part, this research was undertaken to increase understanding concerning the way in which older people perceive their internal and external environment and the multitude of factors which affect the ageing process. There is a rich history of researching older people living in a specific community. Over the past fifty years, previous community studies have sought to paint a vivid picture of the daily life and experiences of older people, against the backdrop of social, cultural and historical influences (Townsend, 1957; Rosser and Harris, 1965; Young and Willmott, 1957; Phillipson, et al. 1998; Savage, 2008). In a similar vein, the location of this study is based in an English former mining area – specifically the communities of the East Durham coalfield (referred to in this document as “Easington”).

The study considers whether there are unique challenges faced by older adults in an area that is classed as deprived in national measures of socio-economic disadvantage. The

research explores the quality of later life for older people in Easington and, against the backdrop of the life course theory, addresses the research question: what has the Easington context, with its historic mining culture, contributed to older residents' experience of ageing? This research seeks to contribute to the scientific and social gerontological research base by further illuminating the "lived experience" of older people in the context of a former mining community and aims to provide further information on the individual and structural factors which influence the ageing process.

The structure of the thesis is outlined as follows: Chapter 2 explores the historical background of Easington as well as presenting data on the current socio-economic picture of the area. Next, the literature review is divided into two chapters, Chapter 3 and Chapter 4. Chapter 3 reviews relevant literature on ageing and the environment, including person-environment fit, place attachment and ageing in place. Chapter 4 examines literature on poverty, measuring deprivation and social exclusion in addition to introducing literature on the theoretical underpinnings of the thesis – the life course theory. Chapter 5 addresses the research methodology and methods used in the fieldwork process and considers the nature of qualitative biographical research. Through detailed analysis, the findings of the fieldwork are presented in Chapters 6 through 8 focusing on the themes of employment, retirement and social networks. Finally, the thesis concludes in Chapter 9 with a discussion of research findings together with implications for policy and service provision.

## **Chapter 2. Easington: Its Past and Present**

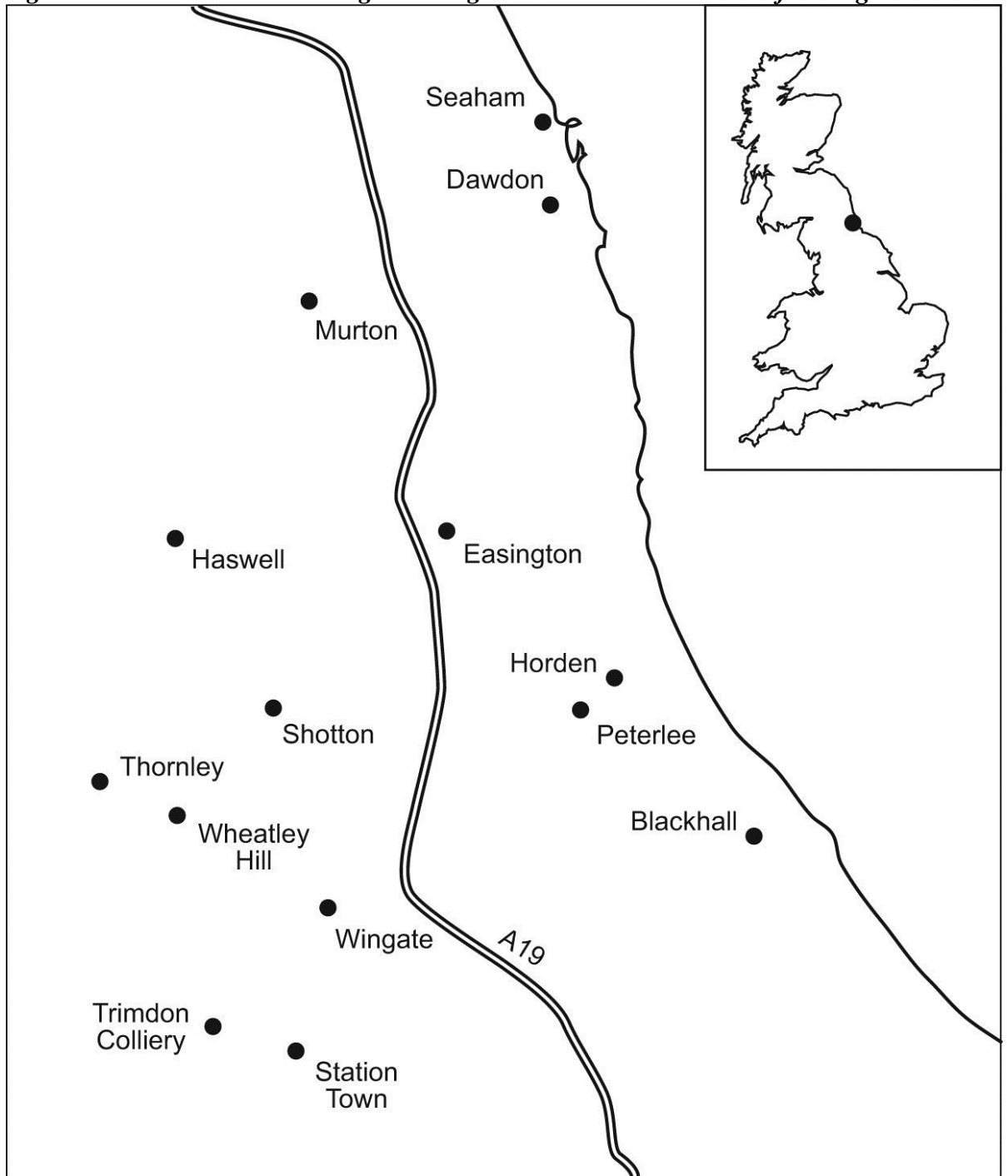
This chapter aims to contextualise Easington, both historically regarding its mining history as well as the area's current socio-economic situation. The district of Easington, in the eastern part of County Durham, North East England, where the fieldwork for this study took place, is best known for its ties to coal mining. The former "District of Easington" comprises two major centres, Peterlee and Seaham, with a population of around 30,000 and 22,000 respectively. Easington's population of approximately 94,000 live in areas designated as 'urban' in nature, although there are many sections which could be classified as semi-rural (see Fig. 1 and Fig. 2 on pp. 9-10). The A 19 road forms the main route through the area linking it to the Tyne & Wear region in the North and Tees Valley in the South (Durham County Council, 2012). Until recently, the former mining villages and smaller settlements in the Easington area were referred to as the "District of Easington". In 2009, the smaller "districts" around County Durham were amalgamated into one unitary authority of Durham County Council. For the purposes of this thesis, the villages in the former District of Easington will be referred to as "Easington", excepting when Easington Village or Colliery is specified.

Easington suffers the effects of deprivation on a wide variety of domains, in part due to the economic and social legacy of the closure of the coal mines. Until the 1830s, Easington was primarily a rural, agricultural district. Most of the mines began operating in the mid-nineteenth century and closed at various times, depending on the village, between 1965 (Wheatley Hill) and 1993 (Easington Colliery). According to Armstrong and Wilson (1985): "It was the development of the mining industry from the 1830s to present date that was to radically alter the economic and social structure of Easington District" (p. 3). While, historically, the local economy depended on the success of the mines for commercial viability, the mines also fostered years of ill health among many miners and their families. Issues of overcrowding, poor sanitation and lack of education concerning health, contributed to increasing morbidity and mortality rates.

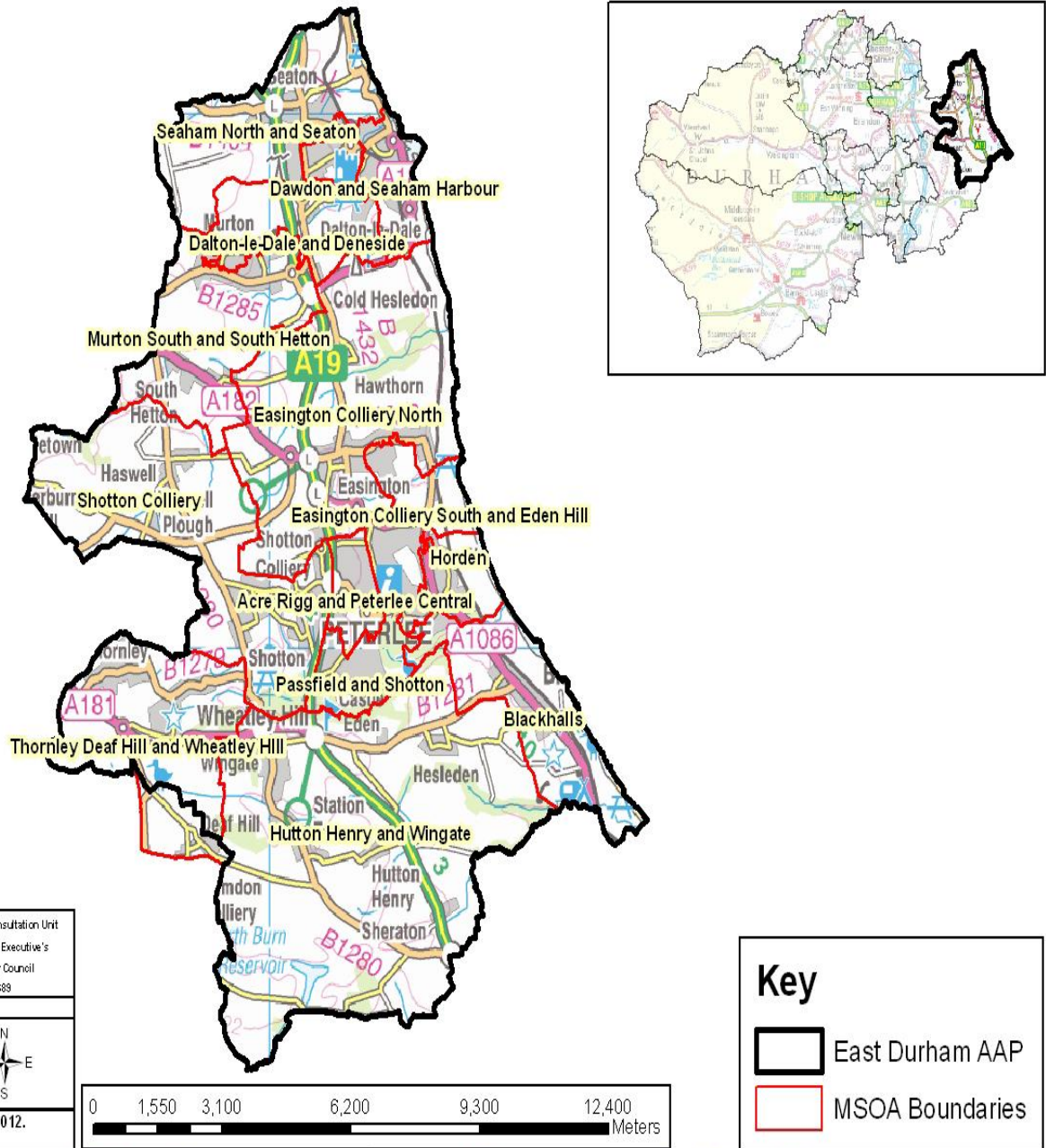
While time, space and scope do not permit a lengthy treatise on coal mining, it is instructive to briefly mention the development of deep coal mining in the Easington area, to provide context for the environment in which this study is set. According to

Emery (2009), evidence of coal mining in County Durham is recorded as early as 1183. Mining in Easington started in 1842 with the sinking of the first East Durham coalfield pit in Seaham. The sinking of several other collieries followed and by 1850 several workable deep coal seams were discovered in East Durham. Emery reveals that coal production continued to increase until, by 1913 “Durham reached its highest rate of coal production, with an output of 41,533,000 tons, raised by 165,246 hands from 304 pits” (p.11). According to Temple (2001), the Great Depression had a devastating effect on the pits in the Easington area. In May 1924, 172,026 miners worked in Durham’s collieries, but by the end of December, the number had plummeted to 107,938. Pit strikes also seriously affected production and had a major impact on the economic conditions of the miners and their families. Dennis, Henriques and Slaughter (1976) state: “The bitter memory of the economic slump and depression is a common-place for those who talk about miners, for it is known that the miners had experiences more severe than those of almost any other section of the community” (p. 56).

*Figure 1 – East Durham - Easington Villages – the Former “District of Easington”*



**Figure 2– Easington Situated in County Durham – (from the East Durham 2012 Area Action Partnership Profile)**



However, following this decline, employment in the pits was to improve. The arrival of World War II brought about desperation for coal, as the government realised the need for increased production to fuel the war effort. Colliery managers were in dire need of new workers as hundreds of miners left their backbreaking work to join the army. The Essential Works Order of 1941 made mining a “reserved occupation” and for the first time since 1872, “miners were legally tied to the colliery where they work” (Temple, 2001, p. 76). Absence from work was made a criminal offense for any reason other than certified illness. Despite continuing labour strikes during and after the war, Easington experienced an increase in employment and a general improvement in working conditions, although employment levels never again reached pre-war levels. The modernisation of the collieries, the advent of amenities such as pit head baths, and a gradual rise in wages helped lead to a time of post-war stability in the colliery industry. However, mines in Easington began shutting down in the late 1960s and these closures continued during the 1970s and 1980s. This was due to several factors, such as a fall in coal production, an increased dependence on oil as a fuel source and competition from imported coal. Strikes over pay and working conditions during the 1970s, especially over threatened pit closures in 1984-85, led to the realisation among the mining community that ultimate closure of the industry which had defined Easington for more than a century was approaching. All that remained in the East Durham coal field by 1990 were the “super” pits of Dawdon, Easington, Murton, and Vane Tempest in Seaham (Emery, 2009, p. 16). Easington Colliery, the last pit to close in the East Durham coalfield, ceased operation in 1993.

### ***2.1 Pit Work and the Culture of Easington***

For a large part of the twentieth century, the conditions in coal mines were especially dangerous. Miners’ families often did not know if their men would come back from a shift in one piece, let alone alive. According to Bulmer (1978), “the working life of a miner is hard, dangerous and uncertain” (p. 25). He goes on to suggest that: “Although older miners insist on the increasingly easier nature of the colliers’ work today, it is invariably said by miners that pit work can never be other than an unpleasant, dirty, dangerous and difficult job” (p. 39). Despite this danger, many miners experienced a sense of a close camaraderie while working in the pit. Williamson (1982) comments on the social solidarity which often resulted from working underground: “The work builds up, too, a basic attitude of helping others; it devalues competitiveness for the conditions



are too dangerous. It fashions a distinctive pattern of social relationships both in families and in communities which must be understood if the more obvious political and industrial attitudes of miners are to be explained” (p. 79).

## ***2.2 The Social World of the Pit Village***

The villages of the East Durham coalfield represent a way of life which has slipped into history. However, the social and cultural norms wrought during the early development of Easington have had a deep and profound effect on the population. Concepts such as a mining village’s social cohesion and social networks, strict division of gender roles, and participation in community life, are among the topics which will be discussed in this thesis. There is no doubting that the mining village was and continues to be a particular and unique type of community. Life as a miner was so all encompassing for the individuals and families involved, that it dictated a particular way of life. This was equally true for the miners’ wives as well as their daughters. As will be more fully discussed in Chapter 6, until the latter part of the twentieth century, women’s roles were limited in mining communities. The wife of a miner, first and foremost, was obligated to fulfil her role in the home, which involved an inordinate amount of domestic work. Constant cooking and baking, washing, cleaning and caring for children, rarely with a break, encapsulated the life of a woman married to a miner. As Bulmer (1978) noted: “The wife’s activities, on the other hand, are centred on the home, on her husband and her children. Her task is to run the home; for instance, she must be at home to provide a warm meal for her husband when he comes out of the pit, regardless of the time” (p. 32). Even in social pursuits, women were restricted in terms of the types of activities they could enjoy. Traditionally, women were largely without formal organisations such as Working Men’s Clubs and other male-dominated social groups. In response many women, who were able to briefly leave behind their domestic duties, formed their own social and community groups and became active in co-operative societies, churches and Women’s Institutes, developing strong social networks.



Men with electric hand lamps at a County Durham Colliery (D/MRP 113/1)  
*Reproduced by permission of Durham County Record Office*

Work in a colliery community was hard and tedious for both men and women and, not infrequently, children. The physical environment did not make life much easier during the early and mid-twentieth century. Colliery housing was often less than adequate for families as internal living space was often limited. However, because people lived in a fairly compact physical environment, there was a strong sense of “neighbourliness”. There is, in fact, solid evidence of a sense of social cohesion in the local and regional literature on Easington’s history and culture. Bulmer (1978) offers a view of the sociological features of a mining community:

Time, a sense of a shared past, is of fundamental importance. The overlapping social ties of work, leisure, family and neighbourhood are reinforced through the sharing of a common past, and of family traditions or working in mining and often living in that community for two or more generations. Sons are destined to be miners, and daughters the wives of miners. This is reinforced by occupational homogeneity, and social and geographical isolation from the rest of society (p. 33).

Bulmer further argues that, although there has been monumental social change in former mining areas, traditional social patterns have persisted. It is clear that the

historical, social and cultural factors related to the development and subsequent closure of the collieries shaped the entire way of life in the former District of Easington.

### **2.2.1 Life After the Mines**

The closure of Easington Colliery in 1993 and the loss of 1,400 jobs was the “nail in the coffin” for the East Durham coalfield. Years of fighting to keep the pits open finally culminated in the harsh reality that the Easington mining villages faced life without their primary industry for the first time in over one hundred years. The *East Durham Area Action Partnership: 2012 Statistical Profile* report, (Durham County Council, 2012) (p. 4) confirms that the closure of the mines resulted in economic and social devastation of the local community, as 53 percent of all male jobs were in the mining industry in 1981. The decades following the pit closures have seen a precipitous decline in measures of health and other socio-economic indicators. In order to provide contextual background for the current study, the following section will highlight the effects of pit closures on Easington and will consider the current socio-economic picture of the area. Measures of deprivation will also be discussed.

Over the past two decades, Easington has attempted to come to terms with the community change resulting from industrial decline. In that Easington depended on a single industry, the miners not only lost their income after the pit closures, but other areas of community life were also affected. Bennett, Beynon and Hudson (2000) make this point, stating:

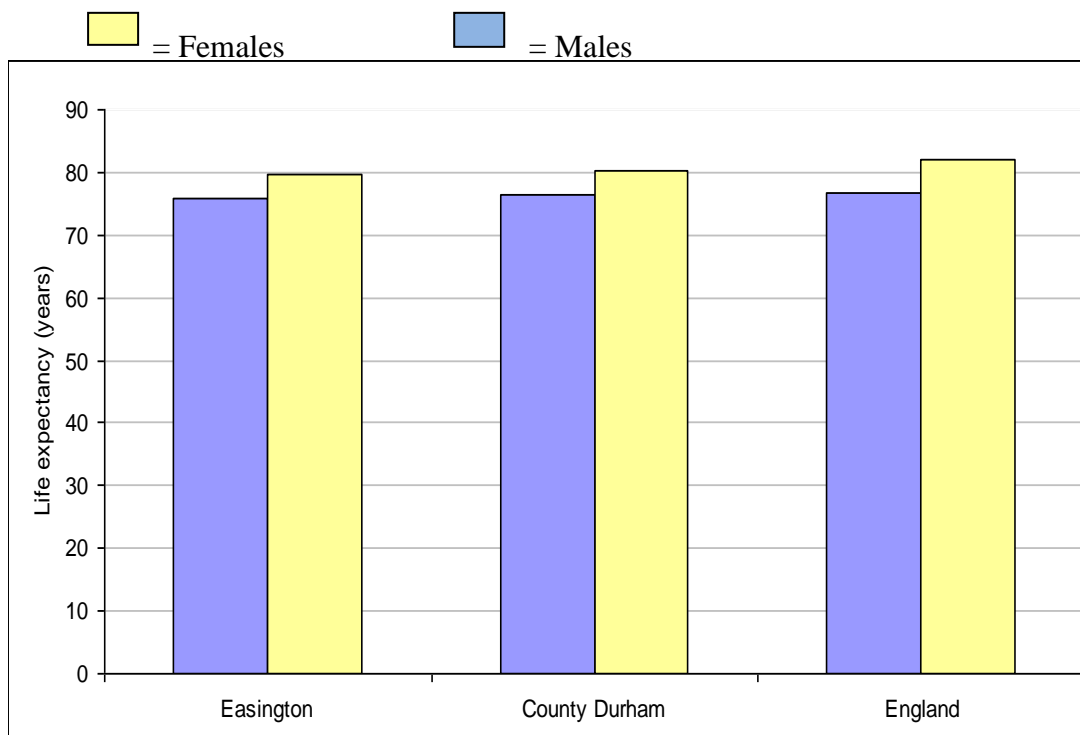
Most coalfield places were built up in rural locations and were completely dependent on the coalmining industry and their collieries as a source of paid employment for men... Such a mono-industrial structure meant that the effects of the mining industry extended beyond the mines and into community life, structuring political, social, household and leisure activities. As long as the mines remained open as significant sources of employment all was well. Once the mines began to close this old order was increasingly threatened (p. 4).

### **2.3 The Current Portrait of Easington**

Although broader concepts of socio-economic deprivation will be discussed in Chapter 4, in order to complete the picture of contemporary Easington, data are presented concerning the area’s level of deprivation. Easington has the dubious reputation of being one of the most socio-economically deprived areas in the UK. Several recent

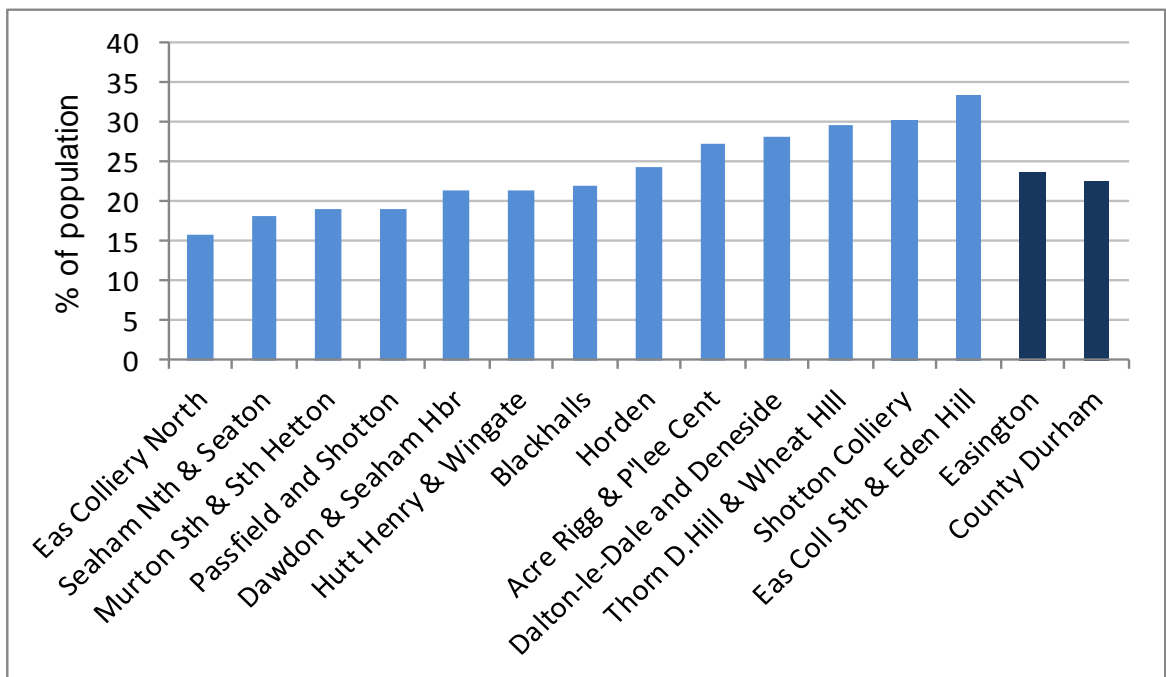
reports describe the effects of ill health, low income, and measures of relative poverty on the lives of Easington residents. Roberts (2009) comments that Easington is: "ignominiously known for some of the worst health statistics within the United Kingdom. It is the most health deprived community outside central London and all 26 wards are among the 20 percent most deprived in England. Within the wider Primary Care Trust region of County Durham in which Easington is situated, there is a differential of 18 years' life expectancy between the richest (Durham) and the poorest (Easington) for women" (p. 39). Since the development of the County Durham unitary authority in 2009, it is difficult to obtain Easington-specific data on the majority of measures (Macdonald and Taylor-Gooby, 2010). A notable exception to this dearth of data is Fleming's (2012) report containing Easington-specific deprivation data, relating mostly to health statistics and limited income deprivation data for children and older people. Research by Fleming (2012) (Figure 2.1) shows the life expectancy at birth in Easington compared to County Durham and England.

**Figure 3. Life expectancy at birth, male and female, 2005-2009 (years), England, County Durham and Easington (average), Fleming (2012)**



According to Fleming (2012), “Male life expectancy (at birth, 2005-2009) is 75.9 years...This is 2 years less than England (77.9 years) and 0.7years less than County Durham (76.6 years). Female life expectancy is 79.8 years...This is 0.6 years less than County Durham (80.4) and almost 2.5 years less than England (82.1 years)” (p.9). Easington’s marginally lower life expectancy reflects the area’s widely known deprivation on numerous measures. The issue of deprivation in Easington has been extensively studied since the closure of the pits. In order to measure levels of community deprivation, the Index of Deprivation (ID) (sometimes referred to as the Index of Multiple Deprivation, IMD) was developed to compare how deprived areas of a similar sized population stand in relation to each other. According to the Department for Communities and Local Government (2011): “The English Indices of Deprivation attempt to measure a broader concept of multiple deprivation, made up of several distinct dimensions, or domains, of deprivation” (p. 1). These domains include: 1) Income deprivation, 2) Employment deprivation, 3) Health deprivation and disability, 4) Education, skills and training deprivation, 5) Barriers to housing and services, 6) Living Environment deprivation, and 7) Crime. Figure 2, used by permission from Fleming (2012), shows income deprivation data in the older Easington population, by village.

**Figure 4. Income deprivation affecting older people (percent), by area, aged 60 and over; Easington and County Durham based on the IMD 2010 Income Deprivation Affecting Older People Index (IDAOPi)**



Fleming (2012)

According to the Department of Communities and Local Government (2011) the Income Deprivation Affecting Older People Index identifies the percentage adults aged 60 or over experiencing income deprivation and is expressed as the proportion of adults aged 60 or over living on Income Support, Income-Based Jobseeker’s Allowance or Pension Credit (Guarantee). Concerning the overall level of deprivation, *East Durham 2012 Area Action Partnership: (AAP) report* further reveals the high level of deprivation in the Easington area compared to other areas of County Durham and England. The Profile states that: “A larger proportion of the population in the AAP live in the top 10 percent and top 30 percent most deprived areas, overall, when compared with the county and England. A higher percentage of the population in the AAP live in the top 10 percent and top 30 percent most deprived areas across all of the domains except the housing and living environment domains” (p 10). While not specifically referring to older people, Table 1 shows Easington data compared to County Durham ID statistics and indicates that measures of deprivation for low income, poor health and low education levels are significantly higher in Easington than County Durham as a whole.

**Table 1 – Percentage of the Easington population living in deprived areas, by domain.**

ID 2010 Domain (In percentages)	Top 10 percent Easington	Top 30 percent Easington	Top 10percent County Durham	Top 30percent County Durham
Overall	29.0	73.9	11.4	45.4
Income	13.0	59.4	9.0	42.3
Employment	61.2	89.2	30.8	64.7
Health	62.1	92.1	27.5	70.7
Education	32.6	72.3	15.3	46.7
Housing	0.0	4.6	1.8	8.2
Crime	6.3	37.1	4.1	21.6
Environment	0.0	0.0	0.0	0.7
Child Index	11.4	54.3	4.8	34.6
Older Person Index	1.6	47.2	5.5	39.9

**Source: Durham County Council, East Durham 2012 Area Action Partnership: 2012 Statistical Profile**

Palmer (2010) states: “The retirement age group (65+) has now begun its sustained increase up to the year 2037 and by 2026 and 2031 this cohort will be 47.9 percent and 64.3 percent larger respectively than it was in 2008. Within the retirement age group, the 85+ age cohort mirrors the trend of the overall group, but at 114.9 percent will see a much larger percentage increase by 2026. While not directly related to older people, Macdonald and Taylor-Gooby (2010) note the following about Easington health statistics:

Easington scores poorly on many measures of health inequalities: Easington has been shown to be one of the worst areas for smoking in the country (Durham PCT 2009). It has one of the highest percentages of people with mental health problems in England. Furthermore, it has the highest number of people registered as having a disability or long-term health problem combine with high death rates from heart disease and strokes. Deaths from circulatory disease, cancer and respiratory disease are higher than the national average, as are rates for smoking, obesity and teenage pregnancies. Easington also vied with Hull for the title of “obesity capital” of the country (p. 9).

## **Conclusion**

While statistics are instructive when describing the objective state of a particular geographic area, they do not tell the entire story. As shall be shown in Chapters 6-8, Easington’s “deprived” status belies the undercurrent of social cohesion which still characterizes the area to some extent. Analysis of ageing in an area such as Easington firstly requires an understanding of environmental factors which influence individuals’ “lived experience”. Environmental gerontology concepts, such as person-environment fit, place attachment and ageing in place will be discussed in Chapter 3. Chapter 4 considers concepts of poverty and deprivation in later life and includes a discussion of the life course theory and its relevance to ageing in a socio-economically deprived area such as Easington.

## **Chapter 3. Ageing, Environment and Community Studies: Consideration of the Literature and Theory**

### *3.1 Aims and Scope of Review*

By definition, social gerontologists confront several questions. Why do some people age “better” than others? What internal and external factors contribute to ageing well? How does an older person engage with close social networks as well as the wider society? Such questions are of vital importance in attempting to understand both personal and societal views on ageing in the 21<sup>st</sup> century. One does not just arrive at old age; we all bring with us an accumulation of life experiences. Arguably, many older people throughout the world share certain similar experiences of life. For example, spending time with family and friends, volunteering in one’s community and participating in social activities may be considered to be some of the essential elements of a full and pleasurable life. In addition, the place where one resides has a significant influence not only on overall life satisfaction but the ability to participate in the daily routines and structure of life. Perceptions of identity throughout the ageing process and the nature of one’s “role”, is at the heart of much gerontological research. The complexity of such an analysis requires a logical approach to the literature. Therefore, in order to fully contextualise the present study, which aims to shed light on the lived experience of older people in Easington, this literature review is presented in two chapters (chapters 3 and 4). The reason for this structure is to provide the reader with more detail on the factors which influence the life course and later life.

Thus, this chapter is divided into four parts. Part I begins by examining literature on quality of life. Next Part II moves on to discuss environmental gerontology, specifically studies on person-environment fit. Part III examines place attachment and identity and ageing in place concepts. Part IV reviews literature on community studies and their relevance to the Easington research. Chapter 4 emphasises the macro social structure around the life course theoretical framework and the related cumulative disadvantage theory. Literature on issues such as poverty, deprivation (e.g. effect of living in a socioeconomically deprived area as an older person) and social exclusion will also be examined. While several subjects within both literature review chapters could justify



their own thesis, due to space constraints only the major and most salient points of each topic will be highlighted.

### ***3.2 Part I: Quality of Life: The Essence of Living***

For all intents and purposes, it is argued that a great deal of social gerontological studies are concerned with discovering either older peoples' current quality of life or the ways in which life can be improved through various health or social interventions. The essence of studying the "lived experience" of older people is, in reality, to discover which factors influence quality of life. While this thesis does not evaluate quality of life per se, e.g. using objective measures, it is instructive to acknowledge that there is a vast amount of literature on this topic. Defining quality of life can be a difficult proposition for it is a subjective perception of what constitutes quality. There are several terms in the literature which have been used to define quality of life. Hagberg, et al. (2002) make the point that in addition to quality of life, terms such as satisfaction with life and well-being are often used to mean more or less the same thing. This variety of definitions can be problematic when comparing study results purportedly measuring the same variable. Hyde et al. (2003) contend that historically, health was used as a proxy for measuring quality of later life. Since people are living longer, Hyde et al. (2003) argue that using ill health as a proxy for quality of life is no longer satisfactory. They go on to say that: "There is growing recognition that QoL [quality of life] amongst older people is a complex and a multifaceted phenomenon that requires greater understanding" (p. 187). Gabriel and Bowling (2004) make clear that evaluating an individual's quality of life can be seen through the prism of personal characteristics as well as the macro-social structure and its core values. Their research involving 999 older people showed that the most important measures which influenced quality of life were social relationships, home / neighbourhood and psychological well-being.

Bond and Corner (2004) describe the evolution of quality of life research in the social gerontology field. They highlight two traditions which have guided the way in such concepts have been "conceptualised and measured" (p. 2): 1) social indicators research and 2) quality of life measures as they relate to health and social policy research. The first tradition bases quality of life on social measures of well-being rather than solely

economic indicators and the second views quality of life through morbidity rather than mortality, i.e. quality of existence versus quantity of years. Most instructive for this thesis is research by Victor, et al. (2005) which shows that quality of life is hugely influenced by the social relationships developed over the life course. She also argues that the social environment holds a key to the experience of quality of life for older people:

It is then widely accepted that the social environment is a key influence upon the experience of later life and that, at the oldest ages, the social context and the physical environment exert a more potent influence upon the experience of old age than intrinsic genetic or biological factors. The absence of social relationships, dissatisfaction with the extent or quality of such relationships, or low levels of social engagement and social participation, are likely to have a detrimental influence upon the quality of life of older people... (p. 358).

There are many factors which influence quality of life in old age. The remainder of this chapter will discuss the ways in which an individual's environment, be it physical, social or cultural affects their quality of life, or lived experience.

### ***3.3 Part II: Environmental Gerontology: The influence of environment in later life***

“We gradually come to wear our environment like a glove, as with increasing familiarity, it almost literally becomes a part of our person” (Rowles, 2000, p. 525). Rowles's statement is pertinent and a good beginning concept to consider when attempting to understand the nature of older peoples' lives and the environmental context in which they reside. Peace et al. (2007) confirm this point, stating that “the types of environment in which people live their lives form the context for continuing or maintaining activity, social interaction and developing personal identity” (p. 209).

Defining who we are, our self-identity, is central to how we perceive the experiences which make up the life course. Perceptions of identity at any age (especially in later life), considering the accumulation of life experiences, are crucial in helping us understand how we relate and interact with both our personal and wider environments. In their research on evidence on environment and identity in later life, Kellaher et al. (2004) suggest that individuals' perception of their environment is very personal: “...individuals judge which features of environment are significant at any given moment, mapping their needs and aspirations onto what is available and attainable in their physical and social environments” (p.78). This approach is supported by authors

(such as Rowles, 1978, 1983, 2000; Rubinstein, 1989) who clearly emphasise the complexity of an individual's subjective perception of the meaning of their environment. Rubinstein (1989) underscores this point: "Each individual may be seen as having a unique system of personal meaning, based on distinctive needs, goals, histories, experiences, and on each person's perceptions of cultural, or shared meanings. In this regard, a fundamental human procedure for creating meaning is interpretation, which can be defined as the act of identifying or understanding an event in the context of personal frameworks for meaning, sometimes thematically organized" (p. S45). Therefore, at the heart of this review is a discussion of both the theoretical literature on the way in which older people perceive their micro environment, but more importantly the meaning given to the context in which a person lives (place attachment).

### **3.3.1 Environmental Gerontology: A Theoretical Framework**

It is the study of *both* the objective (i.e., the physical and material environment) as well as the subjective meaning in later life which gives the field of social gerontology greater theoretical flexibility, compared to other areas of study in the social sciences. Arguably, this is because social gerontological studies are able to utilise numerous theoretical models to explain the nature of ageing. This is certainly the case in the study of older peoples' "environments". Environmental gerontology is a body of research where certain authors have begun to develop theoretical perspectives. The work has evolved from ecology, urban sociology and environmental psychology. While some have commented that it is under-theorised, environmental gerontological theory and study findings have been applied to a wide variety of settings and disciplines, such as the development of housing design and home modifications, understanding the nature of "place" (and the attendant effects of that place on the older individual), as well as policy recommendations concerning the creation of age-friendly cities (Wahl and Weisman, 2003). Kendig (2003) maintains that the study of environmental gerontology was borne out of the theoretical traditions of the Chicago School of urban sociology in the 1920s, as well as the field of environmental psychology from the 1960s onwards. The gerontologist, M. Powell Lawton and his colleagues promoted the idea that the manner in which people relate to their environment has a profound effect on the quality of their later life (Peace, Holland and Kellaher, 2005). Wahl and Weisman (2003) note that "environmental gerontology has, for the past 40 years, addressed the *description, explanation and modification* of the relations between the elderly person and his or her

environment” (p. 616). According to Peace et al. (2007), while the study of environmental gerontology has focused mainly on the objective physical, material and spatial aspects of ageing, many recent studies rightly emphasised the importance of links between the physical, social, psychological and cultural environments.

The early emphasis within environmental gerontology on the micro environment (which focused on the physical/material situation of older people) has increasingly given way to the recognition that the complexity of such environments must include an analysis of the macro / societal influences on an individual’s ageing process. Peace, Holland and Kellaher (2011) recognise this and have broadened the understanding of environmental gerontology, emphasising that one’s environment has a profound effect on the ageing process and overall mental and physical well-being: “As people get older, the significance and the importance of situating the self appropriately have implications for self-esteem, health and well-being. The interaction between environmental context and personal identity is reflected in a wide range of social, psychological and physical issues” (p. 734).

In a relatively early work, Lawton (1983) suggested five categories which need to be considered when distinguishing between the objective environment and subjective perceptions older people may have of their life situation:

1. The physical environment – natural or man-made (objective environment);
2. The personal environment – the group of individuals who make a contribution to the social life of the older person;
3. The small group environment – comprising at least 2 people which whom the older person interacts with, face to face;
4. The supranatural environment – refers to the dominant characteristics of the majority of individuals in the older person’s close physical proximity (e.g. age, socioeconomic status, race, etc.);
5. The social environment – the major social, institutional and cultural force to which the individual is exposed (subjective environment) (p. 352).

Lawton’s categories offer a starting point for considering the concepts of “environment”. Research in the field of environmental gerontology over the past ten years has shown that it is not only the built environment which has a profound effect on older people, but the way in which people perceive their life course within the “spaces” of their existence (Kendig, 2003; Wahl and Weisman, 2003). While the authors

mentioned above acknowledge the impact of the micro-environment, such as the square footage of a residential location, they make clear that within environmental gerontological research, there should be a strong emphasis on the interdependencies between the various types of environments, whether physical, cultural, social or psychological. Peace et al. (2011) support this idea and acknowledge that environmental gerontology is “a multidisciplinary field that has generated interdisciplinary research” (p. 734). In their influential paper, Wahl and Weisman (2003) agree with this notion, but caution that it is the diversity of theoretical approaches within environmental gerontology which challenges researchers to address a range of analytical methods based on the type of place and social context. Kendig (2003) supports Wahl and Weisman’s assessment, but also believes that an increasing number of studies which examine place “within and across anthropological, psychological, and sociological theory – arguably reflect underlying strength rather than fragmentation of the environmental field. Having loose boundaries to environmental aspects of aging can facilitate the building of conceptual bridges across disciplines” (p. 612). The study of the micro environment of older people leads naturally into enquiry concerning the macro, structural issues which influence ageing, such as the socio-economic and political contexts. These issues shall be explored in the next chapter. Environmental gerontology, while open to interpretation depending on an author’s theoretical orientation, has furthered our understanding of the “whole” ageing person over the life course. We now turn to a discussion of a key feature of environmental gerontology – the person-environment fit or congruence approach.

### **3.3.2 The Development of the Environmental Press/Person-Environment Fit Approach**

It is widely acknowledged in gerontological research literature, that there is no single theoretical model which adequately describes the manner in which older people interact with their environment (Peace et al.2011; Wahl and Weisman, 2003; Wahl et al. 2007). The mid-20<sup>th</sup> century saw the development of several theoretical paradigms which aimed to analyse the role of environment in later life, most prominently the concept of person-environment fit or congruence. Contemporary person-environment fit models were developed most famously by the early work of Lawton and Nahemow (1973) who, according to Cvitkovich and Wister (2001), based their work on Lewin (1951). Lewin suggested that an individual interacts with a ‘life space,’ which includes not only the

person and the physical space of the environment, but also the ‘psychological space’ in which the person-environment interaction takes place (Cvitkovich and Wister, 2001). It was Lawton’s work which laid the foundation for future environmental gerontology research. According to Byrnes et al.(2006), “Lawton studied the environment as a means to support or hinder an individual’s physical process of aging” (p. 52). The early version of his proposed environmental docility hypothesis suggested that the more “competent” the individual, the less affected they are by adverse environmental circumstances.

Environmental press theory (sometimes referred to as the press competence model) seeks to explain the way in which people “fit” into their environment and explains how the environment influences the physical and mental well-being of older people. Byrnes et al.(2006) suggest that the theory of environmental press is a theory of adaptation in that older people will learn to adapt to constraints located in their environment or, alternatively, the environment will be adapted to suit the individual’s needs. Simply put, if the individual’s physical needs are not met by the environment which they inhabit, that same environment may “press” on the individual, making his or her life stressful. On the contrary, if an individual’s needs are met, the theory posits that there is an acceptable person-environment fit. Wahl et al. (2007) suggest that the benefit of the press competence model is that it describes different levels of competence such as physical health decline (sensory loss or cognitive decline), as well as environmental factors including housing standards, neighbourhood condition or even transport accessibility. Smith (2009) argues that personal competence can also involve characteristics related to the individual, e.g. financial status, social networks or internal traits such as personality. If older people exhibit a lower level of competence, they become more susceptible to negative environmental press which may lead to decreased physical and mental wellbeing. This is true in both micro and macro environments. If, for example, through declining health, an older person can no longer navigate the internal home environment or “keep up” with the demands of domestic work, they may feel a sense of environmental press on a micro level.

Smith (2009) cites several authors who argue that environmental press on a macro level “is related to such things as the physical demands of the area, aesthetic appearance, amenities and fear of crime...Lawton and Nahemow (1973) also include socio-

environmental relationships in this definition, such as an individual's relationship with family, friends and neighbours, and membership of cultural or social groups..." (p.12). Peace et al. (2007) note that the press competence model has received criticism for "promoting a one sided image of older people as 'pawns' of their environmental circumstance" (p. 212). Peace et al. (2011) warn against environmental determinism, although she and her co-authors also cite Lawton's later work (1983) which introduced the ideas of proactivity and environmental richness to deal with this criticism and enabled "press" to be viewed as stimuli (Peace et al. 2011). Peace et al. (2011) also note that Lawton and Nahemow's work suggests that the way in which an older person copes with change "could relate to personal competence and the adaption of either behaviour or the environment or both" (p. 737). However, Wahl et al. (2007) seem to more strongly support the press competence model, stating that the model "has become a major driver in the practical world of designing and optimising environments for older people" (p. 104) and that the model continues to provide a good explanation of the person-environment fit as people age. A review of the literature has revealed that the majority of gerontologists appear to support various versions of the press-competence model of the way in which older people adapt to their environment. As change is inevitable in the ageing process, the way in which people do or do not "fit" into their environment is a result of a lifetime of accumulated behaviour, including ways of coping and adapting to change.

A distinction may be drawn between those researchers who emphasise the role of the objective environment (i.e. adaptations made within the physical environment) and those who place a greater degree of importance on the subjective perceptions or meanings older people may have of their environment. Byrnes et al. (2006) suggest that much of early environmental gerontological research examined the objective environment, by testing the hypothesis of environmental press to discover the person-environment fit. They note that many of these studies analysed housing design, including interior elements such as handlebars in bathrooms, wide doorways and steps leading to housing units. The emphasis appeared to be on how to adapt the environment or "fix" the problem of poor physical environment design. Rowles, Oswald and Hunter (2004) agree that many studies of person environment relationship "characteristically focus on external, easily monitored dimensions, such as the availability of resources and barriers to mobility. But such research, emphasising environmental accessibility,

usability, and the reduction of risk through the creation of physically enabling environments, sometimes neglects equally important internal, psychologically-based ties between person and place that enhance quality of life” (p. 171) and also ignores the wider environmental context such as neighbourhood change or decay, e.g. deterioration, gentrification, etc.

More recent scholarship (Peace et al. 2011, Byrnes et al. 2006, Peace et al. 2007, Golant, 2003, Wahl and Weisman, 2003, Kendig, 2003) has called for an integrated approach to environmental gerontological research where consideration is given to both the physical environment and social/psychological factors and their effect on coping and adapting in later life. To varying degrees these authors have criticized the person-environment fit model for dominating the environmental gerontology field and have called for a more balanced approach that would involve further analysis of the socio-cultural context and meaning of the “lived” environment and experience of older people. This is largely due to the fact that the person-environment fit model has been unchallenged by other theoretical developments. Oswald et al. (2006, p. 7) attempt to integrate these research strands by promoting two processes of person-environment exchange in later life. They label these processes “belonging” and “agency”. “Belonging” refers to the subjective meaning an individual places on their understanding and interpretation of “place”, resulting from a life-long bonding with a particular place. “Agency” refers to the way in which people behave in relation to their objective physical environment (e.g. retrofitting of a housing unit due to functional decline). Oswald considers both processes to be important in a holistic version of person-environment fit. Peace et al. (2011) similarly argue for the integration of the complexities of macro and micro environments in person-environment-fit. A central thesis of her and her colleagues’ research centres on the idea that the social, physical and psychological dimensions of an older person’s environment encompass both macro and micro elements:

The social dimensions often centre on the micro- and macro-environments of the community and entail personal, family and housing histories. Psychological factors may be seen in displays of attachment, loss and emotions concerning safety, which can impact on morale. The physical or material setting itself may continue to be supportive or become challenging. At the micro level of the individual’s dwelling, this can lead to re-investment, adaptation or reconfiguration. At the macro level of the community, it may lead an individual to main increase or reduce levels of engagement (p. 734).



The authors call the interface between these complex factors, “option recognition” – an environmental “tipping point” which demands action, either through adaptation or compensation (p. 735). Option recognition attempts to discover the extent to which the environment affects decision making in later life as individual experience is a “layered” one and is seen through the lens of personal biography as well as time and space. Smith (2009) suggests that option recognition “allows individuals to preserve identity and well-being by adapting the environment or considering more appropriate housing options. This might be particularly pertinent in an environmental context, which might represent multiple challenges and risks” (p.22), where people are constrained by context and don’t necessarily have options or choice to change.

An important area of study concerns environmental press as it relates to the social and physical neighbourhood environment. Brynes et al. (2006) suggest that while the environmental press model has been used to describe the characteristics of individuals who reside in a certain neighbourhood, there has yet to be systematic research on how environmental press affects older people in socio-economically deprived areas. The notable exception, according to Peace et al. (2007) is that of Scharf et al. (2002). Peace and colleagues note that Scharf and Bartlam’s, (2006a) research on disadvantage in rural areas has shown that increased environmental press is associated with population change, economic decline and rising levels of crime which may enhance vulnerability among older people who still may feel a strong sense of belonging to their area. Research by Scharf et al. (2001, 2002, 2005) on socio-economic disadvantage makes similar points concerning older people who reside in urban areas. Kendig (2003) also makes clear that there is very little research which has studied the macro environments of neighbourhoods, and even regions, although they are central to the structural experience of ageing. He states that:

Although people’s environments begin with their residences, they extend to neighbourhoods, cities, regions, and other spatial units that are changing in their populations and built forms...Broad socio-economic-political change, which has been analyzed so productively through the powerful age-period-cohort paradigm in sociology, can set a larger context for understanding changes in the fit between older populations and their macro environments (p. 613).

The Easington study has attempted to add to the body of literature concerning how older people interpret their macro environment. As previously stated, the way in which an older person adapts to changing environments has a great deal to do with the meaning

they attach to their surroundings, be it their house, social network, community group or location of residence. We now turn to the topic of place attachment in later life which further explores the idea of meaning as it relates to place. Over the past decade, the field of environmental gerontology has evolved and scholars now clearly recognise the importance of considering the linkages between an individual's micro and macro environment. These links will be discussed at length in Chapter 9.

### ***3.4 Part III: Place Attachment – Definition and Concepts***

The next section of this chapter explores the research literature concerning place attachment and identity. These topics flow naturally from the previous discussion of the way in which a person may interpret their environmental “fit”. Furthermore, place attachment literature underpins the upcoming exploration of the “lived experience” of older people in Easington. The concept of “belonging” to a certain “place” has been studied by numerous gerontologists (Savage, 2008; Phillipson, 2007; Oswald, et al., 2006) and there is an increasing body of environmental gerontology literature which seeks to explore the links between the “place” an individual inhabits and his or her experience of later life. Literature on place attachment attempts to illuminate the meaning of home and how people interpret their identity through their micro and macro environments. Naturally, the way in which we view our “place”, be it our physical dwelling, our neighbourhood or regional area is influenced by a multitude of factors. Smith (2009) uses the phrase, “place in ageing” (differing from ageing in place which shall be discussed in the next section) to describe the process of *understanding* what place means during the ageing process.

Chaudhury and Rowles (2005) have written extensively about the meaning of home and the relationship between home and other places: “The meaning of home is not only a product of individual, social, and cultural experiences, but also of the experience of macro environments and “places” beyond home. Socio-cultural issues and their implications for the experiences of diverse places that are “not home” affect the meaning of home” (p. 14). Taylor (2001) comments that place should be defined in broad terms, stating: “Place encompasses vernacular architecture, landscape, social relationships with other people, and memories” (p. 9). In the same vein, Gustafson

(2001) comments that “meaningful places may be of different spatial scale – residence, local community or neighbourhood, city, region, country, etc....but the meanings and relative importance of places may differ” (p. 8).

“...Old people do not perceive meaning in aging itself, so much as they perceive meaning in being themselves in old age” (Kaufman (1986) as cited in Taylor (2001, p. 10). Defining who we are, our self-identity is central to how we perceive the experiences which make up the life course. Perceptions of identity at any age (especially in later life), considering the accumulation of life experiences, is crucial in order to understand how people relate and interact with their personal and wider environments. Therefore, at the heart of this review is a discussion of both the theoretical literature on the way in which older people perceive their micro and macro environments and, more importantly, the meaning they assign to the context in which they live. This perspective is reflected in the writing of selected authors (Rowles, 1978, Rowles, 1983, Rowles, 2000 and Rubinstein, 1989) who emphasise the complexity of an individual’s subjective perception of the meaning of their environment. Rubinstein (1989) makes this point: “Each individual may be seen as having a unique system of personal meaning, based on distinctive needs, goals, histories, experiences, and on each person's perceptions of cultural, or shared meanings. In this regard, a fundamental human procedure for creating meaning is interpretation, which can be defined as the act of identifying or understanding an event in the context of personal frameworks for meaning, sometimes thematically organized”(p. S45). Literature discussed in this review uses two terms to describe place, place attachment and place identity. These terms will be used interchangeably throughout the remainder of the chapter depending on the authors under discussion.

The study of place and an individual’s attachment to it has intrigued social gerontologists for many years. Central to the study of the role of place in later life is the exploration of why it is that older people remain in their homes and neighbourhoods during their lives and the discovery of the meaning they attach to their “place and space”. Defining what is meant by place can sometimes be challenging as researchers from a variety of disciplines, including sociology, psychology, geography and anthropology, have all attempted to interpret this important concept. The definition of

place is multifaceted and has many elements, depending on an individual's interpretation. Smith (2009) references Cutchin (2005) in defining place as: "a concept that broadly refers to the ensemble of social, cultural, historic, political, economic and physical features that make up the meaningful context of human life" (p. 10). Burns, et al. (2012) point out that it is important to make the distinction between place and space: "Space refers to the physical location, whereas place can be thought of as a process and includes an integration of physical, social, emotional and symbolic aspects, interacting in different degrees" (p. 3).

This chapter has already reviewed aspects of the "objective environment", which is more easily measured and evaluated by the "person-environment" fit approach. Peace et al. (2007) suggest that place attachment moves beyond this objective environment and "is concerned with...the gamut of processes operating when ageing individuals form affective, cognitive and behavioural ties to their physical surroundings" (p. 215). They argue that place attachment is also reflected in the strength of bonding to an area and the meaning associated with place such as the home environment or specific landscapes.

Oswald et al. (2006) argue that place is more than the physical aspects of a home: "...place attachment is not only related to attitudinal components of the home, but to aspects of physical, social and personal bonding on behavioural, cognitive and emotional levels..." (p. 8). The way a person experiences a locale comprises both affective and cognitive features to provide a sense of connectedness or attachment to place. Similarly, Wiles et al. (2011) state that "attachment and connection operate[d] at social and community levels; they were not just linked to a particular house" (p. 8). Chaudury and Rowles (2005) describe what they believe is a "...primary human aspiration – to see and find a place where we may feel at one with our self and our world. On this level [coming] home refers to the acknowledging the multiple levels of salience of the concept in our lives; from its role in facilitating physical and emotional well-being, through its contribution to maintaining the continuity of our self-awareness and comfort that stems from having sought and found our place in the cosmos" (p. 9).

Rowles et al. (2004) comment on the difficulty of defining place as it has “overlapping and complexly interwoven dimensions” (p. 171). Wiles et al. (2011) also confirm the difficulty in defining place attachment as it is not only about attachment to a particular home, but rather the process of the older person continually renegotiating their role and identity in the light of changing social, political, cultural and personal circumstances. An individual’s perception of his or her place attachment owes in part to their unique personal identity developed over the life course. Rowles (2000) suggests that in the temporal context, even habitual behaviours must be understood through the lens of an older person’s life history and the intersection with the social history of the community. Taylor (2001) states that: “...time, place, and situations shape the identities people hold of themselves and others” (p. 5). Moreover, Taylor alludes to the fact that a sense of place is a sustaining element for individuals over the life course and “forms the basis for exploring concepts associated with landscape, a sense of community, and self-identity” (p. 7). Taylor (2001), citing Yi-Fu Tuan (1992), argues that “place” is a key concept in geography just as “culture” is the key to anthropology. Cuba and Hummon (1993), citing Steele (1981) posit that the development of place identity arises out of a dialectic involving two concepts: 1) the qualities *of* places and 2) the characteristics and relation of people *to* places. Peace et al. (2007) have written about the complexity of place attachment and note that it is much more than reminiscence and nostalgia. They highlight the fact that authors have varied in their interpretations of place attachment. Among the related concepts advanced by authors are: 1) conceptualising space into place (forming bonds with a particular setting or location), 2) the interaction of the social and physical environment which leads to a meaningful self-identity and 3) analysing the complexity of the person and environment relationship from a life course perspective. On a deeper level, Peace et al. (2007) wondered if the psychological meaning of place attachment and meaning of home fulfils a special purpose. Citing Marcus (1992), Peace et al. (2007) suggest that there are three main functions of place attachment: 1) gaining cognitive and behaviour *control* over space, 2) manipulating, moulding or decorating space in order to create of physical comfort and well-being, and 3) perceived *continuity* with significant places and people of the past (p. 232). There is tremendous value in increasing our knowledge about what connects people to places and the way in which those connections influence the ageing process and later life in particular. The following is a brief overview of various theoretical models of place attachment in later life.

### **3.4.1 Place Attachment in Theoretical Models**

Depending on one's view, it may be either a positive or negative fact that there is not a single definition of place attachment or identity. If a single theoretical understanding of such concepts existed, it would be fairly straightforward to apply a uniform framework or model to all studies, depending of course on the research question. Wahl and Weisman (2003) argue that *pluralism* is vital in environmental gerontological research, as it relates to theory and empirical research. Kendig (2003) suggests that it is the increasing emphasis on "place" in research studies which reflects environmental gerontology's strength.

The interpretation of place attachment or identity in later life has been studied by a number of authors. Arguably, the seminal work in the area of interpretation of place is Graham Rowles's (1978, 1983) idea of "insideness". As a geographer, Rowles's research focuses on the question of how lives evolve through time and over space. His theoretical perspective on the geographical experience of older people is based on in-depth biographical material from his work with five older people. His early work (1978) was ground-breaking in that it offered new ways of interpreting older peoples' lived experience. This is seen through four interdependent aspects of experience: 1) activity, 2) orientation, 3) feeling, and 4) fantasy. Peace et al. (2005, p. 192) have distilled these aspects of experience as follows:

1. Activity relates to movement around the physical setting;
2. Orientation relates to an understanding of cognition of space (from a personal to a community "space");
3. Feelings refer "to the meaning attached to space which helps define place, emotional attachments from 'dread' to 'elation'";
4. Geographical fantasy refers to geographical experience interpreted through places of recollection and imagination.

Rowles (1983) emphasises the element of grand fiction explaining its importance in the interpretation of biography: "The creative 'grand fiction' of a past and of the places that provided the stage upon which each participant's biography was played out was

sustained through three basic mechanisms” (p. 306). These mechanisms include: 1) preservation of certain artefacts, (e.g. photographs), 2) on-going participation in a familiar place, and 3) agreement on the “grand fiction” of what a place had been like, e.g. “social consensus”

Rowles’s (1978, 1983) development of the concept of “insideness” is particularly relevant to this thesis as it furthers an understanding of the geographical experiences of older people. Although Rowles’s research was situated in a rural context, his findings are applicable to a variety of geographical settings, such as semi-rural, ex-industrial areas like Easington. While direct application of these concepts shall be discussed in Chapters 5-7, it is instructive to highlight them here. Insideness has three components; physical, social and autobiographical. Physical insideness refers to the intimate awareness of the detailed physical environment, as basic as where to sit down for a rest when out walking or even which streets to traverse as a short cut to a destination. If an older person suffers from physiological deficits, physical insideness may assist in finding one’s way. Social insideness is related to the idea of being “known” in a community and knowing others. Many older people have experienced a lifetime of “residence in shared space” and use this knowledge of their social fabric to create and maintain a sense of community. Autobiographical insideness encompasses a person’s current locale along with the remembrance of past places. Peace et al. (2005) comment that autobiographical insideness is “based on time and space, a historical legacy of life lived within a particular environment and of importance to developing ‘communities of concern’ for older people...” (p. 194).

For Rowles, attachment to place involves an historical dimension which gives a person’s environment particular depth of meaning. Smith (2009), however, points out that changing conditions in other types of environments, such as urban settings, may “challenge concepts of insideness” (p. 20); “This could present a different way to assess the strength of, or disruptions to, place attachment” (p. 20). Smith (p.21) also cites Scheidt and Norris-Baker (1990) whose research found that older people residing in towns characterised by economic and population decline, “either sought to re-establish the community of the past or create a new identity.” In a similar vein, Gustafson (2001, p. 9) offers what he calls a “three-pole triangular” thematic analytic model for

assessing the meaning of place in later life. This model, with its components of self, self-others and environment, may be summarised as follows.

*Self* – Place has highly personal meaning which relates to important life stages including childhood, adolescence, parenthood, later life. These stages are expressed in terms of both experience and memories. Within the self “pole” the themes of emotion (related to a sense of security of home) and activity (associating place with work and leisure) are incorporated to help people describe who they are in relation to place. This “pole” shares similar elements with Rowles’s aforementioned concept of “grand fiction” regarding the interpretation on an individual’s biography.

*Self-others* – This component explores the relationship between self and other and the sense of community created by a social network. Here, Gustafson mirrors Rowles’s autobiographical insideness by suggesting the importance of being recognised by others and being known to others in the neighbourhood.

*Environment* – Refers to not only the physical built environment, but also a symbolic or historical environment. This “pole” includes the meaning of certain types of places, e.g. an industrial town or farming area. Within the environment “pole” Gustafson also refers to a sub-pole of “Environment-self” which suggests even deeper meaning of a person’s knowledge of his or her place. This knowledge can be geographical or historical and can refer to the value placed on the familiarity of the lived-in or built environment. Again, to some extent, this “pole” mirrors Rowles’s physical insideness concept.

Gustafson acknowledges that while this model is helpful for capturing the meaning of place, it does not “pretend that everybody attributes the same meanings to place. Neither does it pretend that all (kinds of) places have the same meanings. The model is an attempt to capture the variation in the spontaneously attributed meanings of place” (p. 11). Smith (2009) agrees with Gustafson regarding the risk of a “one size fits all” approach to interpreting the meaning of place: “It is also important to make the point that place can undermine identity. Feelings of displacement have the ability to evoke painful memories of past places and people...This might be particularly relevant in the consideration of older people living in deprived inner-city areas, where the experience of significant, unpleasant social and physical changes to their neighbourhood might be a



feature of individuals' biographies" (p. 21). Cuba and Hummon (1993) have written about the importance of the social experience of place and its relationship to place meaning and identification. They cite four ways in which "place identification is mediated by the characteristics people bring to places and the structure of their experience with places." The following points are both micro and macro in nature :

- Local area attachments – Attachment to place involves the integration into particular areas, e.g. social involvement with friends, organisations and even local shopping consistently show strong and significant sources of sentimental ties to places.
- Long-term residence – The length of residence has a profound effect on social networks, and also "provides a temporal context for imbuing place with personal meanings." Here Cuba and Hummon agree with Rowles, stating that "[long term residence] may be important in linking significant life events to place, providing the individual with a sense of "autobiographical insideness".
- Place influenced by life cycle stage – The meaning of home becomes more important as we age. Cuba and Hummon (p. 115) also states that some research (Goudy 1982; Sampson 1988) suggests that attachment to the local neighbourhood or community increases slightly with age.
- Place as mediated by an individual's place in society – This concept refers to the possibility that the meaning of place is influenced by gender. Cuba and Hummon states that "gender...does not appear to influence the strength of attachment to locale, but it may well affect its locus and meaning." Cuba also suggest that women are more likely than men to use the home as a "spatial reference point" as well as a "developed conception of the local neighbourhood" (pp. 114-115).

In his study on the home environment and how it is endowed with meaning in later life, Rubinstein (1989) suggests that three psychosocial processes combine, relating the individual to the socio-cultural order, the life course and the body. The result of Rubinstein's extensive ethnographic work shows that there are myriad ways in which individuals "construct and interpret environmental phenomena" (p. S46). Taylor (2001), citing Relph (1976), also suggests similar processes which contribute to the ways in which individuals experience place. Taylor states that the concept of place

incorporates all the following: “1) location, 2) characteristics which distinguish it from other places, 3) spatial constructs and interactions, 4) particularities within the context of a larger framework, 5) continual revision in response to change, and finally, 6) characterizations of place in the belief systems of individuals” (p. 8). We do not live in isolation within the micro environment of the domestic (physical and material) sphere.

In summary, consideration of these theories leads to the conclusion that while life is carried out in the micro daily routine of our immediate surroundings, there are many macro environmental factors which influence our perception of life, the meaning of the “lived experience” and our ability to “live well”. Social forces (e.g. neighbours, friends and family who reside nearby, the level of crime), the physical environment (e.g. proximity and availability of amenities, state of the housing stock and other buildings) and the cultural, historical and economic background of a locale (e.g. shared norms which relate to social customs, historical events and celebration and a shared history) have all shaped older residents’ perceptions of a particular locale, no matter the size. As shall be shown in the results chapters (Chapters 6-8), this thesis supports the idea that place attachment for older people is understood at both micro and a macro level. This thesis supports the view of Peace et al. (2006) which encourages a multifaceted, holistic understanding of place attachment, or as they refer to it, place identity: “Place identity is a component of self-identity for older people living in Western developed countries that may be experienced differently in terms of micro and macro environments” (p. 203). It may be argued that the interpretation and meaning of place in later life, as discussed in the previous section, naturally leads to consideration of the concept of ageing in place – an idea which has become ever popular in both research and government policy. We now turn to a discussion of ageing in place and ultimately the way in which it relates to an individual’s role in their own life and the life of the community.

### ***3.5 Ageing in Place: To “Stay Put” or Not – Factors Which Influence Ageing in Place***

To move or to “stay put”? That is the question which many older people contemplate as the decades roll along and life circumstances change. Gillear et al. (2007) maintain that within the over 50s population in England, older age groups are less likely to move

home than younger age cohorts. Gilleard and colleagues (p. 591) also cite other studies which suggest that, on balance, there is an increase in feelings of attachment to one's community as one gets older (Fried 1982; Sampson 1988; Cuba and Hummon 1993; Coulthard, Walker and Morgan 2002). The results of Gilleard's research lead us to think about the factors which influence the idea of ageing in place. Conversely, while Vasunilashorn et al. (2012) note in a comprehensive review of the ageing in place literature from 1980-2010 that "ageing in place is not a one-size concept" (p. 3).

Research by Phillipson (2007) on the concept "elective belonging" suggests that in the modern era of globalisation, older people are increasingly able to choose where to live, thereby allowing for the development of a new sense of identity. Phillipson (2007) suggests that: "Increasingly, it is argued, people are making conscious choices about where they want to live and the lifestyles they wish to live by – the place of residence emerging as a central feature of this development" (p. 328). Phillipson recognises this push-pull sentiment among many retirees – one where individuals desire the "feeling of home", but also seek and are willing to develop new place identities at an advanced age. Citing King, Warnes and Williams (2000), Phillipson (2007) states: "Many of the insights drawn from studies of retirement migration – that of multiple place attachments, transnational mobility, identification with particular lifestyles or social groups – incorporate the theme of retirees choosing locations which are congruent with both their past and their expectations about life in the future (p. 329). This section considers ageing in place literature for the simple reason that it provides a conceptual foundation for understanding why older people do or do not decide to reside in their own home as they get older. Given the previous discussion of place attachment and the meaning of home imbibed by older people, ageing in place concepts help frame another set of factors which influence wellbeing in later life. "Person" and "place" are interrelated and it is difficult to study one topic without a great deal of overlap of the other.

Citing Cuchtin's (2003) concept of place integration, Johansson, Josephsson and Lilja (2009) make the point that person and place are an integrated whole. Gilleard et al. (2007) also suggest that both age and ageing in place are "powerfully associated with attachment to place" (p. 597). We shall briefly discuss the scope of ageing in place

literature and various theoretical approaches borne out by recent studies. This will be done by exploring the topics of “ageing in place and the individual” and “ageing in place and the community”. First we review the conceptual idea of ageing in place.

### **3.5.1 Background – What is Ageing in Place?**

A growing body of gerontological research over the past decade has explored the pros and cons of ageing in place. Given the enormous cost of caring for older people in institutional settings, it is thought that living at home may save government coffers money in the long run (Sixsmith and Sixsmith, 2008; Yen et al. 2011, Byrnes et al.2006). Wiles et al. (2011) suggest that for many elected officials and people involved in health and social policy, ageing in place is not only good for older people, it is essential government policy: “Having people remain in their homes and communities for as long as possible also avoids the costly option of institutional care and is therefore favoured by policy makers, health providers, and by many older people themselves” (p. 1). Likewise, Vasunilashorn et al. (2012) also note that due to the increasing number of older people with chronic health conditions who need support to remain in their own homes, policy makers view ageing in place as “an attainable and worthwhile goal” (p. 2).

It is prudent to examine what ageing in place actually means. Ageing in place differs from ideas of place attachment in that it refers to the practical implications which surround the decision to live in a particular place. Ageing in place is defined in a variety of ways. In its most basic form, ageing in place refers to the desire of an older person to remain in their home environment for as long as possible during the ageing process (Yen et al. 2012; Johansson et al. 2009; Fausset et al. 2011). Wiles et al. (2011), citing various authors, suggest that ageing in place involves living in the community “with some level of independence, rather than in residential care” (p. 25). Byrnes et al. (2006) suggest that at the heart of the ageing in place agenda is a two-pronged belief or assumption that “older people want to grow into old age and potentially end of life in a place that is familiar and comfortable to them... [and] older people will remain independent if allowed to age in place...” (p. 55). Although some may question the accuracy of the above statement concerning the certainty of older people remaining independent if they are allowed to age in place, Boldy et al. (2011)

and Sixsmith and Sixsmith (2008) also argue that there is a great deal of evidence that most older people do indeed want to live in their own home, avoiding institutional care.

Ageing in place involves a complex understanding of the mechanisms which lead older people to desire to remain in their own homes. What is clear is that for the majority of older people, ageing in place involve a continuous evaluation of the “suitability of the place they are living in” (Boldy et al. 2011, p. 136). Fausset et al. (2011) confirm this and state that: “Aging in place is a process that involves both the person and the environment; it is a continuous dynamic interaction as both the person and environment change” (p. 126). Indeed the research of Wiles et al. (2011) confirms that older people are connected to their personal home environment as well as their neighbourhood: “...ageing in place is a broad concept of meaning beyond mere functional issues in later life, showing how connections are relevant to the neighbourhood, the community, various sociocultural contexts, church and social groups as well as operating on a personal internal level of meaning” (p. 9). The idea of ageing in place is holistic and focuses not only on the daily routine of living in one’s home, but also on the quality of the older person’s life. The promotion of physical and mental well-being is aided by ageing in place. Sixsmith and Sixsmith (2008) agree that ageing in place “fundamentally and positively contributes to an increase in well-being, independence, social participation and healthy ageing” (pp. 220-221). Boldy et al. (2010) believe that ageing in place fosters a sense of self-fulfilment and helps to enable people to live the life they desire either in their familiar home environment or elsewhere.

### **3.5.2 Ageing in Place and the Individual**

Although we have already covered the concept of person-environment fit, here we briefly consider that concept in light of how it meshes with the idea of ageing in place. An older person may have a strong desire to stay in his or her own home in later life, but this may present challenges in the form of increasing health problems and physical decline. In the person-environment framework discussed earlier, an older person’s “competence” would be compromised, thereby affecting their ability to remain independent. Ageing in place focuses on how an older person can remain in their home despite health challenges which may lead to moving to institutional care. Older people can adapt the physical environment from a practical point of view (moving furniture,

installing rails, etc.), but they may also need to psychologically adjust their mind-set in order to adapt to a different way of living.

As mentioned previously, the concept of “option recognition” (highlighted by Peace et al. 2011) helps older people consider ways in which they can address changes in their physical surroundings. ‘Option recognition’ allows older people to deal with the trajectory of change based on their own individual pathway, with their varying experiences of “health, activity and social involvement” (p. 753). From a micro environmental perspective, Peace et al. (2011) argue that there are two important concepts which are central to understanding the intersection between person and place. Firstly, many older people experience a relational change between space and place. This change is due most often to the “long-term or temporary frailties which become more personally defined and situated” (p. 751). Secondly, the authors suggests that it is experiences over the life course which force older people to face issues of continuity as well as changes in time and space. Smith’s (2009) review of the literature also reveals that ageing in place makes the process of ageing easier. She highlights two reasons for this claim: 1) Rowle’s (1978) concept of “physical insideness” (mentioned earlier in this section) or the “intimate physical knowledge” of an individual’s environment may facilitate an older person’s ability to manage functional decline thereby promoting a sense of control and mental wellbeing; 2) Echoing the research of Peace et al. (2011), Smith states that “coping with ‘spatial restriction’ is found to be made easier if one remains in place. Having intimate physical knowledge of the environment enables people to gain control of both their physical and/or psychological ‘deficits’, and by doing this influence their environmental use, perception, attachment and psychological well-being” (p. 29).

The idea of some semblance of control over one’s experience of ageing in place is in line with Rowles (1978) idea of geographical fantasy, wherein the older person can utilise a form of fantasy or imagination in order to preserve the sense of self even while experiencing physical or mental difficulty or hardship. Rowles comments that “Fantasy makes men free” (p. 181). He goes on to say that: “In fantasy, the individual is liberated. Physiological decline, ill health, economic constraints, social alienation, or

environmental barriers provide no limitation. The only boundaries are those imposed by autobiography, personality, and the limits of the imagination” (p.181).

Ageing in place, however, may instead be viewed by an older person as a negative experience. Issues such as deterioration of the physical surroundings and the lack of ability to maintain a home can have a profound effect on an older person’s wellbeing, reminding them of their increasing frailty. In addition, social isolation, loneliness and loss of close friends (through death or relocation) all affect the experience of ageing in place. Older people may also be reluctant to accept assistance perhaps due to embarrassment of their condition or because by accepting help they are admitting a negative change in their level of independence (Sixsmith and Sixsmith, 2008). Peace et al. (2011) make clear that it is important to “move beyond experiences of the dwelling to recognise the impact of the wider environment and how the press of micro- and macro-environments may combine, leading to a ‘tipping point’” (p. 748). The Easington study adopts the approach used by Rowles and Cuba and Hummon

### **3.5.3 Ageing in Place and the Community**

Someone once said, “no man is an island” referring to the fact that human beings are meant to be “in community” with other people to maximise physical and mental well-being. Peace et al. (2006), as cited in Peace et al. (2007, p. 225), have referred to the powerful impact of the wider community on older peoples’ lives, suggesting that “research concerning ageing in place has to address a ‘layered environment’”. Over a lifetime, older people have built up a repertoire of ways in which they negotiate their external environment. Ageing in place in the community involves utilising resources such as *knowledge* of the physical geography and local societal structure, combined with the ability to *practically care* for oneself in that community. Community is defined here in the broadest terms and may refer to one’s neighbourhood (including amenities, physical environment and social networks). Referring back to Rowles’s (1978) concept of “physical insideness”, an older person’s familiarity with his or her “micro neighbourhood”, i.e. the intimate knowledge of his or her immediate neighbours, streets, and amenities, fosters a “sense of place” or place attachment which can subsequently lead to feelings of security about their present and even their future in that neighbourhood.

While it may seem counterintuitive, it has been shown that even older people who reside in deprived neighbourhoods may experience positive “ageing in place”, despite what may appear to be crumbling infrastructure, rising crime rates and decaying social fabric (Smith, 2009). An older person facing functional decline and increasing physical limitations learns to traverse the external environment through a series of familiar routines which helps them adapt their own ageing process to suit their daily needs. It is this sense of control which aids well-being, thereby leading to a greater likelihood of a positive experience of ageing in place. Although she acknowledges the importance of optimal physical functioning, Smith (2009) suggests that it is this area knowledge which is crucial to a feeling of environmental control in later life. The important extract below encapsulates the issue of area knowledge. Commenting on her research, Smith states that:

It is generally recognised in the environmental gerontology literature that area knowledge is advantageous (Rowles, 1978, Lawton, 1985). Knowing whom one can count on and where to satisfy needs has important implications for environmental control and mastery...Area knowledge is an important feature in the management of daily life and/or enables at least some level of environmental coping despite significant distress...Physical attachment and intimate area knowledge enables interaction and participation in the neighbourhood that might not be achieved in their absence. Area knowledge in the majority of the interviews, case studies and photographs appeared to be predominantly governed by a need to ease psychological fear, specifically, fear of crime, rather than a feature of functional health decline. This can be illustrated by creating a path or routine that maximises experience of place and minimises psychological distress (p. 142).

Peace et al.(2006) suggest that many older people interpret area knowledge in terms of their own immediate neighbourhood and view “area knowledge” in relation to the connections to communities within those neighbourhoods. In the research of Peace et al.’s (2006), neighbourhood refers to “the area extending from their own front door to the point at which they were ‘out of the neighbourhood’ – this usually meant that they no longer felt that they specifically belonged or were known, or were deeply familiar with the environment” (p.70). Research appears to show that in order to positively age in place, older people need to feel a sense of belonging to a particular place (Wiles et al.2011). What might this belonging mean in practice as it relates to ageing in place? Wiles et al. (2011) suggest that in part, ageing in place involves social connections which are relevant to the neighbourhood, the community, socio-cultural contexts ,



church and other cultural groups, all of which operate on a personal level of meaning to influence an individual's ageing in place in their community.

Both Smith (2009) and Rowles (1980) make clear that social "insideness" and related concepts have an important influence on aging in place. Smith comments that people form social affinity with their area through social integration and participation, and thus create emotive attachment to place. Yen et al. (2012) also confirm the importance of social connections within neighbourhoods. She states that: "The neighbourhood does provide opportunities for social interactions and at times social connections..." (p.8). However, Yen also found that in many neighbourhoods in which older people reside and where social connections are limited, there is still a positive feeling of ageing in place. In addition to the strong evidence on the importance of social connections for ageing in place, these findings bring up an important point concerning external factors which aide a positive experience of ageing in place. Opportunities for participation in activities, and general social interaction, are all aided by what Peace et al., (2006) refer to as "the capacity to engage with 'the other'...represented by neighbourhood in a way that the immediate domicile cannot demonstrate or provide" (p.75).

This engagement is especially crucial as it relates to the issue of transport (Sixsmith and Sixsmith, 2008; Peace et al. 2007; Smith, 2009). The ability to travel outside an individual's geographic area either via car or bus represents a certain amount of control regarding engagement with the external environment. Decreased mobility may compromise this ability thereby reducing an older person's chances for social interaction and staying connected with the wider community. If driving is not possible, older people may be forced to use public transport or taxis. This may be problematic due to lack of bus provision in a community or being on a limited income to pay for taxis. Citing Holland et al. (2005), Peace et al. (2006, p. 71) comment that "...sense of control over movement is crucial to self-esteem." Other "community related" issues which affect older peoples' ability to positively age in place include fear of crime (either perceived or real), (Sixsmith and Sixsmith 2008; Smith, 2009; Peace, et al. 2006); lack of facilities which are "older person friendly" such as public places to sit, access to toilets and uneven pavements, (making it difficult to consider going out) (Sixsmith and Sixsmith, 2008); and crumbling infrastructure (Smith, 2009). Finally, Smith (2009)

suggests six factors which are important when considering place and ageing; 1) physical attachment and area knowledge, 2) social attachment, 3) historical attachment, 4) religiosity and spirituality, 5) the life history and 6) public spaces (p. 140).

Ultimately, as Peace, et al. (2006) suggest, “location matters” (p. 74), stating that: “...in terms of interaction at the practical and everyday level, it is the neighbourhood that continues to be the more significant point of attachment for many older people. The neighbourhood provides a context for and a bridge between the intimacy of a dwelling place and the wider public domains of township/state/country – with any or all of which people might identify at some level, but not really know the intimate way that they know their neighbourhood” (p. 74). While time and space do not allow a lengthy exploration of person-environment fit and environmental press literature, these concepts form the basis of a holistic framework which uses ideas of place attachment and ageing in place to fully describe the why, where and how of an individual’s environment in later life. The micro environment of the domestic sphere as well as macro, community based arena, both contribute to viewing the person in place” as it is impossible for one to be separated from the other.

The extensive research on these topics over the past several decades has revealed the complexity of theoretical models. This research has confirmed that the meaning of environment and place in later life is at the heart of the interpretation of the “lived experience” of older people. Analysing the intersection of an individual’s micro environment with the wider socio-cultural environment provides a more comprehensive picture of life in a particular locale. It is not enough to analyse the objective or subjective environment in isolation. As will be shown in Chapter 5, the subjective and to some extent, the objective environment study participants will be examined. A way forward in environmental gerontological research is to consider each model or framework described above, many of which offer relevant points to consider when evaluating the influence of the environment on the experience of ageing. Furthermore, it can be argued that implicit within environmental gerontology is the understanding of factors which influence quality of life for an older person. Issues which have previously been discussed, including the physical and social environment, have bearing on the way in which older people perceive their quality of life.

We now consider community studies literature in order to further contextualise the present study of the lived experience of older people in Easington. It is clear that there are also links between the underlying focus of many community studies and the environmental gerontological concepts of place attachment and ageing in place.

### ***3.6 Part IV: Community Studies Literature***

Where we live determines a great deal about how we age. Not only do we form ideas of place attachment at an early stage in life, opinions of community living are heavily influenced by the individuals and organisations with which we come into contact. The concept of “community” also brings to mind thoughts of “belonging” to a particular place or locale. Living in an area for a long period of time may lead to feelings of nostalgia for old ways of life. Although some older people may view the “old days” through rose tinted glasses, any study of ageing in the community needs to take into account this important concept: “Policy makers of all kinds seek to remake ‘community’ and anyone who conducts research on local belonging cannot help but be struck by the power of popular nostalgia for old ways of neighbourhood life” (Savage 2008, p. 151). Savage also suggests there is great variability in the ways in which older people perceive their sense of community. While some individuals express a sense of “loss and marginalisation”, others perceive their community in a completely different manner. Referring to his research on community “belonging”, Savage comments:

Far from lamenting the loss of community, these people waxed lyrical about where they lived. They were clear that they did not live in a faceless global locale, but in a particular place with its own identity, meaning and ‘aura’, with which it was immensely important for them to claim affiliation. The actual lived history of the place in which they lived was less important as the way in which they could define the place as belonging to them through their conscious choice to move and settle in it (p. 152).

Community studies offer a rich and textured form of enquiry into the lives of older people. An individual’s lived experience within a particular community has been an attractive area of study for researchers over the past five decades (Townsend, 1957; Rosser and Harris, 1965; Young and Willmott, 1957; Phillipson et al. 1998). It is the nature of human curiosity which seeks explanations for social phenomena that has given

rise to the increase in community studies literature. Morgan (2005) believes that the fairly recent shift in community studies literature reflects the recognition of the “more dynamic and complex understanding of the term ‘community’... (p. 642). Referring to the community studies method, Moore (2008) comments: “An advantage of working with a real population grounded in a locality is that the lived experiences of that population are a constant challenge to the conceptual tools one brings to the work” (p. 121).

The holistic view of the community study as a rich data producing method is supported by Crow (2000) who states that: “...in order to answer the enduring question of how people’s lives are affected by where they live, it is necessary to chart the trajectories by which they have come to be there. These trajectories necessarily have a temporal as well as a spatial dimension, and a strength of community studies is their capacity to illuminate the nature of people’s movements across time and space, sometimes in ways quite unexpected” (p. 178). If the goal of qualitative research in ageing is to discover the factors which influence quality of life, then community studies literature appears to have much to offer. We now turn to a brief discussion of community studies and will subsequently consider: 1) the history and rationale of community studies, and 2) an overview of selected empirical findings, and finally, 3) how gerontologists have developed this literature over time.

### **3.6.1 History and Rationale of Community Studies**

According to Savage (2008), the study of communities has a long history, stretching back to the eighteenth century (in the romantic literary tradition) in the form of a social theory from Toennies onwards (p. 151). Forrest and Kearns (2001) also claim that the study of community and its related elements have been high on the sociological agenda for some time: “Concern with neighbourhood, community and social cohesion have a long history in social policy and sociology. Indeed, it was these issues which were at the core of sociology in the first half of the 20<sup>th</sup> century” (p. 2125). Charles and Davies (2005) suggest that debate on the effects of social change on community in both modern and traditional societies also has a lengthy pedigree, arguing that today’s debate is rooted in both the anxiety about the decline of social capital as well as the idea of individualisation and choice, both of which may lead to greater equality within relationships. What then does the term ‘community studies’ really mean? Moore

(2008) suggests that community studies allow the researcher to consider the full context and background of study participants by taking into account their relationship with their surroundings:

In the community study, respondents are expressing attitudes towards not hypothetical but actual agencies (the local council, the police) or to identifiable people (neighbours or kin, the family down the road or the gang in the next street). In the community, the sociologist may then engage with the 'others' in order to discover how well-founded attitudes and opinions are, and how informants view one another. Unlike the survey, the subjects of a community study are known to one another and the community study therefore permits the analysis of reciprocal relationships. Furthermore, the community study has thereby a significant longitudinal element in which the interactions of the idea and material interest of real actors may be observed over time (p. 121).

Despite Moore's positive assertions concerning the benefits of community studies, Crow (2000) points to the criticism levelled at the approach: "The shortcomings of community studies...include "the neglect of conceptual issues like power and conflict, reliance on an essentially descriptive methodology, and failure by researchers to transcend the specificities of place and time" (p. 173). During the 1970s and 1980s, community studies seemed to fall out of favour within the sociological field. Crow (2000) points to several reasons for the decline of this type of research, the first of which was that traditional community studies did not use a standard method of enquiry thus study findings were not easily comparable. Additionally, there appeared to be pressure within the sociological field to quantify community study findings, which is difficult given the broad and amorphous nature of key community studies topics. Ritzer's (1998) thesis on the "McDonaldisation" of community studies, (as cited by Crow (2000) states that: "...the McDonalization of sociology offers a plausible explanation of the demise of the old tradition of community studies in which calculability, predictability, efficiency and technological innovation were rarely defining characteristics of individual pieces of research" (p. 175).

Over the past two decades there has been a resurgence of interest in studying the community life of older people. Citing Allen and Perkins (1995), Phillipson et al. (2008) makes the case for the increase of research in this area: "...the case for such a locus has never been stronger, first because it is still likely to provide many insights into how older people manage and organise their daily lives; second because of structural

changes affecting the family, notably those associated with smaller family size, lower fertility and increasing rates of divorce and remarriage; third, because the nature of family ties has become an abiding concern of social policy, most especially in the field of community care” (p. 260). Charles and Davies (2005) claim that the revival of community studies as a theoretical concept brought about a new focus on the meaning of living in a community: “...its revival concentrated on the way communities, national as well as local, were imagined (Anderson, 1983) and on local communities as symbolic constructions (Cohen, 1985). This perspective emphasised the meanings people attach to communities and their use to include and exclude and to define boundaries rather than their rootedness in local social relations” (p. 675).

### **3.6.2 Community Studies – Empirical findings**

We next turn to a brief examination of literature which has at its heart, the study of older peoples’ community life. Phillipson et al. (1998) note that the history of contemporary community studies of family life, (many of which have a strong emphasis on older peoples’ lives) originated during the post-war period of the 1940s and 1950s. This was a time of “national debates about issues relating to an ageing population” (p. 260). Ageing was seen as a burden and older peoples’ care was viewed as a drain on the finances of the emerging welfare state, both in terms of pensions and health. Phillipson et al. (2000, p. 260), referring to the Royal Commission Report on Population (1948), note that questions were raised among policy makers at that time concerning who would provide the majority of help to older people in ill health. However, as a result of a major socio-cultural, political and economic shift which took place in post-war Britain, older people’s care, which was historically provided by family and kin was under the microscope of change. It is important to consider that the social relationships individuals develop over their life course (with family and kin, friends as well as community groups) are fundamental to the organisation of a well functioning society.

Three landmark community studies emerged in the post-war era which were designed to explore, among other things, the extent to which family and kin were prepared to care for their older relatives. Townsend (1957) used detailed qualitative interviews to determine the extent of the “problem” of old age as it appeared in popular policy documents. Townsend’s study chiefly analysed older people’s lived experience in

Bethnal Green, a working class area of East London. His research was primarily concerned with the extent of older peoples' kinship ties and whether individuals lead an isolated life. Townsend summarised the reason for his study:

Concern about the growing number of old people springs partly from an assumption that many of them are isolated from their families and from the community. It is widely believed that the ties of kinship are much less enduring than they once were and as a consequence the immediate family of parents and unmarried children, of which the individual is a member for only part of his lifetime, has replaced the larger family of three or four generations, of which the individual is a member for the whole of his life, as the fundamental unit of society. Such an assumption is of very great importance and demands careful examination (p. 13).

He found that despite the devastation experienced by Bethnal Green during the war, the community was remarkably adept at providing support to older community members. Study results indicated that both regular contact and geographical proximity to family and kin were the key reasons for continued support of older people in the community. Neighbours and friends help to provide a "sense of community", especially among those who had lived in Bethnal Green the longest period of time. In addition, he also found that despite older people's need for familial interaction, study participants stressed a desire for continued independence and a "separate existence" (Phillipson, 1998, p. 261). Willmott and Young (1960) examined family and community life in both the middle class suburb of Woodford and the working class area of Bethnal Green. Although conducted only a few years after Townsend's study, Willmott and Young were interested in exploring the degree to which "geographical and social mobility may have loosened ties between the generations" (Phillipson et al., 1998, p. 262). Their research confirmed Townsend's findings of kinship support and the expectation that adult children should respond to requests for assistance when required.

Rosser and Harris (1965) developed a "detailed empirical exploration of the nature and significance of extended family ties in Swansea's distinctive settlements" (Charles and Davies, 2005, p. 675). Their study centred on older people in an urban environment and their research showed a loosening of historic bonds which had previously connected older people to their extended family members. Charles and Davies suggest two main reasons for the importance of Rosser and Harris's study: "Firstly, that the study is about

place and about the centrality of social networks in uniting the inhabitants of a geographically defined space and, second, that kinship networks are central to social networks and hence, the maintenance of community” (p. 677). Rosser and Harris were concerned about the impact of social change on aspects of community life. They found that the social fabric of Swansea had moved from being homogenous in terms of jobs, cultural practices and moral values to one of heterogeneity which altered the social fabric of the community. This subtle change experienced over nearly a decade by families in Townsend’s as well as in Rosser and Harris’s studies, show the shifting nature of relationships between children and older family members. According to Charles and Davies (2005), loosening of family ties as well as the loss of community structure played a large part in such societal change. Additionally, geographic mobility was mentioned as a factor which influenced a loosening of social networks (p. 679).

In an influential study, Phillipson et al. (1998) re-examined the extent of changes to the social and family networks of older people in three urban areas of England: Bethnal Green, Wolverhampton and Woodford mentioned above. In his original study of Wolverhampton, Sheldon (1948) found that a solid third of people studied were able to help an ill older neighbour. The Phillipson et al. “re-study” of the above areas found that kinship ties remain a central feature of older peoples’ lives in all three areas: “Most people still retain contact with children and the bonds of kinship remain of major consequence in urban areas – just as they do in rural areas” (p. 284). There were however, significant changes in the intervening years from the original studies. First, Phillipson et al. (1998) notes that older peoples’ social networks have become more fragmented due to social and economic pressures. One of the biggest changes was the extent of telephone ownership amongst older people. The vast increase in telephone ownership allowed older people to maintain contact with family and friends who lived at a considerable distance. Although Phillipson confirmed that the extended family continues to be a vital social link for older people, study findings show that personal social networks have increased in their importance: “Now children and friends are the centre of attention: the extended family group is rather less significant in terms of its impact on daily life. Of course, relationships extend beyond those with children (many of whom may be pensioners themselves); siblings, grandchildren, great grandchildren are also present within the family system. But our research brings out the point that in



terms of close and supportive relations, most people draw upon a small and rather selective group” (p. 286).

It is vital to mention the community studies which have examined the personal and social life of pitmen and their families. Over the past three decades, community life in coal mining areas has been studied by authors such as Dennis, Henriques, and Slaughter, 1978; Taylor and Townsend, 1976; Bulmer, 1978, Williamson, 1982 and Carr, 2001. These studies were influential in painting a picture of social and cultural change as well as the challenges which confronted residents faced with the prospect of large scale industrial change. Spence and Stephenson (2009) have commented on the nature of mining-related community studies:

Most accounts of British mining life emphasize the strength and importance of community as a self-contained way of life deriving from particular industrial conditions. These accounts demonstrate relationships of work, family, and neighborhood radiating from the mine, sustaining a local culture in which “community” turns back toward the mine in a symbiotic, sustaining duality (p. 69-70)...The strong relationship between community and place has attracted a particular “community studies” type of approach to understanding mining life and relationships.

The history of community studies literature, including those which examine life in the coal fields, reveals the ebb and flow of academic “value” placed on such a method of enquiry. Crow (2000) argues that it is the flexibility of the community studies approach which makes it attractive to sociology and some gerontology researchers, but not all gerontologists subscribe to a multidisciplinary approach. He cites four reasons : 1) “...the sense of place which community studies have the potential to convey...; 2) ...community studies have the capacity to locate individuals in relation to the wider social structure...; 3) ...community studies may be regarded as bucking the trend toward ever narrower specialization; 4)...the distinctiveness of community studies as a means of conveying sociological ideas may be valued precisely because this mode of delivery cannot readily be reduced to McDonaldized ‘munching’” (p. 175).

Allan and Phillipson (2008) suggest that the emphasis of recent community studies literature has begun to shift from the historical focus on researching “deprived” areas

(such as former industrial locations) where people may feel “constrained” within their community (p. 169) to an increasing focus on exploring the concept of elective belonging to a residential setting which may not be a part of an older person’s place biography. Allan and Phillipson state that: “Increasingly, it is argued, people are making conscious choices about where they want to live and the lifestyles they wish to live by – place of residence emerging as a central feature of this development” (p. 169). Community studies literature offers a glimpse of the complexity of community life for older people. Phillips et al. (2000) point out that friendship is increasingly playing a larger role in the social support received in the community: “The nature of support exchange within the network has shown that the family is still a key operator in the network but for some, friends are of increasing importance” (p. 851). Phillips et al. (2000) also suggests that this finding is significant as funding for community-based care for older people will increasingly be limited, thus influencing the level of care provided by formal services. While community studies research has evolved in its emphases, at its heart is still the quest to discover the nature of the “lived experience” of individuals who reside in a particular area. Discovering this lived experience necessitates reviewing the background of a region or locale. The next section seeks to explore Easington’s historical, social and economic scene which will aid the reader’s understanding of the research setting.

The physical, social, cultural and economic portrait of Easington reflects several aspects of life experienced by older people in previous community studies. Research by authors such as Dennis, Henriques, and Slaughter (1978), Taylor and Townsend (1976) and Bulmer (1978) consistently show that any analysis of life in a post industrial area must necessarily consider the totality of an area’s historical roots. As shall be shown in Chapter 7, family and kinship ties have had a profound influence on the way in which older people in Easington perceive their lives as well as how they interact with their neighbourhood and environment. The Easington study supports Crow’s (2000) assertions that community studies help to locate people within a given social structure while providing information about how people perceive their “sense of place”. Environmental gerontology and related concepts such as person environment fit, ageing in place and place attachment also link into community studies research and are relevant when analysing the lived experience of older Easington residents.

## **Conclusion**

This chapter has explored wide ranging and diverse topics, from macro environmental factors which influence ageing in place to more micro issues concerning one's "place in ageing" and the resultant issues of personal identity in later life. Environmental gerontology literature clearly shows the importance of the "person-environment fit" approach when researching the personal, physical and social environment in later life. Community studies literature has helped "set the scene" of the social, family and community structures which influence "ageing in place". As research questions in this study attempt to explore the "lived experience" as it relates to ageing in a socio-economically deprived area, it is therefore important to include both a macro and a micro focus which aides the process of viewing ageing through a holistic lens. In Chapter 4, we now turn to exploring concepts of poverty and deprivation in later life through the framework of the life course theory.

## **Chapter 4. Concepts of Poverty, Deprivation and the Life Course Theory**

It may be tempting to assume that in this modern era, older people in developed countries would rarely be at risk of experiencing socio-economic disadvantage in all its forms. Surely modern societies agree on a shared ethic of ensuring that later life is supported, respected, enjoyed and even celebrated. However, the social data tell a different story as, in Britain as elsewhere, many older citizens experience the debilitating weight of socio-economic disadvantage and an accompanying lowered quality of life. As discussed in Chapter 2, the reasons for this disadvantage are varied and begin with the material deprivation of a portion of the older population. The fact that some older people in Britain, who lack ample personal savings or robust pensions and who rely entirely on government assistance, find themselves at the margins of community life is not surprising. Financial hardship at any stage of the life continuum inherently places pressure on a person's ability to maintain an adequate quality of life. Financial well-being however, is only part of the story as the quality of life is measured by a multitude of variables whose effect is often felt long before a person reaches old age.

The focus on deprivation in later life has received more attention over the past ten years. Significant government funding has been funnelled to socio-economically deprived areas such as Easington, with the goal of alleviating some of the effects of poverty existing in pockets of the nation. Government sponsored programmes, including the Neighbourhood Renewal Fund, the Single Regeneration Budget, the New Opportunities Fund and the Coalfields Regeneration Trust, have all sought to reduce high rates of poverty in selected Easington-area communities. As discussed in Chapter 2, in some of these areas poverty has existed for decades and is due to myriad economic and social factors. This chapter is divided into two parts. The first section explores issues of poverty and deprivation. The second section discusses the theoretical underpinnings of the thesis, the life course theory and its relationship with disadvantage in later life.

#### ***4.1 Part I: Concepts of Poverty and Deprivation***

To be poor is a relative state defined by the context in which it occurs. A person is poor in relation to the conditions and the standards that apply in a certain society (Gunnarsson, 2002, p. 711). When considering the literature on socio-economic issues and how they affect the lives of older people, it is useful to consider the differences in definitions of poverty. The terms, which are used to describe poverty, are many and varied. Much of the early literature on ageing and poverty, for example Townsend (1981) and Walker (1980a) referred to people as being “in poverty”, rather than using the more global terms of experiencing deprivation or disadvantage. Modern authors in the field use several terms to describe poverty, including deprivation, socio-economic disadvantage, material disadvantage, and inequalities. Arguably, *poverty* is an inadequate word to describe the poor, their circumstances and living conditions. *Poverty* is limited as a descriptive term in as much as it refers to a specific lack of money or financial resources whereas *deprivation* is a more comprehensive term, encompassing those things that determine the quality of life, including food, clothing, shelter and safe drinking water, but also such "intangibles" as the opportunity to engage in meaningful employment and socialise with others. There is a solid evidence base showing the ways in which older people are affected by lack of income. The UK Office of National Statistics as well as the Department of Work and Pensions regularly publish statistical reports detailing the state of pension provision and the level of “pensioner poverty”. Thus, *poverty* is a relative term and it can be challenging to use a single set of measures to determine socio-economic status. Generally, however, poverty is defined as: “Those with less than 60 percent of median income are classified as poor. This ‘poverty line’ is the agreed international measure used throughout the European Union” (Seymour, 2009).

#### ***4.2 Measuring Poverty and Deprivation***

A commonly used measure of poverty in the older population is material disadvantage. According to Groffen et al. (2007, p.1), material factors can be conceptualised in different ways: “[F]rom restricted standards of living (the lack of two or more of 10 items or activities that are considered necessary by the majority of society), having financial problems (difficulty paying bills for food, rent or electricity), limited or lack of

health insurance, no car ownership and no household tenure to restricted household item ownership (from basic to luxury goods).” Groffen’s research was based in Holland thus there may slight differences in the 10 item scale if used in UK research (e.g. private health insurance is not as common in the UK as in Holland). Measuring socio-economic deprivation is difficult since there are numerous ways to define and characterise the nature of disadvantage and the description of poverty. The term poverty primarily refers to a lack of income and the attendant effects of being in such a condition. Poverty is a relative term as one can possess a low income but not be poor, for instance owing to asset ownership. The term “material disadvantage” is often used to define poverty or deprivation. Dominy and Kempson (2006, p.1), in a recent report on material deprivation of older people state that: “Much is known about the incomes of older people, but less is known about how well material deprivation measures reflect the experience of poverty for older people. Income analysis points towards older people being on lower incomes. In addition, past research using material deprivation indicators suggests that pensioners are less likely to report deprivation than younger people with the same income”. This fact is confirmed by the Institute of Fiscal Studies (IFS) (2011) report which points out older peoples’ reluctance in reporting deprivation: “ In particular, it was felt that older people were uncomfortable responding that they could not afford an item and instead reported that they did not want or did not need it, downwardly biasing the estimated rate of material deprivation” (p.58).

Analysis of the Poverty and Social Exclusion Survey (1999) has shown that rates of poverty (measured as low incomes) are high among people over state pension age at the same time that deprivation (as measured by indicators such as replacing any worn-out furniture, keeping the house warm enough, having two pairs of all weather shoes, etc.) tends to be low (Dominy and Kempson, 2006). However, the lack of reporting of deprivation in the older population may be a function of low expectations regarding economic well-being in retirement (the attitude of “doing without”) and possibly the “survivor effect” of making it to an advanced age having coped with a limited economic circumstance (see Scharf, et al., 2002, 2005, 2006).

A number of researchers have noted the importance of using a variety of measures to identify socio-economic disparities. In an EU-wide study involving 10 countries,

Knesebeck et al. (2007) argue that studies should include indicators such as assets or homeownership that reflect economic advantage or disadvantage over the life-course. Car ownership, while at times an ambiguous indicator, can be used to indicate wealth, social participation and autonomy. The literature on deprivation measures also includes locality specific measurement scales. Groffen, et al. (2007) used a 20 item instrument developed by the Social and Cultural Planning Office of the Netherlands to determine material deprivation. However, O'Reilly (2002) questioned whether standard indicators of deprivation accurately reflect the socio-economic position of older people. He referred to the Acheson report (1998), which acknowledges the lack of routinely collected reliable data on social class or other determinants of socio-economic status in people above the age of retirement. O'Reilly also commented that it can be difficult to classify a woman if she has not been in paid employment or has been classified under her husband's occupation and that, in the main, unemployment indicators may be irrelevant to this age group. While many people own their own home, the cost of heating and maintenance can be prohibitive, leading to possible fuel poverty and subsequent poor health. Chiu et al. (2005) remarked that while socio-economic status is universally viewed as a composite construct that is typically measured by income, education and occupation, there are "major differences in samples and measures, as well as divergent findings, leaving considerable room for debate about the nature of the relationship between socio-economic status and health in old age" (pg. 378). Although there are valid points from several studies concerning the measurement of poverty and deprivation in old age, this researcher agrees with O'Reilly's view that deprivation in later life should be analysed using a variety of measures rather than the standard income, education and occupation indicators.

#### ***4.3 How Does Socio-economic Deprivation Affect Older People?***

There are myriad ways to analyse the consequences of socio-economic deprivation for older people. Not all older people residing in an area designated as socio-economically disadvantaged would be considered "deprived" and thus one method of analysis might look less at individual factors (such as self-perceived health, education, occupation) and more at social factors including changing demographics and the consequences of industrial decline for neighbourhoods and the social environment. Conversely, a more "individualised" approach might consider how low socio-economic position affects

older people's quality of life. This view looks at inequalities, such as in the area of health, and suggests that a person's poverty (both relative and absolute) has a profound effect on mortality and morbidity, as well as social exclusion (discussed later in this chapter). The focus of the following section is to highlight issues concerning social exclusion, which all too often affects older people in a variety of settings, but especially those people who live in a socio-economically deprived area.

#### **4.3.1 Social Exclusion**

"Poverty and social exclusion are the greatest threats to the wellbeing and independence of older people" (Walker, 2005, p. 822). Reduced physical and mental wellbeing is at the conceptual heart of social exclusion in later life. Walker (2005) asserts that the focus in recent social gerontological literature increasingly reveals the emphasis on factors that contribute to social exclusion. Levitas (2006) points out that it is sometimes difficult to differentiate between poverty and social exclusion. Some authors make the distinction by defining poverty as primarily a lack of material resources needed to participate in society whereas Levitas (2006) note that organisations such as the Copenhagen World Summit for Social Development view poverty and social exclusion together. Gordon, et al. (2000), as cited in Scharf and Smith (2004, p. 164) have developed a measure of exclusion which addresses social participation to some degree. The participation component is "further subdivided into elements such as individual's non-participation in common social activities, social isolation, a perceived lack of support in times of need, lack of civic engagement, and an inability to get out and about.

Social exclusion has been closely linked to income and wealth inequalities in later life but it is generally accepted that the term refers to something wider and to a combination of adverse social situations (Ogg, 2005). Definitions of social exclusion include: "the inability to participate effectively in economic, social, political and cultural life, alienation and distance from the mainstream society" and the "dynamic process of being shut out...from any of the social, economic, political and cultural systems which determine the social integration of a person in society" (Ogg, 2005, p. 70, citing respectively: Duffy 1995, p.4 and Walker and Walker 1997, p.8). Citing Billette and Lavoie (2010), Burns, Lavoie and Rose (2011, p. 2) define social exclusion as a "process of non-acknowledgement and deprivation of rights, resources of certain segments of the population (in this case older adults) that takes the shape of power



dynamics between groups with divergent visions and interests.” The authors suggest that the processes of social exclusion mentioned above may lead to inequalities and possible isolation from society in seven dimensions: 1) symbolic exclusion, 2) identity exclusion, 3) socio-political exclusion, 4) institutional exclusion, 5) economic exclusion, 6) exclusion of significant social ties, 7) territorial exclusion. Hoff (2008, p. 6), citing Ogg (2005) makes the point that although some regions such as Scandinavia offer comprehensive welfare provision to minimise poverty and social exclusion, inequalities persist for older women and people who are separated or divorced/ Phillipson et al. (2004) echo this sentiment, stating that:

Transitions and major life events play a key role in generating social exclusion in later life. Widowhood, the adjustment to living alone and the loss of close family members, friends and neighbours feature strongly. Also important are such life events as the breakdown of family relationships, the onset of chronic ill health, withdrawal from the labour market, and the experience of crime. The research suggests the need for a new type of preventative social policy geared towards providing support to individuals at such points in their lives...the study presents compelling evidence of the impacts in old age of low social status and economic disadvantage throughout the life course (p. 4).

Phillipson’s focus on improving policies aimed at tackling social exclusion in later life is echoed in Hoff’s (2008) study of 25 EU countries ageing policies. The aim of the study was, in part, to determine the gaps in work on social inclusion and exclusion at a national level and to learn about current best practice from which countries could learn. Hoff’s research found that the mix of “hard” social policies on preventing social exclusion (focusing on pensions, employment, early retirement and long-term care) as well as the “soft” examples of best practice combine to promote social inclusion (p. 64).

Phillipson et al. (2004) also suggest that social exclusion encompasses five “exclusion domains”: material resources, social relations, civic activities, basic services, and neighbourhood/environment. Through the use of these exclusion domains, pensioner poverty can be broadly measured, both quantitatively and qualitatively. Ogg’s (2005) research on the social exclusion of older people in ten European countries found five indicators of social exclusion. Although mentioning that using self-rated measures of poverty to measure social exclusion is somewhat controversial, the study found that an older person on a low income was more likely to demonstrate a “significant correlation” (p. 78) between poverty and social exclusion. Ogg (pp.78-80) mentions several other

indicators of social exclusion including: 1) social isolation, 2) lack of a confidant, 3) level of social activities, 4) level of political engagement, 5) measures of well-being, and 6) self-rated health. Ogg remarks: “The finding confirms evidence from research on social inequalities in health that the socio-economic status of individuals is the strongest determinant of their health and quality of life” (p. 87).

#### **4.3.2 Applying Social Exclusion to Older People**

Scharf and Smith (2004) discuss at length both the strengths and weaknesses of operationalising the concept of social exclusion in research relating to older people. While they agree that the multidimensional nature of social exclusion may be beneficial in terms of measuring the extent of social exclusion, they also acknowledge “at least three difficulties arising from current exclusion debates in terms of the situation of older people” (p. 164). Firstly, the fact that labour market participation is often used as a measure of social exclusion is problematic as the majority of older people have retired from paid working life. In addition, Scharf and Smith (2004) suggest that the impact of retirement is often overlooked as a phase of possible social exclusion. The reality for many socially excluded older people is that it is a challenge to escape poverty and improve their financial situation without help from the state. Finally, measuring neighbourhood social exclusion is difficult due to the complexity of emotional place attachment many older people feel toward their neighbourhood environment. Older people may intensify their feelings and attachment to their neighbourhood in order to cope with a changing milieu, which presents a challenge to the researcher attempting to measure the level of social exclusion experienced by older people in a particular geographic area (Scharf and Smith, 2004). Levitas et al. (2007) developed the Bristol Social Exclusion Matrix which highlights three domains of social exclusion and ten sub-domains.

### The Bristol Social Exclusion Matrix (Levitas et al. (2007))

Resources:	Material/economic resources
	Access to public and private services
	Social resources
Participation:	Economic participation
	Social participation
	Culture, education and skills
	Political and civic participation
Quality of life:	Health and well-being
	Living environment
	Crime, harm and criminalisation

Scharf and his colleagues go beyond quantitative poverty statistics to reveal a picture of selected populations for whom quality of life is adversely affected by financial hardship over the life-course: “The stories that emerged from this study convey the true impact of low incomes on older people’s ability to participate in taken for granted activities, and the ways in which poverty diminishes the quality of many older people’s daily lives” (Scharf et al. 2006b, p. 49). The research of Scharf et al. (2002, 2005, 2006) on social exclusion expands on the concept that many older people living in deprived areas have low expectations concerning their standard of living:

While all groups and individuals commented on the importance of maintaining their independence in terms of the quality of their lives, not all regarded being able to afford to participate in common social activities – such as having family or friends around for meals or attending weddings as necessities of life. This points to the degree to which the experience of poverty has been internalised by many disadvantaged older people over the course of their lives (Scharf et al. 2006b, p.5).

Research on social exclusion in later life by Phillipson and Scharf (2004) has highlighted some issues concerning exclusion from community life.

*Age-related characteristics* – refers to the way in which older people are more likely to sustain certain types of losses related to health, income or reduced social interaction.

*Cumulative disadvantage* – refers to the fact that certain birth cohorts may become increasingly unequal over time, e.g. early life situations such as educational and work opportunities may have long-term consequences.

*Community Characteristics* – refers to the manner in which older people relate to their place of residence, to which they may have very strong attachments; older people may feel vulnerable and insecure in their own home, fearing crime and watching the neighbourhood decline in many ways.

*Age-based discrimination* – economic and social policies can contribute to different forms of social exclusion, including age discrimination in old age. (pp. 5-6)

### **4.3.3 Critique of Social Exclusion**

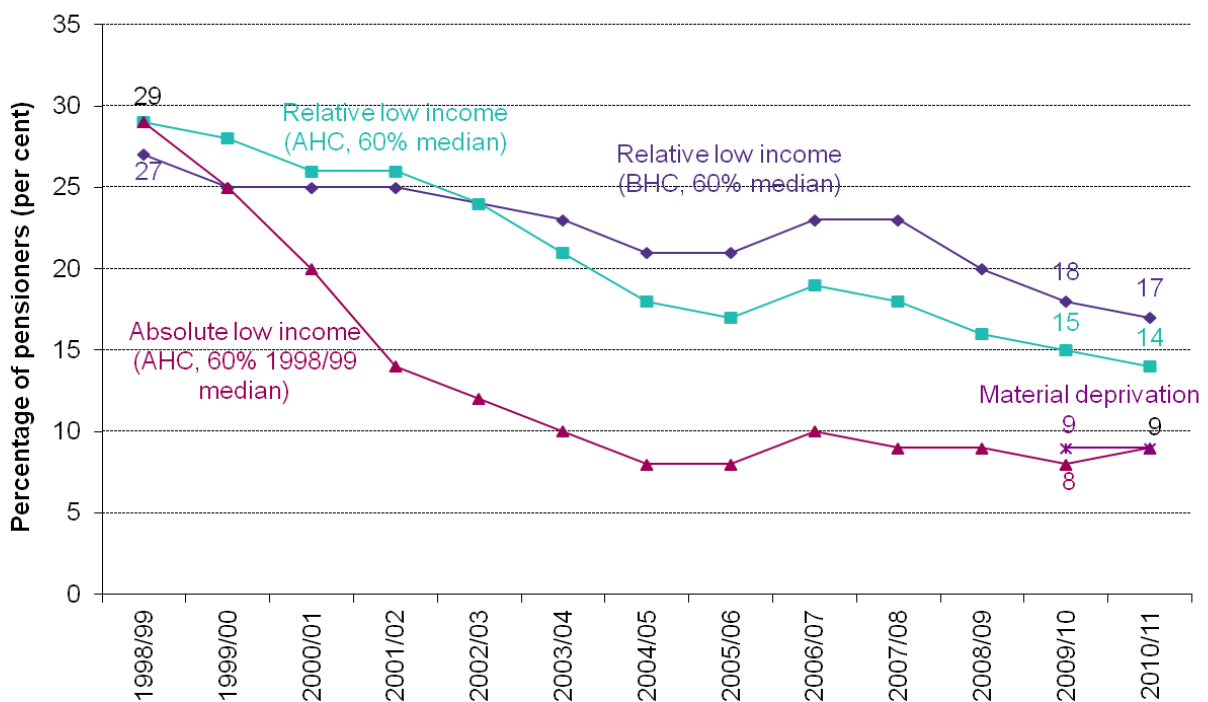
While an expanding body of literature highlights the advantages of social exclusion analysis in measuring overall pensioner disadvantage, social exclusion has not been without criticism. Hickey and du Toit (2007) note that many critiques focus on the problem of agency and the risk that older people may be seen as *helpless* victims suffering from perceived exclusion. They argue the term “exclusion” risks creating the impression that social “inclusion” is always good and that to be included is, categorically, the way in which life should be organised. There have also been suggestions that the term “social exclusion” was used to supplant the more politically unacceptable term “poverty” during United Kingdom and European Commission policy discussions in the 1980s and 1990s (Morgan et al. 2007, pp. 479, 482, citing Byrne, 2005 and Burchardt, 2000). Morgan et al. (2007) devote an entire study to dissecting the meaning (citing Levitas, 2006). While social exclusion as a research concept has received criticism its emergence represents a comprehensive approach to the measurement of poverty and a basic level of deprivation in the older population. Hickey and du Toit (2007) were moderately critical of social exclusion. They note that social exclusion implies that poverty should be understood as a “social phenomenon” and that there are complex underlying social causes for older people’s suffering of social exclusion, arguing that it is difficult to even determine what social exclusion feels like, whether subjective or objective. They conclude that often the indicators used to assess social exclusion fall wide of the mark: “...most indicator lists lack the very social dimension that is unique to social exclusion and distinguishes it from poverty.

#### 4.4 Statistical Picture of Older People's Poverty in the UK

According to a recent report from the Institute for Fiscal Studies (2011), based on the Households Below Average Income (HBAI) methodology, pensioner poverty has fallen over the past three years: “Based on 60 percent of the relevant median, the poverty rate fell by 0.4 percentage points measuring incomes ACI [After Housing Costs] from 16.0 percent to 15.6percent, and by 1.9 percentage points measuring incomes [Before Housing Costs], from 20.4 percent to 18.5percent. The latter change is statistically significantly different from zero” (p. 54).

According to the Department of Work and Pensions (DWPP) (2012), there was a general decrease in the percentage of pensioners in poverty between 1998/99 and 2010/11 (p. 191). The percentage of pensioners in relative low income, both Before (BHC) and After Housing Costs (AHC), was nearly at an historic low in 2010/11 and DWP reports that pensioners are less likely to be in relative low income than the population as a whole, After Housing Costs. Figure 3 shows the percentage of pensioners (percent) falling below various measures of low income.

**Figure 3 – Percentage of pensioners (percent) falling below various measures of low income (Households Below Average Income: An analysis of the income distribution 1998/99 – 2010/11), Source: Department for Work and Pensions, 2012.**



Similarly, the Institute for Fiscal Studies (IFS) (2011) report confirms that pensioner poverty is at its lowest level since the beginning of the 1980s. The IFS (2011) maintains that one reason for the decrease in pensioner poverty may be the increase in benefit entitlements and pension credit payments. Research by the DWP (2012) shows that younger pensioners tend to have higher incomes than older pensioners because they are more likely to receive private pension and earnings income than older pensioners, and at a higher level. Differences in pensioners' incomes are also a reflection of their working lives. People with uneven work records, such as women who have taken on caring responsibilities, are likely to have accrued lower levels of private or state pensions.

Material deprivation, however, is an increasing concern later in life. The IFS (2011) reports that: "In 2009–10, the rate of material deprivation for pensioners was 9.3 percent and 3.5 percent of pensioners were both materially deprived and living in a household with an income of less than 70 percent of the median household. That is, only around 37 percent of pensioners who are materially deprived also have low incomes; of those with low incomes, only around 12 percent are materially deprived" (p. 58). Reporting slightly different statistics, according to the DWP (2012), approximately 8 percent of pensioners aged 65 or over were in material deprivation between 2010 and 2011. Almost half of pensioners in the lowest quintile were unable to take a holiday away from home; the most common reason across all quintiles for this was health or disability preventing them. Over four-fifths of pensioners in the lowest quintile would not be able to pay an unexpected expense of £200, without the use of savings. Only 1 percent of all pensioners did not have at least one filling meal a day.

#### ***4.5 The Challenge of Measuring and Capturing Deprivation***

The measurement of poverty and deprivation is fraught with complexity, especially in later life. While there is not a single composite measure to assess deprivation, it is often left to the researcher to ascertain the best, most valid assessment tool for a particular piece of research. While the following proxy measures of deprivation will not be discussed at great length in this document, they bear mentioning as there are widely in the literature. The measures are health, educational attainment and mental well-being.

### 4.5.1 Health

While not a major focus of this research, it is important to mention the issue of health as it is often used in research as an indicator of deprivation. Whether measured objectively or through self-perceived health status, the links between poor health and socio-economic deprivation are strong and well-documented. The *Black Report*, Black (1980) provided the modern context for the study of health inequalities and, according to Bernard and Smith (1998) and Marmot, et al. (2010), the gap between the health of the poorest and the richest has widened. The “wider determinants of health” model is often mentioned when discussing health for any age group. These determinants include:

- Age, sex and hereditary factors
- Individual lifestyle factors
- Social and community influences
- Living and working conditions
- General socio-economic, cultural and environmental conditions

This model has been widely used to explain the influences of social and other external factors on health. In their study on social inequalities in health and ageing, Marmot and Nazroo (2001) observe that although socio-economic differences in health are thought to diminish in older age, evidence suggests continued large inequalities in self-reported health and mortality. Self-perceived health status has received a great deal of attention in the literature especially since study results often indicate that poor self-perceived health status is strongly associated with low socio-economic status (Wang, et al. 2005).

Reports concerning self-perceived health are often difficult to measure objectively, though the House of Lords Scientific Committee Report (2005-06) concludes: “We know little about the sources of health perceptions, and what people are telling us when they report ‘good’, ‘fairly good’ or ‘not good’ health, or what is the underlying mechanism which consistently links perceived health status with other health-related outcomes” (p. 19).

However self-perceived health has been repeatedly shown to be predictive of health outcomes. The most dramatic influence is seen in the association between self-rated health and subsequent mortality (Benyami and Idler, 1997). Chandola et al. (2007) also

found that there are widening gaps in health inequalities as people *enter* old age. Results also indicated that people from lower occupational grades age faster in terms of a decline in physical health than people from higher grades. Marmot and Nazroo (2001, p. 453) discuss the nature of early life influences on health and have identified three possible models to explain health inequalities in the older population:

1. A latency effect, describing how exposures in early life effect old age;
2. The accumulation of advantage and disadvantage throughout the life-course (by examining social and economic conditions and subsequent changes in health outcomes);
3. The “pathway model” which suggests that there is no direct effect of earlier social circumstances on health in later life, but that such circumstances can determine social and economic position that a person attains in life and it is this latter attainment which affects health.

Marmot and Nazroo identify a need for comprehensive longitudinal studies of individuals in order to determine which model is most efficacious and we now have the The English Longitudinal Study of Ageing to address these issues. Breeze et al. (2006) suggest that while more research needs to be done, it is clear that poorer older people experience socio-economic disadvantage in relation to health. Poorer people were reporting more symptoms, whether angina, balance problems, dizziness, falls or pain. These could be the end result of a lifetime accumulation of disadvantage – all that are reported here are the current associations. Further longitudinal analyses in the future will help to show how much the wealth advantage comes from the healthy staying wealthy and how much from the wealthy staying healthy (p. 100).

Historically, much of the evidence on health inequalities has been based on social class or socio-economic group, usually associated with occupational classifications. Bernard and Smith (1998) and O’Reilly (2002) contend that groups such as older people, for whom occupational classification is less relevant, have often been neglected in scientific studies of health status. Studies measuring the prevalence of material deprivation and its effect on health related dysfunction in older people are rather scarce, and only a small number of deprivation indicators have been studied (Bernard and Smith 1998; Knesebeck et.al 2007; O’Reilly, 2002; Grundy and Holt, 2000; Groffen et al. 2007).



Breeze et al. (2005) studied how living in a deprived area in the UK affects the health related quality of life for people aged over 75. Results indicated that older people from the most deprived districts, who were also in the lowest social classes (IV and V), had double the risk of poor home management, self care, mobility and social interaction and nearly double the risk of poor morale. Other factors postulated to have effects on health, independent of social class, included substandard housing, heavy automobile traffic, and cultural or behavioural variables not conducive to health promotion.

Matthews et al. (2005) studied the association between morbidity and socio-economic factors using a range of individual, household and area level indicators of socio-economic status, including a subjective measure of adequacy of income. From the original number of study participants (1,470), 719 were followed-up from 1987 to 2003. Self-perceived adequacy of income showed the strongest association with onset of disability. Interestingly, the median age of those reporting difficulty managing was 80.5 years, seven years younger than those who felt that their income was adequate (87.8 years). Not all scientific research on health inequalities and ageing paints a negative picture of quality of life for older people in deprived areas. In a recent study, Gilhooly et al. (2007) found no differences between “healthy” and “unhealthy” older people although both resided in the same deprived area. The authors confirm the difficulty of using data from self-assessed health status.

#### **4.5.2 Educational Attainment: A Strong Association with Socio-economic Deprivation**

Many studies have confirmed that level of education is one of the strongest predictors of socio-economic status in the older population. As previously mentioned, using income or occupational data as outcome measures for deprivation does not always give an accurate picture of an older person’s socio-economic status. Thus, many researchers have found that education level is strongly associated with level of socio-economic deprivation in the older population (Koster et al., 2006, Beydoun and Popkin, 2005, Ogg, 2005 and Heisman et.al (2003). The results of Chiu et al. (2005), are similar to those mentioned above:

Level of education may both influence and act as a proxy for health-related aspects of the life course and individual behaviour. Most of those of low education in the study cohort had arduous manual jobs, had experienced

considerable barriers to medical care, had unhealthy habits and behaviour, and had little access to rehabilitation when disability occurred (from a stroke). From this perspective, the level of education influences both aspects of the life course with strong health implications and the outcomes in old age: this SES indicator has unusually strong predictive power (pp. 387-388).

According to Wilson et al. (2007), education is a useful outcome measure to assess socio-economic status because of its direct and indirect links to income, wealth and occupational status. Wilson and colleagues maintains that this is because “education is converted into skills, labour market advantage, and economic and social well-being...” (p. 1895). In an interesting study on the links between morbidity, education and socio-economic inequalities, Huisman et al. (2003) found that prevalence rates were definitively higher on every health measure for lower educated women and men, although he believes that while education is an excellent measure of socio-economic deprivation, it tends to be a skewed measurement which is why income may perhaps be used more often as an objective measure of deprivation.

#### **4.5.3 Mental Well-being and Socio-economic Deprivation**

There is a wealth of literature showing the association between lack of income and mental ill health in the older population. Townsend et al. (1988) have highlighted the apparent link between poverty and poor mental health. Lack of affordable transport, social isolation, fear of crime, etc., often leave the older person in a deprived area with a reduced sense of mental well-being. Additionally, it is well known that people living in very deprived settings are far more likely to suffer from stress-related depression and anxiety. According to a report on mental well-being and ageing in Scotland (NHS Health Scotland, 2004) older people on low incomes are more likely to experience anxiety and depression.

In 2003, the Northeast Public Health Observatory published a report entitled *Ageing and Health Inequalities: Tackling Inequalities in Older People's Health in the Northeast of England*. Interviews were held with twenty-three stakeholders in the northeast to identify key issues for tackling inequalities in the health of older people. Interviewees stated that poverty not only negatively impacts the quality of life for older people but it is also exacerbated by mental health problems (p. 34). Other studies using a variety of

measurements have suggested that older people in deprived areas experienced a heightened degree of loneliness (Scharf et al. 2005, p.7). Research has also been conducted on socio-economic deprivation as a risk factor for cognitive impairment. Basta et al. (2008) found that there is a significantly higher prevalence of cognitive impairment in older people living in socio-economically deprived areas regardless of their socio-economic status. Even after adjusting for socio-economic measures which indicate early life (education) and midlife (social class) advantage, individuals were found to be at greater risk of cognitive impairment compared to those living in affluent areas.

Walters et al. (2004) researched the connection between depression and anxiety analyzing “area deprivation” (neighbourhood socioeconomic deprivation) and population density among people over 75 who reside in Britain. Postal codes were used to link census information and individual data on depression and anxiety in 13,349 people aged 75 years and older taking part in a trial of health screening. The result of the study showed that living in the most socio-economically deprived area was associated with depression, but the association disappeared after adjusting for individual deprivation characteristics. The local living environment and deprivation may be more important in later life, according to Walters, because older people tend to spend more time in their homes due to retirement or decreased mobility. According to Walters et al.

The pathways are likely to be complex, but local area deprivation may have an indirect impact on depression through [these] intermediate individual, physical, functional, social, and deprivation factors. Area deprivation may be associated with higher crime rates and lower social cohesion, which may lead to increased fear of crime, and social isolation. Lower expectations and a lower sense of control may be associated with living in a more deprived area (citation), which again in turn is associated with increased depression (p. 1770).

Research on the personality characteristics of older people residing in an area of deprivation was undertaken by Gilhooly et al. (2007) who found that personality traits were linked to health status in old age. The authors hypothesised that perhaps this was due to a stronger internal “locus of control” which helped participants feel that they were responsible for their own health. In addition, they suggests that: “Although locus of control has been described as a stable disposition, there is also evidence that it changes with age, varies by health status and social class... Epidemiological studies

have shown that a sense of control, along with social support, is among the most important psychosocial predictors of morbidity, mortality and psychological well-being” (p. 816).

This research demonstrated that it is difficult to disentangle the precise way in which personality traits impact on health status. In a study concerning the links between socio-economic resources, gender, and living arrangements, and how they relate to “neighbourliness”, Perren, Arber and Davidson (2004, pp. 979-980) found that: “...in later life, socioeconomic disadvantage (such as being a tenant or not having access to a car) does not hinder sociability with neighbours, but is associated with less likelihood of both giving and receiving favours...Overall, our findings suggest that older people who are more disadvantaged in material resources are also disadvantaged in terms of receiving fewer favours and reciprocal exchange with neighbours.” One explanation might be that older people who lack material resources and are not able to provide assistance to their neighbours, subconsciously isolate themselves due to low self-esteem or self image, thereby negatively affecting their mental well-being.

The Easington study attempts to ascertain the ways in which older people in Easington experience various forms of deprivation. Chapters 6-8 specifically highlight perceived participant deprivation as it relates to education, socio-cultural issues and the physical environment, and deals with the research question: do older adults believe they have confronted particular hardships by virtue of their social and economic environment? It is clear that deprivation is often difficult to accurately measure in that often the objective measures of deprivation do not always capture the true “lived experience” of older peoples’ lives. As will be discussed in Chapters 6-8, results show that while study participants’ experienced both absolute and relative material deprivation over their life course, this deprivation did not necessarily negatively impact on their life experiences.

#### ***4.6 Part II: Toward a Theoretical Construct: Structure vs. Agency (or a bit of both)?***

As stated earlier in this chapter, Part II will discuss the theoretical underpinnings of the thesis - the life course theory and its relationship with disadvantage in later life.

An enormous volume of research (Elder, 1994; O’Rand, 1996; Wilson et al. 2007; Backman and Nilsson, 2010) has been published highlighting issues of status and the fact that many older people experience disadvantage over their life course. Causes of such disadvantage may be structural factors, such as the unequal distribution of financial resources in retirement and pension policies, or purely due to the glorification of youth versus old age and the disadvantaged position in which that places the older population. Over the past few decades, theoretical approaches have been developed to explain the structural nature of deprivation in the older population. Townsend’s (1981) structured dependency theory and Walker’s (1980b) political economy theory, have both been influential in conceptualising disadvantage in the older population. Instead of viewing individual ageing *within* a structure, structured dependency theory attempts to explain the social structure itself. Phillipson (1982) claims that the structured dependency of older people relies on the following elements: 1) demographic change in the population over 60 (Phillipson alludes to a large increase in this population owing to advances in medical technology), 2) displacement of elderly from the work place, and 3) failure of the elderly to achieve a minimum income in retirement. Phillipson’s view of structured dependency relies firstly on the fact that a substantially large older population will most likely require more personal and state-based financial and social resources thereby creating more risk of disadvantage. In a similar vein political economy theory has been used to explain the nature of poverty in old age and the factors which influence inequalities in later life. It adds the element of social class to the economic inequality that is widely seen to affect many older people. Townsend and Walker’s theories provide instructive background for consideration of socio-economic disadvantage in the older population.

Conversely, there may be other, more complex factors which contribute to older people’s quality of life in a deprived area, such as the role of “human agency” over the life course. Bandura’s (2006, p. 164) work on the influence of human agency argues that agency and the role of structural forces are inexorably linked, as one influences the other: “To be an agent is to influence intentionally one’s functioning and life circumstances. In this view, personal influence is part of the causal structure. People are self-organizing, proactive, self-regulating, and self-reflecting. They are not simply onlookers of their behaviour. They are contributors to their life circumstances, not just products of them.”

Heinz and Kruger (2001) believe that the concept of agency is absolutely essential when attempting to understand the connection between social change and biography. By bringing past experiences and biographical narrative to the life course research “table”, the concept of agency becomes useful for “explaining why the social structure of life courses does not follow or copy cultural norms or institutional regulations” (p. 41). While Elder and Kirkpatrick-Johnson (2003) would agree with Bandura’s as well as Heinz and Kruger’s view, they also point out that “social constraints restrict and direct the expression of agency” (p. 61). In a similar vein, Backman and Nilsson (2010) also argue for an agentic view of the life course where individuals control their destiny, but within the structure of historical and social situations. Their view is that of a “resource perspective” where an individual’s access to resources and ways to use them actually determines life opportunities (p. 2). Dannefer and Kelley-Moore (2009) also believe that human activity is necessarily agentic: “It is important to recognize that each human being enters the world as a helpless and dependent infant who learns language and other cultural forms and practices from parents and others more advanced in development. Thus, human agency is always fundamentally organized and constrained by the perceptual and motivational systems deriving from such situated learning experiences” (p. 392).

In a fascinating article examining the role of personality on the construction of the life course, Caspi (1987) introduces a conceptual framework designed to explore the links between psychology, sociology and history. His view is that personality may partially explain “the choices people make at various age-related transition points, the maintenance of life styles across different contexts, and the level of adaptation in new settings” (p. 1203). On the surface, he appears to be arguing for a mostly agentic contribution to life course trajectories, but in truth he is actually more in favour of an approach which combines the sociological concept of age-graded social roles with the psychological question of how people adjust to those roles based on their personality and behaviour. It is this adaptation process that individuals employ over the life course which interests Hareven (1986). Although not explicitly discussed in her research, she alludes to individual, personality-related factors which have a bearing on how experiences in early life shape the experience of old age:

The adaptation of individuals and their families to the social and economic conditions they face when in old age is contingent on the paths by which they

reach old age. The differences in their respective backgrounds, particularly the ways in which their earlier life experiences and their cultural heritages have shaped their views of family relations, their expectations of support from kin, and their ability to interact with public agencies and bureaucratic institutions are crucial to determining their ability to adapt to conditions they encounter in old age (p. 171).

Whether one approaches later life from a structuralist or agentic viewpoint or perhaps a combination of the two, it is valuable to consider selected theoretical ideas which have loomed large in the field of social gerontology over many decades as they relate to older people in socio-economically deprived areas.

#### ***4.7 Life Course Theory: A Framework for Understanding the “Whole Person”***

The words “life course” are frequently used to describe how individuals and population groups age and the factors which influence adaptation to an ever changing environment. Although they don’t specifically refer to the life course theory, Ryff and Singer (2009) make a more general point referring to ageing research in stating that “there is a growing recognition of the need to create whole-person perspectives” (p. 121). The following section is a discussion of the life course theory and its usefulness when considering ageing in a socio-economically deprived area. The aim is to provide the reader and researcher with a framework or lens through which to filter subsequent concepts relating to life as an older person in Easington. Ultimately, as Alwin (2008) suggests, ageing over the life course, in its most simple form, refers to “changes to individuals that occur over time resulting from some combination of biological, psychological and social mechanisms” (p.6). Although this thesis does not address the biological issues of ageing, nevertheless, the challenge is to disentangle the aforementioned factors to elucidate how each affects the ageing process and associated quality of life. Defining what is meant by the term “life course” can be problematic. Alwin (2008) suggests that all too often, the terms used to describe life course research have become muddled:

“...life course sociology” and “life span psychology” – now share center stage in the analysis and interpretation of human development and behavioral change; but are “life course” and “life span” perspectives on development and aging the same or are they different? And if different, how do they differ? It is not always clear from the ways in which the key concepts are used. It is increasingly common, for example, to see students of human development and aging simply use the term “life course” as a synonym for “life” or “life cycle” or the “span of life”, or even as a synonym for “aging” or even “human development” itself (p. 3).

Alwin (2008) also argues that the concept of life course is *not* the same as, for instance, life span. Life span most often refers to biological concepts such as a person's age at death and a "lifespan perspective" considers the ageing process from the beginning of life until death. Elder and Kirkpatrick Johnson (2003) consider that life span studies "typically link behaviour in two or more life stages" (p. 56) and usually necessitate a longitudinal study approach in order ensure proper time to study relevant associated variables. Similarly, Settersten (2003) comments that the term "life cycle" was originally used in the human development literature to identify the fixed stages an individual moves through as a part of the maturational process, some of which are linked to the reproductive cycle. These stages, such as courtship, marriage, birth of first child, etc. are cyclical and are repeated in subsequent generations. However, Settersten (2003) offers a critique of the lifecycle approach as being too deterministic of the life course, leaving out a portion of the population who do not or cannot have children.

While many people experience similar life events and transitions, the life course is highly variable and cannot be analyzed from merely a fixed trajectory model. Marshall (2009), in a departure from Alwin's point of view, explains that Leonard Cain (1964) who was an early pioneer of the life course theory, suggested that words such as "life cycle", "life span", "stages of life", and "ageing" *were* actually "approximate synonyms for the concept 'life course' (p. 575). Although there are many terms in the literature to describe the elements of the life course, the term "life course theory" will be used throughout this thesis.

#### **4.7.1 Life Course Theory: History and Application**

Why study ageing using the life course theory? Hareven (1986) states that: "The emergence of 'old age' as a social, cultural, and biological phenomenon can be best understood in the context of the entire life course and the historical changes affecting it" (p. 171). Thus, life course theory helps to reveal the forces that shape a person's past, present and future. In the early days of life span and life cycle research the approach was often negative. Research tended to focus on the inevitable decline in the physical and mental functioning of older adults over each successive life stage. The prospect of a positive *future* for an older person was not adequately emphasised. Despite that initial



limitation, the tenets of the traditional life course theory, with its sociological underpinnings, emphasised a combination of structural *and* individual approaches to understanding life in the past, present and future. As Heinz and Kruger (2001) observe: “Whereas the focus of social mobility research (Erikson and Goldthorpe, 1992) has been on the status changes between generations, life-course research looks at the shaping of biographies in a generation as a process of adapting to turning points, flexible institutional participation and the sequences of transitions” (p. 36). Hareven (1986) takes the view that family status and experience of later life is shaped by cumulative life history, stating: “the differences in the experiences of various cohorts that result from their location in historical time are critical to our understanding of their respective adaptations to old age” (p. 171). This holistic approach is important as far too often practitioners approach health or related interventions for older people without a proper understanding or appreciation of what “went on before” in an individual’s life. As Elder and Kirkpatrick Johnson (2003) note “the objective is to understand contextual variations that make a difference in human lives, development and aging” (p. 73).

It is difficult to determine when sociological research first incorporated life course concepts, but many social scientists refer to Thomas and Znaniecki’s seminal publication on Polish peasants’ immigration to Europe and America as the earliest example of using life history concepts (Elder, 1994, Heinz and Kruger, 2001). According to Elder (1994), Thomas and Znaniecki’s (1918-1920) “notions of life history, life planning, and life organization could be found in the *Polish Peasant*” (p. 10), signalling a new era of scholarship which examined issues of social change and the individual’s reaction to such change over time. During the 1960’s and 1970’s, Matilda Riley developed the concept of age stratification which relates age cohorts (people grouped into the same birth year) to social structures over the life span. The value of Riley’s work is that, according to her age based model, grouping people into birth cohorts improved analysis of historical events and transitions affecting life patterns. According to Settersten (2003), Riley’s approach focuses on the transitions of individuals as they grow older, through successive age strata in society. Using larger cohorts of individuals to explore the order in which life transitions take place is a powerful analytical tool. These age-based strata include education, family relationships, working lives and retirement. Kohli and Meyer (1986) provide an excellent explanation of the structuring of life stages in an age stratification system, suggesting that such a

system helps to “clarify the interaction between aging and social change, and helps to understand how this interaction can produce and alter the stages in the life course” (p. 151). The concept of age stratification, with its emphasis on movement of large cohorts of individuals through the life course is especially relevant to gerontological research. However, since the early 1990s, it has increasingly been recognized that the older population is heterogeneous, even *within* birth cohorts. The problem, according to Riley, is that social structures do not advance at the same pace of change as individual lives, thereby creating what she terms a “structural lag” (Riley and Riley, 1999, p. 128). This heterogeneity (in terms of equality of opportunity) does not always translate to the everyday experiences of people, particularly as concerns education, work and family (Settersten, 2003).

It wasn't until the 1970s that life course research began using more of a multidisciplinary approach to studying human development. Although many authors have written on this important topic, none has been quite as prolific as Glen Elder (e.g. 1994, 1998, 1999). Elder has authored many publications analysing later life from a social, historical and cultural framework. Elder (1994) comments that his view of the life course theory incorporates elements from various disciplines, stating that:

Broadly speaking, the change is part of a general conceptual trend that has made time, context, and process more salient dimensions of theory and analysis. This development has various theoretical strands including the macroworld of age stratification (Elder 1975; Riley, Johnson, and Foner 1972), cultural and intergenerational model (Kertzer and Keith 1984), and developmental life span psychology (Baltes 1987). My perspective tends to stress the social forces that shape the life course and its developmental consequences (pp. 4-5).

A major focus of the life course approach is the emphasis on the dynamic and interdependent pathways in an individual's life and the personal and societal forces that shape these pathways and relationships. There are divergent viewpoints in both the fields of sociology and gerontology over the role of individual versus structural factors in older people's adjustment to later life. Although the individual is central to life course analysis, Kohli and Meyer (1986, p. 146) argue that not enough attention has been paid to the role of social structure in shaping individual lives.

The uniqueness of life course research according to Marshall (2009) derives from its perspective that “the individual life is structured by age norms and other constraints, biological and social” (p. 576). Similarly, Dewilde (2003) argues that the life course theory, which accepts heterogeneity as an inherent feature, is a more flexible concept than the life cycle approach. Despite the debate concerning the role of agency and structure, it is widely agreed among scholars (Elder, 1994, 1999, Marshall, 2009, Settersten, 2003) that there are five main principles of the life course theory:

1. Human development and ageing are lifelong processes;
2. Historical time and place: the life course of individuals is embedded in and shaped by the historical times and places they experience over their lifetime;
3. Timing: the antecedents and consequences of life transitions and events vary according to their timing in a person’s life;
4. Linked lives: lives are lived interdependently, and social-historical influences are expressed through this network of relationships;
5. Human agency: individuals construct their own life course through choices and actions they take within the opportunities and constraints of history and social circumstances (Marshall, 2009, pp. 576-578).

In essence the life course theory is concerned with three central concepts within the five themes: events, transitions and trajectories (Dewilde, 2003), or as Moen, Dempster-McClain and Williams (1992) state in slightly different terms: timing, process, and context. Hareven (1986) views study of the life course in the following way: “The life course approach focuses on the interaction among individuals and collective timing of family transitions as they are shaped by different historical conditions. It examines the synchronization of individual behavior with the collective behavior of the family unit as they change over time and in their relation to external historical conditions” (p.172).

The Easington study has adopted the life course theory (based on the five principles listed above) because of the nature of the context under examination and the advantages of viewing an older person’s life through the prism of historical, social, structural and agentic factors. This author takes the view that the life course is powerfully influenced by the social structures and constraints within society and their effect on life chances, but also recognises the strong role of human agency in life decisions.

#### ***4.8 Ageing in Place and the Life Course***

The concepts of place discussed earlier in Chapter 3 have special relevance to the life course theory. The following analysis by this author attempts to capture the links between life course theory principles and ageing in place literature.

##### **1. Life course principle - Linked lives**

Research by Cuba and Hummon (1993) supports the idea of “linked lives”, emphasising local area attachments and social involvement with friends and local organisations. This research confirms the significance of strong ties to place. In addition, Rowles’s (1978, 1983) concept of “social insideness” and the idea of “being known” and knowing others in a community helps to create a sense of community and positive “linkages” for many older people.

##### **2. Life course principle - Historical time and place**

Both Cuba and Hummon (1993) and Rowles (1978) found that long-term residence has a profound effect on social networks and may be important in linking significant life events to place, providing the individual with a sense of “autobiographical insideness”. The focus of autobiographical insideness is on a person’s current locale, along with the remembrance of past places. Attachment to place involves an historical dimension that gives a person’s environment particular depth of meaning. Gustafson’s (2001) concept of the “environment-self” (which refers to a deeper meaning of a person’s knowledge of his or her place) may be geographical or historical. Golant’s (2003) research on understanding place in later life, through the prism of space and time is also relevant to this life course principle.

##### **3. Life course principle - Human development and ageing are lifelong processes**

Place has highly personal meaning which relates to important life stages including childhood, adolescence, parenthood and later life (Gustafson, 2001). These life stages are manifested in terms of both experience and memories. The themes of emotion (related to a sense of security of home) and activity (associating place with work and leisure) are incorporated to help people describe who they are in relation to place over their life course. Place is influenced by life cycle stage and the meaning of home becomes more important as we age.

#### **4. Life course principle - Timing: the antecedents and consequences of life transitions and events vary according to their timing in a person's life**

The meaning of place is influenced by “what happens to us” over the course of our lives. Life transitions such as moving home, changing employment or retiring from the work force influence the way in which we perceive “place”. Taylor (2001) suggests that time, place and situations all help shape personal identity. It is the intersection of the social environment, life events and the physical landscape that allows for a holistic examination of transitions over the life course. Marshall (2009) also notes that human agency allows individuals to construct their own life course through choices and actions they take within the opportunities and constraints of history and social circumstances. Place attachment links into the concept of human agency as it is the juxtaposition of the control over the social and physical environment which leads to a meaningful self-identity

#### ***4.9 Applying the Life Course Theory to Socio-economic Disadvantage in Later Life***

People do not just arrive at “old age” without a substantial historical background which has influenced their quality of life. Early childhood experiences, education, marriage, career, retirement, health status and overall financial well-being are among the contributing factors which determine how people age over the course of their lives (Backman and Nilsson, 2010). For most people, socio-economic disadvantage in later life does not emerge suddenly, for example when a person reaches age 60 or 65, but accumulates over the life course. However, depending on individual circumstances, women who suddenly become single through the death of their partner or through divorce, may face immediate financial hardship. The life course theory uses what Elder (1994) terms the “interweave of age-graded trajectories, such as work careers and family pathways, that are subject to changing conditions and future options...” (p. 6). Life course trajectories, according to George (2003) are defined as “long-term patterns of change and stability” (p. 162). Ferraro et al. (2009) concur with George’s definition of trajectories and remark that they are socially generated and “do not develop in a vacuum” (p. 423). This suggests that each person has a number of trajectories, such as financial, spiritual, functional, etc. and that these are subject to change during points of transition. It is the interplay between the “socially generated” trajectories and the influence of the individual on those trajectories that has received so much attention from social scientists.

#### **4.9.1 “Timing” Over the Life Course and its Link to Socio-economic Disadvantage**

Timing is central to understanding socio-economic disadvantage in ageing, and the concept of timing is linked to trajectories and transitions within the life course. Most people strive to “get the timing right” in life on important issues such as education, employment and family formation. Though definitions of “right timing” differ between individuals, there are social norms concerning “time tables” for various transitions in life. Dewilde (2003) notes that transitions mark socially constructed changes in the life course which may be predictable and result in loss of control. If the majority of the population experiences a certain transition, it may be referred to as a “normative transition”. From the perspective of psychology, Caspi (1987, p. 1210) also comments on transitions over the life course, arguing for an “interactional framework” which accounts for interaction between personality, social roles and historical change.

As Heinz and Kruger (2001) note, that there are three main research perspectives in the modern life course theory: “historical time (generations and cohorts), individual time (life history, biography) and institutional time (careers, sequences, transitions)” (p. 33). They go on to suggest that an individual’s life chances are strongly influenced by year of birth and other important historical milestones or transitions. Institutions, such as family, education and the economy, play a crucial role in determining life opportunities, but also may contribute to the reproduction of social inequalities: Citing Kerckhoff (1995), Heinz and Kruger (2001) state: “Each society has institutionalized ‘sorting machines’. These sorting machines contribute to the reproduction of social inequality across the life course from educational selectivity to eligibility for social assistance, unemployment benefits or retirement funds” (p. 34). This perspective helps account for the prevalence and nature of socio-economic disadvantage as people age. Similarly, Ferraro and Shippee (2009) claim that life course trajectories are embedded in social inequalities. The way in which they believe this transpires is that “social systems generate inequality, which is manifest over the life course via demographic and developmental processes, and that personal trajectories are shaped by the accumulation of risk, available resources, perceived trajectories, and human agency” (p. 334). The research of Blane, et al. (2004) concerns the measurement of socio-economic position as a proxy for disadvantage and reflects problems of occupational social class measurement rather than accumulated disadvantage, pointing out that :

Measures of current socio-economic position are found to differ in their strength of association with quality of life in early old age. Social class, based on last significant period of employment, proves to be a poor predictor. The more immediate measures of material circumstances, however, such as housing tenure and receipt of means-tested welfare benefits, are associated strongly with quality of life (p. 2177).

Although Ferraro and Shippee (2009) believe that life trajectories are influenced by accumulated risk, they also echo Blane's view concerning individuals' perceptions of deprivation. Moreover, the way in which individuals perceive life transitions, i.e. their subjective view of their own situation, may exert a powerful influence on subsequent trajectories.

#### **4.9.2 Cumulative Advantage/Disadvantage Theory and the Life Course**

The life course theory advocated by Elder and others offers a robust explanation of the factors that influence the "lived experience" of older people. The life course as a theoretical orientation has been used and built upon by a generation or two of gerontologists. A recent "school of thought" posits a nuanced version of the life course theory, placing a greater emphasis on the risk factors for experiencing disadvantage in later life. The major developer and proponent of these concepts is Dale Dannefer (1987, 2003, 2009) who has written extensively on the theory of cumulative advantage/disadvantage (CAD). Dannefer (2003) defines CAD as: "the systematic tendency for inter-individual divergence in a given characteristic (e.g. money, health, or status) with the passage of time" (p. S327). Merton's (1968) definition of CAD is perhaps more descriptive: "...the ways in which initial comparative advantage of trained capacity, structural location, and available resources make for successive increments of advantage such that the gaps between the haves and the have-nots...widen" (p. 606). There are many similarities between the development of traditional life course theory and CAD as both have their origins in sociological, psychological and economic theory. O'Rand (1996) states that within the CAD theory: "Patterns of inequality within and among cohorts emerge over time as products of the interplay between institutional arrangements and individual life trajectories" (p. 230). Put another way, CAD is concerned with age-specific individual differences and the equity in which resources and opportunities are distributed. Essentially, CAD addresses the following questions relating to ageing over the life course:

- Are there systematic inequalities between cohorts over the life course?

- To what extent is resource allocation (e.g. school classes or work situations) reflective of age-related variability?
- Which factors contribute to the increase in inequality over time? (O’Rand, 1996)
- What role do individuals play in their interaction with their environment and how does the social structure impact on “cohort ageing”? (Dannefer 2003)

Dannefer’s work attempts to offer an explanation concerning the nature of disadvantage in later life by suggesting that at the heart of this issue is the concept of aged heterogeneity (O’Rand 1996; Wilson, Shuey and Elder 2007; Ferraro and Shippee 2009). Dannefer (1987) believes that within the traditional life course model, later life has been interpreted through the lens of historical change and individual response to that change, rather than through “the social processes that tend to operate similarly on each successive cohort over its collective life course” (p. 212). Dannefer proposes a different model for life course studies in which the effect of individual decisions is considered, but placed in the context of social processes that regulate what he calls the “internal differentiation of cohorts” (p. 212). He emphasizes two related ideas: 1) age stratified roles, e.g. student, worker, or retiree and 2) age grading, the process of “correct timing”, e.g. “what is considered ‘natural’ and ‘normal’ human behaviour” in terms of life decisions and transitions (Dannefer and Kelley-Moore, 2009, p. 404). While focusing on age cohorts as a whole is valuable, Dannefer (1987) cautions against only considering “normative” transitions in analysis of heterogeneity because this risks neglecting the diversity *within* age cohorts. It is this diversity which is a key to understanding the nature of socio-economic deprivation.

It is interesting to consider the mechanisms and processes which may lead to increasing heterogeneity in the older population. First of all, there is the question of what heterogeneity actually means. Dannefer (2003) argues that heterogeneity and inequality are linked as material inequality in key domains, such as health and life-style, may create an increased level of heterogeneity between and within different age cohorts. The conceptual development of the CAD approach was, in part, based on the research of Merton (1968) who believed that the tendency to accumulate advantage was so evident that he called this the “Matthew effect” which alludes to a passage from the Gospel of Matthew wherein Jesus states: “Whoever has will be given more, and he will have abundance. Whoever does not have even what he has will be taken from him”



(Matthew 13:12, *New International Version*). In essence, CAD describes the structure of opportunity, or lack thereof, during the life course which increases or decreases the chances for inequitable life experiences. Dannefer (2003, p. S331) states: “CAD offers a systematic life course component to the general understanding of education and work as comprising institutionalized systems through which class and gender inequalities are systematically and relentlessly reproduced, and through which success and failure are created.” Thus, there appears to be general consensus among life course researchers (O’Rand, 1996; Wilson, Shuey and Elder, 2007; Dannefer 1987; Marshall, 2009) that the common pathways leading to inequality in later life flow through access to education and work opportunities (linked to pension payments), and are also influenced by gender, class and childhood living conditions (Fors, Lennartsson and Lundberg, 2009). The extent to which older people residing in socio-economically deprived areas confront negative effects of heterogeneity depends in part on the degree to which they experienced “inequality of opportunity” over their life course.

It could be argued that the Cumulative Advantage/Disadvantage theory takes salient points from structured dependency, political economy as well as life course theory. Structured dependency and political economy have been criticised for their tendency to paint a definitive picture of older people as homogeneous, experiencing the same issues irrespective of cohort. Political economy may suffer less criticism due, one might say, to the “corrective” of allowing for more individual differentiation and influences. There is an increasing recognition among ageing researchers that analysing later life based on the attributes of a particular cohort’s homogeneous life experience does not take into account the amazing heterogeneity of a changing older population (O’Rand, 1996): “[T]he differentiation of cohort members over time along significant life-course transitions (health, family, work, income, and wealth) has become an equally important concern. The explanation of growing heterogeneity and inequality within cohorts is thus a central principle of the life-course perspective and common ground for demographers, economists, historians, sociologists, and psychologists alike” (p. 230). This thesis will use the life course theory as its primary theoretical construct, but will also draw upon environmental gerontology concepts (discussed in Chapter 3) to explain social phenomena. It is hoped that by taking a multifaceted approach to the analysis of study data, the stories of Easington participants will emerge more clearly.

### **4.9.3 Limitations of Literature on Poverty, Deprivation and the Life Course Theory**

Given the complex nature of the topics under consideration, there are clear limitations to this literature review. A majority of the studies discussed in the literature review were cross sectional studies which make it difficult to attribute causation between variables. Several study authors acknowledged that to prove a statistically significant association, costly and time-laden longitudinal research would need to be undertaken (some of which is being done through the English Longitudinal Study of Aging). The studies on perceived health status present the possible issue of source bias, as it cannot be ruled out that participants were biased while discussing their health with the interviewer or when they answered questions on a survey.

Research on “the third age” highlights recent theoretical work on how older people are “breaking out” of the stereotypical view of being passive, dependent recipients of services (Gilleard and Higgs, 2000, 2005). While the theory of structured dependency is still relevant to the debate on poverty in later life, there are now new theoretical models (social exclusion, for example) which seek to further illuminate the relationship between societal structure and the nature of poverty and deprivation in old age. The emerging normative view is that “third agers” are newly retired, healthy and empowered older people who want to be engaged with society in their new phase of life and do not want to conform to the traditional view of “resting” in retirement. These concepts will be explored more fully in Chapter 7.

Gender is a major focus of life course studies; specifically the fact that women’s “lived experience” is often quite different from men as a result of the unique roles women undertake over their lifespan. Moss (2002, p. 657) states that: “The socioeconomic factors as well as the family and occupational roles that influence health in women may be different from the factors that influence health in men. Women are more likely to experience role strain and overload that occur when familial responsibilities are combined with occupation-related stress. These are compounded (or alleviated) by material circumstances” (p. 657). Arber and Ginn (1995, 2003) make the point that until relatively recently, older women have been much less scrutinized. However, there

is a wealth of literature describing the way in which women approach family, friends, community, workplace and retirement (Matthews and Brown, 1987; Slevin and Wingrove, 1995; Villani and Roberto, 1997;). Given the complex nature of gender-related issues over the life course, related themes will be discussed in Chapters 6 through 8.

## **Conclusion**

This chapter has reviewed literature which contends that poverty, deprivation and social exclusion over the life course are experienced by older people, based on a variety of factors including the timing of life events as well as the historical context. Scholars of the life course theory and related academic literature, including O’Rand, (1996), Wilson, Shuey and Elder, (2007), Dannefer (1987), Marshall (2007) and Heinz and Kruger (2001) confirm the importance of analysing socio-economic inequality of older people in light of factors such as family life, educational and economic opportunities, all of which are vital to an understanding of disadvantage in later life. It is evident that while there are numerous ways to measure poverty, material disadvantage and social exclusion, there remains a central question concerning ageing in a socio-economically disadvantaged area: how does one mitigate against the circumstances of cumulative disadvantage, limited income and low expectations of a positive quality of life? This issue is an ever present challenge not only for older people themselves, but for all those who work with and care for them. At its core, it is about maintaining dignity in later life, which includes respecting the older person’s past, possessing the willingness to challenge societal attitudes about aging, and developing new and innovative ways to help improve the quality of life for older people. The next chapter will discuss the research methods and methodology used in this study.

## **Chapter 5. Research Methods, Methodological and Theoretical Foundations**

### ***5.1 Introduction***

Research methods and methodology are the essential foundation for any scientific study, be it from a qualitative or quantitative perspective. It is at times confusing for researchers to accurately use the terms method and methodology. Thus it is vital to ensure clarity of what is being measured or which theoretical foundation informs a particular study. This chapter will consider several foundational concepts which underpin the philosophical and theoretical approach of this thesis. As will be shown, this study's research design and strategy follow a logical progression, from scientific philosophy to the practicalities of data collection and analysis. Firstly, this chapter will discuss the epistemological and ontological concepts which inform the thesis. Secondly, the logic of the chosen theoretical paradigm in relation to the research methods will be explored. Lastly, the research method will be discussed, including data collection and analysis.

According to Van Manen (1990), a distinction should be made “between research *method* and methodology and between research *method* and research technique and procedure” (p. 27). He asserts that methodology may refer to the philosophical framework, e.g. orientation to life, how knowledge is acquired, etc. In essence, he views methodology as “the theory behind the method, including the study of what method one should follow and why” (p. 28). Describing method, Van Manen states that: “the notion of method is charged with methodological considerations and implications of a particular philosophical or epistemological perspective” (p. 28). Here he implies that the choice of “method”, e.g. interviewing subjects, may mean something different to each researcher depending on their methodological “stance”. Crotty (1998) defines the research “process” slightly differently. His use of the additional category, “theoretical perspective” in the research process involves explaining “the philosophical stance informing the methodology and thus providing a context for the process and grounding its logic and criteria” (p. 3).

Bengtson, Burgess and Parrott (1997) appear to agree with Crotty's assertion that theory is “added” to methodological concepts in epistemology: “Traditionally, methods and

theory have been viewed as distinct enterprises; it is our contention that they are, in fact, inextricably linked.” Concerning epistemology and theory development, they state: “A second aspect of epistemology concerns *theories*: accounting for what we have empirically observed in the context of previous knowledge in our field” (p. S72). Differing from Van Manen is Crotty’s definition of methodology, referring more to a “strategy, plan of action, process or design lying behind the choice and use of particular methods and linking the choice and use of methods to the desired outcomes” (p. 3) than to a philosophical framework. It can be argued that regarding methodology, Van Manen may be referring to the inclusion of epistemological and ontological frameworks, and Crotty to the practicalities of choosing a research “process”. Despite variation in the definition of terms, it is evident is that the research process needs to involve a clearly laid out process designed to present the reader with detail on the entire research enterprise.

## ***5.2 Background - The Research Question***

Jaimeson (2002) ask the important question, “What does it mean to grow and be old? Is it possible to generalize about the experience?” (p. 13). In their discussion of theory in ageing research, Jaimeson and Victor (2002) recognise that interest in interpreting the ageing experience is growing and a great deal of recent research has focused on the meaning of ageing in a variety of contexts. This study in Easington reflects this interest of exploring both individual and shared meaning in a particular context. The main aim of the study was to discover the “lived experience” of ageing in Easington, thus the primary question was “what has the Easington context, with its historic mining culture, contributed to older residents’ experience of ageing, through the lens of the social, physical and cultural environment”?

## ***5.3 Qualitative Research: The Art and Craft of Constructing Meaning***

Prior to addressing the above topics, a brief word must be said on the choice of using qualitative research methods to explore the study’s research questions. Since the dawn of scientific enquiry, researchers conducting qualitative research have explored the nature of life’s meaning and purpose. In the scientific quest for meaning and purpose, factors which positively impact on an individual’s quality of life may be identified. The

converse is also true in that there are certainly many negative experiences a person may confront that influence life satisfaction and the way in which one copes with adversity. A key factor in uncovering the “truth” behind study results is the extent to which the meaning of the results have been systematically analysed. Mills, Bonner and Francis (2006) echo this sentiment: “To ensure a strong research design, researchers must choose a research paradigm that is congruent with their beliefs about the nature of reality. Consciously subjecting such beliefs to an ontological interrogation in the first instance will illuminate the epistemological and methodological possibilities that are available” (p. 26). They go on to mention the difficulty in developing such a framework as there are competing beliefs concerning the way in which we interpret our lives: “We do not quickly or easily reach any sort of conclusion or resolution about our own view of the nature of truth and reality. We are all influenced by our history and cultural context, which, in turn, shape our view of the world, the forces of creation, and the meaning of truth. Often these underlying assumptions about the world are unconscious and taken for granted” (p.26). The art of analysing an individual’s life and the way in which his or her environment, family relationships and personal decisions interface is the craft of any qualitative study.

Green and Thorogood (2004) assert that qualitative research studies attempt to answer questions “about the ‘what’, ‘how’ or ‘why’ of a phenomenon, rather than questions about ‘how many’ or ‘how much’” (p. 5). The type of method chosen is based on the aims of the study and what the researcher hopes to discover. Green and Thorogood (2004) underscore this point, stating: “It might be more useful to characterize qualitative research not by the kind of data produced or the methods used to produce them, but by the overall aims of the study” (p. 5). Thus the construction of research questions and the research method go hand in hand. Within the qualitative research community, obtaining a single definition of what constitutes such an approach is difficult. However, Esterberg (2002) offers a very useful definition of what qualitative social research attempts to accomplish and provides the rationale for using the qualitative method:

Instead of trying to extract abstract categories from social phenomenon as quantitative scholars do, qualitative researchers try to understand social process in context. In addition, qualitative researchers pay attention to the subjective nature of human life – not only the subject experiences of those they are studying but also the subjectivity of the researchers themselves. In other words, qualitative

researchers try to understand the meanings of social events for those who are involved in them (p. 2).

The aims of the Easington study were borne out of this author's interest in the way historical, social and personal factors of living in Easington affect older peoples' interpretation of their life course. There are several ways in which to uncover life experiences for an older person residing in a socio-economically deprived area. If research solely examined quantitative factors relating to ageing in Easington, such as those described in the, The English Indices of Deprivation, 2010 (Department for Communities and Local Government, 2011) the picture of life would be incomplete. Esterberg (2002) agrees, stating that: "Quantitative research is not particularly useful in revealing the meanings people ascribe to particular events or activities; nor is it well suited to understanding complicated social processes in context" (p. 2). As shall be discussed in more detail later, using qualitative research methods to collect and analyse data reflects a desire to more fully capture the "lived experience" of older Easington residents.

Flick (2006) maintains that interest in the world of qualitative research has changed dramatically over the past decade. He states that qualitative research is of "specific relevance to the study of social relations, owing to the fact of the pluralisation of life worlds... This pluralisation requires a new sensitivity to the empirical study of issues... locally, temporally and situationally limited narratives are now required" (pp. 11-12). Schwandt (2000) also points out that qualitative research offers ways of understanding the meaning of what we do and say: "The qualitative inquiry movement is built on a profound concern with understanding what other human beings are doing or saying" (p. 200). Mason (1996) comments that "it is a great strength of qualitative research that it cannot be neatly pigeonholed" (p. 4). In answering the question "what is *qualitative* about qualitative research?", Mason goes on to offer three points loosely describing this type of research. Qualitative research is: 1) "grounded in a philosophical position which is broadly "interpretivist" in the sense that it is concerned with how the social world is interpreted, understood, experienced or produced", 2) "based on methods of data generation which are flexible and sensitive to the social context in which data are produced", 3) "based on methods of analysis and explanation building which involve understandings of complexity, detail and context" (p. 4). These elements are reflected

in the nature of the Easington study which attempts to examine older peoples' lives in each of the three ways mentioned by Flick. The research questions under consideration have thus been constructed with the aim of elucidating the lives of individuals while capturing a sense of historical, social and cultural "realities" and perceptions of Easington.

#### ***5.4 An Early Caveat: Multiple Theoretical Perspectives***

Newbury (2011) makes a strong case for a pluralistic methodological approach to qualitative research. It is certainly the case with the Easington study that there is not a "one size fits all" methodological approach. Perhaps it is the general nature of researching the "lived experience" of individual lives, which sometimes makes it necessary to use various theoretical perspectives in order to explain data. This is not to "take the easy way out", refusing to make a strong claim one way or another for or against a particular framework. It is, rather, an acknowledgement that while there is indeed an imperative to situate this study in a specific theoretical orientation, within most methodological approaches there are "shades of gray" concerning the application of theoretical approaches. Thus, the reason for drawing on multiple theoretical perspectives is to help explain different aspects of the study data, as using one theory alone would be insufficient.

#### ***5.5 Methodology: Philosophical Foundations***

##### **5.5.1 Ontology - The understanding of "being"**

A major philosophical question concerns how we understand the nature of our existence. Volumes of social theoretical literature have been published over the past century, which postulate how we perceive reality. According to Crotty (1998), ontology "is concerned with 'what is', with the nature of existence, with the structure of reality as such" (p. 10). Snape and Spencer (2003) mention that ontological research questions are concerned with "beliefs about what there is to know about the world...whether or not social reality exists independently of human conceptions and interpretations; where there is a common, shared, social reality or just multiple context-specific realities; and whether or not social behaviour is governed by 'laws' that can be seen as immutable or generalisable" (p. 11). Blaikie (2007) also emphasises that ontology deals with "claims



and assumptions that are made about the nature of social reality, claims about what exists, what it looks like, what units make it up and how these units interact with each other. In short, ontological assumptions are concerned with what we believe constitutes social reality” (p. 8).

Historically, both positivistic and post-positivistic research frameworks have had a major influence on the nature of social enquiry. Positivism supports the classical view of science where only “methods of the natural sciences are appropriate for the study of social phenomenon; only those phenomena which are observable can be counted as knowledge; and knowledge is developed inductively through the accumulation of facts” (Snape and Spencer, 2003, p. 6). Citing Denzin and Lincoln (2000), Laverly (2003, p. 25) posits that: “From an ontological perspective, positivist frameworks view reality as something ‘out there’ to be apprehended”. Conversely, post-positivist paradigms, such as interpretivism, do not use natural science methods to measure social realities. The social world in the interpretiveist perspective is focused on understanding the social world through the eyes of the research participant.

This study adopts an interpretivist approach to how older people in Easington might perceive their social reality. Interpretivism may also be thought of as a theoretical perspective (Crotty, 1998). Crotty points out that interpretivism is often linked to the social thought of Max Weber (1864-1920) who suggests that “in the human sciences we are concerned with *Verstehen* (understanding)” (p. 67). Snape and Spencer (2003) suggest that Wilhelm Dilthey (writing during the 1860s-70s), who preceded Weber, proposed that “social research should explore the ‘lived experiences’ in order to reveal the connections between the social, cultural and historical aspects of people’s lives and to see the context in which particular actions take place” (p. 7). Laverly (2003) suggests that the interpretivist ontological framework “supports the ontological belief in the existence of not just one reality, but of multiple realities that are constructed and can be altered by the knower. Reality is not something ‘out there’, but rather something that is local and specifically constructed” (p. 25). The interpretivist ontological framework supports what Blaikie (2007) refers to as a “subtle realism”, a “belief in the existence of an external social reality” (p. 17). Although a relativistic ontology assumes that there is no objective reality, the link to subtle realism is the recognition that “the world consists

of multiple individual realities influenced by context” (Mills, Bonner and Francis, 2006, p. 26). I take a subtle realist view and believe that although there exists an objective reality, such reality is mediated by the socially constructed meaning given to it by the individual and society. According to Holden and Lynch (2004):

...In contrast to the objectivists, subjectivists focus on the meaning of social phenomena rather than its measurement. Their goal is to understand and to explain a problem in its contextual setting; they do not perceive that it is a question of causality but rather it is a question of the meaning individuals attach to a given situation (Easterby-Smith et al. 1991; Hughes and Sharrock 1997) (p. 11).

### **5.5.2 Epistemological Approach: How Do We Know What We Know?**

According to Blaikie (2007): “An *epistemology* is a theory of knowledge...It is a theory of how human beings come to have knowledge of the world around them (however this is regarded), of how we know what we know” (p. 18). Similarly, Snape and Spencer (2003) comment that: ““Epistemology”” is concerned with ways of knowing and learning about the social world and focuses on questions such as: how can we know about the reality and what is the basis of our knowledge” (p. 13). Crotty (1998), citing Maynard (1994, p.10) argues that a researcher’s chosen epistemological approach informs other building blocks within the research paradigm and provides a “philosophical grounding for deciding what kinds of knowledge are possible and how we can ensure that they are both adequate and legitimate.”

In the previous discussion on ontological frameworks, it was revealed that there are numerous ontological viewpoints. A similar point can be made concerning epistemological frameworks. There is a necessary logic within the process of identifying an epistemological and ontological foundation for research as certain epistemologies “go” with a particular ontology. Given the interpretivist ontology discussed above, the most natural epistemological approach applied to this study is social constructionism. Although a strict definition of constructionism postulates that “all reality, as meaningful reality” (Crotty, 1998, p. 54) is socially constructed, including our knowledge and emotions, Crotty claims that not all researchers subscribe to this “hard core” view. Regarding the social constructionist approach, he states: “Not everyone agrees. There are some who take social constructionism to mean that social realities, and only social realities, have a social genesis. Natural or physical realities do not. In other words, they understand social constructionism as denoting ‘the construction of social reality’ rather than the ‘social construction of reality’” (p. 54).

This view is often referred to as “weak” social constructionism as the definition is less constraining. Likewise, Lee (2012) suggests that social constructionism is “nuanced”: “There are, for example, social and psychological forms of constructionism (see Gergen, 1994; Phillips, 1995), and within social constructionism a weak version is further distinguished from a strong one, depending on the stance they take on ‘the role that social factors play in what constitutes legitimate knowledge’ (Schwandt, 2003, p. 308)” (p. 405). Citing Marshall (1994, p. 484), Crotty (p. 54) goes on to point out that social constructionists believe that society is a more or less a creation of active and creative human beings, “social worlds being ‘interpretive nets woven by individuals and groups’.

Regarding the use of social constructionist theories in ageing research, Putney, Alley and Bengtson (2005) suggest that in social gerontological circles, critical and interpretivist approaches have increasingly been used to underpin qualitative research methods. They write: “Arguing that science and positivistic approaches are limited for understanding aspects of aging, social gerontologists with critical and social constructionist perspectives suggest that there are non-scientific ways to examine, interpret, and develop knowledge about aging... This perspective posits that knowledge of the social world derives from the meanings individuals attach to their social situations” (p. 92). Gergen and Gergen (2000) discuss the “aging self” and “cultural values” from the standpoint of social constructionism: “Of focal importance in social constructionist writings are the social processes giving rise to our common understandings of the world - what we take to be the real and the good. For the constructionist all that has meaning in our lives - that which we take to be knowledge, reason, and right - has its origins within the matrix of relationships in which we are engaged” (p.3). Bengtson, Burgess and Parrott (1997) maintain that researchers who employ social constructionist theories seek to understand (and attempt to explain) the ageing process on individuals and how it is influenced by the structures around them. They offer three reasons why social constructionism is valid epistemologically and theoretically:

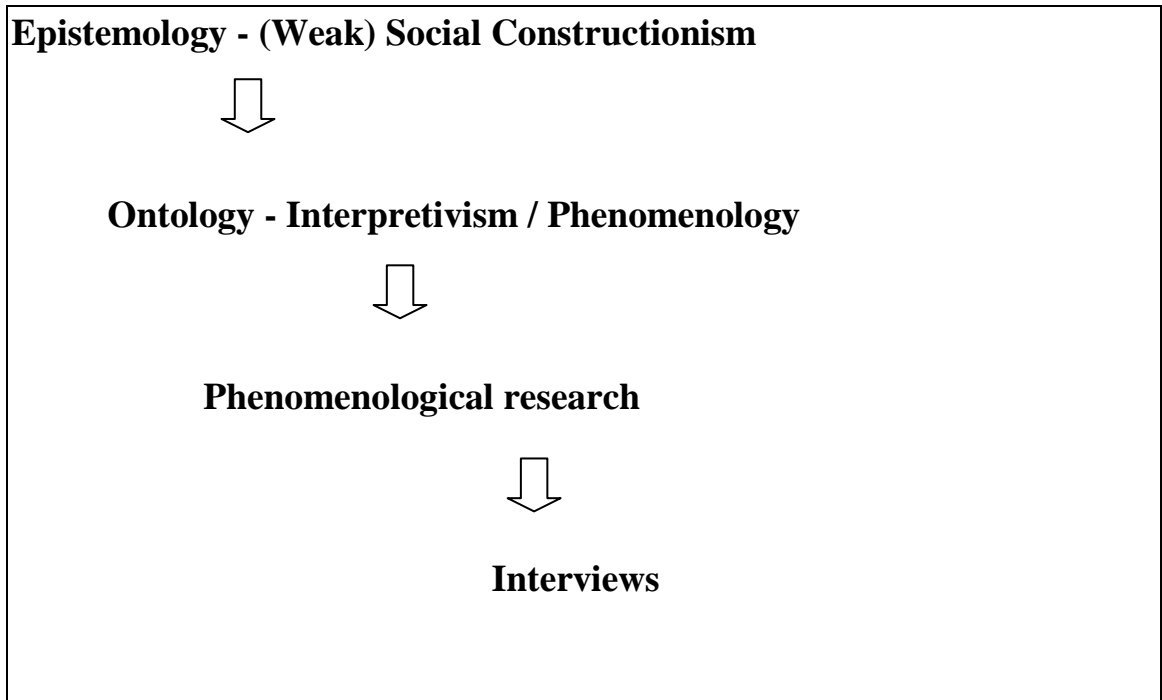
- 1) Examining the social construction of age and ageing, links individuals to social-structural contexts.

2) Social constructionist theories explore how social meanings of age and self-conceptions of age arise through negotiation and discourse.

3) Social constructionist theories of aging emphasize that social reality shifts over time, reflecting the differing life situations and social roles that come with maturation (p. S77).

This thesis subscribes to what Feast and Melles (2010) refer to as “weak” social constructionism, wherein an individual constructs his or her social reality as a result of historical, cultural, social and economic influences. Referencing the discussion of the life course theory in Chapter 3, it is easy to recognise the links with the life course theory and the understanding of how individuals acquire knowledge through a social constructionist epistemology. According to Bengtson, Burges and Parrot (1997), “...the life course perspective attempts to bridge the macro- and micro-levels of social-structural analyses by incorporating the effects of history, social structure, and individual meaning into theoretical and analytical models” (p. S80). The epistemological explanation offered by social constructionism is a valuable grounding for the present study. Social constructionist theories recognize that individual behaviour helps shape reality and, according to Bengtson, Burgess and Parrot (1997), helps “individuals actively participate in their everyday lives, creating and maintaining social meanings for themselves and those around them” (p. S77). These "social processes of interaction" can be seen as dialectical — individual behaviour produces a "Reality" which in turn structures individual lives (Dannefer and Perlmutter, 1990, p. 120).” Social constructionism, as described above, is especially important in relation to the data generated from the Easington study as the results are interpreted through the lens of older peoples’ lives which are constructed in large part through their social reality. The Easington study confirms Bengtson, Burgess and Parrott’s research (1997) which applied social constructionism to ageing research in order to fully examine the “lived experience” of older people (see chapter 5, p. 92). Diagram 1 shows the linkages between epistemology, ontology, methodology/theory and method to which the Easington study subscribes:

*Diagram 1 - Methodological Framework*



### **5.5.3 Phenomenology – The Theory of Method**

Having reviewed the philosophical underpinnings of this thesis’s methodology, we now turn to a concept which informs data collection and analysis - phenomenology.

Phenomenology is a way of interpreting the meaning individuals’ attach to their environment. Lavery (2003) suggests that: “Phenomenology is essentially the study of lived experience... This inquiry asks ‘What is this experience like?’ as it attempts to unfold meanings as they are lived in everyday existence” (p. 22). The phenomenological method seeks to uncover the world as we see it. As Van Manen (1990) states: “Phenomenology aims at gaining a deeper understanding of the nature or meaning of our everyday experiences. Phenomenology asks, “What is this or that kind of experience like?” It differs from almost every other science in that it attempts to gain insightful descriptions of the way we experience the world pre-reflectively, without taxonomizing, classifying, or abstracting it” (p. 9).

Van Manen also mentions that phenomenology describes and attempts to interpret meaning in an in-depth manner. Lavery (2003) suggests that one’s life history influences understanding of the “lived experience”: “Historicity, a person’s history or background, includes what a culture gives a person from birth and is handed down,

presenting ways of understanding the world. Through this understanding, one determines what is 'real', yet Heidegger also believed that one's background cannot be made completely explicit" (p. 24). Phenomenology is a useful method to capture meaningful data from qualitative studies. As Bryman (1984) states : "The point about the phenomenological position is that it takes the actor's perspective as the empirical point of departure" (p. 78). Discovering the lived experience through the research participant's eyes is a chief aim of phenomenology, but it is interpreting the meaning of that experience that makes phenomenology so attractive for this study. The purposes of phenomenological inquiry are description, interpretation, and critical self-reflection into the "world as world" (Van Manen, 1990, p. 5). Central tenants include the notions of intentionality and caring: the researcher inquires about the essence of lived experience. In ageing research, Pierce and Timonen (2010) discuss the concept of the theory of phenomenology of ageing which "emphasises subjective experience of ageing and draws attention to the relationship between individuals and social life" (p.18). In this thesis, phenomenology is a philosophical approach which provides a rationale the interpretation and understanding of data.

### ***5.6 The Data Collection Process***

Telling the stories of our lives is so basic to our nature that we are largely unaware of its importance. "We think in story form, speak in story form, and bring meaning to our lives through our stories... The stories we tell of our lives carry ageless, universal themes or motifs... " (Johnson, 2002, p. 121). When conducting research a key decision concerns the type of method used to obtain study data. Obtaining qualitative study data often requires some form of personal interaction in order to elicit information about a particular set of questions or topics being investigated. This interaction is, on the surface, rather straightforward as it may appear that one individual (an "interviewer") is usually "in charge" of obtaining information from another individual (an "interviewee"). Lawler (2002) comments on the value of conducting qualitative interviews: "With social research, one compelling reason for carrying out qualitative interview is that they offer a means of exploring the ways in which social actors interpret the world, and their place within it" (p. 242). Gribich (1999) maintains that in a qualitative study, interviewing is most often chosen as the ideal technique because it captures information not obtainable in any other way. She goes on to discuss the aim of

interviewing within qualitative research: “The aim of conducting interviews is to gain information on the perspectives, understandings and meanings constructed by people regarding the events and experiences of their lives” (p. 85). However, the complex field of qualitative interviewing involves data collection that is anything but straightforward.

For both the researcher and the study participant, perceptions and assumptions include preconceived notions of reality. Nevertheless, Green and Thorogood (2004) suggest that the relationship between interviewer and interviewee is the foundation for obtaining qualitative data: “The research interview can be seen, then, as a specific kind of interaction, in which the researcher and the interviewee produce language data about beliefs, behaviour, ways of classifying the world, or about how knowledge is categorized” (p. 87). This concept is important as it suggests that the interview process requires the researcher to confront decisions concerning: 1) the type of information desired from participants, 2) the type of interview conducted and, 3) the theoretical and/or philosophical basis for their research method. Pink (2004), commenting on reflecting on the need for reflecting on the practice of biographical interviews, states: “the knowledge produced through any qualitative research encounter... should be understood as the product of a specific interaction between researcher and informant(s). Our informants tell and show us what they do *because* they are in a research situation with us as individuals; this encounter and the knowledge produced through it can never be objective” (p. 397).

### ***5.7 Biographical Interviewing Techniques: “Tell Me About Your life”***

The aims of the Easington study lent themselves to using a relatively open type of interview technique, discussed in due course. Bornat’s (2008) work on biographical methods serves as a foundation for the discussion of the methods used in the Easington study. The term “biographical methods” encompasses several research approaches which seek to obtain in-depth qualitative data:

Biographical methods’ is an umbrella term for an assembly of loosely related, variously titled activities: narrative, life history, oral history, autobiography, biographical interpretive methods, storytelling, auto/biography, ethnography, reminiscence. These activities tend to operate in parallel, often not recognising each other’s existence, some characterised by disciplinary purity with others demonstrating deliberate interdisciplinarity. History, psychology, sociology,

social policy, anthropology, even literature and neurobiology at times, all have a part to play (p. 344).

Using the biographical method to obtain participant data fits neatly into life course theoretical understanding of the lived experience of older people. The life course theory and the biographical interpretive method complement each other. While there are similar elements between the two areas of study, they are distinct in that biographical methods are suited to the way in which qualitative research is “done” whereas the life course theory is more useful for analysing the “nature” of the lived experience via an analysis of structural and agentic factors. Bornat makes the distinction between oral history methods which are concerned with the way which participants use language and emotion to describe events in their lives, and the biographical interpretive method (a phenomenological approach) which focuses on the individual’s perception of the structural and historical context and what it is like to “be that person” (p. 346) who has experienced many decisions and transitions in life.

Biographical methods help the researcher consider the ways in which participants see themselves in the context of their social environment. The life course theory is a macro theory which helps to underpin the more expansive questions of social structure, historical events, timing and human agency, and the way in which they combine to influence individual lives. Capturing the voices of older people in Easington was the aim of the study, thus a biographical interview approach was selected as a “line of enquiry”. This notion of a “line of enquiry” presents some challenges. To what extent should interview questions be structured? Should an interviewer just let participants’ speak unhindered about their lives? In biographical approaches, a researcher asks an initial question and then waits, ideally without interruption, for the interviewee to relate his or her answer on a particular topic. This format fits in well with the concept of in-depth interviewing. Johnson (2002) comments on the nature of in-depth interviewing in order to go beyond capturing the “basics”: “A researcher who uses in-depth interviewing commonly seeks “deep” information and knowledge – usually deeper information and knowledge than is sought in surveys, informal interviewing, or focus groups, for example. This information usually concerns very personal matters such as an individual’s self, lived experience, values and decisions, occupational ideology, cultural knowledge, or perspective” (p. 104). Lawler (2002) supports the idea that using



qualitative interviews assists our understanding of the life course: "...It [interviews] deals with the 'narrative' dimensions of people's accounts with qualitative research – the ways in which people make and use stories to interpret the world. I want to emphasise, however, that I am not using narrative here to indicate a 'story' that simply 'carries' a set of 'facts'. Rather, I see narratives as *social products* produced by people within the context of specific social, historical and cultural locations...they are interpretive devices through which people represent themselves both to themselves and others" (p. 242).

This study combines concepts from both the biographical interpretive approach and the oral history approach (Bornat, 2008), to measure both the lived experience, and also to take into account the *way* in which participants describe their life in Easington. The place of the researcher in this type of research has been debated in the literature (Esterberg, 2002). Esterberg highlights the fact that some researchers believe that the interviewer should be a part of the interview process while others think that the researcher should be neutral during the interview. Esterberg's primary point is that the role of the researcher depends in large part on the nature of the research (p. 88). The phenomenological approach compliments oral biographical interview techniques as they both allow for an openness in the questioning process, for maximum description of the individual's lived experience. It is interesting to consider whether there is a relationship between biographical interviewing techniques, phenomenology and the life course theory. One explanation is that these concepts may be considered to be on a continuum of "knowledge acquisition". To summarise: 1) phenomenology, as a philosophical approach, underpins the overall "view" of what the researcher desires to capture in the interview, 2) biographical interviewing is the method or technique of obtaining the data, and 3) the life course theory situates the individual's life in both the macro world of their cohort and the micro environment of their local neighbourhood. The remaining chapter outlines the specific research methods used to gather data and analyse the results.

## **5.8 Methods**

### **5.8.1 Position of Researcher – “Insider” or “Outsider”**

Corbin Dwyer and Buckle (2009) write about the importance for researchers to consider their status in qualitative research. The concept of whether a researcher is either an “insider” or an “outsider” to the study population needs to be considered when attempting to analyse and interpret study data. It may be argued that I had a dual role as an insider and an outsider. I was an insider in that at the time of the fieldwork, I worked as a Health Improvement Specialist with the County Durham Primary Care Trust. As a result of my employment, I had greater accessibility to older people in Easington than I might otherwise have had as a member of the general public, thus I was able to more easily access potential study participants. The benefits of this accessibility included: 1) strong knowledge of the geographic area of the participants and 2) familiarity with the social, cultural and historical issues of Easington. My role as an outsider, i.e. my status as an American citizen may have conferred other benefits to the research process as participants might have felt more freedom to discuss sensitive issues with “an outsider”. Corbin Dwyer and Buckle (2009) refer to this dual role as the “space between” (p. 61), stating: “The intimacy of qualitative research no longer allows us to remain true outsiders to the experience under study and, because of our role as researchers, it does not qualify us as complete insiders. We now occupy the space between, with the costs and benefits this status affords” (p. 61). It is acknowledged that I was in a unique position to occupy both an “insider” and “outsider” position during the fieldwork. This issue is discussed in more detail in Chapter 9 (“Reflections on the Research Process”).

### **5.8.2 Participant Recruitment**

Fieldwork was conducted between in 2008-2009. Study participants were recruited in various ways. Rather than a blanket approach to recruitment, e.g. submitting adverts in local newspapers or posting fliers through letter boxes, it was decided that purposive sampling would be used, capitalising on the researcher’s proposed links with the local area. Firstly, printed material describing the project was developed and distributed to local community centres as well as to colleagues in the Age UK Easington office who agreed to mention the study to their clients. Secondly, community centres, which are known in the area to be welcoming of research projects, were approached to gauge their willingness to advertise for participants. Presentations about the study were also made

in social groups and older people's fora, including luncheon clubs and resident associations. Although the project was explained in detail to many individuals, attracting participants proved a challenge. For example, after reading the study leaflet one potential interviewee in Wheatley Hill remarked, "why would I want to talk about those times"? When asked the reasons for her reluctance, she stated that her husband had been killed in a mining accident and she was forced to raise her children as a lone parent. She did not view the past in a positive light. Ultimately, the best recruitment strategy turned out to be 1) word of mouth, 2) community centre staff and 3) this author's contacts who worked with older people in the area. A total of 14 participants were initially recruited to the study. Upon arrival at one potential interviewee's house in Wheatley Hill, the woman stated that she no longer wanted to participate in the study. She said that her daughter was reluctant to have a "stranger" in her mother's home. An offer was made to contact the daughter, which was declined. In another instance, a man who was recruited to the study through Age UK, was intoxicated upon arrival to his home and the interview did not proceed.

All twelve participants in the Easington study have lived in the Easington area for more than twenty years (see Appendix E which contains summary biographical information on each participant). There was a wide diversity of ages in this study, ranging from 62 to 99 years old. The variation in historical time periods through which participants lived is important to bear in mind when considering the "lived experience" of each participant. A point must be made concerning gender. Initially, the study plan was to interview the same number of men and women on the subject of their lives in Easington. However, the recruitment yielded mostly women participants. Thus, although the data analysis is weighted toward responses from the female participants, the two men who were interviewed provided fascinating data concerning their own lives, especially relating to social networks (see Chapter 8).

### **5.8.3 Ethical Considerations**

Ensuring that qualitative research is of the highest ethical standard is a chief concern of any researcher, whether conducting quantitative or qualitative studies (Mason, 1996). Lewis (2003) comments that in qualitative research studies, ethics is a particularly pertinent issue: "...the in-depth, unstructured nature of qualitative research and the fact that it raises issues that are not always anticipated mean that ethical considerations have

a particular resonance in qualitative research studies” (p. 66). Research involving older people presents investigators with increased risks due to the potential vulnerability of some individuals. There are several basic principles which aim to ensure that all research studies adhere to a strict code of conduct concerning how their research is conducted and disseminated. The overarching goal in conducting ethical research is to respect an individual’s dignity and human rights. As the British Society of Gerontology’s (BSG) ethical guidelines state: “do no harm, treat those participating with respect and dignity, and work within a framework that acknowledges privacy, justice, human rights, and non-discriminatory practice” (p. 5). The study was undertaken in compliance with ethical standards as documented by the British Society of Gerontology (BSG) and the Economic and Social Research Council (ESRC). Ethical approval and insurance for the study was obtained from the Ethics Committee of Newcastle University’s Faculty of Medical Sciences (see Appendix D). The sponsoring institution was the Institute of Health and Society at Newcastle University. Study participants signed consent forms which were stored in a secure file. The data (including audio recordings and transcribed interviews) were stored and used in accordance with the Data Protection Act and the Copyright and Licensing Act. As previously stated, participants were assigned pseudonyms to protect their identity and reference to all potential identifying information (e.g. work places, family, colleagues) was removed during transcription and checked during initial reading of the transcripts. Participants were told about the intentions of the research (i.e. a PhD dissertation) and consent was sought and obtained from each participant, should future publishing opportunities arise resulting from the research.

All research with human beings seeks to avoid harm, which might result from either the research process or the dissemination of findings. Although the risks of harm in this study were minimal, every care was taken to make sure participants were not harmed in any way. The chief concern regarding possible risk of “harm” revolved around the interview process and possible painful life memories brought up in the course of conversation. Participants were assured that they could stop the interview at any time if they felt uncomfortable and it was reiterated that they were not obligated to answer questions or discuss any issues which elicited difficult memories.

#### **5.8.4 Interviews**

Interviews were conducted during 2008-2009. While a formal piloting process of the proposed topic guide used in the interviews was not undertaken, several meetings were held with this author's community contacts in Easington to determine the appropriateness of the guide. Feedback on the guide was received and the guide was amended accordingly. Participants were given the option of meeting in their homes or another suitable venue in which to hold the interview. Eleven of the twelve participants decided to hold the interview in their own home. One interview was held in a community venue. The interviews began by reiterating the nature of the study and reminding participants that they could withdraw from the study at any time. An explanation was also offered regarding the type of questions which would be asked and participants were assured that there were no "right" or "wrong" answers. Most interviews began with the participants describing their early life and progressed in a more or less chronological "time line" of their lives. The interviews initially were conducted using a topic guide which covered biographical information on early life history, (childhood, education, occupational life), experiences of retirement, neighbourhood perceptions and social activities (see topic guide in Appendix C). The interviews lasted between 60 and 90 minutes. Ultimately, the less structured, more biographical approach suited the topics both for the participants and the researcher. The guide was not abandoned, per se, but conversation flowed naturally from the probes without referring to it. Prompts, i.e. suggestions for topics to discuss, were occasionally given to participants if they "veered" away from the topic at hand or the conversation needed moving along.

Interestingly, participants mentioned many of the same issues despite the fact that not all interviews covered exactly the same topics. Using open techniques in qualitative interviewing runs the risk that an interviewee may offer seemingly irrelevant information. However, even data which do not appear to "fit" into the overall aims of the study may be examined to discover possible subjective meaning to study participants. Open-ended interview techniques also allow for silence, periods of time where the participant may be reflecting, though saying nothing. Bornat (2008) acknowledges that it is appropriate to look and listen for silences and unexpressed views within qualitative interviewing. However, she cautions that it may be easy to "over interpret" the silences, infusing them with subjective meaning (p. 352). Interviews were

concluded after conversation naturally led to a type of “ending” when participants were asked if they desired to add anything additional to the information they had shared. The plan was to conduct one interview with participants, leaving open the possibility of returning should clarification be needed. The main concern regarding whether to conduct additional interviews involved “weighing up” the need for information versus the pragmatic issue of contacting interviewees once again. Table 2 displays demographics of the twelve participants. They have been given pseudonyms to protect their identity. The reader is referred to the case studies in Appendix E for additional in-depth information concerning the lives of study participants.

### **5.8.5 Transcription of Interviews**

Interviews were tape recorded and transcribed verbatim by the researcher. They were read several times in order to ascertain the various themes which emerged from the data. The method of self-transcription was advantageous in that it allowed for deep knowledge of the data and the opportunity to fully reflect on the emerging themes which appeared most often in the data. Researcher transcription is often the first “way in” to the data following the interview. Transcripts were not returned to participants as it was felt by the researcher that this would have presented an undue burden to participants.

**Table 2: Age, gender and location of study participants – (see Fig. 1 – p. 9 for location detail)**

<b>Age</b>	<b>Gender</b>	<b>Code / Village</b>
80	Female	Miss Smith – Blackhall
81 - His wife was also present and contributed to the conversation  Mrs. Troy's age unknown	Male	Mr. Troy – Easington Colliery  Mrs. Troy
71	Female	Mrs. Sanders – Easington Village
99	Female	Mrs. Knight – Horden
71	Male	Mr. George – Seaham
86	Female	Mrs. White – Seaham
79	Female	Mrs. Scott - Station Town
69	Female	Mrs. Jones – Station Town
62	Female	Mrs. Johnson – Trimdon
92	Female	Mrs. Green – Wheatley Hill
78	Female	Miss Black – Wheatley Hill
66	Female	Mrs. Frost – Wingate

### 5.8.6 Data Analysis

There are myriad ways in which qualitative data may be analysed and interpreted. Citing Morse (1994), Thorne (2000, p. 70) points out that no matter which type of analysis is used in qualitative research, there are certain elements common to each approach. Morse summarises the cognitive approach that each researcher needs to possess in order to fully understand and interpret the data in a qualitative study:

- *comprehending* the phenomenon under study
- *synthesising* a portrait of the phenomenon that accounts for relations and linkages within its aspects
- *theorising* about how and why these relations appear as they do, and;
- *recontextualising*, or putting the new knowledge about phenomena and relations back into the context of how others have articulated the evolving knowledge

Thus it is not only how one “does” data analysis, in the first instance it is how one “thinks” about the data and subsequent meanings. Therefore, meaning and interpretation follow on from theme identification. The Easington study may be categorised as a retrospective study which incorporates the use of biographical methods and is defined as “a research design in which retrospectively from the point in time when the research is carried out, certain events and processes are analyzed in respect of their meaning for individual or collective life histories” (Flick, 2006, p. 143). A thematic analysis was applied to the data using the constant comparison technique which built up a rich and thick description of the categories and themes arising from the data. Constant comparison as a data analysis technique allows the individual pieces of data to be compared between interviews, allowing the researcher to discover the relationship between those data. Thorne (2000) states:

For example, by comparing the accounts of 2 different people who had a similar experience, a researcher might pose analytical questions like: why is this different from that? and how are these 2 related? In many qualitative studies whose purpose it is to generate knowledge about common patterns and themes within human experience, this process continues with the comparison of each new interview or account until all have been compared with each other (p. 69).

Many texts refer to constant comparison (Grbich, 1999; Flick, 2006; Arksey and Knight, 1999) and its usefulness in collecting and analysing data. According to Arksey



and Knight (1999), the method involves the circular work of continually comparing transcripts to refine initial coding categories, conducting subsequent interviews and additional refining. Green and Thorogood (2004) maintain that comparing study results with those found in the existing literature is also important to ensure validity: "...good analysis also involves comparison of the findings with other findings from the field. This does not necessarily just include findings related to the substantive topic of interest, but from the more general social science literature that relates theoretically to the issue" (p. 194).

The data analysis approach in this thesis differs from the strict "grounded theory" use of constant comparison method of data analysis in that it does not *generate* theory, instead it aides phenomenological understanding of the lived experience through the data. This type of data analysis also supports the social constructionist epistemology which views the acquisition of knowledge as constructed by social experiences. The interpretive ontological framework in this data analysis uses the phenomenological approach to understanding the meaning of participants' lived experience. A central task in data analysis subsequent to the discovery of themes, is to understand the meaning of the data. Using a phenomenological approach to interpreting data helps reveal participants' lived experience. Interpreting qualitative data from a phenomenological perspective is a multifaceted process. Data analysis techniques for this thesis broadly followed the five step process described by LoBiondo-Wood and Habec (1998). The following steps lay a foundation for understanding data from a phenomenological perspective:

1. Thorough reading and sensitive presence with the transcription of the participant's description.
2. Identification of shifts in participant thought resulting in division of the transcript into thought segments.
3. Specification of the significant phrases in each thought segment, using the words of the participant.
4. Distillation of each significant phrase to express the central meaning of the segment in the words of the researcher.
5. Preliminary synthesis of central meanings of all thought segments for each participant with a focus on the essence of the phenomenon being studied.

6. Final synthesis of the essences that have surfaced in all the participant's descriptions, resulting in an exhaustive description of the lived experience. (p. 225)

### **5.8.7 Coding**

After transcribing the interviews, the transcripts were coded without the use of a computer assisted coding system. Instead, the open coding method, advocated by Strauss and Corbin (1990/1998), as cited in Flick (2006, p. 299), was used. As previously mentioned, this involved generating broad themes within the data, such as gender, education, employment, retirement and perception of neighbourhood (see Appendix F). These themes were subsequently analysed using a technique called axial coding which breaks them down further to "refine and differentiate" the categories generated through open coding (Flick, 2006, p. 301). For example, under the theme of "women", several sub-categories were identified:

#### **Women – Employment**

##### Types of work

- domestic service – description of work
- culture of young women in domestic service / working locally in the Northeast / London / Manchester
- sent back home during World War II

##### Factories

- crisp factory
- wool factory
- telephone factory
- munitions
- long hours away from home / Bishop Auckland
- physical environment in factories
- social environment / opportunities in factories

##### Other type of work:

- Post office (social role of postmistress)

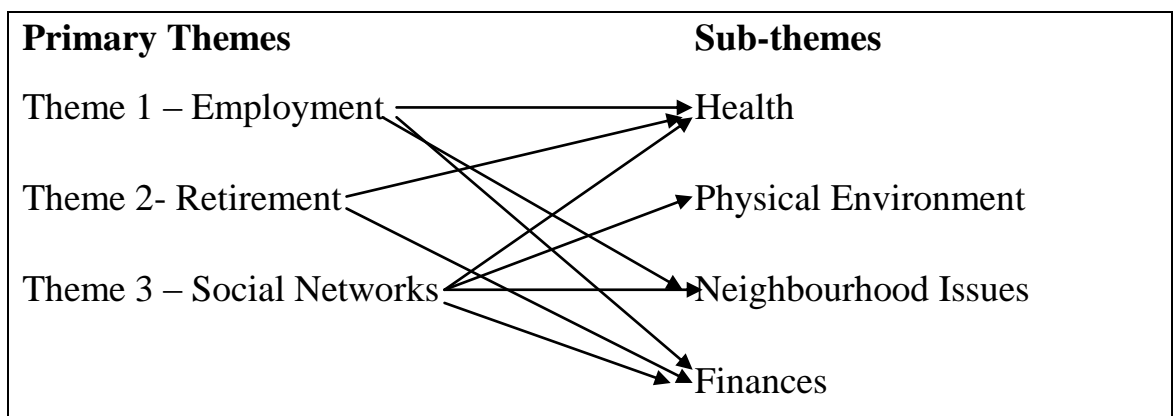
- Pit canteen
- Shops
- “Laying people out”
  - Transport to work
  - Feelings about work
  - Missing work after retirement
  - Social networks

**Women – Education**

- leaving school at age 14, 15 or 16 years of age
- grammar school attendance
- societal expectations of women after leaving school
- mother’s aspiration for child’s career
- unfulfilled desires due to parental pressure
- lack of money for further education
- personal career aspiration

There were three primary themes which emerged from the constant comparison technique of data analysis which also impacted other areas of life, thus discussion of the sub-themes will be integrated into the three “results” chapters. The three main themes were employment, retirement and social networks. Steps 3-6 above were especially relevant in ensuring that the data analysis was completed in a systematic manner. Diagram 2 shows the intersection between the three main themes and sub-themes:

*Diagram 2 – Themes and Sub-themes of Interview Responses*



Although there is no formal research diary, throughout the studentship, I made reflective notes particularly during the transcription and analysis of interviews. The justification of chosen themes stems from: 1) the significance of the topics to participants, 2) their consistency and volume of their appearance in the data, 3) the relevance to the “lived experience” (related to the research question), and 4) the fact that these “higher order” themes incorporate other emergent themes. In addition, as shall be shown in Chapters 6-8, results themes were chosen because such macro issues as employment, retirement and social networks showed a demonstrated effect on the micro, more personal level of participants’ everyday lives.

### ***5.9 Rigour and Quality in Qualitative Research***

Is it possible to determine the truth and accuracy of qualitative research? According to Green and Thorogood (2004), “the notion of validity can be problematic, as in the interpretive and constructionist traditions, we are working with ‘truths’ that are socially situated, and rejecting a positivist idea of one fixed and essential truth” (p. 192). Is it possible to accurately reflect what actually happened during the qualitative research process? Researchers may read and interpret qualitative data in a multitude of ways, thus it is difficult if not impossible to say that the results of a qualitative study reflect true social realities. It is equally true that reliability (the idea that study results may be replicated) in qualitative research is often problematic, in that respondents will seldom do or say the exact same things. The Easington study results were analysed and interpreted in light of existing research and sought to address issues of validity by considering whether the interviewees were led by the researcher to present their stories in a biased way. Flick (2006) offers advice on this point: “The main question here is whether the interviewees were given any cause to consciously or unconsciously construct a specific (i.e. biased) version of their experiences which does or does not correspond with their views in any way” (p. 372). The Easington interviews were conducted in a manner which allowed participants to freely share their life experiences with a minimum of interruptions during the conversation.

Given the nature of qualitative research, within the interpretive tradition, it can be difficult to know how to best interpret what participants report of their “lived experience”. Sandberg (2005) states that: “the principal question of reliability

concerns the procedure for achieving truthful interpretations” (p. 58). He goes on to discuss the concept of reliability in qualitative research as “interpretive awareness” (p. 58): “... criteria of reliability, such as replicability and interjudge reliability of results relating to objective reality, fall outside the domain of interest in achieving reliability within interpretive approaches (Sandberg, 2005)” (p. 59). One of the ways Sandberg suggests trying to achieve reliability in qualitative research is through what he refers to as “perspectival subjectivity, whereby a researcher exercises particular awareness of their interpretation of all facets of the research process: “researchers exercising perspectival subjectivity are more aware of how their own interpretations are influenced by the particular disciplinary, theoretical, and methodological perspectives taken in the study. Thus, interpretation then becomes a strength rather than a threat to reliable results” (p. 59). The Easington study worked toward to achieving a degree of “interpretive awareness” through continual evaluation of the above research elements, specifically the strong theoretical influence of the life course theory and environmental gerontology concepts. Golafshani (2003) contends that the concept of reliability in qualitative research is “irrelevant” compared to expectations of reliability in quantitative research. This relates in part to the fact that quantitative research may be “replicated” perhaps more easily than qualitative findings. Research by Ritchie and Spencer (1994) confirm this concept and suggest that rigour in qualitative research is about “detection”. They state that: “Qualitative data analysis is essentially about detection, and the tasks of defining, categorizing, theorizing, explaining, exploring and mapping are fundamental to the analyst’s role” (p. 176). This “generation of understanding” is precisely the reason that qualitative research methods and techniques were used for the Easington study, in order to discover the “lived experience” of older residents. As previously mentioned, this was achieved by comparing categories developed through coding, to determine their similarities, differences and dimensions, called “discrepant” or “deviant” cases. These are cases which don’t always fit with the majority of the data. According to Morrow (2005), the process of determining discrepant cases ensures that the researcher has fully explored all the data and has not relied solely on the majority findings for data analysis. Morrow (2005) states that: “...providing adequate discrepant case analysis involves finding disconfirming instances of a phenomenon and comparing them with confirming instances in order to understand the complexities of the phenomenon. Through repeated comparisons, the investigator is able to revise key assertions or categories until they accurately reflect the experiences of participants” (p. 256). The process of reading and re-reading the transcriptions, hand-coding and

developing thematic categories assisted in the progression of the data analysis and in determining discrepant cases in the Easington study.

## **Conclusion**

This chapter has reviewed the methods and methodological approach of the Easington study and has sought to address salient issues which influence data collection as well as the interpretation of results. Although qualitative research is rightly considered to be a scientific endeavour, encompassing methodological rigor in research design, data collection and interpretation, it also includes a degree of flexibility. A distinctive feature of qualitative research is the relationship between the interviewer and interviewee. Parry, Thomson and Fowkes (1999) make a similar point: “Qualitative... researchers on the other hand celebrate, rather than diminish the importance of the relationship between researcher and researched, and the methods themselves are not treated as distinct from the data which are collected” (p. 4). The methods and methodology used in the Easington study were chosen to ensure that participants’ life stories were considered in full, respecting the spirit and truth in which they were conveyed. These life stories are further elucidated in chapters 6 through 8 which present study data on employment, retirement and social networks. Chapters 6 and 7 focus on the lives of older women as employment and retirement were mentioned most by women in the study. While the two male participants briefly mentioned issues of employment and retirement, the majority of their data concerns social networks and social participation (discussed in Chapter 8). The following “findings” chapters provide data through which to evaluate the response to the study’s research questions. The overarching question concerning older Easington residents’ lived experience and the subsequent related themes will be discussed throughout the duration of the thesis.

## Chapter 6. Women and Employment

The network of social relations, customs and expectations could form a secure base upon which to live their lives. The expectedness of the daily routine balanced the unexpectedness of pit life. A firm foundation of acceptance and determination to retain a community and identity made the women a very strong cohesive force. Without the particular bonds formed by colliery women the character could not have functioned or retained its elusive and definite character.

- Susan Wilson in *Miners' Wives* (Wilson, 1984, p.3)

### 6.1 Introduction

Work makes the world go round. By definition, in their daily toils men and women throughout the world engage in an amazingly wide variety of work activities that support individuals, families and economies. While the term *work* usually denotes receiving pay for services rendered to an employer, society recognises that there are many types of work including that which does not receive any remuneration, such as caring for grandchildren or ill family members, engaging in volunteer activities or managing a home. The people of former mining communities in the United Kingdom are well known for their hard work and tenacity in the face of adversity. Throughout history, although men most often supplied the main household wage, women, both married and unmarried, provided the never ending domestic labour necessary to maintain families. As discussed in Chapter 2, women in the colliery villages of Easington, County Durham were a part of a culture which held strict expectations concerning both their role in the home and in outside paid employment.

The primary aim of this chapter is to explore the employment lives of women in Easington. As mentioned in Chapter 5, employment was a prominent feature of participants' narratives which had a profound impact on participants' lives. The chapter addresses the following questions. Under what circumstances did the female respondents engage in paid work? How do these women recollect their working lives and is it possible to determine the effect employment had on them in later life? How did they respond to societal expectations of their role within the family and their role outside the home? The education of participants, though briefly mentioned in this chapter, will be explored more fully elsewhere in the thesis.

The working lives of women in this study reveal a picture of a country in transition as the Easington women were part of a wider cultural and social transformation which took place during the twentieth century. The challenge for them was to determine how to best live their lives within the values framework in which they had been raised while adapting to the changing times. There are many similarities between the respondents but also some very interesting discrepancies which relate to age cohort, family size and psychosocial factors. Although many, if not most, of the issues at hand may be analysed through a purely sociological lens, this thesis adopts the life course approach in order to address the above questions. The story of the working lives of these older Easington residents paints a rich picture of their contribution to their family and to the larger community.

## ***6.2 Background***

In order to understand the social and cultural environment in which the Easington women in this study lived and worked, it is necessary to provide a brief overview of the role of women in previous generations. It is tempting to think that we are our own masters, making daily decisions concerning how we live our lives in the public sphere. In reality, government policies have influenced women's working opportunities or lack thereof for many years. Social attitudes concerning women's roles have a profound effect on female employment and career opportunities. It is clear that, especially in rural settings during the seventeenth and eighteenth centuries, women worked alongside men, an arrangement that was deemed to be socially and culturally acceptable. In some rural contexts, women's work even seemed to rank in equal importance to that of men. The gendered divisions of work which characterised the period of industrialisation in the later nineteenth and early twentieth centuries were not as apparent in the more agrarian societies of previous centuries. Families worked as a team to accomplish daily tasks:

In such households, men, women and children co-operated in the production of food and basic commodities. Tasks were divided along gender lines; women cared for poultry and pigs, household tasks, dairying, and other ancillary work such as spinning and sewing, whereas men were responsible for larger animals (horses and cattle), ploughing, and mowing, although in periods of work intensity such as the harvest both sexes might do similar work (Crompton, 1997, pp. 6-7).



In her work on women in labouring families from 1860-1950, the historian Laura Oren notes that prior to industrialisation a wife would keep animals and also possibly earn some cash from a small local industry (Oren, 1973, p. 108). The industrial revolution radically altered the landscape for women. Oren's work is primarily centred on researching the allocation of food and the distribution of so called "pocket money" within families during times of poverty in the eighteenth and nineteenth centuries. Her research illustrates how women's roles within the family and their opportunities for paid work radically changed in the post-Victorian era.

The Victorian concept of the "good" woman was propagandised as it was thought that women were fragile beings who needed to be shielded from the evils of the outside world, including the sphere of paid employment. Crompton (1997, p. 7) suggests that a woman became the "angel of the house" and the home was maintained by "the efforts of its resident spirit (the wife)". Although a generalisation, most middle-class Victorian women were dependent on their husbands for economic security. If women did engage in paid employment it was usually "home work", which involved such tasks as taking in washing, minding children and other similar jobs. This work was poorly paid but it provided a much needed supplementary income for the family. In spite of relying on her husband for sustenance, a wife used her power in the domestic sphere to shape her work and control domestic life to the extent she could. These ideals of domesticity prevailed, and some argue still prevail, until the major cultural changes for women were wrought by the two world wars and post-war government policy concerning working women. The period after World War I was one of widespread change in the social and political landscape. Thousands of women had been encouraged to work in the munitions industry during World War I. Bruley (1999, p.61) has argued that the majority of working class women who entered paid employment during World War II, mainly in industry, benefited from their experience. Their work choices were most certainly an improvement on pre-war options such as domestic service. However, most women were forced to leave their posts to allow men coming back from the war to return to their previous jobs. The government imposed "marriage bar" kept married women out of paid employment and had a profound effect on women's career opportunities.

According to Bruley (1999):

Government departments, local authorities and businesses also dismissed women, particularly if they were married... A formal marriage bar came into force in many areas for women teachers, clerks, nurses and civil servants. This vicious backlash against women workers was officially sanctioned by the 1919 Restoration of Pre-war Practices Act, which enforced the 1915 agreement between engineering employers, unions and the state allowing women workers to be introduced into industry for the duration of the war only (p. 61).

Crompton (1997, p. 15) suggests that it was the male breadwinner model of the division of gendered labour which contributed to the exclusion of women in paid employment in the early twentieth century. The Trade Union movement at that time fought hard for a family wage, one large enough for a man to support his family. Therefore women's domestic position was seen as a major reason for their comparatively low labour market position. Author Jane Lewis (1984, p. 49) has remarked that many male trade unionists thought women's employment pushed down wages, a belief that resulted in opposition to married women as workers. Furthermore, Lewis (1984, p. 16) suggests women themselves often "internalised" the belief that their place was in the home, owing to childbearing responsibilities which limited their opportunity to undertake education and training required for "professional" work. Lewis (1992, p. 67) also argues that by staying home a woman became part of the "respectable working-class code of masculinity." Williamson, who wrote about his grandfather's life and the experiences of pit workers, was also keen to point out the place of women in the life of the colliery. The extent to which many women had a limited chance to experience a social life outside of the home is reflected in the following quote describing a woman's world in the early and mid-twentieth century: "Work, then, was the motif of her whole life, the source of her self-respect, her access to the community around her, the opportunity for her deepest self-expression and the quality above all others that her husband valued... Unions and the Labour Party offered a glimpse of a different future for the men. What did they offer the women?" (p. 132). Williamson goes on to cite Peter Stearns (1972, p. 108) who made a similar point about the world of women in coal mining areas circa World War I: "...because there was little sense of alternatives there was little visible despair." Easington participants would have been familiar with this sentiment through their mothers' and other female relatives' lived experience. As shall be shown later, this is not to say that women during this period were completely removed from life outside the home. Guilds, co-operative societies and political causes occupied certain groups of women but, on the whole, most women found that their role was one of

attempting to create a harmonious domestic life despite the challenges of “making ends meet”.

### ***6.3 New Horizons: A Changing Landscape – 1940s and Beyond***

It is often the case that significant social change is brought about through national crisis, requiring a rapid shift of cultural values in order to achieve an important outcome. This was certainly the case for women during and after World War II. Roberts (1995), in her important book on women and families from 1940-1970, asserts that the pressure women felt to combine family life with work in the “war effort” revealed a link between two very important social and cultural periods in history:

From our evidence it would seem possible to argue that the demands made of women during the war, together with the dual role they were expected to play, symbolizes a bridge between the pre- and post-war worlds of women. During the war they were expected to be, as they had been earlier in the century, household managers *par excellence*. They were required to feed and clothe their families on meagre rations and an inadequate supply of clothing coupons. But the other role of women at this time was as important figures in the world of men’s work. It might be argued that the war had only a limited effect on the history of women in the labour market, as almost all of those doing war work lost their jobs at the end of the war; indeed they expected to do so (pp. 115-116).

The passage of the National Service Act on 18 December 1941 changed the working lives of many women almost overnight. Women between the ages of 20-30 were conscripted by the government to work in munitions factories all over Britain. Childless married women were later recruited into service, but pregnant women and those with small children were initially exempt, although many did eventually enter the workforce aided by government sponsored childcare. Although it was more or less government policy after the war for married women to give up their jobs, mostly in industrial and factory settings, to returning servicemen, times were changing and, due to shortages in occupations such as teaching and civil service, the marriage bar imposed after the WWI was lifted in 1946. The Government went as far as directly appealing for women to re-join industry, despite at the same time encouraging married women to continue their domestic life by having more children due to the falling birth rate in the UK. There was an increasing realisation in society that a woman could indeed hold down paid employment while being a mother. However, most of the jobs open to women were part time and low paid and were classified as jobs typically reserved for

women, such as teachers, nurses, and shop assistants (Roberts, 1995, pp. 119-120). There are myriad and complex reasons for an increasing number of married women entering the work force during the 1940's and 1950's. For many it was out of financial necessity in order to provide for the family, especially if the husband was ill or had been made redundant. For an increasing number of women, however, especially into the 1950s and 1960s, their ability to participate in life outside the home gave them a new found sense of fulfilment and allowed them to more fully experience the well known benefits of paid employment, a regular wage and increased self-esteem.

#### ***6.4 The Easington Experience***

*I am always hearing middle-class women in London saying that they could do with a change. They should try being a miner's wife in East Durham.*

JB Priestley (1934, in English Journey, 2009, p. 238)

The qualitative interviews undertaken in this study provided a rich vein of information about employment over the life course and how it influences quality of life as people age. It is interesting to note that respondents' answers concerning their working lives directly correlate to that which was taking place in the national historical context around women and employment. Some of the themes gleaned from the research have already been mentioned but will be developed further in the more local context. There is a surprising lack of specific literature on the lives of women in former coal mining communities from 1930-1960, even less which specifically addresses women's working lives. Angela John (1982) states that:

Where women have received some attention from coal mining historians it has usually been as the wives and mothers of miners. Not only is their childhood and young working life usually ignored, but almost invariably they have been considered from the standpoint of the male miner, helping to elucidate his little known world. They have appeared too as widows, the surviving victims of explosions, though they have tended to disappear quite rapidly once the story of an accident has been told (pp. 15-16).

Much of the recent literature which even remotely mentions women living in coalfield areas is focused on two distinct historical periods: 1) the mid nineteenth and very early twentieth centuries, emphasising descriptions of home life and social roles for colliery women (McDowell and Massey, 1984), and 2) the 1984-85 pit strike (Gier-Viskovatoff and Porter, 1998, Spence, 1998).

The 1984-85 pit strike literature focuses heavily on how women used their power in the domestic sphere to engage in the political process to campaign against closure of the mines. The '84-'85 miners' strike was a milestone in the evolution of East Durham women's involvement in protest movements. Although the immediate subject concerned the threatened closure of East Durham collieries, the cause drew more women into the broader work of attempting to effect political and economic change in their local environment (Spence, 1998, p. 33). John (1992, p. 13) claims that social scientists over many decades have chosen to focus their research on the miner working underground, to the near exclusion of workers at the mine surface. While that is a valid point, the work of miner's wives has been even more neglected. Furthermore, to the extent that miner's wives have been mentioned in the academic literature, it is most often to highlight their daily, practical support of the miner.

Despite the dearth of literature on women and colliery life from 1930-1960, existing research from both ends of the twentieth century is very useful in attempting to understand the influences on women in the Easington villages, especially the social and cultural factors which led them to work in paid employment over their life course. Hall (2001) has observed that writings on life in coal mining areas, in this case in Northumberland and County Durham, have often reinforced the stereotypical image of the miner. According to Hall "the classic view of mining society is of more rigidly segregated sex roles and workspaces and of more entrenched patriarchy than in any other industrial community. Many histories of miners' trade union and political activity reinforce this picture, which leaves an impression of a hyper masculine culture centred around the trade union, working men's club, allotment, and football field" (p. 107). Hall also discusses the fact that women in the coalfields of Northumberland, while fitting the stereotypical ideal of domesticity, also had opportunities to participate in life outside the home and were a more heterogeneous group than sometimes portrayed.

In two classic studies of life in coalfield communities, Bulmer (1978) and Dennis, et al. (1976) vividly describe the life of a miner's wife as one of constant domestic toil, interrupted by occasional social networking opportunities "over the clothesline". While

the reality may not have been as bleak for all coal mining women as portrayed in books and articles, nevertheless, a woman's life in coal mining areas was more or less prescribed from birth. Storm-Clark (1972, p. 18) has compared the work of a miner's wife "to that of a domestic outworker in the early years of industrialisation. The economic and work organisation of the pit imposed a corresponding cycle of cooking, washing and household demands." Hall (2001) suggests that while women in mining communities were influenced by the social changes around them, there remained distinct social roles within families. She observes that "although mining communities were affected by outside trends, internal dynamics promoted continuity in gender relations, notably the mother-daughter relationships and the persistence of geographical and social isolation. After marriage, mining women were still restricted to the domestic sphere and traditional responsibilities" (p. 10). While this study's interviewees confirm that life was prescribed in the coalfield villages, they also make clear that even within the confines of societal expectations, they have used their personal and social resources to maximise possibilities for productive lives.

#### **6.4.1 "Well, I just went to work"**

A good starting point for discussing paid work opportunities for women in the Easington area is to highlight the opportunities young women had upon leaving school. Education and occupation are inextricably linked and it is well known that education affects life chances as well as physical and mental health status. Most women in the study left school between ages 14-15 as fourteen was set as the compulsory school leaving age until 1947 when it went up to age fifteen. It was very common in working class areas such as Easington for young women to leave school on Friday and start work on Monday. Only one respondent went on to higher education (obtaining a degree at Durham University), albeit as a mature student. Most women felt that their parents' expected them to get a job after their compulsory education was finished. This was especially true for a young woman whose family was beset by financial challenges. One especially poignant story was told by Mrs. Green who said that at the time of the 1926 mining strike, her father was an agent for a London and Manchester insurance company. As the strike took hold, people couldn't pay their insurance premiums so he had no wage. The family also had a bakery which was affected by the lack of cash people had to buy even basic goods. A few years after the strike she turned 14 and had to leave school to take a job:

*“You see when we got to the age of 14 and left school we had to take a job - there was no money anywhere, there was no child allowances in those days, we just had to go off to work, so at 14 I left school on a Friday and started work on a Monday. I started a job looking after a little girl, they had a business in [Easington]. I used to go over there at 7:45 in the morning until 6:00 at night, see after the girl, do a little bit of the house work, cook the dinners for them, because we were all brought up to be cooks and bakers and I stayed there until I was 17, mind you I was doing all that work for 5 shillings a week.” (Mrs. Green, age 92)*

Most parents have always desired the best life for their children even though challenges sometimes prevent them from actually helping their offspring financially. Miss Smith’s father was killed in a mining accident in 1952 and her widowed mother encouraged her to “stay on” at school until she was 15. Progressive parents in the Easington mining area sometimes encouraged their daughters to stay on at school to improve their potential to earn a better wage, although it is difficult to know Miss Smith’s mother’s true motivation for keeping her in school. It may have been that Miss Smith’s mother wanted her to become financially independent in case *her* husband became ill or died.

*“I stayed in school a little bit longer. I was about fifteen when I left school, because with mother getting this compensation money for me she wanted me to stay at school as long as I could and I stayed there until I was offered a job in a drapery shop and I got twelve shillings and a hay penny and that was my wages.” (Miss Smith).*

Roberts (1995) has suggested that parents played an important role in the choice of where to work or go to school after a job or education. Some parents expected offspring to go into employment immediately upon leaving school, while others wanted their children to seek further education. Roberts (p. 51) maintains that one thing was definite in the 1930s and 1940s; “all jobs and careers were gender related.” It is clear that young women in mining contexts had fewer opportunities to pursue a formal career. The pressure to assist their mothers at home, the lack of value placed on female education by many men in the mining community and the simple financial pressure to contribute to the family income led most girls to begin working lives immediately after compulsory education. One respondent, Mrs. Sanders, commented that in her day (late 1940s and early 1950s) it was well understood that boys had more opportunities than girls in terms of career aspirations, although going “down the pit” was an ever present obligation for many.

*“A great amount of difference between boys and girls. In my day then, the careers weren’t what...you had nursing, in an office or in the shop, you know, there were very, very few that had aspirations to go on to university and in actual fact if you weren’t engaged or heavily courting by 18 or 19, you were absolutely on the shelf. And all my friends, me included were married by 20, 21.” (Mrs. Sanders, age 71)*

Dennis, et al. (1976, p. 239) make a strong claim about the value of boys over girls in mining villages during the mid-twentieth century: “parents are much more interested in the educational progress of their sons than of their daughters, many of them regarding education for women as a waste of time, since they are destined to spend their time as mothers and housewives.”

#### **6.4.2 Why Did Women Work?**

Naturally, the reasons women work are numerous though the most obvious and common one is financial necessity. Study participants talked at length about what motivated them to seek paid work. As previously stated, there was often pressure from a young woman’s family to start work immediately after education in order to contribute to the family finances. Other themes emerged from interviews with Easington women, consistent with the literature on working-class women in the mid-twentieth century. For a few participants, the motivation for working was that their husband or father had died or was injured in an accident. These women became the breadwinner in the family or they simply felt that they wanted to help the family as much as possible. For some women, obtaining a job meant merely walking to the village shop, but for others, having employment meant travelling a considerable distance.

The miner’s strikes in 1973 and 1984-85 had a profound effect on the finances of families in Easington. Many people fell into serious poverty which necessitated that the wife work to make ends meet. Mrs. Johnson (age 62) described how bleak it was and that she felt that there was no choice during the miner’s strike in 1973 but to go to work full time;

*MRS. JOHNSON - (Describing the 1973 strike)...It was hard going. You were just subsisting then. You got your pay on a Friday – you paid your rent, you put money away for your electricity and gas and if you were lucky you had money for food to last you the week. I wasn’t working at the time. That is why I went out to work, just to make ends meet.*

*JE - How long were you there (at the cleaning job)?*

*MRS. JOHNSON - About two years, that was all. That was - it was because I needed the money else I would never have done it. It was out of desperation. The wage [husband] was on didn’t see us through the week. I mean there was 3 strikes. You got to remember there were 3 strikes all together and the first 2 strikes they had to go back*



*because we had nothing behind us. We didn't even have a lump of coal in the coal house.*

The great sense of impending poverty during the strikes in the 1970s sent many Easington women out to work, never having been relied upon as the family's primary source of income. For participants who were young women during the 1940s and went to work to help contribute to the family wage, there was a genuine sense of relief especially on the part of their mothers who knew that the extra money would help pay for the necessities of life. Most young women received pocket money in return for giving the family their wages. Miss Smith (age 80) describes her situation:

*JE – What was it like to receive a wage?*

*MISS SMITH – “It wasn't a lot, but it was a little bit. I thought I was doing well. I was taking a wage. The wage went straight to my mam and she gave me some pocket money. By this time my sister was married and living away. My two brothers got married and were living away so it was just mam and I.”*

Working in paid employment gave many women a sense of independence, especially for younger women who were new to the labour force. They felt a distinct pride in being able to assist their families. A Wheatley Hill participant, Miss Black (age 78), said that although her parents paid for her daily necessities, she was happy to pay for her entertainment.

*MISS BLACK - Well, this is 1947 we are talking about - a pound a week. I gave my mother 5 shillings a week and I said, I'll buy my own clothes and pay for my own entertainment, going to the pictures, to a dance and save up for a holiday out of a pound a week. I felt really independent.*

*JE - What did your mother think of you paying her?*

*MISS BLACK – Oh my mother was quite happy with that. But I mean they bought all my clothes, gave me pocket money, and that, I said I'll give you that 5 shillings and I will see to my own clothes and entertainment.*

Sometimes it was the husband's redundancy from pit work, as mine after mine in Easington closed, that forced women into the role of their family's main wage earner. Mrs. Johnson, described the situation she was in when her husband was made redundant from the Trimdon pit and was taking care of his elderly mother:

*“But I carried on working full time while [my husband] was helping his dad look after his mam. And that was at Durham and that was why I was working 7 days a week to make our wages. I had two teenagers at home and a mortgage. It is things you've got to do. I mean it is no good sitting on your backside, you know, “somebody else is going to have to do something for us” - we had to do something ourselves.” (Mrs. Johnson, age 62)*

Many respondents mentioned how they “did what they had to do” to survive times of economic hardship. Social norms of domestic life dominated participants’ world to the extent that they still had to complete the household chores and see to the children and husband before going out to work, often working late evening shifts to minimise disruption to family life. Roberts (1995, p. 124) notes that especially in the homes of unskilled men “women’s wages were needed in these families to help clothe, feed and house them, the man’s wage being inadequate for these purposes.” Part-time work was the only option for many married women in Britain post-World War II. By working part time, women’s standard of living rose to the extent that they could buy “extras” they weren’t able to afford before the War. Some participants’ mothers engaged in paid employment as well, both for economic necessity but also to help fund the items which were considered luxuries. Historian Sue Bruley (1999, p. 124) confirms the idea of a wife’s wage contributing to the family’s ability to buy non-essential items: “Many women regarded work in the same way... to earn money for extras – clothes, furniture, a holiday, a car – never challenging the bread winning role of their husbands and fitting in their work around other commitments.” This concept was reflected by Mrs. Scott who stated: *“And we were lucky because a lot of people never had a holiday. Because I always had a little job. I home helped.”* After Mrs. Johnson’s father was made redundant from the mines, he decided to retrain for factory work. During this time, Mrs. Johnson’s mother went back to work at a laundry to support the family, but also to earn money so that her husband could have a car. Her mother had worked at the same laundry before she was married, but quit her job after marriage as was expected at that time:

*“Oh yeah, I would be 16 - I was working and I wasn’t earning very much as an apprentice hair dresser and my mom went back to work at [the laundry]. No - that was very hard work, but she went there so that they could afford to have a car so that they could get out on weekends and go on holiday and things like that. Dad adored his cars.”*

The fact that Mrs. Johnson’s mother was willing to go back to work to support her family was admirable, but her mother also recognised the importance of leisure time for her and her husband and was willing to make sacrifices in order to achieve this goal.

### **6.4.3 Work settings: limited options**

At any point in history, individuals can find it a challenge to conform to the social and cultural expectations placed on them. This was undoubtedly true for study participants who lived in communities which were renowned for their limited employment opportunities. Participants ranged in age from 62 to 99 and therefore their working lives spanned different generations of government policy toward women's paid employment. Owing to government policy in the 1930-50s, there were only certain types of work which were deemed appropriate for married women. Some women in the study were forced to give up their jobs when they married. Pregnancy forced women to leave work to, as Mrs. Johnson stated, "make way for younger women." Zweiniger-Bargielowska (2001, p. 149) confirmed this fact, noting that "marriage provided the major turning point in most women's lives from worker to housewife during the first half of the century." Participants who worked outside the home seemed to take it in their stride that they had to quit at times of domestic upheaval and transition, saying that was "just what you did." Interviewees acknowledged that there was an expectation they would engage in paid employment, but within the constraints of the social norms pervading Easington's villages, such as leaving work upon marriage and pregnancy.

A tension existed for many women in mining areas like Easington. On the one hand they accepted their circumstances, including domestic responsibilities of managing the family budget, raising the children, cooking, washing and cleaning. On the other hand, there was recognition, especially as the standard of living began to rise after World War II, that women could work part time in order to afford necessities as well as "extras". Roberts (1995, p. 139) claims that a wife's ability to "make something out of nothing" was a very important skill. This was especially true in times of scarcity in the mining communities. It is important to note that as women's roles outside the home changed with greater employment opportunities, their domestic status in the home was somewhat diminished:

In less prosperous times women's budgeting skills and abilities to make 'something out of nothing' had been highly prized and very important; a well-managed family budget could mean the difference between, on the one hand, being adequately fed and housed and, on the other sinking below the poverty line. Now, this kind of work, because it was unpaid, was increasingly perceived by some as having little value. With increased male wages a woman's ability to make do and mend and to budget well became less important than in earlier periods. At the same time, the opportunity to make money in the home, which had made it an economic power base for many women was much eroded.

Coupled with these developments was the growing belief that a woman's place was no longer exclusively in the home. In the midst of all this confusion women found themselves in a truly transitional phase: losing some of the power they had once had in the home and family, they had yet to acquire equality and any real power in the world of paid work (Roberts, 1995, pp. 139-140).

## **6.5 Paid Employment Options in Easington**

### **6.5.1 Domestic Service**

Before the massive role changes for women post World War II, domestic service was the most common option open to unmarried women in the 1920's and 1930's. Lewis (1984, p. 157) states that "Increasing numbers of young rural women went into domestic service, where they were better paid, receiving £12-£15 pounds a year...and were in addition given board and lodging... Domestic service and field work remained the only two options open to the majority of rural women until after World War II." Two study participants travelled to Manchester to become domestic servants for families with a large family or large home and one participant was posted to London. This work involved taking care of the children, cooking and serving meals, cleaning or sometimes a combination of all three tasks. When war began in 1939, two participants' fathers brought the young women home, fearing that London and Manchester would be bombed. When she was 17 years old, Mrs. Green moved to Manchester to work as a "domestic", but was forced by her father to move back to the northeast when she was 23 after the war started. Two other female study participants worked in the northeast as domestic servants. One worked for a wealthy doctor's family in Hartlepool, but did not like being away from home so she left that post in pursuit of other options:

*MRS. SCOTT - Before the war we went to help people, you know, like domestic servants to them who went to the factory. None of my sisters worked in the munitions because our Alice house kept for Nemo's brewery then. When they left school, they went to into service.*

*JE - Was that type of work quite common for young girls in this area?*

*MRS. SCOTT - Oh yeah, well they used to go, what you call into service, so you lived there, and you got your days off. If you lived away you would just come home on your holidays. Really, you took care of the children. You didn't if you were a domestic, the kids had a nanny. You were the domestic. I only went to[a nearby city], I didn't like it. I went away and I didn't like leaving home, me.*

*JE - What was the job?*

*MRS. SCOTT - It was housemaid, you know, young, learning to be a housemaid, a cook. Me and a friend in, we used to get some laughs because we would just, they didn't have a cook. Good job we could cook, so we were cooking. Well [my friend] who I went with was 17 at that time and I was 15. So you were having to do the cooking and [the housemistress] was to see everything was alright. (Mrs. Scott, age 79)*

After World War II domestic service declined and by 1951 there was a dramatic shift away from such work for unmarried young women due to emerging opportunities in secretarial, retail and factory employment (Zweiniger-Bargielowska, 2001, p. 11). Increasing demand for nurses and teachers, among other professions, also helped women explore other career paths leading away from the domestic sphere. While study participants did not dwell upon how it felt to be sent away from their homes at a young age, doubtless it would have forged in them a certain resilience and sense of achievement that they were able to survive and perhaps develop the skills they would need to cope with stressful situations later in life.

### **6.5.2 "Home work"**

Many women in mining and other industrial areas supplemented their family wages by participating in "home work". This might have involved taking in a neighbour's washing, looking after small children or taking in lodgers. Widowed women took in lodgers to replace the income lost when their husbands died. In addition, many fathers and brothers also moved into their daughter's or sister's homes to be cared for if their wives had died. Mrs. White (age 86) expressed her feelings about looking after her father and brothers:

*MRS. WHITE – Yes, and of course after my mam died I looked after my dad and three brothers and then one got married and then I looked after the other two until they died.*

*JE - Did you feel that was expected of you – something you would have to do?*

*MRS. WHITE – Yes, and meals you know. They [her brothers] lived in Dawdon. They got a house [in Dawdon]and we lived in a colliery house and I used to do all their work, all their washing, their meals, and that was a job.*

Mrs. White's experience is an example of what many women faced by way of cultural expectations relating to their domestic roles. After working in the pits, Mrs. White's husband retired due to ill health at only 52 years of age. She then went to work as a manageress of a frozen food shop. Her life is a revealing illustration of the dual role of domestic and outside work which many colliery women faced in order to keep family

harmony and contribute to the family income. In Mrs. White's case, she became the sole breadwinner after her husband left the colliery, even though he received a small pension each month. Mr. George's mother seemed to be willing to explore any type of work just to earn a little bit of income:

*"It was living from day to day, there was no planning for tomorrow. My mother used to take in washing she used to wash for the schools, wash for the patrols doing the war, and that. She did anything for a few bob". (Mr. George, age 71).*

Another type work which could be classified as home work was the practice of "laying people out". This usually involved the deceased family contacting a designated woman in the village to prepare the body for burial and help make funeral arrangements. This appears to have been a common practice within the lives of study participants' mothers and grandmothers and is evidence of community-based activities that were socially acceptable as women's "work" and for which they received respect and were sought after for advice:

*MRS. WHITE - She [grandmother] used to go and lay people out because they didn't used to have undertakers like they have now, you know, and you couldn't afford it anyway and she used to lay people out... so she was a very good worker, you know, I mean she brought eight up in the family.*

*JE - Did your mother work outside the home or did she take care of the family?*

*MRS. WHITE - My mam didn't go to work apart from going out and laying people out.*

*JE - Tell me about that, what was that like.*

*MRS. WHITE - They used to come and knock us up during the night- someone would die and someone would knock my mom up, or someone would take ill, someone would come and knock her up to see if she could sit up with someone. (Mrs. White, age 86)*

The role of laying people out combined the perceived expertise of a woman as a carer with her dominance in the domestic sphere, and underscored to the community the importance of her knowledge and skills which could be "transferred" to paid work outside the home. Women in Easington who engaged in home work faced some of the same issues as their daughters in attempting to support their family. The social and cultural environment in the mining villages of Easington did not provide many options for women in the interwar years to obtain paid work outside the home. Even though Easington women worked within the boundaries of their social roles, they nevertheless showed their children, especially their daughters, the study participants, how to be resourceful in times of need. This type of work declined in the 1950s, but there is

evidence of the practice still continuing in former industrial areas into the 1960s (Roberts, 1995).

### 6.5.3 Factory Work

By far the most common type of employment mentioned by study participants was factory work. As mentioned previously, the 1940s post-war period was a time of major transition in terms of paid work opportunities for women. Factory work offered the prospect of working part time on flexible shifts allowing women the chance to care for the family and home while earning a wage. For women in the Easington area who were semi-skilled, factory work offered an ideal way to break out from types of paid employment that their mothers may have had including domestic service and home work. One study participant went to work at a factory in nearby town after three decades of employment with the postal service. She started a new “career” rather late in her working life:

*“And she said oh would you go to a factory? I said, well at 51 years old, I haven’t a lot of choice. Oh, she said, the factory is looking for temporary workers. She said, would you like to go for an interview? And it was the one factory I said I’d never work in because of the smell! And the young girl who interviewed me said do you think you will like it? And I said I don’t know, I have never worked in a factory before, I can only try. Ee, that first day I came home I ached, every bone in my body. After a night sleep, I went back again and the same thing happened and I thought if I can get to the end of the week, that is it, and I was there until I was 60. I just got used to it”.* (Miss Black, age 78)

Interviewees who discussed their factory work would have become adults in the late 1940s and 1950s when such employment constituted one of the main employment options for married women in the Easington area. Two participants worked in textile factories. Mrs. Jones said that she worked in a Darlington factory and had to take the bus to work each day at 6:30:

*MRS. JONES - Well, I just went to work at Patons and Baldwins. It was a wool factory. It no longer exists now. It was in Darlington. I used to have to get up to get the bus at 6:30, to go through to Darlington, hail rain and snow.*

*JE - How long of a journey was that?*

*MRS. JONES - About an hour...then I went to work in Hartlepool, for [a telecommunications company]. (Mrs. Jones, age 69)*

The other textile factory worker, Mrs. Frost, lived in Yorkshire during her work at the factory. Since she had worked in a factory prior to her move to Wingate, she knew what to expect when she got a new job in County Durham:

*“We used to make, I started off at the sewing factory and I used to make Jockey shorts and I used to put the y’s on the y fronts and I also learned how to...needle, the lock stitch, sewing the tabs on you know, the name labels on. And then from there I went to the parish hall in Thurns...they started making jackets for the factory and sheepskins on the other. I loved it there... Well the sewing factory was a large factory and it was, you had a target to meet, their targets were always so high, it was really hard work and then we used to work from 8 in the morning until 6 at night. I used to get headaches and I had to start wearing glasses. We were sitting at the machine all day.”* (Mrs. Frost, age 66)

She described her work in County Durham:

*“Oh I felt lonely when I moved up here. You know, you don’t know your neighbours. But I got to know Pat next door and I got a job in a sewing factory, 9 ‘til 3 in Ferryhill. It is closed down now. The bus used to pick us up at the end of the road, the estate road and drop us back off.”* (Mrs. Frost, age 66)

Two other participants worked at the munitions factory in Newton Aycliffe during World War II. These women were part of the generation for whom working in a munitions factory involved a significant contribution to the war effort. Mrs. Scott mentioned how women who had never worked outside the home were now going off to work in the munitions factory:

*“Well people, women who never worked in their lives were going to the munitions factory. Most women went to the munitions factory from here. And they were doing all these nights, so anybody that had a few lasses, why they used to say ‘will one of your lasses stay with the bairns.’”* (Mrs. Scott, age 79)

Another well known post-war employer of Easington women was a telecommunications equipment company. Two participants, Miss Smith and Mrs. Jones, worked for this company where they appeared to receive a good wage; *“and of course I had been working, and at [a telecommunications company] you earned good money.”* Both women retained their jobs for over 20 years, until the factory closed in the early 1980s.

#### **6.5.4 Child Care**

As for women elsewhere, coping with child care needs posed a challenge for Easington women. It was usually a female relative who would stay with the children of a factory worker. Mrs. Knight who worked full time, depended on relatives to keep life going for her children. She had gone to work at the munitions factory when her first husband died



and she was forced into paid employment. Mrs. Knight mentioned that she didn't see her children all week due to full time work at the munitions factory. She sent her children to be looked after by her mother and only saw them on weekends.

While this was not an uncommon occurrence during World War II, the losses that women in Easington endured due to the hardships their husbands faced working in the collieries had a direct effect on their life course and rendered them more likely to enter the workforce than their middle class counterparts at that time. All participants who relied on others for child care assistance did so out of complete necessity. Their dual role as mother and employee forged a sense of accomplishment which stayed with them in later life.

## **Conclusion**

This chapter has addressed the working lives of participants and has explored the questions posed at the beginning of the chapter: 1) Under what circumstances did the female respondents engage in paid work? 2) How do these women recollect their working lives and is it possible to determine the effect employment had on them in later life? 3) How did they respond to societal expectations of their role within the family and their role outside the home? The life course theory is a useful framework for discussing how social, cultural and personal events combine to tell the story of an individual's life. Coleman (1991) states that:

A life history, at any age is the particular construction of an individual person in a particular context. Even the most superficial consideration of life histories, both autobiographical and biographical, demonstrates the importance of individual differences which make up the content of the story, and in the extent to which this material has been integrated and restructured. A life history is the product of a variety of factors, some social and cultural, but others more individual, and involving both motivational and cognitive factors. There is also the influence of the immediate context to be considered, in particular the role of individuals who have directly or indirectly stimulated the telling of the story (p. 121).

Similarly, Walby (1991) argues that by using the life course theory to analyse employment patterns, one can see how structural change directly influences the individual over time. She explains how life history data records work experiences:

...life histories will necessarily record the effects of labour market structuring. Indeed they provide information about how an individual experiences the labour market. Cross-sectional analysis cannot tell us about how a given individual, or cohort experiences structural change. Thus life histories provide us with information, which is otherwise unobtainable, about the implications of structural change for individuals or specific social groups. This is the great strength of the life history methodology for analyses of work (pp. 169-170).

The following key points are presented in relation to participants' "lived experience" of employment and addresses the questions mentioned at the beginning of the chapter.

1) How did participants respond to societal expectations of their role within the family and their role outside the home?

Participants gave the impression that they felt a sense of accomplishment being able to combine their dual roles as mothers and workers. While this fact is not unique to women in colliery communities, it does highlight that women, no matter their geographic location, take pride in their ability to manage life in a variety of contexts. While living in their parental home, it is clear that participants felt the expectation that they would contribute to the family income. This was especially true for those families whose fathers (or husbands later in life) had been injured while working in the mines. Female participants were also expected to leave work, in line with cultural norms, once they married. However, all female participants did engage in some form of paid work throughout their "working years". The two male participants went to work in the mines, although they both indicated that they tried to avoid that type of work at the outset of their careers. Since working in the mines was the nearly the only industry available in the area, there were not many other choices.

2) How do the female participants recollect their working lives and is it possible to determine the effect employment had on them in later life?

Women in this study have faced unique hardships over their life course. Despite the threat of death or injury that hung over mining families, the women developed coping strategies which allow them not only to survive, but to thrive in the face of economic and other challenges. Womens' employment helped forge coping/survival strategies which enabled them to deal with the challenges of living in an industrial area. It is difficult to ascertain the direction of association regarding their coping skills, i.e., did

their employment situation help influence their domestic coping skills or vice versa? Pai and Barrett (2007, p. 437) suggest that paid employment in early and mid life can have a profound effect on how women cope with later life: "... experiences in the paid labour force over their young and middle adult years provide women with a range of economic, social and psychological resources – all of which are likely to enhance their ability to recover or adjust to events they face later in life." They also point to research on the influence of lifetime employment that shows a strong association between social support and health in later life. This is not to say that each participant in the Easington study found paid employment to be a positive life experience, only that research indicates the overall positive benefits in later life of paid employment.

### 3) Under what circumstances did the female respondents engage in paid work?

While women in the study had their own reasons for entering the workforce, they benefited from the community social support that followed a collective sense that they were facing the same challenges as their peers and "in the same boat". This collective sense of historical, social and cultural challenges in Easington, as well as a common need to engage in employment, led several participants to feel that they were in a similar situation, which aided community cohesion. Discrepancies within participants' "lived experience" of employment were mostly due to issues of educational opportunities, cohort effect (e.g. older participants having fewer employment options) and family support. In her study on the influence of wisdom on the ageing process, Ardel (1997, p. 24) states that "objective life conditions alone cannot explain subjective well-being among the elderly. Wisdom, or a person's degree of psychosocial development, has a stronger influence on life satisfaction than objective circumstances." This concept is easily applied to the women participants in this study. While their objective circumstances were at times extremely challenging, including in terms of their working lives and financial resources, they were able to rise above such challenges, showing strength of character in the face of adversity. Participants found that employment gave them a sense of accomplishment despite life's hardships.

In Chapter 7, we turn to the experience of retirement for study participants and the ways in which this life changing transition continues to affect the quality of their later years.

## **Chapter 7. Women and Retirement**

### ***7.1 Introduction***

*Retirement.* It is a word that conjures up myriad thoughts in young and old alike. For some, the excitement of planning for increased leisure time and new opportunities dominates their thinking. For others, the fear and insecurity of paying for the necessities of life is foremost in their thoughts. Whether with joy or trepidation, contemplating retirement leads people to think about their own ageing process. Has my career been successful? What will happen to my family when I die? Where did the time go? Leaving the paid labour force is a complex life transition for both men and women and a decision that affects people from every social class and socio-economic background. Even those for whom paid labour has not been a central part of their lives may experience a form of transition from a societal viewpoint, from “potential worker” to “older person”.

This chapter aims to discuss structural and societal issues of retirement against the backdrop of the experiences of study participants, viewed through the lens of their own life course. The following questions will be considered:

1. Under what circumstances did women participants leave the paid labour force?
2. How did they adjust to life after retirement?
3. Does there appear to be any significant differences between retirement patterns of women in former coal mining areas and the general population?

While participants’ views on retirement finances and pension policy will be mentioned, a more thorough treatment of the effect of finances on participants’ quality of life will follow in a subsequent chapter.

### ***7.2 How Did We Get Here? – The Concept of Retirement***

In the literature of social gerontology very few issues have been studied as extensively as retirement. An interest in how individuals experience such life transitions animates

researchers because the subject strikes at the heart of what it means to be an older person. Although societal expectations concerning leaving the workforce are changing and have less to do with chronological age, many individuals in their early sixties still face questions from employers and relatives alike – “so, when is the big day?” Kohli, et al. (1983, p. 24) have described the “chronologicalisation” of life stages: “Old age itself has become more clearly distinguished as a specific stage of life, and delimited chronologically, with the result of a sharp tripartite division of the life-course into a phase of preparation, one of economic activity, and one of retirement.” The history of the development of retirement has generated thousands of books and articles. It is not within the scope of this chapter to present a lengthy historical discussion of the topic. However, in order to analyse the issues faced by study participants it will be useful to briefly consider how and why retirement has become widely perceived as the gateway to “later life”.

### **7.2.1 What is “Retirement”?**

The answer to this question often depends on who you ask. The word retirement comes from the French *retirer*, or to “pull back”. Among the definitions of retirement in the *Oxford English Dictionary* (2010) are the following: “The action or an act of falling back or retreating from a place or position”; “the state or condition of living apart from society”; “the action or an act of retreating into seclusion, quiet, or privacy”; “the state or condition of having left office, employment, or service permanently, now especially on reaching pensionable age.” It isn’t so long ago that the concept of retirement portrayed old age as a time of “disengagement”, i.e. gradually playing less of a role in society (Cumming, 1964). At its root this view has what Atchley (1982, p. 269) refers to as the “wear and tear” theory of biological ageing. Although the theory seems dated by today’s understanding of later life, it was thought at the time (between 1900-1929) that the rapid development of industry was wearing people out at an increasing rate. Atchley (p. 269) also points out that this may have been due to the fact that many individuals worked very long hours (six days per week) and there was little time to recover from the stresses and strains of the job. The rise of biomedicine during the 1940s-1960s greatly influenced society’s view of older people in relation to retirement, by what Phillipson (1998, p. 33) describes as the “social construction of ageing as a medical problem.” He argues that “older people learnt to interpret their problems and anxieties through the medium of doctors in general and drugs in particular.” Phillipson

(p. 35) observes that there was great promise that the diseases of older age could be “suspended or held at bay” until much later in life, hence the possibility of living a healthy life after leaving the workforce.

The difficulty in providing a precise definition of retirement in the 21<sup>st</sup> century is due to the fact that this important life transition has become more fluid, with many workers leaving the labour force at “non-traditional” times (i.e. early retirement in their fifties). In their paper on retirement and economic well-being in Britain, Bardasi et al. (2002, p. 135) take the approach that retirement is interpreted based on each individual’s own assessment of his or her status in the labour market. Some may consider themselves to be retired, when in reality they may have left their long term work but are now working part-time somewhere else. McDonald (2002, p. 3) quoting Donahue et al. (1960, p. 331) observes that the 1960 edition of the *Handbook of Social Gerontology* defines retirement as “the creation of an economically non-productive role in modern societies which are capable of supporting large numbers of persons whose labour is not essential to the economic order or...the prescribed transition from the position of an economically active person to the position of an economically non-active person in accordance with the norms through which society defines this change.”

Until recently it was assumed that retirement would be a more or less permanent state. However, Bardasi et al. (2002, p. 136) suggest that “retirement need not be a discrete event happening at a single date, but may be a process that takes place over a period of time.” Villani and Roberto (1997, p. 151-152) point to contemporary studies which make the case that the retirement decision may change and doesn’t always mean leaving the paid labour force for good. They also suggest, as do many other researchers, that the decision to retire is highly complex: “...since it incorporates external variables over which the person has no control, for example voluntary retirement programs, layoffs, or perceived “forced” retirement and job discrimination. In addition, many personal attitudinal factors are also an integral part of the decision making process.”

The way a society views and values older people is reflected in the social and fiscal policies which affect their daily lives. Throughout the period of massive industrial

change during the early to mid-20<sup>th</sup> century, social policies concerning retirement were developed to cope with the ageing workforce. There were a variety of factors which contributed to the growing “institutionalisation” of retirement. Laczko and Phillipson (1991, p. 13) suggest that “modern retirement policy is a product of the late nineteenth century as large private companies and branches of the civil service adopted pension policies for their employees.” The economic depression in the late 1920s accelerated the decline in employing older workers, especially in America where many older people lost their jobs as well as newly acquired pension plans due to pension company bankruptcies (Laczko and Phillipson, 1991, p. 17). In Britain the problem was of a different sort, the oversupply of workers. Phillipson (1998) argues that beginning in the 1950s and continuing well into the 1970s older workers were becoming increasingly “sidelined”, forced into early exit from the labour force for a variety of reasons:

...first, the concentration of older workers, in many cases, in contracting industries [e.g. mining], second, the operation of particular schemes to promote worker redeployment (for example, the Redundancy Payments Act) or replacement (the Job Release Scheme); third, the pressure of mass unemployment; fourth, changing attitudes among government, business, trade unions and older people themselves, in respect of the older worker’s right to employment in relation to other, younger age groups (p. 58).

Macnicol and Blaikie (1989, p. 21) state that although many older people saw their standard of living rise (eventually) after World War II, public perceptions of ageing, along with government social policies, combined to: “...define the elderly as an increasingly useless group in society. Age related classifications became more common; older people were inexorably shaken out of the labour market and portrayed as an unproductive “burden” on the rest of society; and most important of all, the concept of mandatory retirement was institutionalised in the 1946 National Insurance Act.”

By the mid-1980s, opportunities for older workers improved, allowing them to delay retirement or to find other employment after retirement. However, in the 1990s the rise of unemployment again limited opportunities for older workers (Phillipson, 1998, p. 58). The trend toward early exit from the labour force has continued to the present day, although the retirement landscape is changing as governments confront the substantial rise in pension provision for an ever growing population. There is an increasing tension

between people in mid life, whose expectation is to retire when they wish, and governments and private companies which recognise the need to increase the retirement age to afford future pension payments. Where retirement is concerned, Nordenmark and Stattin (2009, p. 414) claim that in most contemporary western societies there is great variability in “both the transition ages and the exit pathways.” They maintain the average age at which many people retire today is well below the state pension age and is also low compared to the 1960s and 1970s. The view held by many policy makers in the early 20<sup>th</sup> century, that retirement demarcated entry into later life, has evolved to the point that, according to Atchley (1982, p. 274), “today retirement primarily means giving up a job, not movement into old age.” Regardless of one’s definition of retirement, Silver (2010, p. 1) contends that it is still considered by most people to be a significant life transition. She states that “[r]etirement has long been considered to be one of the most important later life changes and is described as a life course transition with developmental and social psychological implications that can alter an individual’s sense of well-being.”

### ***7.3 Research on Older Women and Retirement***

The structural processes that shape women’s lives require attention. We need to understand better the effects of shifting role commitments throughout a women’s life cycle, whether those involve, for example, being a wife or mother or caring for an ageing parent. In this perspective gender is seen as more than a variable. Instead, it becomes central to the exploration of women’s experiences on their own terms (Slevin and Wingrove, 1995, p. 2).

Retirement often has different meanings for men than it does for women. A case in point, until the 1980s, the majority of the literature on retirement focused almost exclusively on men. Over the past fifteen years a wealth of studies have explored women’s retirement. The complexity and interconnectivity of women’s roles throughout the life course have, at times, made it challenging for researchers to extrapolate the exact nature of this important life stage. Until recently, women’s work was generally seen as being less important than men’s. Throughout much of 20<sup>th</sup> century history, men most often functioned as the family bread winner. McDonald



(2002, p. 5) confirms this view by suggesting that “the few histories of aging [which] touch on retirement suggest that women’s retirement was originally anchored in the patriarchal family wherein women’s welfare in old age was dependent on the male breadwinner or his sons.” However, as discussed in the previous chapter, women in former coalmining areas, like women in other industrial contexts, regularly went out to work to support their families when their husbands became ill or were made redundant. For these women, their family’s financial survival fell squarely on their shoulders. Other women worked part time to supplement their husbands’ wages.

As shall be discussed later, the lives and retirement patterns of never married and previously married women have received the least amount of attention from researchers. Married women who had families often worked part time, leaving and re-entering the labour force over the course of their lives, owing to the multiple roles they occupied. This work pattern would invariably have an effect on their transition to retirement: “Women’s multiple role commitments in the home as well as their labour force experiences and variable work histories, are markedly different from those of men. Irregular work histories and other inequalities have an impact on whether women can afford to retire, as well as having an influence on decisions about when and how they retire” (Slevin and Wingrove, 1995, p.2). Historically, much of women’s paid work has not been recognised because it was more domestic in nature, such as providing child care, doing housework, taking in boarders or undertaking sewing projects. This work was considered to be a normal part of life, serving their families, relations and friends. McDonald (2002, p. 42) suggests that a reason research on women’s retirement is lacking is that retirement has little meaning outside of the paid labour force. A notable exception to McDonald’s point is the extensive research on gender and retirement by Moen (for example, Kim and Moen, 2002, Smith and Moen, 2003) which focused on the issues of gender and retirement satisfaction.

#### ***7.4 The Next Phase of Life: Women’s Retirement Patterns in Easington***

*“JE - Did you retire when you were 65? MRS. KNIGHT - Oh I never retired at all [laughter]”.*

*Mrs. Knight (99 years old)*

One could make the case that all older people on the verge of retirement face similar issues, regardless of socio-economic circumstances. McDonald (2002, p. 7), however, cautions against treating older people's experiences as being all alike, what she calls the "cardinal sin in the eyes of most gerontologists". Nevertheless, the Easington women in this study are part of a national socio-cultural environment in which there are similarities between older women's retirement patterns across the country. Furthermore, there are natural and distinct similarities in the life course of people within a particular age cohort, in this case UK retirees. As Gilleard and Higgs (2000, p. 42) suggest: "Cohort and generation are obviously interlinked. Each cohort of retired persons is the product of a particular generation and each possesses a unique as well as a common culture... All these processes of cultural change that make up 'high' or 'late' modernity permeate the adults lives of the various generations of retirees at different times in their lives."

Such factors beg the question: does the Easington study participants' work history point to a unique set of factors which influenced the reasons for their retirement? More generally, is the decision to retire as a woman living in a former mining context different from the experience of the general female older population? Zimmerman et al. (2000, p. 111) provide a useful framework in which to analyse three main factors which influence women's retirement decisions: 1) the family environment, 2) health-related variables, and 3) work-related factors. For discussion purposes in this thesis, the "family" and "health" sections will be considered together. A fourth category suggested by Atchley (1982, p. 283) is called "willing retirement", those people for whom health, family or work related issues are not the primary reasons to retire. Although this study's respondents discussed the reasons for their retirement, they generally provided more detailed information on their adjustment to being retired. Not all respondents discussed leaving the paid work force during the interviews. While the reasons for this aren't completely clear, some women who worked in a variety of jobs merely chose to talk more about their family and adjustment to other issues in life such as declining health, death of family members or more positive issues including social activities or the importance of their social network.

#### **7.4.1 The Family Environment and Health-related Factors**

Life-changing decisions are often the result of many and connecting factors. This is no less true when contemplating retiring from the paid labour force. Two respondents, Mrs. Sanders and Mrs. Johnson, indicated that they retired early due to ill health, and not solely based on family reasons. Still, in each woman's life, family issues played a role in their decision to leave paid work. In the case of Mrs. Johnson, her decision to retire was influenced by the stress of supporting her husband as well as helping to care for her mother-in-law who had Alzheimer's disease. While the reason for her ill health is unclear, it may have been exacerbated by the high demands of her roles as caregiver and family financial supporter. At the time of her retirement her husband had already been made redundant from the pit:

*JE - You were working in Durham after that – how long were you there?*

*MRS. JOHNSON - About 12 year.*

*JE - Did you retire from there?*

*MRS. JOHNSON - I was ill – yeah. The last 4 years I worked there I worked 7 days a week. I never used to take any holidays or anything because by then Jim's mother had Alzheimer's and he had to take, they was finishing them at the pit. (Mrs Johnson, age 62)*

According to Slevin and Wingrove (1995, p. 8) research by Skirboll and Silverman (1992) demonstrated that “spousal and family pressures have a significant impact on women's decisions to retire.” In their study examining whether retirement is a critical life event relative to other life transitions, Matthews and Brown (1987, p. 551) found that women appear to be more likely than men to retire due to the health of their spouse or other family members. Zimmerman et al. (2000) appear to confirm that Mrs. Johnson's situation has been documented in the research literature on women and retirement:

Health and stress-related factors also influence the retirement decision. Women may not only have to contend with their own health problems, but they may also have to retire because of health issues related to other family members...retired men and women report “health reasons” as the third most important reason for retiring. In addition, women who retire early report more stress than their working counterparts, possibly because of their care giving demands (p. 114).

Mrs. Sanders also “retired” under health-related circumstances: *“I retired at 54 and I retired through quite ill health and I was quite poorly and because the job was stressful, although I loved it, and then my marriage was stressful, so I left at 54.”* It could be interpreted that Mrs. Sanders might have wanted to stay in her job had the circumstances not threatened to overwhelm her. She decided that it would be more advantageous to her mental and physical health if she stepped down from that post. Mrs. Sanders had divorced her second husband by the time she left her job at age 54, still with several years to go until she could receive statutory retirement pay. It is not known if she received any money from her ex-husband. In their study on the factors which influence psychological well-being and reasons for retirement, Nordenmark and Stattin (2009, p. 420) found that the majority of study participants who retired early, i.e. before the normal pension age, cited “ill health” as the reason. In addition, some research has shown that women who are divorced or separated tend to take early retirement, although the causal factors to explain this occurrence are not always clear (Slevin and Wingrove, 1995, p. 8).

#### **7.4.2 Work-related Factors**

In this study sample the most discussed reasons for retirement were being made redundant because of 1) mandatory retirement age or 2) company closure. The term “mandatory retirement” is loaded with negative connotations, indicating that an older person has been forced to retire solely because of their chronological age. It strikes at the heart of the value older people occupy in society. As previously mentioned, British as well as American retirement history is replete with literature concerning how involuntary retirement affects both men and women. It is interesting to consider the different socio-cultural factors related to mandatory retirement policies. Arber and Ginn (1995) note that much of the American literature on the timing of the retirement decision suggests that in the US retirement is mostly voluntary, allowing for freedom to decide when one will retire. In Britain, Arber and Ginn (1995, p. 72) paint the picture of retirement as a more constrained process (in relation to couples): “In Britain, couples retirement timing is likely to be more constrained than in the US, since the majority of men and women who leave employment before the state pension age do so involuntarily, due to redundancy, dismissal, poor health or termination of a temporary job...those who retire at the state pension age generally leave employment at the

mandatory retirement age for their job, again reflecting little choices in retirement timing.”

There are many complex economic, social, historical and cultural factors, some of which have already been discussed, which illuminate how mandatory retirement policies have affected older people. The state pension age has vacillated over the years since the creation of the first pension in 1908. Until recently, women received their state pension at the age of 60. Men have traditionally been “allowed” to work later in life than women (until age 65), but this difference is being phased out so that by 2018, both men and women will qualify for a state pension at the age of 65. The point is that people’s experiences of the retirement decision, especially one such as mandatory retirement, are rooted in the social consciousness of a particular culture. In Britain, economic factors coupled with social and cultural expectations of ageing have meant that the effect of mandatory retirement policies is often keenly felt by older women. Two participants left paid employment involuntarily due to mandatory retirement, Mrs. Sanders and Mrs. Green. Their experiences of retirement were vastly different and each woman dealt with the consequences in her own way.

#### **7.4.3 Mandatory Retirement**

Mrs. Sanders worked as a nursery manager until ill health, stress and marriage tensions prompted her to leave that post at age 54. She indicated that she felt extremely disappointed leaving her post:

*JE - What was that like, how did that feel to retire?*

*MRS. SANDERS - I was devastated, I thought the nursery would fall down and it didn't (age 71).*

Her friend then encouraged her to apply to become a magistrate. Though unpaid, it was a post she held for fifteen years until she was forced to retire at age seventy:

*MRS. SANDERS - I had a friend who was a magistrate who convinced me to put in an application for a magistrate and so I got accepted so I had been a magistrate for 15 years.*

*JE - Are you still working as a magistrate?*

*MRS. SANDERS - No. I had to retire at 70, unfortunately.*

*JE - Are you forced to retire at 70?*

*MRS. SANDERS - Yes, really was annoyed for the fact that you get assessed every year and I was on three benches and each bench you would be assessed to see if you were any good or not, so they had the means of getting rid of you if you weren't any good, so the government who said we mustn't have this ageist thing, says that is you out at 70!*

*JE - What did your colleagues say?*

*MRS. SANDERS - Well, a lot of them said, you know, ee you are that old, it is ridiculous that you are retiring, I thought no matter what they said I had to go, I had to do it, so there was an acceptance there. (Mrs. Sanders, age 71)*

It is clear that Mrs. Sanders was bitterly disappointed at being forced to leave her post as a magistrate. She clearly attached significance to her job and appeared to be appreciated and valued in her role. It is interesting to note that a magistrate's position is not remunerated so a financial incentive to continue working would not have been a factor in her retirement. Mrs. Sanders appeared to pick up the pieces of her life after leaving her nursery post due to health and family issues. Involuntary retirement dealt a blow to her self-image and view of being an "older person." Until she left, she may not even have thought very much about age and its relevance to her life. Among other things, being forced to retire based on age seemed to make her question government policy on age discrimination. Although she said that in the end "there was an acceptance there", it seems certain that she felt let down and discriminated against due to her age. The following poignant description of the effect mandatory retirement had on Mrs. Sanders gives a very clear picture of how she viewed the "push" out of her position.

*JE - Since that time, what has the adjustment been like, since you retired from the magistrate?*

*MRS. SANDERS – Well I felt for a while, it was the same when I retired from work, I felt a little bit like a second class citizen and you know, at the nursery I was making, you know in one way life and death decisions, in a certain way I felt my opinions were worth nothing as a retired person, and really, you know, nobody wanted to know about you talking about it, which you didn't. And so it took me a little while to get over that and then when I went to be a magistrate and I realised the training I did, using my brain. Then when I got to be 70, I thought you know, I am definitely, you know on the scrap heap now, I am just going to read at the library. But in actual fact, my sister who comes here, talked to Fiona, and she said, oh we are desperate for volunteers and so I came up here. At the same time, a friend who works for Home Start wondered if I could come down to Home Start and so I went to Home Start. I am also a lay visitor, I go into police stations and go into the police cells, just in police stations and then I empty the boxes for the RNIB, I empty all the money boxes, but it is all doing something rather than not do anything. I can't say, my heart isn't 100 percent in it, but that is not anybody's fault but my own.*

Barnes and Parry (2004, p. 219) suggest that people who are forced to leave work before they are “ready” found it painful to retire. One of their study participants experienced similar feelings to Mrs. Sanders: “For Mrs. Barber, a former teacher, retirement was triggered by reaching 60 years of age and by her husband’s health problems. She had not felt ‘ready to leave’, and described losing her job as ‘bereavement’, saying that she had ‘cried for weeks.’” Matthews and Brown (1987, p. 564) point out that research shows that “women who did not want to retire when they did were particularly likely to experience retirement from work as affecting them a lot and in a negative way.”

For Mrs. Green, although she was also forced to leave her job as a dinner nanny at age 60 (same as a teacher), her experience appears to be different than Mrs. Sanders in a variety of ways. Firstly, she mentioned that she was initially very grateful to have received the dinner nanny post because it paid her more than her previous school cleaning position. Secondly, although she was disappointed to retire at age 60, she seemed resigned to it and unquestioning of the retirement age limit. While she also may not have felt ready to leave the post, the retirement experience seems to have been less agonising for her than for Mrs. Sanders.

*JE - What was it like being a nanny?*

*MRS. GREEN - Oh I loved it, oh I did, I’ve got some marvellous letters I still have them, when I retired they said please do not retire, you were supposed to retire at 60.*

*JE - Do you miss it?*

*MRS. GREEN - Oh yes, I miss it lots. I still keep in touch with the children because I became governor of two schools*

*JE - Are you still involved with the schools?*

*MRS. GREEN - Yes I am still involved with them. (Mrs. Green, age 92)*

Thirdly, this short snippet from her interview reveals that Mrs. Green is still “involved” with the schools at her advanced age (94). This continuing involvement may have been a factor in her ability to have “coped” with mandatory retirement. With the passage of time, 34 years, Mrs. Green has found other ways of staying active, the memory of being

“forced out” having faded over the years. Mrs. Sanders was forced to retire only two years ago, the memories of that experience still fresh in her mind. While speculative, it may be that the difference in the self-perception of their occupational attainment influenced each woman’s adjustment to life after retirement. Nordenmark and Stattin’s (2009) study on older Swedes’ psychosocial well-being after retirement seems to lend credence to this idea. They found that “age negatively correlated with psychosocial ill health, signifying that older pensioners enjoyed relatively good wellbeing...the effect of age might be the result of an adaptation process, which leads to improvements in general life satisfaction” (p. 426). Mrs. Sanders went back to university later in life and obtained an advanced degree. She was very proud of her achievement and seemed to relish the professional status of being a magistrate. Conversely, although Mrs. Green seemed equally proud of being a dinner nanny, she did not appear to place the same importance on her job status as Mrs. Sanders, possibly assisting her in “moving on” after leaving paid employment.

#### **7.4.4 Redundancy: “Forced Early Retirement”**

While mandatory retirement due to age and being made redundant due to company closure are both considered “involuntary retirement”, there are obvious differences in the way in which the events are experienced. Lack of control concerning the decision is a common theme in both situations, but in the event of company closure, the decision is most often based on economics rather than on a personal characteristic such as age. Mrs. Jones and Miss Smith were both made redundant from their factory jobs due to company closure. In Mrs. Jones’s case, the company closed due to the work being moved “overseas”. For Miss Smith her company closed down and operations permanently ceased. While their situations were similar, there are some interesting key differences concerning the ultimate effect of redundancy on their lives. Mrs. Jones was married and her husband was nearing retirement age (Mrs. Jones was 20 years younger than her husband). Although finances were not discussed, she may have felt that her husband’s income would be sufficient until such time as she would be eligible for her state pension. She indicated that it was difficult to face redundancy. Yet the fact that she was part of a union and was asked to help others who received redundancy notices, appeared to help Mrs. Jones feel like she was “softening the blow” for the younger workers (although Mrs. Jones was rather young herself – mid 40s – when she was made redundant). The realisation that other industries were experiencing the same type of



closures and that she didn't have any external control over such decisions perhaps strengthened her acceptance of the situation, to the extent that she was able to better cope with a decision that was done "to" her and others.

*JE - Did you officially retire?*

*MRS. JONES - No, I got my redundancy. It was during the days when they were running all the industries down, in the '80s. Can I say whose term was it? It was during the Thatcher years. They were running the coal mines down, they were running the shipyards down and they were running the factories down and we were hit hard.*

*JE - Why was the factory closed?*

*MRS. JONES - Because they were sending work elsewhere, you know, sending work everywhere else. You see in those days the unions were quite strong. I was in the fortunate position to be a union woman, the ETPU. And I ended up the last year of my tenancy down there as the convener. Well you had to represent the work force and I had to be there during the redundancy time to go in with the group of girls to be interviewed by management to tell them that their jobs were finished in April or May, it was awful. Young people sitting around the desk and bursting into tears, you know it was pretty dreadful. And anyway, it came to my turn and I thought, get out when the going is good because you got company redundancy and government redundancy. After that you were just paid the company redundancy, and it was a small amount of money.*

*JE - Did you work after that?*

*MRS. JONES - No, I said that was it. (Mrs. Jones, age 69)*

It appears that Mrs. Jones made the best of her situation by taking advantage of redundancy related financial offers by the company and government. It is not clear why she did not seek paid work after leaving the company. During the interview, Mrs. Jones mentioned the number of activities in which she is involved. She perhaps has transferred the loss of the work role to her voluntary work. The role of social activities in later life will be explored in a subsequent chapter. Miss Smith's situation was similar in terms of the actual facts of company closure, but there are some interesting differences which bear highlighting. Miss Smith was 56 years old when she was made redundant, so she was closer to pension age than Mrs. Jones, but perhaps the most striking difference is that Miss Smith never married, making financial considerations more salient. She described the shock and stress of hearing of her redundancy and the relief when she turned 60 so that she could receive her pension.

*JE – How long did you work at [telecommunications factory]?*

*MISS SMITH – I worked at [telecommunications factory] until I was in my fifties (56) until I was made redundant. Because [telecommunications factory] closed down,*

*similar to what is happening with the car factories. Exactly what is happening with the places today. I was just sat the other night, the tele was on, and they were saying about Nissan closing and I just said, I've been there mate, don't tell me what it is like, because I did it at [telecommunications factory].*

*JE – What was it like for you?*

*MISS SMITH – Here again it was horrendous. I think you got 27 pounds unemployment benefit and you had to live on that. I did get redundancy money as well, but that redundancy money, I put that to one side. I thought no way can you spend any of that because you don't know how long you will be out of work and I have never worked since. I was fifty-six. The best day of my life was when I got my old age pension.*

*JE – Was it when you were sixty?*

*MISS SMITH – Yes, when I was sixty. (Miss Smith, age 80)*

It is interesting to note that Miss Smith “never worked again” after she was made redundant. It is quite remarkable that she said she was able to live on her unemployment money of £27, and it is not surprising to discover her delight when she turned 60 and could receive her pension. There is an increasing body of literature showing that single women, in particular women who never married, may experience retirement in a more positive way than married, separated or divorced women (see Slevin and Wingrove, 1995, p. 5, Hatch, 1992, p. 78, and Barnes and Parry, 2004, p. 228). This could be due to the fact that some married women believe that, while they may have left the paid labour force, they have not retired from the other multiple roles they inhabit such as domestic work, caring for grandchildren and/or partner, or helping ill relatives (see Barnes and Parry, 2004, p. 221 and Zimmerman et al., 2000, p. 122).

#### **7.4.5 Personal Choice of Retirement (or Willing Retirement): “The day I am 60 I'm out”**

Choosing when and how one will retire may be considered a luxury. For many older people, ill health, a financial need to continue working, or involuntary retirement force circumstances upon them about which they feel a great deal of stress. There is however, an increasingly sizeable group of older people who are choosing to retire at an earlier age (Gilleard and Higgs, 2000, pp. 19, 36-37). This brings up the fact, consistently reported in recent literature on retirement, that there is no longer a single pattern to explain the process of retirement. Bond et al. (1986, p. 225) make the point that “voluntary retirees were the most fortunate before retirement because their health was

good enough to permit a voluntary choice and their jobs were less likely to be subject to mandatory retirement. This group enjoyed more positive benefits from retirement because retirement was what they wanted and they had the resources to take advantage of the benefits of retirement.”

Miss Black had a unique work experience. She worked at the post office for 30 years but resigned her post to help take care of her father who died a year after she left her employment. In essence, Miss Black left involuntarily due to becoming a carer. She was “on the dole” for a year and then began work in a factory. It was from this job that she finally retired at age 60. This retirement was based on her desire to leave work, not due to health or caring responsibilities.

*MISS BLACK - Then they brought it out that you could work over 60 if you wanted. One of the women said to me, well I am going to keep on. Well I said I'm not. The day I am 60 I'm out. She said, well as long as you're fit...and I said what is the point of waiting until you are in ill health and then retiring? I said I might as well enjoy it. So I worked until I was 60 and then I was out. (Miss Black, age 78)*

Like Miss Smith, Miss Black never married. It is unclear to what extent her marital status has affected her retirement years. She describes the adjustment to her new retired life:

*MISS BLACK - Well when I first retired, I thought, oh brilliant. I actually did less housework when I retired than I did when I was working. Because you had your certain days off and things that needed doing you did them while you were off. When I came to be retired, I can do it tomorrow, tomorrow, but tomorrow never came! I found I did less house work when I retired, than I when I was working.*

*JE - Do you miss working?*

*MISS BLACK - Well, I enjoyed it when I first finished. I thought, this is brilliant. I can go to bed when I like, get up when I like. Then I thought, oh I am going to have to do something. You see getting a paid job would have affected my pension. And I saw it advertised for meals on wheels and May was in charge of it for Wheatley Hill. And so I rang her about it and it was on a Tuesday, so I went to volunteer on Tuesday.*

Although she had a newfound sense of freedom after leaving her factory work, Miss Black soon found that after years of structured employment she needed to again experience the sense of accomplishment that paid work can bring. It is conjecture, but perhaps if her pension wouldn't have been affected by returning to work, she may have looked for other paid employment opportunities. What is clear is that Miss Black

desired meaning and purpose in her later years, something volunteering for Meals on Wheels gave her. Interestingly, her colleague at the factory could also have retired at the same time as Miss Black, but instead chose to continue working. The following interview extract indicates that Miss Black is happy with her own company, a sentiment also expressed by Miss Smith.

*JE - Do you think she [her colleague] wanted to stay for the money?*

*MISS BLACK - Maybe the money, or perhaps the company, I don't know. But I like my own company. I don't have to be among a lot of people. As long as I've got my books. I am a terrific reader. I love books. I've got stacks of books in the house. I watch very little television. I don't find anything worth watching. I don't watch any of the soaps. If there have been a programme on, when the adverts come on, I am reading a book when the adverts come on.*

Miss Black did not have the pressure to retire due to health or other family reasons and this situation was bound to have a more positive effect on her overall retirement experience. She was free to pursue social activities when and as she wished.

### ***7.5 Adjustment to Retirement***

Do these women believe retirement was much of a transition or a “crisis” in their lives? It would be entirely understandable for the four women who were made redundant to feel bitterness about the fact that their job was ended abruptly. Interestingly, it appears that after the shock of the redundancy news, Mrs. Jones and Miss Smith seemed to be resigned to the fact that they were not going to look for another job, especially as they were below the state pension age at the time of redundancy. Mrs. Sanders who was forced to retire due her age, appeared to feel the pain of the loss of her role more than the other three women. Miss Smith and Mrs. Jones worked in factory environments and experienced the closures which were out of their control, age not being the issue which forced them out. For some women the adjustment to retirement has not proved to be a major issue. Although their role in paid work had ceased other roles seemed to take centre stage in their lives, mitigating the negative affect of the retirement transition. Two other female study participants who were in their 80s, although engaged in paid work outside the home, did not mention leaving the paid work force. Instead they focused on other life transitions such as becoming a widow.

### 7.5.1 Role Transitions

Is retirement then, a negative or positive experience for women? According to Nordenmark and Stattin (2009, p. 415) there is conflicting evidence to determine whether retirement has a positive or negative effect on wellbeing. Despite mixed results, Nordenmark and Stattin suggest that one central theme of many studies has been the impact of “role transition” on the quality of an older person’s life. They argue that there are three main theories which relate to changing roles in life, in this case applied to retirement:

- 1) Role Expansion
- 2) Role Stress
- 3) Continuity Theory

Role expansion theory takes the view that engaging in a variety of roles may help individuals cope if they fail in one role over the life course, e.g. lack of success at work could be compensated by being a good grandparent. If a person feels that their work role was the most successful, retirement may contribute to a feeling that their main purpose in life is now gone and that they now must draw on other roles to live a fulfilling life. Since Mrs. Sanders’s marriages had failed and she had been made redundant from her magistrates post, she was forced to look for other ways to make life after retirement a fulfilling experience. Role stress theory takes almost the opposite view, postulating that by having many social roles, individuals can suffer from role overload which often leads to poor physical and mental health. By retiring, the burden of trying to cope with multiple roles may be relieved. Mrs. Johnson’s retirement experience can be seen in terms of role stress given that she had to work long hours to support the family and was also helping to take care of her ill mother in law. By retiring, perhaps she felt that some of life’s pressures were suddenly solved. Finally, continuity theory puts forward the view that when people change roles over the life course, they hold onto their previous way of life and their self perception. Mrs. Green, Miss Black, Miss Smith and Mrs. Scott all appear to continue, as health and finances allow, to live as they had prior to retirement. It is however, a difficult task to disentangle the reasons why those four individuals were able to seemingly carry on to their previous way of life after retirement. Most likely, the combination of personality, coping skills, social support, etc. has contributed to their overall positive quality of life.

## ***7.6 Relating Theoretical Issues to Older Easington Women***

Every person is influenced by the culture in which they live. The physical environment, social milieu and political structure have a profound effect on how we interact with each other. The study participants came of age in an era when what was “allowed” in terms of educational and employment opportunities, particularly for women, was limited. The Easington women were products of their time and place. Their employment opportunities were dictated by accepted cultural norms for women, not just in working class areas such as Easington, but in middle class contexts as well.

In the social gerontological literature, there are several theoretical frameworks which attempt to explain the nature of older peoples’ position in society. The purpose of this section is to highlight the tension between the messages society sends older people concerning retirement and the extent to which they conform to those messages.

Although older people may respond to the societal pressures placed on them to retire, each person makes unique decisions based on finance, personality, family commitments and individual moral beliefs. Structured dependency theory, especially as it relates to women, attempts to explain the disadvantage women experience in domestic life and paid work. This theoretical approach has its origins in the work of Townsend (1981) and Walker (1980a), both of whom believe that older people’s quality of life is most heavily influenced by the structure of inequality. Zimmerman et al. (2000) drawing on Bernard and Meade (1993) summarise previous literature on structured dependency:

...the structures that shape women’s earlier lives, such as their paid work in a segregated labour market and their unpaid work, mold and continue to shape structured dependency in their later lives. Structural dependency denotes that the social, familial and political economic structures restrict women’s financial and social autonomy... Thus, women’s differential experience in the paid and unpaid labour market is assumed to disadvantage women in a variety of ways. Notably, women’s location in both the public (paid work) and private (unpaid domestic work) spheres are expected to effect the timing and reasons for retirement timing. This can translate to structural dependency and to fewer resources (i.e. financial) that are available to women subsequent to their retirement (p. 112).

The main critique of structured dependency theory has been that it is too deterministic, focusing solely on the unequal social structure as it relates to older people without taking a more individual, biographical approach to analysing later life. The political economy of ageing theory, developed by Estes (1986) sought to view structured

dependency theory through a wider lens, explaining that older people are viewed by society based on gender, social class and ethnicity. Estes defends this approach arguing that political economy helps to explain the role of the state in managing “the individual and society” (Phillipson, 1998, p. 18). According to Laczko and Phillipson (1991, p. 3), the political economy approach has been “important in shifting the focus of investigation in social gerontology from that of asking how individuals have adjusted to retirement to examining the socio-political factors which influence retirement outcomes.” They also suggest that the political economy approach illuminates the influence of social class, gender and race on the retirement experience. Estes (2001) succinctly describes how the political economy perspective has shaped society’s view of older people:

The political economy of aging emphasises the broad implications of structural forces and processes that contribute to constructions of old age and aging as well as to social policy. It is a systematic view predicated on the assumption that old age can be understood only in the context of social conditions of the larger social order... The theoretical model of the political economy of aging is a multilevel analytical framework that aims to elucidate the socially and structurally produced nature of aging (p. 1).

This “multilevel analytical framework” more fully recognises gender as a reason why women are disadvantaged in employment and retirement as well as family relationships (Estes, 2001, p. 9).

Arguably, the area in which study participants were most restricted was that of education which had a profound effect on the employment opportunities available to them (Miss Black and Mrs. Johnson). Did the participants who were forced to retire at age 60 feel that this discriminatory practice disadvantaged them in some way, either economically and/or socially? Mrs. Sanders, who was forced to retire from her magistrate’s post, appeared to indeed feel that the “rules” of society had negatively affected her life directly by forcing her out of a post she loved. For her, the “social construction of old age” became a reality the minute she was told she had to retire due to her age. Both Mrs. Sanders and Mrs. Green (school dinner nanny) experienced the transition to retirement as a result of socially imposed rules which starkly reminded them of their passage into what society views as old age. For other female participants, retirement did not seem to be viewed as a “crisis”, but was rather another life transition which allowed them to “do other things”. McMullin (1995) discusses the fact that

concepts of gender in later life are often concerned with the economic well-being of women, some of whom suffer great poverty after retirement or after becoming a widow.

...because women tend to be financially dependent on men, have more irregular work histories, and live longer than men, they have smaller pensions and are more likely than their male counterparts to exhaust their financial resources in later life; thus their economic well-being in later life is influenced by their marital status in a way men's is not. Thus women are more likely than men to experience poverty for the *first* time in later life (p. 35).

How then does political economy relate to the Easington women's retirement experiences? It would be tempting to assume that because the study participants live in an area which is well known as being "deprived", their economic situation would be worse than other older UK women in their age cohort. While it is true that their opportunities for education and employment were limited, this was also the case for many other women in their age cohort. Although the Easington women did not seem to describe themselves as wealthy, neither did they seem to focus on their finances as a source of stress in retirement. Rather, they appeared to view their retirement in a context which considers events across the whole of their life course. This appeared to be true even for the two participants who were forced to retire due to age. Most participants were not plunged into poverty on retirement. Although some participants had unsteady incomes throughout the life course, many were at least more stable in income, if not better off in retirement due to a state pension. This fact mirrors the statistics presented in Chapter 2 concerning the recent improvement in pensioner income (see page 55).

### ***7.7 Retirement and the Life Course***

During the 1990's there was a colossal shift in the meaning of what it means to be an older person. Until that time, much of the social gerontological theory had focused on four distinct stages in one's life (childhood, family life, career, retirement etc.) and tended to emphasise the structural reasons for inequalities experienced by older women, as previously described. This compartmentalisation of life can more easily be applied to the life course of men as they often experience life in a more fixed way, especially as it relates to their employment and retirement. Women's lives do not fit as easily into such a structure as many women leave and return to the workforce once or more over the course of their lives. However, for both men and women, the chronological



milestones such as retirement which previously marked life transitions are not as structured now as in previous generations.

Recently, social gerontologists have moved forward in their thinking regarding how to explain women's employment and retirement experiences. "Critical gerontology" is an attempt to use both structural and more individualistic, biographical methods to analyse ageing and social change, especially as this change relates to older women. Although political economy attempts to explain the nature of women's lives within the social structure, Phillipson (1998, p. 20) makes the point that it cannot fully explain how women fit into society. What is missing, according to Phillipson (1998) is a biographical element; what Bernard et al. (2000, p. 15) call "a lifetime of experience; knowledge; passions; and decisions." Women's retirement patterns, including adjustment to retirement, must be seen through the lense of previous experiences of social and family transitions. How a woman copes with the changes brought on by retirement is very much dependent on she how she dealt with the social, psychological, emotional and financial transitions over the life course. Personality and individual coping styles also have a profound effect on a how woman copes with these changes. As Bernard et al. (2000, p. 15) state, "individual identity formation and development, together with deliberations about social identity, are key aspects of a life course perspective". Silver (2010, p. 4) contends that: "The life course perspective suggests that role transitions, such as retirement, are not only an objective life course change, but also a subjective developmental transformation. This perspective emphasises the importance of studying the individual's own perception of their transition and the need to consider the transitions that take place in the context of on-going life trajectories."

A key principle in the life course theory is human agency. Individuals make choices based on opportunities which are influenced by social and historical norms and events, and this includes decisions about retirement. Silver (2010) also suggests the life course theory is valuable in analysing women's retirement because of the notions of time, transitions and context, all of which shape human development. Her study found that while role transitions such as retirement are highly subjective, women who successfully made the transition fared better compared to women who held a paid position in the workforce. Silver (2010, p. 14) also suggests that this could possibly be explained by

the fact that women who worked fulltime may be better able to “harness the accumulated benefits of their experiences in the paid labour force” in adjusting to retirement.

## **Conclusion**

Drawing on the wider retirement literature, these findings suggest that there does not appear to be a major difference between retirement process of women in coal mining areas compared to non-coal mining areas. Retirement due to national economic problems, ill health and family issues as well as forced retirement due to age are societal issues not specifically unique to Easington. However, given the closure of many northeast factories in the 1970s and 1980s, older women in Easington may have felt the economic downturn more intensely than women in middle and upper class areas. Thus, it may be that the effects of living in a former coal mining area are felt more acutely *after* retirement. Individuals’ adjustment to retirement is heavily influenced by how their social life is structured, either as a result of their own efforts, or that of more structural barriers, constraints and health limitations. It is fairly straightforward to develop a list of hobbies and activities in which participants engage. More vexing is understanding the process through which people determine how active or engaged they will be in later life. Thus, one could postulate the following questions: Is the geographic and physical structure of Easington conducive to pursuing leisure opportunities in retirement? Are there sufficient opportunities for social activities, volunteering, etc. in Easington compared to other non-coalmining areas? These questions are explored in Chapter 7.

Clarke and Warren (2007) make a powerful point concerning the importance of contemplating retirement in a holistic way, emphasising both the structural and individual aspects of this important life transition. Their quote below accurately reflects the complexity of study participants’ retirement experiences. Participants’ retirement process, it may be argued, was somewhat structural in nature (i.e. age-related mandatory retirement and company closures due to economic downturn). Despite the way in which participants entered retirement, it is clear that the process itself influenced the

way in which they deal with their post-retirement lives and how they experience their later years. Clarke and Warren (2007) state:

A clearer understanding of what people want in the present can be gained if their lives are seen in the context of their past and if we listen to what they say, or do not say, about the future. We argue that there is a need for more subtle ways of comprehending activity that go beyond emphasising structural factors (such as finance, employment and retirement) and physical functioning – although these are important – and to examine other ways in which individuals ‘actively age’. The emphasis should be to integrate past experiences and concomitantly to acknowledge the value of living in the present with an eye on the future, both immediate and long-term (pp. 482-483).

## Chapter 8. Social Networks

*Humans are social beings; the need to belong is a fundamental one across the life span.*  
- (Golden, Conroy and Lawlor, 2009, p. 280)

*I live an entirely different life from what my mother did, because I mean I am in the Women's Institute, the U3A in Peterlee. Then I have the community centre, which wouldn't thrive unless I was there [laughter]. So you know I have got a pretty involved life. (Miss Smith, age 80)*

### **8.1 Introduction: Relationships Over the Life Course**

An essential part of humanity is being able to engage in a meaningful way with other individuals and the wider society. From birth to death, a person's social connections give life purpose and structure, providing vital emotional and practical assistance. The social world of older people has been well documented in the literature, including the importance of close relationships and their influence upon wellbeing and mortality. This chapter explores the social life of the Easington study participants and attempts to shed light upon the structural, community and personal worlds in which they live their lives. The following questions are considered, which inform larger questions concerning the lived experience of older people in Easington:

- 1) What are the roles of social networks and social participation in the promotion of wellbeing in later life?
- 2) To what extent do social networks developed in early life help participants cope with transitions throughout the life course?
- 3) What are the factors which influence individual's level of participation in the social life of Easington's villages?
- 4) What is the nature and role of "place" and how do they affect community cohesion and participants' quality of life?

While it is not the aim of this chapter to present a detailed portrait of the social history of Easington, historically, the social life of Easington centred around the church, working men's clubs, the colliery band, women's clubs (e.g. the Women's Institute) and other informal groups which would meet for a common purpose such as knitting, baking or similar domestic activities.

If a miner was brought in injured (my dad was brought in twice on a stretcher), all the neighbours from all over would be there the next day in their aprons with rhubarb pie or something. All helped each other that way, very communal, hospitable. Although they had now't they'd share the bit they had with you. The old neighbourliness. (Armstrong and Wilson, 1985, p. 46).

The rich social history in each older person's life is partly the result of accumulated relationships over the life course. As such it is not surprising that the life course approach holds a great deal of appeal for researchers who attempt to analyse the social networks of older people. Given the multiple roles in which many older people engage, notably women, during their life time, it is helpful to view an older person's social world within a life course context. Van Tilberg (1998, p. S314) supports using Kahn and Antonucci's (1980) metaphor of the *convoy* to define the use of life course concepts when discussing social networks: "individuals enter and leave a variety of roles throughout their lifetimes, and each of these roles is accompanied by a specific set of personal relationships." The *convoy* model of social relations suggests that a person's social network is protective of their welfare, is dynamic and "moves through time, space and the life course" (Kahn and Antonucci (1980) in Fiori, Smith and Antonucci, 2007, p. 322). Within the convoy model, there are gains and losses (such as widowhood), family histories (marriage and family history) and historical contexts (World War II). The model has been used in various studies to explain social network typologies and their associations with wellbeing. As the term *convoy* implies, social relationships throughout a person's lifetime are on a moving trajectory and very much dependent on roles and responsibilities undertaken at a specific point in time. Fiori, Smith and Antonucci (2007, p. 323) suggest that "the structure, function and quality of individuals' social convoys all contribute significantly to well-being."

This "moving trajectory" of life events and transitions is precisely what the life course approach attempts to explain in relation to older people's social networks and the influence of social relationships upon wellbeing. Moen, Dempster-McClain and Williams (1992) however, suggest that a life course theory doesn't actually offer a straightforward explanation of the relationships between social integration and health in later life. Instead, social connections are viewed as most likely a cumulative process where roles during early and middle adult life "play out in patterns of involvement over

the life course that, in turn sustain health” (Moen, Dempster-McClain and Williams, p. 1617). Moen et al. (1992) conducted a 30-year longitudinal study (1956-1986) of the pathways which lead to women’s increased social integration, finding that engaging in multiple roles was positively associated with health and social integration. The early and middle adult years were seen to “promote both social integration and health in the *later* years of women’s lives” (p. 1632). Given the amount of supporting literature on the use of the life course approach when analysing social networks, it is clear that such an approach is uniquely suited to examining the social life of older people (both men and women) because of the components of time (timing and sequence of roles), process (the focus on role transitions) and context (the individual circumstances of life).

Social relationships experience change and transition over the life course, through retirement, migration, death as well as general shifts in social ties due to less significant reasons. There may be little explanation concerning why people don’t keep in contact with certain friends or perhaps “drop out” of participating in their “usual” activities. Sally Falk Moore (in Myerhoff and Simic, 1978, p. 25) suggests that a life course approach is helpful in considering the continuity of social relationships throughout life:

Both continuities, discontinuities, and cumulation of various kinds may take place in an individual’s *social relations*, and this may well be the most important element of all, both analytically and experientially....Social relationships may be accumulated over time, and at one point or another they’ll be lost or broken off. They may become more intense – i.e., the cumulation over time may be in the intensifying and strengthening of the relationship in terms of emotional investment, common experiences, long-term exchanges. Thus, cumulation may be of numbers of relationships, or kind and quality of relationships, or both.

Perhaps Moen et al. (1992) offer the simplest defence of using the life course approach when examining older peoples’ social relationships by stating that “the study of ageing and health from a life course perspective becomes an investigation of pathways, of the connections between the different phases of life, and how circumstances in early adulthood may affect health and social integration later in life” (p. 1614).

## **8.2 What is a “Social Network”?**

When considering the concept of social networks in later life, there is an inevitable difficulty in defining precisely what is being measured. The large number of terms used

to describe the social life of older people can be thought of as a word salad – one dish but different ingredients. The term “social connections” may perhaps encompass an overarching idea that people, both young and old, possess a variety of life relationships. These connections refer to social interactions with friends and family, along with people in the wider community. Our social world is a key to understanding quality of life issues and it has a profound effect on both our physical and mental wellbeing. Defining the term “social network” can be problematic in that it often refers both to an individual’s external environment (e.g. friends or colleagues) and internal environment (family relations). The difficulty in researching social network issues in later life is identifying where, conceptually, to “start”. In its most basic form a social network may be viewed as “the web of relationships which surround the individual” (Golden, Conroy and Lawlor, 2009, p. 280). These internal and external relationships impinge on every part of life and play an enormous role in the overall quality of one’s life.

The social gerontology literature reveals that various related terms have been used interchangeably to describe older people’s social networks, such as social engagement, social support and social participation. Victor, Scambler and Bond (2009, p. 14) state that there is “terminological inexactitude” when defining social networks as the term can mean all things to all people and may not be spatially defined. They view social networks as an “accumulation of relationships and interactions across a variety of settings both social (family, friends or groups) or places (village, workplaces)” (pp. 14-15). Similarly, Bowling et al. (1991), as cited in Phillipson, Allan and Morgan, (2004) make clear that social networks are distinct from other forms of social interaction such as social support: “A social network is defined here as a set of linkages among an identified group of people, the characteristics of which have some explanatory power over the social behaviour of the people involved. It is the set of people which whom one maintains contact and has some form of social bond...” (p. 37).

While it is gratifying to acknowledge the depth of the literature describing the social world of older people, for the researcher as well as the reader, the vast array of terminology makes it somewhat murky to discover the “direction of travel” or strength of association or causation between a strong social network and other variables such as physical and mental wellbeing. Wenger (1991, p. 147) suggests that social gerontology

has only “recently recognised the importance of network analysis, which looks at the broad range of social relationships as a whole rather than the specific categories of actors such as family, friends or neighbours.” The study of older people’s social networks often focuses on network size or number of social contacts and their association with health status. This approach often misses the opportunity to explore more complex elements of how social networks influence quality of life, such as the perceived value older people place on relationships, the differences between family and friend support and the extent to which social networks are influenced by where one lives.

Based on a review of the literature, Litwin (2009, p. 600) suggests there are four major elements of older people’s social networks:

- 1) Network structure and interaction
- 2) Social exchange
- 3) Social engagement
- 4) Subjective network perceptions

Litwin (2009) explains that although the size of one’s social network does not fully explain a positive social life, network size has been shown to be related to wellbeing. He also suggests that some recent evidence reveals that there are benefits to what is called “selective diminution” of social ties as people age. Friendship does, however, continue to be very important in later life especially as it highlights the fact that most older people still make personal choices regarding with whom they spend their time. Evidence has shown that network members derive positive outcomes when they are able to help others. Social support almost always refers to support received by external carers, friends or family members and suggests a more dependent relationship, with care and support usually flowing one way, from carers to the older person, although many older people also provide support and caring duties to younger family members or friends. The support is usually focused on “provision of financial, instrumental or emotional support from network members” (Victor, Scambler and Bond, 2009, p. 15). Usually the support is sought from a section of the network most suitable to assist the older person, a concept supported by Phillips, Bernard, Phillipson and Ogg (2000) in



their study of three urban communities in England: “The study found that respondents do not mobilize the whole of their social network when looking for support. Instead, a section of the social network is drawn upon (mainly immediate family) to provide specific kinds of assistance. In addition locally available friends offer complimentary or alternative sources of help” (Phillips et al., 2000, p. 837).

Studies on social support frequently attempt to make the association between level and type of support and health outcomes. For example, a study by Ell (1984) showed that social support was found to increase individual wellbeing, including immunity to physical illness and mental health disorders. Coping with life and problem solving was also positively influenced by one’s social support network. Psychosocial coping strategies have been widely researched and many longitudinal studies have shown that social support actually promotes physical and mental well-being as well as protecting individuals from harmful stresses (Jang, et.al., p. 808). While the majority of the research on social networks has described the positive effects of having a wide network, negative relationships can equally have a detrimental effect on personal wellbeing and can be measured in terms of perceived loneliness. As Caspi and Elder (1986) point out, the relationship between social involvement and psychological wellbeing (discussed in social network analysis and other research on coping with stressful events) is central to many gerontological theories on individual adjustment to later life. Caspi and Elder caution however that it is often difficult to explain the reasons behind why older people cope well or not in later life and that at times there are surprising study results. For example, they state that “several studies have shown that social involvement is more strongly related to subjective wellbeing for persons of *lower socioeconomic* status than for persons of higher status” (1986, p. 19).

### ***8.3 Social Participation: Evidence from the Literature***

*Solid evidence links informal social networks, social activities, and participation in organisations with better health chances...Networks can provide social support, self-esteem, identity and perceptions of control. (Cattell, 2001, p. 1502)*

Social participation among older people has been extensively studied to determine how and why participation in social activities influences quality of life (see Lemon, Bengtson and Peterson, 1972, in Litwin, 2009, p. 600). Many studies on social activities in later life have focused on the number of social contacts or attendance at social activities as outcome measures in determining related effects on health status. While this type of information is valuable, it may not address the more difficult questions, including: 1) what value do participants attach to the activity? and 2) what about people who don't participate in social activities? Are they still ageing well? These concepts will be more fully explored later in this chapter.

An assumption is often made that in later life people *should* be active. Jerrome's (1991, p. 185) research suggests that many middle class women feel compelled to pursue an activity or hobby which is goal directed or develop a shared activity with other women. Jerrome also reflects that there is a culture of "doing" which may lead older people to join groups in order to be "engaged" in life. She states that: "This reflects a cultural emphasis on doing rather than being, activity rather than passivity, the attractiveness of purposeful behaviour and value attached to it in middle class culture" (Jerrome, 1991, p. 185). Potential group or club members may join because of a particular programme or topic which appeals to them, thereby making it easier to "make friends". However, joining a social club does not always produce the desired effect of, for example, making friends. Jerrome claims that for older, unmarried women, this may result from a complex set of reasons, such as shyness, or other personality factors. Among other reasons, it may be difficult to reach out to others due to feeling lonely and unattached (p. 186). A dynamic area of study explores the link between social activities and the prevalence of dementia. According to Bassuk et al. (1999, p. 165), there is a strong link between a socially engaged lifestyle and higher scores on memory and intelligence tests in community-dwelling older persons. Fratiglioni et al. (2000) cite several studies which reported that the risk of dementia was lower in people who participated in more social and leisure activities. They observed that: "Poor social network affects the immune system, and that dementia, both degenerative and vascular types, have large inflammatory components. Thus it is possible to trace a connection linking social support, immune-system depression, and inflammation in the demented brain" (Fratiglioni et al., 2000, p. 1317).

#### ***8.4 Relationships with Community: Social Networks and the Nature of “Place”***

*Easington is a strong community because you’ve got strong people...The reason I enjoy living in Easington is due to the people and the community spirit. You get the friendship and comradeship here. (Armstrong and Wilson, 1985, p. 36)*

*People mixed in so if the lady next door was poorly you would go and help, even if it was just making her a cup of tea. But now everybody is suspicious of each other. (Mrs. Troy, age unknown)*

Both of the above quotes paint a picture of one community and each quote is accurate in its own way. Many communities such as Easington experience the solidarity of community life; feelings of trust among and between residents which contributes to positive social cohesion. Equally true, social and economic changes can lead communities which once were well known for being “close knit” to experience the disconnectedness felt by *Mrs. Troy*. Clearly it is easy to view the past with “rose tinted glasses”. The well-known phrase “the good old days” is sometimes used to describe what might be perceived as a by-gone era, when village life meant a shared social, cultural and economic experience. The network of relationships within a community may determine the quality of life in a neighbourhood, village and city. Ageing naturally begs the question: what do we want our social and cultural life and the surrounding physical environment to look like as we get older? Phillipson (2007, p. 323) suggests that “ideas about older people’s relationship to their community and environment have had a complex history in social gerontology.” Concepts of belonging and identity have formed a central theme in much of the research on how older people “age in place” as well as the extent to which the living environment affects wellbeing. Studies of the same communities at different times have indicated that older people derive a strong sense of emotional attachment from both their home and the surrounding community (Townsend, 1957, in Phillipson et al., 2001). Indeed, Rowles (1978, p. 200 in Phillipson, 2007, p. 332) made the point that; “selective intensification of feelings about spaces’ might represent ‘a universal strategy employed by older people to facilitate maintaining a sense of identity within a changing environment.” Rivlin (1987) believes that the concept of place is both enduring and changing over the life course. She emphasises that although the home and neighbourhood are a large part of self-identity, they are part of a “broad set of experiences and relationships in a number of physical settings over the lifespan” (p. 10). Milne, Hatzidimitriadou and Wiseman (2007) view ageing as “being situated or ‘emplaced’ within a house, community and wider socioeconomic context” (p. 477).

Van der Wel (2007, p. 71) makes several interesting points concerning this important topic. First, he points out that variations in health between geographic locations may “simply” be due to the differences between people who reside in those places. He calls this the “compositional” place effect. Second, Van der Wel states that there are more “real” place effects on health such as quality of local services, housing conditions, access to good quality water, and access to safe recreational areas. Other elements of community life which may contribute to health inequalities include health care and social services and transport options. These issues he labels as “contextual” place effects (Van der Wel, 2007, p. 71). While these elements of community life are essential for a positive quality of life for older people, the concepts of trust, shared norms and values may perhaps be viewed as the prerequisite, the foundation which supports all other aspects of community life. Van der Wel calls those more intangible elements the “social climate” of a place. The links between place, health and age are increasingly being considered by policy makers seeking to develop effective local services and activities for older people based on the local level, i.e. “place” (Milne et al., 2007, p. 477).

### ***8.5 Social Capital***

Social capital is a concept which has, in recent years, been used by policy makers and community leaders to describe elements of community life which may contribute to the development of social networks in a particular community. The concept is briefly mentioned in this chapter due to the sheer volume of research produced on the subject over the past five years and also because, however limited, it does offer “food for thought” when considering the issue of the social networks of older people.

Putnam (in Cattell, 2001, p. 1502) explains that social capital encompasses “...features of social life-networks, norms (including reciprocity) and trust - that enable participants to act together more effectively...” Gray (2009, p. 6) suggests that Putnam’s view of social capital argued that “ties between individuals, particularly voluntary co-operation within clubs, churches and other formal associations, help to increase social capital in the community as a whole.” In contrast, Colman (1990, in Cattell, 2001, p. 1502) holds a more structuralist view of social capital in terms of its relational and functional

dimensions. Putnam has been criticised for focusing too much on involvement in formal organisations (Gray, 2009, p. 7) to the detriment of the “really useful” social capital many people experience through informal networks.

Bourdieu (1997) appears to take the combined approaches of Putnam and Coleman by describing social capital as both an individual resource, developed over the life course and influenced by current activities, but also contingent on structural factors (as cited in Gray, 2009, p. 7). Although people can choose with whom they associate, depending on health, neighbourhood, class and gender, they cannot guarantee how helpful their friends or family are if social support is needed. Therefore while social capital may be considered an individual resource, it is also a collective resource, shaped by the norms and values of a particular area (Gray, 2009, p. 7). Social capital is also suggested as a mediating factor linking poverty and ill health. This reasoning rests on the idea that income inequalities have a negative influence on health by reducing the social capital in a poor area. Cattell (2001) suggests that it is not necessarily the case that deprived areas suffer from either a lack of social cohesion (a term often wrongly assumed to be the same as social capital) or “depleted stores of social capital.” Her research results found the contrary: “The research indicates that perceptions of inequality can have positive as well as negative health effects; deprivation can be both a source of hopelessness and a source of social action. Much depends on the way that residents perceive the way that inequality is structured and on their response to it” (Cattell, 2001, p. 1502).

In reviewing the literature on social capital, it may seem like there are more questions than answers, as Cattell (p. 1502) states: “For example, should it [social capital] be most usefully considered as a resource for individuals or neighbourhood; to what extent is context influential; can its effects be negative or its structure bounded and exclusionary? What is the nature of the relationships between networks, trusts and norms?” Bourdieu (1997) views social capital as an individual resource and as well as a structural force in older people’s lives is compelling. It points to perhaps a more complex, yet more complete understanding of the “social connections” in older people’s lives and how they are formed.

## ***8.6 Older Easington Residents : Their Social life and Social Networks***

The social lives of Easington participants paint a portrait of individuals who value not only participation in community life through social activities, but also their sense of connectedness to the wider social environment. During the interviews, participants were asked open ended questions concerning the nature of their social life. Participants also offered their views on the significant social and community structural change they have witnessed during their life time. The following thematic categories emerged from the data and will be discussed in turn in the following section:

- 1) Social activities in which participants engaged during their childhood and young adulthood;
- 2) Descriptions of social networks such as family, friends and work;
- 3) Current activities in which participants are engaged (beginning in mid life and after retirement);
- 4) Barriers to participation in social activities or social life of the community;
- 5) Concepts of "place" (neighbourhood) and community cohesion or a lack thereof, as a result of the pit closures and societal change.

### **8.6.1 Social Life of Childhood and Young Adulthood**

The lived experience of childhood and young adulthood has an enormous influence on the way people live their lives as older adults. This is not to say that childhood determines one's fate later in life, but certainly exposure to a variety of situations and experiences prepares a person for later challenges. Elder and Liker (1982) contend that experiences as children provide the foundation from which "life tools" are developed and used in later life:

Successful aging may be linked to early experience which tests and develops a person's mettle in coping with the disruption of losses, with the problem of lost attachments and purposes ... A life course perspective on aging assumes that individuals assess and react to new situations in the light of their personal biographies. The ups and downs of a lifetime furnish lessons, liabilities, and resources that influence the ways in which men and women age and meet the realities of later life. The wisdom to make sound choices stemming from life experiences, positive and negative, may ensure a legacy of good health, adaptive skills, and material security in old age. Study participants shared many experiences they had in childhood, which appeared to carry into later life (p. 243).

Similarly, Rivlin (1987) maintains that the home environment of children is very powerful in terms of place-identity development. She states that: “Children’s immediate settings help to define both the world and themselves within it. For most children up to the age of 6 the home environment is the major arena of socialization.... The neighbourhood, thus, is a part of the social, emotional, and cognitive experiences of the child” (p. 10). The social world of Easington study participants almost universally reflects a view that childhood and the path to adulthood was one of freedom and a sense of shared community activities. Their memories of childhood seemed to revolve around being outdoors, running in the fields, swimming in the sea and walking.

*Mrs. Knight - We used to go on down to the beach when we were little. We ran down the road to get to the beach, you know. Because at Lanchester it was only the river in Lanchester; there was no beach. But when we got to [indecipherable] to live, there was the beach. We were just kids, we thought it was just great. There was a dene in Hesleden as well. The older ones tied the rope onto the tree and would swing. When I was young I used to do all kinds of things, in the denes and that. We used to climb all the denes, and that. I used to have a go; I was a tomboy when I was young. (Mrs. Knight, age 99)*

*Mr. George - All we did was play outside. There was no electricity so we played football, cricket, hockey, balls, tiggy, leap frog, we used to play tons of games. Years ago we had the biggest bottle works in Europe now where the docks is and all the buildings are still there. It closed in the 20s or 30s. There was still glass dishes, huge buildings and we used to go climb up onto the roof. You would take your life into your hands. We used to go down to the beach, find crabs, etc. There was no traffic, it was fabulous. (Mr. George, age 71)*

Participation in sporting activities was also very popular with cricket and football being the activities of choice for many young men. The sense of both physical and mental wellbeing was very evident in the childhood experiences of participants. These appeared to be very vivid and happy memories which were recalled with great fondness. In terms of more structured activities, in most pit villages there was at least one cinema. The cinema was a form of low-cost entertainment, very popular with young people and because it was in the local area transport was usually not an issue.

*Mrs. Johnson – There was always the pictures. Wingate had two picture houses, Trimdon Village had a picture house, Wheatley Hill had a picture house, I mean for all we are just small villages....and then of course you could go into the town to the big dance hall known as the Rink at Hartlepool, there was one at Spennymore, one at Ferryhill. (Mrs. Johnson, age 62)*

Dances were another form of social activity in which young people could participate. Similar to attending the cinema, dancing offered a shared activity where young people could go for entertainment.

*Mrs. Knight – We used to go to a dance at Easington and the snow came and the bus didn't come for us and we started walking singing on the road, so we had to walk into Blackhall. I am not sure if the bus came! But, we did all kinds of daft things when we were young, you know. (Mrs. Knight, age 99)*

*Mrs. Johnson – Well, there were a lot more pubs around then (laughter). Working Men's clubs were a big source of entertainment, I mean when we were in our teens and early 20s and 30s, you could go to a working men's club every night and find entertainment. All over, there would be dances, live groups on, live bands, fantastic bands, yeah, that was great. And the local miner's welfare halls always had dances on, yeah. (Mrs. Johnson, age 62)*

In their account of life in a colliery village, Dennis, et al. (1976, p. 127) describe this form of entertainment which helped to provide a relatively safe form of socialisation; “The main function of these weekly dances appears to be that of bringing young people together in a manner which facilitates the approach of the two sexes.” There was also a general feeling amongst participants that they had a great deal of freedom to “make their own fun.”

*Mrs. Jones – We could go out and be free. We have two lovely woodlands over there. One is called the Wood and one is called the Moor. So we used to build tree houses, just a lovely carefree life. We had the common at Hutton Henry. It had a bog in those days and a plank across. I have been in that bog more times than tongue can tell, have been fished out of the bog. So, just a nice, normal carefree kind of a life. (Mrs. Jones, age 62)*

Although on the surface it may seem trivial, examples of this type of play contribute to the development of social networks in early life and often “set the scene” for how young people view the importance their external social world. If one takes a life course view of social networks, then it follows that children's social networks emerge in the context of influences from school, family and friends, all of which may have a profound effect on relationships and wellbeing in later life, as Nairne (2008) states:

Psychologists now recognise that a child's social network – the number and quality of his or her friends – can have a meaningful impact of social development and wellbeing. Children with friends interact more confidently in social situations, they are more cooperative, and they report higher levels of self-esteem.



These trends are true for young children and adolescents and they continue on into adulthood...our network of friends predicts how well we're able to recover from injury or disease. This is just as true for children as it is for adults (p. 121).

While it would be difficult to make the causal link between childhood relationships and strong social networks in this small study sample, it is interesting to consider the value participants place on their perceptions of early social life. To what extent did their friendships and exposure to their family's social life influence participants' social network in later life? The study data does not give a precise indication concerning the exact relationship between childhood networks and social linkages in later life, but what is clear is that participants had fond memories and appeared to value their friendships at an early stage in their lives.

A characteristic of childhood which was often described in the interviews was that of freedom to explore the outdoors, seeing friends and taking advantage of the relative safety which today's children may only dream about. The apparent lack of restrictions placed on children concerning their "outings" must have contributed to the feeling of freedom to develop their social "network" in their own way. It could be argued that living in a so-called "deprived area" did not allow the participants to partake very often in more formal social outings which may have been beyond the means of their parents, thereby forcing study participants to develop more informal social networks.

### **8.6.2 Descriptions of Social Networks: Family and Friends**

*Mrs. Scott – What would I have done without these sisters of mine? I couldn't have been the same person I am without going out with our Jenny. When Bill died, [husband] our Eva and Harry, Eva's husband died the year after, he died with cancer the year after and she came to my house one weekend and I came to hers and we did that for 20 years until she broke her hip and she moved to a bungalow. Our Peggy lived the oldest at that time, 79. She had dementia and died at the table while eating dinner. And here I am, 79 years old [laughter]. (Mrs. Scott, age 79)*

For most people, the relationship with family constitutes one of the most important social connections in life. Connidis (2001) shares this view, stating that "Because the life experiences of any age group are so closely tied to the family, examining the family ties of older individuals can lead to a better understanding of later life" (p. 4). She also remarks that it is important to correctly define what we mean by family when

researching older people and family life: "...both the childless and single are active participants in family life as children, nieces, nephews, siblings, aunts, uncles and cousins. Therefore, they are an important part of the family network and do experience "family" life. Our focus on family ties and aging emphasizes the fact that nearly all older persons are family members and that the process of aging is associated with transitions in family relationships" (p.4).

The structure of the family has changed over the past century reflecting a shift in family formation patterns (Bond and Corner, 2004, p. 40). In addition, the increase in longevity means that married women can expect to live alone for a period of later life, and therefore the importance of friends within social networks has become increasingly critical to a positive quality of life as people age. Most older people, however, find that their primary support network is still through family-based networks (Bond and Corner, 2004, p. 41). During the interviews with the Easington study participants, there were interesting discussions regarding family life and the extent to which they were (in mid-life) and are currently involved in their immediate family network. The primary themes which emerged from the discussions regarding family network include: the level of emotional support received from family members; help from family with practical tasks such as shopping and lastly; caring for older family members. The majority of participants were very positive regarding their own family network and the extent to which they felt "close" to their family.

*Mrs. Scott – Our Norma was our sister, our younger sister. She is just in her 60s. She helped me when I was bad last surgery, so she is a good person, you know. She is still working as a carer. Our Norma has been a carer for years, a home help. She has still gone back when she is 63 and is doing two all-nights. She really likes old people.*

Help with practical tasks was very important to some participants, especially as several did not drive and had health problems which affected their mobility and ability to carry their shopping

*JE – How do you get to where you need to go, is it your son?*

*MRS. KNIGHT – He takes me shopping. I've got 2 sons, one lives at Peterlee - he comes and takes me out if I want some clothes, the other one takes me out shopping every Friday if I want some groceries. They are marvellous! (Mrs. Knight, age 99)*

Wenger (1993, p. 27) argues that it is the older person's perception of who is available to help in times of need which influences whether or not that help will be sought. Both *Mrs. Scott* and *Mrs. Green* assumed that an immediate family member would be able to assist them with their daily routine, or if they were ill. As previously mentioned, Wenger's network typology structure would be more useful in a large scale study than for this present research. However, after analyzing each participant's family-network support system, it is clear that they do, for the most part, fit into Wenger's named network types. As Wenger mentions, there may be considerable overlap between the typologies as it isn't always easy to put people into neat categories. *Mrs. Green* and *Mrs. Scott* were two of the oldest participants, thus it may follow that they may receive more assistance from their families. *Mrs. Knight*, the oldest participant, aged 99, also received a great deal of practical daily help, primarily from her daughter. Two participants, *Mrs. Johnson* and *Miss Smith* provided a great deal of care in mid life to their older mothers but currently did not require much care themselves. Most of the study participants were 75 years of age or younger and were still able to tend to their daily needs without assistance. The effect of practical assistance on participants' wellbeing can be seen in the sheer delight that *Mrs. Green* expressed over her sons' assistance: "they are marvelous"! Clearly her mental wellbeing was promoted by her son's willingness to "be there" for her. This was true for other participants as they expressed gratitude that their family had been there to help in times of need.

There was however, a discrepant case of negative family relationships which continues to have a profound effect on the participant. *Mr. George's* immediate family relationships (with his daughters) had disintegrated over the past five years to the point that he expressed hopelessness that the situation would improve anytime soon.

*JE – Do you have any children?*

*MR. GEORGE – Have I got children? Five. One speaks to me, four don't. Two have never spoke a word to us since I got married. One speaks now and then. One comes out almost every day. And I see the other one once in a blue moon.*

*JE – Is that as a result of your remarriage?*

*MR. GEORGE – Yes, it is hard for me. I have a granddaughter 13 month old and I never have seen her. I was told if I ever see her, it would be an accident. She is emigrating to New Zealand, so I will never see them.*

*JE – Do you have other grandchildren?*

*MR. GEORGE – Oh I've got four.*

*JE – Comparing your life and their lives, how would you compare them?*

*MR. GEORGE – My second grandchild, I brought her up from three month old until she was 11. I had her every day; Monday, Tuesday, Wednesday, Thursday, Friday because [daughter] was working, her mother was working. She was born the month I was made redundant. From three month old until 11 I had her every day. Her first day at nursery, her first day at school, her first day at the big school. What they have done to me and what they said to my wife, I can't repeat it. And then, my middle daughter has poisoning the two of them against my wife and the granddaughter. (Mr. George, age 71)*

Mr. George had remarried in recent years and there was a great deal of acrimony directed at him and his new wife from his daughters. He tended to obtain support from his former pit work mates with whom he often went to the pub.

*JE – Did you miss the pit at all?*

*MR. GEORGE – Oh ay, you missed all your mates and everything. But, we still all together now. The camaraderie is still there. Every Saturday night, we meet for a drink; we have done for the past 15 year. We are still there, but some are dying off.*

Friendships over the life course add texture to human experience and contribute to a sense of wellbeing, especially in later life.

*MRS. SCOTT – Well, supermarkets, and people with cars. I mean, I have to go and carry my groceries; I, we have never had a car. Joan [her friend and neighbour] fetches my heavy stuff if they go to ASDA on a Monday. But I go shopping for all the other things I need. But she brings my soap powder, my washing up liquid, my flour, my margarine all that is heavy Joan fetches for me on Monday. (Mrs. Scott, age 79)*

Jerrome (1981) has written extensively on the importance of friendship in later life. She observes that a review of the literature reveals that friendships are often maintained well into later life. She also suggests that over time the idea of what it means to be a friend changes:

As the lifespan unfolds, people's concepts of friendship change. Friendship becomes less hedonistic, more an expression of help and support. Friends do not compete with neighbors or kin though they can be substituted for either in the provision of certain services. The friendship tie is distinguished from the other two by its foundation in affectivity and free choice, rather than face-to-face contact or permanence, and by its capacity to accommodate changes in personal taste and lifestyle (p. 178).

Participants often mentioned friendships developed through social situations such as work, church, clubs, and other voluntary associations. As shall be discussed, an emphasis on neighbourliness in the past (especially when the pits were in operation) was often mentioned as part of a bygone era (i.e. a major shift in the social and cultural fabric of Easington). Several participants mentioned their positive memories of the way in which neighbours helped each other, sharing food, allotment produce and lived in a safe and neighbourly environment.

Although most older people have some form of existing social network (family, kin, community), it is thought-provoking to consider how social networks are *formed*, even in later life. Wenger (1993, p. 27) suggests three underlying factors which contribute to network formation. Firstly, she claims that network formation is largely due to chance. Factors such as marriage patterns, gender, birth order and how many children are in a family affect the type of support network available in later life. For example, Mrs. Scott came from a large family of daughters, all of whom supported one another throughout life. This has been especially true for Mrs. Scott over the past few years as her youngest sister has been a major support to her. Conversely, Miss Smith does not live near her siblings, nor did she ever marry. It was clear from her responses however, that she feels “supported” by her wider community, for example, fellow volunteers at the local community centre and her Women’s Institute colleagues. Secondly, Wenger argues that migration influences older people’s social networks, either by their own relocation to a new area or by their close relatives moving, for example to seek better employment opportunities. Interestingly, this did not appear to be a factor in the social network formation of Easington participants but this issue resonates with many older people in our fast paced society. Thirdly, an important and often under-researched factor in social network formation and maintenance is that of personality or temperament. Wenger claims that:

Some people are more outgoing and gregarious than others who may adopt a more privatized life-style. Those who are loners in old age tend to be those who have been loners all their lives and those with large social networks tend to have always been sociable. Some develop personality traits which distance them from others or become so desperate for social contacts that others back away. But even the most gregarious temperament cannot alter the effects of biology and migration. It can only affect adaptation to the outcomes of these factors (p. 28).

Factors of personality and temperament in later life perhaps belong more to the field of psychology than to the study of social networks. However, Wenger makes a strong point that personality and temperament exert a powerful effect on an older person's ability to cope with a changing social network landscape.

### ***8.7 The Meaning of "Social Participation" for Easington Study Participants***

The motivation to participate in social activities is a highly personal decision. As mentioned previously, there is a wealth of research proving the benefits of a "socially engaged" life. The term "active ageing" has become increasingly popular when describing participation in social activities in later life. Stenner et al. (2011) suggest that while the term "active ageing" (or participation in social activities) can be neatly coded into categories, such as "physical", "mental", or "social", it is far more challenging to understand the subjective nature of activities, i.e. the meaning of participation. Stenner et al. (201) suggests that for older people, the type of activity engaged in matters less than the sense that one is controlling their own destiny by choosing what one wants and is able to do.

Litwin and Shiovitz-Ezra's (2006) also report that the well-being of older people is associated not with the quantity but with the quality of their activities, as it seems likely that agentic capacity is a key factor in what makes an activity subjectively meaningful and interesting to a person. Mrs. Green expressed a similar sentiment:

*MRS. GREEN – What I do, I like to do and I do it. I go around the community centre for health fairs, I help along here, I collect for the British Legion, do my part for the British Legion. (Mrs. Green, age 92)*

The majority of study participants engaged in at least one activity outside the home.

The nature of the activities on offer were wide-ranging and included:

- Flower arranging
- Card making
- Gardening
- Parish council work
- Pigeons

- Women's Institute
- Community centre activities
- Local volunteer
  - history society
  - Royal National Institute for the Blind
  - Lay visitor for the police
- Dances
- Church

Mrs. Scott was an example of a discrepant case concerning social participation. Although she was healthy enough to participate in outside activities, she chose to socialise more with family and friends in her home. Mrs. Scott indicated that she had “been there and done that” in terms of formal social activities. This lack of participation did not diminish her interest in life or engaging with others in the home environment. She spoke a great length about the support she received from her family.

As mentioned in Chapter 7, retirement from the labour force can be a double edged sword. Many people find this new phase in life to be liberating, while others may feel a sense of bewilderment and loss of the structure they experienced during their working lives. Regardless of the reasons for retirement, most of the study participants found that they have enjoyed the freedom to be able to participate in activities of their choice. For some study participants, such as Mrs. Johnson and her husband, social involvement is a continuation of the same type of activities undertaken in earlier life.

*JE – How long has [her husband] been retired?*

*MRS. JOHNSON – He has been retired 2 years, he is 63 coming up and I am 62.*

*JE – How has he found retirement?*

*MRS. JOHNSON – He hasn't got time to go to work! I mean he helps me, he does all my mam's garden. He takes her to the hospital and the doctor. He is still working around the welfare (hall). We are still really wrapped up in that. He is chairman of the parish council. I am one of the councillors. We haven't got a lot of time! And then he is racing his pigeons! He is out a lot. (Mrs. Johnson, age 62)*

Mrs. Jones's retirement appears to have also given her a second career as a community organiser and activist.

*MRS. JONES – Well, I am chairman of the parish council, I am church warden of the church at [local village]. I am chairman of the community association and I am also a member of the partnership. That is the three villages, Station Town, Wingate and Hutton Henry. In fact I am vice chair of that. I dare not tell him too much [her husband who is seated near her].*

*JE – Have you always been involved in community life?*

*MRS. JONES – Yeah, well especially since I finished work. I didn't have much time since I finished work. I finished in 1986 and since then I got on the parish council and I remember that for my sins, and then the Labour party. I have trampled these streets leafleting for Tony Blair, and for Stephen Ewes and for them all. (Mrs. Jones, age 69)*

It is interesting to consider that both Mrs. Johnson and Mrs. Scott were heavily involved in community life *before* they retired and appear to place a great deal of personal value on their contribution to community solidarity. They have “carried on” with the familiar tasks of committee work and managing community associations, thus it can be argued that they have not necessarily sought out a set of “new” activities in which to participate. Their participation reflects the continuity theory mentioned in Chapter 7 which postulates that when people change roles over the life course, they hold onto their previous way of life and their self perception. Conversely, Miss Black, who never married and evidently did not seem to participate a great deal in community life prior to retirement, felt that she had to “do something” to keep busy in later life, somewhat mirroring role expansion theory also mentioned in Chapter 7. Miss Black sought out activities which were new to her and seemed to value being a volunteer, both helping people directly (Meals on Wheels) and generally socialising with community members (at the local Heritage Centre).

*JE – Do you feel like even though you are not working, you like to be involved in community activities?*

*MISS BLACK – Well it gives you an interest to get out among other people. And I see people, some I haven't seen for years, people who originally belonged to Wheatley Hill, but moved away and then they come back, you know.*

*JE – That must be really enjoyable.*

*MISS BLACK – Oh it is. (Miss Black, age 78)*



Social participation was equally valuable to all three participants as they were involved in activities where they felt their role could promote both community cohesion and their own personal sense of well-being.

### ***8.8 Personality***

The role that personality plays in motivating older people to participate in social activities has been considered by researchers. McAdams and Olson (2010) comment on the way in which personality affects quality of life: “Personality traits sketch a dispositional outline of psychological individuality; adaptations fill in the motivational and social-cognitive details; and life stories speak to the full meaning of the individual life” (p. 519). Easington participants, given the wide age range (60-99), were as distinct in personality as the general population. Findings reveal that personality contributes to the motivation for engaging in community life. It is therefore necessary to analyse the role of personality in later life as it has a considerable effect on older people’s willingness to become involved in social activities in some way, shape or form. The interviews reveal that the majority of individuals appeared to have the type of personality which was naturally curious and interested in life outside their home environment. This may have been due to participant selection, as the majority of individuals who offered to take part in the study were, for the most part, independent and interested in life. Was it these aspects of their personalities which motivated them to greater social participation? Other participants were no less curious, but preferred to engage more with family-related activities in their home. The participants who preferred to engage in home-based activities were older and had experienced more health problems than younger participants. In contrast, the more “active” participants had always been busy throughout their lives and carried on with their usual activities after retirement. Two participants in particular, Miss Black and Mrs. Sanders, experienced a lull in determining what they wanted “to do” after retirement. They had always worked outside the home and thus felt the need to find something to fill their time. It is difficult to determine if this was due to personality traits or to the fact that they had always had a structured life and missed such daily routines. Although participants experienced barriers to their involvement in community life, they were determined to remain active and derived significant benefits from their participation in the social life of the community. The main findings related to personality and social

participation are: 1) the motivation to participate in the social life of a community as an older person is highly influenced by past involvement in activities, 2) health status and advancing age may counteract a “curious” personality and have a profound effect on level of interest in community life. Study results confirm the findings of Ardeltd (1997) and Wenger (1993) who found that personality as well as wisdom (in Ardeltd’s case) may influence an individual’s ageing experience more than objective life conditions, such as living in a socio-economically deprived area.

In the literature on successful aging (Rowe and Kahn, 1997 and Gilhooly et al. 2007), objective life conditions are often assumed to be responsible for major differences in the well-being of elderly persons. This approach, however, ignores the personal history of older people. Individuals enter old age with a lifetime of experiences that have shaped and transformed their personalities and determine how they deal with the vicissitudes of life in the later years. As a consequence, older people do not react to the same objective situation in identical ways. Depending on their personal resources, the same circumstances may be unbearable for some and tolerable or even beneficial for others (Ardeltd, 1997).

### ***8.9 Barriers to Participation in Social Activities or Social Life of the Community***

Even with the best will in the world, there are often barriers to participation in the social life of a given area. Older people in particular are more prone to facing barriers due to issues such as declining health, lack of transport and lack of financial means to pay for activities. There are also other structural barriers study participants mentioned which have a profound effect of their quality of life, such as closure of popular community venues used for activities. The meaning of neighbourhood change is subjective for each individual, and the effects of such change make their mark on people in different ways depending on their history and present circumstances. Three of the four barriers to participation in social activities mentioned by study participants related to the practicalities of participation. Although “lack of mobility” generally referred to the problem of ill health, participants also mentioned poor transport as a barrier. This is supported by other research describing the way in which lack of transport negatively impacts quality of life (Scharf and Bartlam, 2006a, Walker and Hiller, 2007). Transport

in rural or semi-rural areas is often perceived as a major barrier to participation in that it can socially isolate people who may be keen to become involved in activities. The lack of transport options in Easington is well known and since the closure of the mines the problem has intensified, especially for older women, many of whom do not drive (Commission for Rural Communities, 2006). Many bus routes in Easington have been withdrawn over the past two years and it is difficult for some older people to stand for long periods waiting for a bus to arrive in their local community. Most of the study participants grew up in Easington and were used to walking to their local amenities. In their older age they now face difficulty walking a long distance to the shops and back home. Most study participants were involved in at least one social activity outside of their home environment, but often spoke about reasons they were not able or did not desire to participate in other social activities. The social gerontological as well as community studies literature is replete with research which explains the common barriers often facing older people who do not participate in activities. The following related issues were highlighted during the interviews:

1) **Lack of mobility:**

Declining health is a major obstacle for the lack of participation in social activities. This problem is especially acute for older people who do not have access to easy transportation and must rely on the bus to take them to local venues. In the case of Mrs. White, she was still able to participate in activities in her sheltered accommodation centre which didn't require her to walk very far.

*JE – What are your opportunities like to visit with friends? What is your social life like now?*

*MRS. WHITE – I don't go out at all. I am a Catholic. I used to go to church but I can't even do that, but they come to the house to give me communion.*

*JE – Is it due to your mobility?*

*MRS. WHITE – I can't walk very well, you know. On an afternoon, you go down stairs between 3 and 5 for a cup of tea and a biscuit and I've been promoted - I am in charge of the biscuits! (Mrs. White, age 86)*

Mrs. White was able to continue a small portion of her social activities despite her limited mobility. The question is how do those older people who are limited by their health reach out to embrace local activities? This is an issue often faced by local government and health authorities who are trying to help their older residents maintain

their physical and mental wellbeing through outside activities. One participant, Mrs. Green, was fortunate to have activities “brought” to her by the local Age Concern which helped erase the barrier of poor mobility.

*JE – So your health isn’t preventing you from taking part in activities?*

*MRS. KNIGHT – No, not at all [showed JE her cards from her card making class, attended once a week] I made quite a few cards. Now I give that to my son who is 40 years married. He is 62 year old.*

*JE – Had you ever done anything like that before?*

*MRS. KNIGHT – I have done flower arranging, I do a lot of flower arranging.*

## **2) Loss of venue options for activities:**

*JE – Can you comment on social activities for older people in this area?*

*MRS. JONES – Well, there is another thing. We had a nice social, well, two mornings a week, Wednesday and Friday. We have an old people’s residence in Station Town called Dormand Villa. Now then, Easington is closing it down. They are moving the people out and they are going to close it down. So those two mornings a week, we had like what was called the pop in, it was a coffee morning. We had the likes of Maureen, Jean, Kath’s cousin used to bake and people used to come from all over and they enjoyed it and they used to sell the biscuits and the cakes and all that money mounted up and that would qualify them for a nice bus trip in the Summer to Whitby or places like that, but that stopped now. (Mrs. Jones, age 69)*

Another “barrier” to social participation faced by older people in Easington is the loss of venue options in which to hold social activities. Several participants mentioned their frustration and disappointment that Durham County Council had decided to close what participants felt were community buildings still worthy of use. Many of their older friends still attended activities at the centres identified for closure and there was a strong sense that the Council had already made the decision to close the centres despite a public consultation period. Thus, participants appeared to feel somewhat disempowered in their ability to influence local government policy makers who were viewed as lacking understanding of the social issues in Easington. Sixsmith and Boneham (2003) also found that lack of community facilities has a strong influence on participation, especially for older men. Some of the feelings related to venue closure may have their roots in the historical nature of community meeting places. As previously mentioned, attending a social club, institute or church was a cultural norm within the pit culture of

Easington's villages. Without the buildings in which to meet at low cost, social activities cannot be planned. Although Easington has experienced major regeneration over the past ten years, many of its community venues are in need of repair and improvement. In addition, during the past two years, Durham County Council earmarked several sheltered accommodation centres for closure, forcing residents to move to other centres. This is what happened in the excerpt described above. The closure of the venue may have saved the Council some money, but one could argue that the real cost is in the sacrifice of a local venue where many older people, both those who resided in the centre and older members of the general public, enjoyed congregating for simple social events. For a significant subsection of Easington's older population (especially those whose health is declining but want to "keep active" and those who don't drive), the closure of similar local venues makes it difficult to offer social activities on their doorstep.

### 3) **Lack of funding:**

A related issue for many communities such as Easington is loss of funding for activities. Many of the community centre-based social groups have historically been funded out of short-term and often ad hoc monies from neighbourhood renewal programs, Primary Care Trust budgets or other external funding streams. Easington study data revealed participants' knowledge concerning the difficulty in developing and sustaining suitable funding to "make programmes work", suggesting that once funding for a group or activity ends it is very hard to "re-recruit" people. Once funding ends and older people stop attending the activity, it is often difficult to restart the activity if new funding is subsequently found. Thus, maintaining continuity is a significant challenge which can result in a feeling of "short termism" among participants and a lack of sustainable funding to continue offering high quality social activities for older people in Easington. Mrs. Jones described such a situation.

*MRS. JONES – Well, what happened was, it was a funny situation. County Durham had stopped funding the community centres and we were finding it very difficult making ends meet down there. And there were all these little bits, like kids parties, but not sufficient to keep it going. So [a local councillor] got [a community development worker] from Easington and it was really touch and go whether it was closing or not, so I told the tea dance ladies that we will have to pack it in because we couldn't afford to run the building and we would have to close the building until we sorted some funding*

*out, so it just closed then and then it was difficult to get people back.* (Mrs. Jones, age 69)

#### 4) **Decline in activity leader's health:**

A key point was made regarding the negative effects on a group if a hardworking, reliable leader suddenly becomes ill and has to resign from his or her post. In a close knit area such as Easington, word of mouth is often the best advertisement for social groups or clubs and word can quickly spread if a well qualified group leader is in charge of an activity. It is interesting to consider possible reasons for reliance on group leaders by older people. It may be the type of activity offered at a community venue (such as a physical activity class) which would have required a specially trained leader.

Nevertheless, there did not seem to be a desire among the Easington participants to “peer lead” an activity or social club, a model favoured by the University of the Third Age. In terms of the sustainability of future activities, the concept of community peer leadership may be worth exploring. This depends on the activity, especially if it involves health issues such as the promotion of flu and pneumonia vaccinations, eyesight checks, home safety checks and use of “green gym” and other gardening schemes (Holland, et al., 2008). The lack of a group leader as a barrier to participation is not unique to Easington, but it does raise questions about other, more complex reasons people don't continue participating or don't start in the first place. The reasons behind this concept were not explored, but an argument could be made that perhaps participants either 1) did not feel they had the skills or expertise to take on group leadership, 2) did not want the responsibility for organising activities, or 3) simply liked the fact that an “expert” or “leader” was in charge which gave a certain legitimacy or trust in the quality of what was being offered.

*MRS. JONES – Our little church at [local village], there is only a hand full of us and we are all getting older. In fact, one of our valuable members is in hospital now with a stroke. I mean she was a valuable person, I mean baking, doing all the teas, washing up. If you could see her, it is heartbreaking. I mean she can't speak and she is all sort of stiff down the right side.*

Rightly or wrongly, often the success of an activity depends of the availability of a strong, motivated group leader or group of volunteers to effectively keep the group going.

*JE – What do you like about those classes?*

*MRS. KNIGHT – Oh [Age Concern - Easington leader], Oh she is great...six of us attend, the camaraderie is wonderful.*

If a leader or dedicated volunteer suddenly becomes ill, the continuation of the activity can sometimes be placed in doubt. This problem is endemic in both small and large communities, but especially in a semi-rural, socio-economically disadvantaged area such as Easington.

#### **5) Lack of confidence:**

What is meant by “lack of confidence” in participation in social activities? Most simply it means the reluctance to engage in social activities for a complex set of reasons which may relate to self-esteem, fear of the unknown or simply being shy in new social situations.

*Miss Smith – I mean there are a lot of people in their own homes and they are not getting out and about, they don't communicate, you are not able to ask the right questions, and I think that if you don't ask the questions you don't get told the information. (Miss Smith, age 80)*

*Mrs. Scott – They have meetings for bereaved people (re: her adult son who died a few years ago). They send us a card at Christmas. They were having a service. I wouldn't go on my own and our Norma was busy, but I still I have that letter with that card. (Mrs. Scott, age 79)*

The above excerpts reveal a fascinating difference between two women, both of whom are nearly the same age, but grew up in very different family situations. *Miss Smith* never married, worked for many years and was “socialised” by her mother to be independent. In contrast, *Mrs. Scott* was part of a large family of daughters, worked in low level jobs in her local area prior to marriage, but never worked again after getting married. Not all study participants indicated their strong desire to participate socially in their community. They seemed to be content and happy interacting most often with family and selected friends in their home environment, which may be seen as an alternative form of “social participation”. Katz (2000) discusses this concept of “anti-activity” and believes that some older people may feel forced into participation because of peer and societal pressure or because they feel that “activity” is something that they should do. The meaning of participation is complex and comprises a mix of personal, societal and historical factors to disentangle not only an individual's motivation but also the perceived benefits to such activity.

### ***8.10 Easington – “This is our Home”: The Role of ‘Place’ and the Social Environment on Wellbeing***

*Communities, in the sense of small localities or neighbourhoods, but also in terms of social interactions which take place there, and residents’ perceptions, exist in space, time and social and economic structure. These to some extent shape community life.*

- (Cattell, 2001, p. 1504)

Each person would like to view his or her own place of residence as unique and every neighbourhood, be it affluent or deprived, likely has attributes which residents would both love and loath. The present study of older Easington residents has yielded some thought-provoking data concerning the concept of “place” and “belonging”, both of which have a direct relationship to feelings of social and physical wellbeing. As mentioned in Chapter 2, while there is increasing research activity in the area of environmental gerontology, according to Phillipson (2007, p. 322), “issues relating to place and the environment have received far less attention” than traditional sociological studies on community life. Given the comprehensive attention on the subject of “place” in later life in Phillipson’s (2007) paper, the subsequent analysis will consider some of his theoretical concepts in relation to older Easington residents’ thoughts and feelings about their community and their opportunities for developing social networks.

Human beings have always been prone to migrating to other areas to improve their quality of life through a new job, a warmer climate after retirement, or to be closer to family or friends. While migration has become increasingly popular for a portion of the older population in the Western world (Phillipson, 2007), Gilleard and Higgs (2005) make the case that there is a certain “rootedness” in many older people’s lives regarding where they live; “The longer people live, the less they move. Preference for one’s own neighbourhood increases as the costs of moving come to outweigh the benefits. There appears a growing desire to stay put” (Gilleard and Higgs, p. 128). In fact, Phillipson (2007) points out that a study of areas with *New Deal for Communities* characteristics (areas characterised by severe deprivation), found that “79 percent of older people had lived in their neighbourhoods for twenty years or more, and nearly one-half (47 percent) had been in the area for forty or more years” (p. 332). As previously mentioned in Chapter 5, nearly all Easington study participants have lived in the area their entire



lives. Two people moved from outside the area to Easington during their mid-adulthood, but indicated that although they felt a part of the community, it took a long time not to be considered an “incomer”:

*Mrs. Sanders – Whereas when I came here [from Sunderland], this was a community I hadn't experienced anything like it, it was certainly a difference. I get talking to people and they tell me about life in the villages and the pits and perhaps I am accepted now because I have been here for 25 years so I am not an “incomer” anymore. (Mrs. Sanders, age 71)*

Townsend's (1957) seminal work, *The Family Life of Old People*, showed that many older people exhibit a strong sense of attachment to both their home and community. It was interesting that the Easington interviewees expressed conflicting feelings concerning their own communities. Many positive views were expressed about their present-day neighbourhood, but there was a pervading sense of sadness for the loss of community. Phillipson (2007), citing Bauman, helpfully illuminates this sense of loss, recognising other literature on the topic:

Rather than the mutual solidarities presented as typical of loyalty ties in the 1950s and 1960s, community life is now regarded in the words of Beck (2000), as 'unsettled [and] friable'. In Bauman's view (2001, p. 47), the present period is characterised as 'times of disengagement': 'gone are most of the steady and solidly dug-in orientation points which suggested a social setting that was more durable, more secure and more reliable than the time-span of an individual life' (p. 323).

In virtually the same breath, study participants sought to describe their community as one where the older social ties still exist but are becoming fragmented due to a whole host of social and structural changes, not least the closure of the pits, the effects of which are still keenly felt in all the pit villages of Easington.

*MR. GEORGE*

*JE – Your social life sounds like you were often with friends in the area?*

*MR. GEORGE – We all went to the same school, your fathers worked at the same pit. You knew every person from the top of the street to the bottom. It was nothing like what it is now. There was no fear. They used to say, every house was left open. No back gates were ever locked. Nobody was frightened about anybody coming into the house because you had nothing to steal. Everybody knew everybody so there was nothing to steal. (Mr. George, age 71)*

*MR. TROY*

*JE – How has this area changed over the years?*

*MR. TROY – Well, a lot of respect have gone out of people's – most people used to respect each other. Since the pit closures, community spirit is not there anymore.*

*JE – Was there a good community spirit during the times of the pits?*

*MR. TROY – Oh yes.*

*MR. TROY'S WIFE – You used to have your neighbours. Overall if there was anything to happen, everybody looked for each other. They would help each other. (Mr. Troy, age 81)*

It is notable that both Mr. George and Mr. Troy mentioned fear of people coming into the house, or being suspicious of other people, a definite change, they thought, from pit days where there appeared to be more structured norms of what it meant to be a neighbour. Two elements are worthy of consideration to explain participants' feelings about the changes in their neighbourhood surroundings:

- 1) the filtering of the view of their surroundings through the possible rose-tinted glasses of their childhood experiences
- 2) a genuine sense of fear and sheer frustration that their village life has been "overtaken" by forces beyond their control (e.g. "outsiders" from other areas in the UK and youth who are at times unruly).

Mr. Troy and his wife made an important point about their belief that young people today don't seem to have the same sense of trust of people in their community, hence a possible explanation for a sense of community decline:

*MR. TROY'S WIFE – When I first moved here, the first two or three weeks, I thought ee. I says they must go to bed at 9 o'clock and die, because there was no sign of life, you know, no sign of life. Before I would walk around to the sons and think nothing about it, walk to the fish shop and think nothing about it, through the streets. But I wouldn't walk out here at night on my own when it is dark. I would call [son] and say come and get us.*

*JE – Is that because you perceive that it is less safe than where you were before?*

*MR. TROY – Even as a man if I went out late at night I would be a bit wary about the kids.*

*JE – Where were you living before?*

*MR. TROY – Oak road, only 5 minutes away.*

*JE – Do you think that is a major thing that has changed for you?*

*MR. TROY'S Wife – I would say it was part of it. You see, the younger ones haven't had the life that we had, where we trusted. Perhaps we were naive. It didn't do us any harm to be naive. (Mrs. Troy, age unknown)*

Miss Smith expressed a different view from other participants. She felt that there still is a strong sense of community in the area, but she wondered if that feeling will disappear as the older generation dies out.

*JE – How has the district of Easington changed over the years?*

*MISS SMITH – Basically, you still have the old colliery people. You know, I often think, these colliery villages; they are different than living in the south. There is still a community. I was out the other day and I had been in the shops and I had my purse in my hand and my bag over my arm. And I was walking along, and a woman, a complete stranger, she would probably know my face, she said “ put that purse down and out of the way, somebody will be grabbing it out of your hand before long.” Oh right, I put my purse away. You wouldn't get that anywhere else, would you. I mean I have been around the beach front walking and some old man with his dog: “ you should have had a hat on today, it is far too windy.” Basically all the colliery villages have been so close knit; it is something bred into people. It might die out as the young get older, but it is there. Like, this person who said get your purse inside, it will be snatched out of your hand, she was just a young person. (Miss Smith, age 80)*

Mrs. Sanders also stated that she felt positive about the sense of community in her area. Interestingly she appeared to appreciate that her “community” had widened from the home environment and now encompassed social activities at a local venue.

*MRS. SANDERS – You know, people would be going past and would chat. There wasn't any community centres, there wasn't this and wasn't that, it was all in your home, I mean now, here, how many classes are going on here – it is fabulous. (Mrs. Sanders, age 71)*

Choosing to move house later in life naturally can affect people's experience of “place”. Only one participant experienced moving house in later life. Mrs. Troy wife said that the move had affected her more profoundly than her husband. For her, the “mix” of generations was an important feature of community life and the move reminded her of her own “ageing.”

*JE – For the two of you, how have your lives changed since you moved from your house into this bungalow?*

*MR. TROY – I don't think it has changed.*

*MRS. TROY – Well I think it has, mine. Because where we lived there were the generations. You had a mixture of people living beside you. Here, we are all old. And there is, most oldish people like children, but there are one or two they don't like. So the kids can't play here. And in this day and age I like to have the bairns where I can see them. If any of my grandbairns were here I would have to go the field with them. (Mrs. Troy, age unknown)*

### **8.11 Loss of Infrastructure**

What effect does an area reputed to be in socio-economic decline have on older people? Does the decline in social cohesion affect social participation and development of social networks? The loss of “community” which participants mentioned throughout the interviews was expressed in myriad ways. As mentioned previously, the loss of trust, social cohesion or a feeling of disconnectedness was almost a universal theme throughout the interviews. Equally important to participants was the loss of infrastructure (closing of institutions such as banks and libraries) and the loss of buildings which housed social activities, both of which have had an adverse effect on the area. Although the quote from *Mrs. Troy* is rather lengthy, it paints a strong picture of not only the closure of buildings and activities, but how the change has affected the lives of older people in Easington.

*MRS. TROY – At the moment there is a thing going on where they are closing community centres in East Durham, at the end of October. All together there are nine closing in this area. There is one just up the road. Well that is going. There is something on there every day, Monday to Friday, sometimes things on a Saturday you know, but there is something going on there all the time, and but they are going to close it. Well, they say you could go to [other centre]. Well they don't want to go to [other centre] because they have their own little groups...a lot of old people from all these bungalows further up used to go across for a game of bingo. Well the nearest place they can go for a place of bingo is down the Colliery Club. Well it is a working men's club and well there is a lot of younger ones going and of course their idea of a night out isn't the same as what old people want. And they say you can go down to the Welfare like on Saturday night, and that is in the middle of Easington. But the trouble is the older you are, you don't want to like go down unless you have a car, but you can walk down but they would have a job walking back. Also, it is not safe, because there is that with the young ones hanging around. The further you go down there is drugs down there, like there is in most places. The young ones are sitting, drinking. They have these community police but nothing seems to change. (Mrs. Troy, age unknown)*

Miss Black also mentions similar changes in her neighbourhood

*MISS BLACK – Well, something drastic has to be done. I mean Wheatley Hill is dead. You go along our front street, we used to be able to buy everything in Wheatley Hill. You didn't have to go out of the village at all. Now what have we got? Nothing... We*

*have no bank; we lost the library and now if they close Wheatley House. Instead of regenerating the place we are losing things. (Miss Smith, age 78)*

In contrast to *Miss Black*, *Mrs. Green* expressed a different perception of her reality of life in Wheatley Hill, choosing instead to focus on the positive changes made over the past few years.

*JE – Do you think – what do you think about growing old in Wheatley Hill, what do you think could be improved?*

*MRS. KNIGHT – Well at the present moment, we are pretty lucky, we have the community centre, and we have the centre here. I mean old people need not be lonely, if they are lonely it is their own fault.*

*JE – Do you think a lot of older people in Wheatley Hill are lonely?*

*MRS. KNIGHT – Yes they are, because they won't try – oh I have tried time and time again to get people to come with me to the community centre*

*JE – What do you think the reason is?*

*MRS. KNIGHT – They think the community centre is as it was as the miners had it, they haven't realised that everything has changed, it is for the full public. (Mrs. Knight, age 99)*

According to Phillipson (2007, p. 325), older people's feelings about the loss of community have been well researched over the past fifty years. What has changed, suggests Phillipson, is that recent research has focused more closely on older people's beliefs about the apparent loss of community compared with the early post war period. He suggests that environmental gerontology raises important questions about "older people's relationship with the physical and social contexts that shape everyday life" (p. 326) and that..."environmental gerontology must, it can be argued, re-discover the community dimension as a key influence on the quality of life and on wellbeing on old age" (p. 336). Ultimately, as authors such as Peace et al. (2005, 2006, 2007, 2011 and 2012), Smith (2009) and Rowles (1978, 1980 and 1983) and Rowles et al. (2004) suggested in Chapter 3, environmental gerontology concerns the relationship between environment, place identity and ageing in place.

Throughout the life course, there is a constant process of learning how to adapt to change such as changes in health status, family circumstances or place of residence. As Bowling et al. (2006) state:

There is rich, interdisciplinary literature on the health effects of social contacts and support which are believed to act as buffers to the deleterious effects of stress and socioeconomic disadvantage... Alongside this, cognitive mechanisms, such as feeling in control of one's life, may also be important in enabling people to mobilise resources, and to cope effectively at times of change (for example, when facing the challenges of older age, including illness (p. 476).

Although there were universal themes of decline and lack of social "connectedness" among the participants, it is intriguing to consider why for some participants those perceptions of place resonated so strongly. The strong sense of agency expressed by *Miss Black* and *Miss Smith* (widowed and never married respectively) propelled them to overcome negative feelings about their area in order to lead fulfilling and "healthful" lives. Learning how to adapt and cope with the changing structure around them, they appear to "get on with it." Perhaps their level of confidence as older people is borne out of a strong sense of self, developed in early life. Both women were not able to rely on a partner to bring them a sense of safety, and neighbourhood decline didn't seem to faze them. In contrast, Mr. Troy is married, but his wife seemed to feel that the changing social structure engenders a sense of fear, for example a reticence to go out after dark and a fear of young people "hanging about." How then do older people adjust to the changing nature of their neighbourhood surroundings? Each person has his or her own way of adjusting to change. A framework was developed to reflect study results which offer three main ways of adjusting to neighbourhood change in later life

1) "Changers" - People for whom the changes in the neighbourhood profoundly affect their quality of life, but they are willing to do something about it

No older person in Easington is truly immune from the challenges which social change brings to their lives. However, some individuals view change as an opportunity to improve the quality of life for themselves and their communities. Mrs. Johnson, Mrs. Green, Miss Smith, Mrs. Jones and Mrs. Sanders all exhibit this type of empowered attitude toward their respective communities. This attitude has contributed to their own wellbeing as well as giving their life after retirement additional meaning and structure. Their involvement may partly be explained by the fact that during the course of their adult life, they were active in their community and carried on with that activity well into later life. They were all in positions of community leadership, including as a school governor, community centre manager, activity volunteer and magistrate. Perhaps it was their voluntary positions which motivated them to become more engaged in their

community than some of their peers. Age did not appear to be a factor in their activity as the age range of these participants was 65-91.

2) “Sideliners” - People who care about the changes in their neighbourhood, but are not as actively involved in community activities designed to improve social connections

This group of participants, (Mrs. Knight, Mrs. White, Mr. George, Mrs. Frost, and Mrs. Scott) while still marginally active in their community, did not appear to feel as passionately about contributing to improving the sense of community through social involvement. They were not necessarily dispassionate about their villages, but their life focus was elsewhere. For two participants, family issues were seemingly more important in their lives. Two of the oldest participants (aged 80 and 99) fell into this category; the sheer physical effort it took to be involved was difficult for them. The last participant used to be very involved in community voluntary work, helping miners with pay-outs for ill health, but no longer serves in that capacity. While bemoaning the decline of the area, Mr. George didn't seem to think that there was much hope for improvement.

3) “Non-reformers” - People who feel disempowered by neighbourhood change and are less likely to be involved in community reform efforts

One participant strongly recognised the importance of being involved in community life, but didn't have the motivation to participate in activities. In some cases, such people may not have the financial means to provide activities for themselves or perhaps the structure of the area (e.g. lack of local resources, shops, activities) is not conducive to enjoying later life. Both Mr. and Mrs. Troy and Miss Black clearly stated their feelings of disappointment in the decline of their neighbourhood. As has been shown, Mr. and Mrs. Troy's negative view of the area was heavily influenced by the perception of the new neighbourhood in which they lived and their consequent apprehension about going out at night for social events. Miss Black expressed feelings of frustration that her local high street did not offer her the chance to obtain many of life's necessities, requiring her to travel on the bus to purchase needed goods and services. These participants seemed to care about their community equally as much as their fellow participants, but it was clear that they were less positive about the future of the area. In assessing how they view their lives, personality shown through as it appeared that they were the type of individuals who more often viewed the proverbial glass as half-empty.

## Conclusion

Why should social gerontologists, policy makers, and staff of health, social care and voluntary organisations care about the level of older people's social participation and the nature and quality of neighbourhoods where older people reside? To put it simply, because everyone will be an "older person" one day and we should desire that today's older population experience the best quality of life for possible for as long as possible. We return to the questions posed at the beginning of this chapter:

1) What are the roles of social networks and social participation in the promotion of wellbeing in later life?

It is clear that study participants' social networks are diverse and almost universally contribute to their physical and mental wellbeing. Incorporated into the concept of wellbeing is the idea of coping or resilience. Participants in this study experienced their fair share of hardship, some of which was made more bearable by the strength of their social networks. Elder and Liker (1982, p. 27) make an important observation that it is often through hardship that people, in this case older women, develop the fortitude to manage life's challenges: "We argue that women who experienced particular losses and learned to deal with them are better equipped to manage sub-subsequent events of this type. The particular coping skills acquired in periods of hard times are not activated by tranquil stages of the life course. It is only during trying periods of detrimental change, such as the later years, that coping resources are brought forth and distinguish the prepared woman from the sheltered or untested one."

2) What are the factors which influence an individual's level of participation in the social life of Easington's villages?

It might be tempting to argue that participation in social activities almost defines participation in life in general. These are concepts which the field of psychology has studied for years, as issues of motivation, behaviour change and self-perception of health are inexorably linked. For some, the value of social participation in later life is the chance to continue life-long patterns of activity, thereby retaining the structure they had during their working lives. For others, the "third age" represents an opportunity to try something new. Many participants felt that they "had" to "do something", as if they knew it was expected that they would "be active." Perhaps it is this societal expectation that people *should be* involved which actually motivates them to seek out activities.



What if a person is not involved in community or social activities owing to health or transportation problems, or because he or she is not interested in what is “on offer” or perhaps simply prefers his or her own company? By not going out or being involved, are older people somehow deficient? The value participants place on the social activities in which they engage may, arguably, reflect a subconscious value that they place on themselves and their contribution to the community, and provide the motivation for their involvement in activities.

3) To what extent do social networks developed in early life help participants cope with transitions throughout the life course?

Relying on their social network for emotional and practical support indeed contributed to participants’ journey (or “convoy”) through the life course. Social networks ebbed and flowed over the years, but on the whole, the combination of family, friends and community networks gave participants a way to help manage life’s ups and downs. The reasons for and barriers to participation in activities are complex and are not easily explained through any one theory. What was it that participants hoped to gain from involvement in social activities? What meaning is there for active social participation? Some reasons might involve: 1) a chance to have some form of structure to their day after retirement, 2) to develop a new skill, and 3) to help others. There are most likely other intrinsic reasons for involvement which have to do with the elevation of participants’ self esteem and self-image, but these concepts were not explored in detail in this chapter. What is clear however is that those study participants who were involved in community activities perceived a positive influence of their involvement both on their own lives and on the social life of the community. Other participants indicated that family took more of a central role in their social lives. The research findings also indicate that the motivation to participate or engage in the social life of a community is influenced by two important factors: 1) an individual’s life history and 2) their own individual personality.

4) What is the nature and role of “place” and how do they affect community cohesion and participants’ quality of life?

The nature of “place” for study participants appeared to be a very powerful factor in their overall feelings about their community. Chapter 3 extensively covers the concepts of place in later life. Their concept of place involved perceptions of the extent to which they felt they could “age well” amidst the social, cultural and economic change. Some participants expressed feelings about safety and fear of crime, negative changes in the

infrastructure of their local neighbourhood and wider community. The majority stated that they had positive feelings concerning their their “place”, many indicating that despite changes in their community, they still felt a sense of social cohesion with their neighbours and neighbourhood. Whether these positive feelings of social cohesion result from earlier memories of such cohesion (such as during the mining era) is difficult to determine. The way in which participants perceived their “place” has a great deal to do with how they see themselves as an older person in the context of their community. The framework describing adjustment to neighbourhood change mentioned above helps illuminate participants’ perception of how they perceive their role in the community at this point in their lives. Thus, the concept of neighbourhood environment may be considered a prerequisite for the potential to develop and sustain social activities. Without social cohesion, a sense of trust and shared community values, it would arguably be difficult to foster the “social environment” needed to promote social engagement.

The social world of older people or people at any age is one of joy and sorrow, pain and suffering. Thompson (1992, p.45) perhaps best sums up the experiences of the Easington study participants: “Later life from the inside – like life at any age – is a story with its dark side, its pain and suffering. But the message which comes most strongly from these accounts is of resilience in the face of the twists of fate; of adaptability; and in some of these lives, of a powerfully continuing ability to seize or create changes for fulfilment, whether in work, leisure or love.”

## **Chapter 9. Discussion and Conclusion**

*Who I am today, and what I do, reflects the interaction of various life course processes... identity doesn't simply lie within the individual, but changes as the context changes*

- (Moen, 2001, pp. 97, 99).

### **9.1 Discussion**

Interpreting the meaning of particular study results makes ageing research an engaging process. Qualitative research examining the lives of older people helps to illuminate the human condition. Understanding the context in which people age is essential to identify how they interpret what increasingly is a lengthy period of time between retirement and the end of life. The research undertaken in this study set out to discover the lived experience of older people in Easington, specifically querying: what has the Easington context, with its historic mining culture, contributed to older residents' experience of ageing? Ageing in a socio-economically disadvantaged area such as Easington presents unique challenges. However, it is also evident from this research that despite such disadvantage, study participants displayed resilience and strong coping skills in many aspects of their lives. An abundance of data portrayed participants' social networks as well as the nature of their social participation. Within the spheres of employment and retirement, social issues are also pertinent. This chapter aims to encapsulate the study findings within wider gerontological and related literature presented earlier in the thesis. This chapter will be presented in four parts. The first part summarises the study findings. The second section considers study findings in light of environmental gerontology concepts. The third part discusses results concerning poverty and socio-economic deprivation. The final part examines study findings and how they are supported by the five elements of the life course theory. In addition, the chapter will discuss the key contributions this study makes to the UK gerontology research base as well as suggestions for ageing policy.

## ***9.2 Study Limitations***

Some limitations of the study should be noted. First, a possible limitation is the issue of transferability. With a sample of this size, care must be taken with transferring findings of the setting into others. Second, by definition, narrative biographical research includes a degree of subjectivity *and* selectivity on the part of the interviewee. For example, as previously stated, while health status was among the interview topics for discussion, interviewees generally preferred not to divulge personal health information. As noted in the methods chapter, this study has predominantly focused on the lives of women.

A caveat must also be mentioned concerning financial deprivation. When studying the issue of inequality in later life, one naturally thinks about financial insecurity and the associated challenges to quality of life. In the course of conversation, participants were asked about their feelings of economic security and whether they felt “deprived” over their life course. All participants said that money was limited during their childhood but they never felt deprived. Some participants mentioned that everyone they knew was in “the same boat” which made it easier to cope with the effects of any financial hardship. As working age adults, participants experienced a range of challenges, largely related to education and employment opportunities and family responsibilities, which affected their financial situation, but during the interviews, there was little desire to talk in depth about financial issues. It is unknown whether this was due to reluctance to discuss private financial matters with a stranger or perhaps their desire to focus on other, more important aspects of their lives. If participants felt financial pressure at the time of the interview they did not volunteer this information. However, a common theme concerning money emerged, the fact that participants said how much “better off” they were then their parents were at their age. Even participants who experienced early retirement and may have felt pressure concerning how best to suddenly structure their finances, expressed the view that their financial lives are a vast improvement over what previous generations of older people had to contend with. These results to some extent mirror those of Scharf and Bartlam (2006a) who discovered a relative view of deprivation in their older study participants: “By contrast, many described the hardships that they and their families had experienced at earlier points in their lives, and felt that any current financial difficulties were insignificant when compared with those

of the past” (p. 43). One caveat which should be mentioned is that study participants were mostly active individuals and may be atypical of other older people in Easington. There are many older people in Easington who are in less favourable circumstances whose voices are often not heard. More research needs to be done with older people in such situations who are ageing in a more “precarious” way.

### ***9.3 Part 1: Key Study Findings***

Concerning the experience of ageing in Easington, study results confirm that there are particular challenges faced by older adults in an area that is classed as deprived in national measures of socio-economic disadvantage. These challenges present possible obstacles which may inhibit a positive quality of life for older Easington residents, but study evidence shows that these challenges are not insurmountable. Key findings of the study:

1) Living in Easington has helped study participants forge coping skills in later life in relation to health, social and economic change. The “lived experience” of older people in Easington is influenced by their own personality, family structure and life opportunities (in education, employment and retirement), each of which have all contributed to participants’ experience of ageing. Experience of coping with and overcoming previous hardships, along with cultural norms of dealing with difficulty show that living in a former coalfield area, with its pervasive and proud industrial heritage, may help foster coping skills, as well as a sense of mastery and resilience.

2) Confirmation of the positive and negative effects neighbourhood, “place” and social networks have on older peoples’ overall quality of life. The sense of social connectedness is an important factor relating to a positive quality of later life. The social connectedness found in Easington villages during the era of the collieries remains in the minds of Easington participants, despite personal, family or financial challenges, and in part transcends socio-economic deprivation in the community. While it is difficult to disentangle the contributing factors which lead to a feeling of social connectedness, elements such as a strong family and friend social network, participation in community activities and an optimistic view of the geographic area’s future, all have a positive effect on the quality of life for older people in Easington.

3) Development of typologies (see Chapter 8) which explains adjustment to neighbourhood change and social participation in later life as well as factors which influence the ageing experience of older people in Easington. This framework presents a novel approach to analysing the perceptions of the 'lived experience' and the direct effects of structural change on older people.

4) Loss of community infrastructure resulting from closure of the mines has profoundly influenced the ageing experience of older people in Easington. This research confirms previous studies which highlight the fact that older people residing in such socio-economically deprived areas are at increased risk of social exclusion. Findings also confirm the influence of wider structural factors on the quality of older peoples' lives. In the context of this study, social exclusion is most closely associated with "community characteristics", specifically relating to the change Easington participants feel about the socio-economic transformation of their community. This is reflected in substandard housing, social isolation, limited social participation, and restricted access to a range of goods and services. The isolation which can develop due to closure of high street shops as well as an increase (or a perception of an increase) in crime can be nothing short of debilitating. It is this feeling of security which is vital in communities in order to foster a sense of neighbourhood cohesion.

#### ***9.4 Part II: Environmental Gerontology Concepts***

##### **A) Person-Environment Fit / Environment Press**

The multifaceted nature of environmental gerontology confirms the complexity of interpreting study results in light of how the individual relates to the various environments in which they live. This study supports research by Peace et al. (2007), Wahl and Weisman (2003) and Kendig (2003) which emphasises the link between the physical, social, psychological and cultural environment. Concerning person-environment fit (or environmental press), this study did not focus on "fit" or "competence" in relation to the objective, internal physical environment within the home and did not analyse the creation of physically enabling environments. Instead, it emphasised the "fit" between individuals and the macro environment, in the broadest definition of the word. Broadly speaking, in the study population, press competence

(see Chapter 3) is seen in the way in which individuals coped with change in their neighbourhood and local area.

Several participants commented about the social and cultural change which has taken place over the past several years in the Easington area. Environmental press most directly relates to the study population in terms of their ability (or not) to participate in social activities. This is especially true for individuals who appeared very keen to participate in the life of the community but who encountered structural barriers such as lack of available venues for activities, poor transport options and negative perceptions of personal safety at night. This finding agrees with Smith (2009) (see Chapter 2, p. 9) who also found that lack of accessibility to amenities and poor aesthetic appearance of public spaces may lead to environmental press. However, despite the environmental press that participants experienced, findings show that the majority still expressed a sense of belonging to their community, echoing the findings of Oswald et al. (2006). It may be that the social and cultural change in the Easington area which was precipitated by the closure of the mines has been so gradual that participants have become accustomed to “just getting on” with managing their lives despite the structural barriers previously mentioned. Coping with change in the macro environment and related social structure appeared to be due to a variety of factors including personality and other life course influences. These include imbibing a shared social culture, having a supportive social network, and, to varying degrees, feeling a sense of control over their external environment.

#### **9.4.1 Place Attachment**

It is the meaning that older participants placed on their environment which is a key element of interpreting their “lived experience”. Throughout the results chapters (Chapters 6-8), participants expressed strong sentiments concerning feelings of place attachment to the Easington area, most often reflected in their shared view of the historical culture and the social networks. Although the mining industry is long gone, the underlying culture left in the wake of the pit closures remains deeply etched in their minds. In general, participants’ feelings of place attachment confirm Rowle’s (2001) (see Chapter 3) view that attachment to place is strongly influenced by a person’s life history and the intersection with the social history of the community. Emotional

connections to Easington appeared to be deeply rooted in their early life experiences which seemed to transcend any current negative feelings about the present day social and cultural life. Although a handful of participants conveyed negative feelings regarding present day culture in Easington, the extent of their place attachment still appeared to be high, again due to early positive life experiences, especially relating to their social networks. This finding reflects the view of Wiles et al. (2011) that place attachment is a process of continuing to renegotiate an older person's role and identity as social, cultural and personal circumstances change. A key result in this study as it relates to place attachment is the replication of findings by Rowles (1978, 1983). Rowles's concepts of geographical fantasy and "insiderness" referred to in Chapter 4 were evident in the way in which participants interpreted their attachment to Easington. Geographical fantasy refers to the way in which individuals interpret their lives through recollection and imagination of places. Participants appeared to share a similar geographical fantasy about "the life that was..." which helped them contextualise later life. According to Rowles, "insiderness", is reflected in three ways; 1) physical insiderness (the intimate knowledge of the physical environment, 2) social insiderness (the idea of being known and knowing others, and 3) autobiographical insiderness (encompassing an individual's current locale along with memories of past places. As discussed primarily in Chapter 8, all participants expressed strong feelings reflecting the three types of "insiderness", even the two participants who had moved to Easington later in life. It is argued that the participants' level of place attachment to Easington is most strongly reflected in their feelings of social and autobiographical "insiderness." Despite the decay of some villages in the area, participants still appeared to feel a strong sense of attachment to their physical surroundings, displaying intimate knowledge of the physical geography of their village. The unique combination of knowing and being known to others as well as interpreting life through past people and places appeared to be a powerful formula for ascribing meaning to later life and the overall "lived experience" in Easington. Study results also broadly confirm Cuba and Hummon's (1993) research on the four ways in which place identity is influenced by individual's personal characteristics as well as the structure of their experience of place:

1) **Local area attachment** - Participants expressed a strong attachment (in varying degrees) to their local area, seen primarily in the extent of their social networks with friends and family as well as participation in local groups and organisations (see Chapter 8)



2) **Long-term residence** – All but two participants have lived in the Easington area since they were born. The two who moved to the area later in life indicated while they will always consider their birthplace as “home” (Yorkshire and Sunderland, respectively), they feel very attached to Easington and have endeavoured to stay involved in community life

3) **Place as influence by life cycle stage** – Although participants ranged in age from 60-99, life cycle stage did not appear to heavily influence the strength of attachment to Easington. None of the participants expressed a desire to move to a new locale in later life. While specific reasons for this were not explored explicitly, it appears that participants feel a high level of well-being and life satisfaction concerning place attachment regardless of their life cycle stage. Life cycle stage therefore, was not a factor in overall interpretation of place identity in this study.

4) **Place as mediated by an individual’s place in society** – Cuba and Hummon (1993) suggest that while gender does not appear to influence the strength of attachment to place, it can affect how individuals interpret the meaning of place. Easington study results echoed Cuba and Hummon’s research concerning gender and place attachment.

As detailed in Chapters 6-8, place attachment was primarily influenced not as much by gender but by life choices of education, vocation, retirement, social networks and options for social participation. It is interesting to consider whether or not an individual’s level of attachment to a particular community may be enhanced by previous generations’ commitment to the area, no matter the presence of macro-level hardship and adversity. In a fascinating article on the meaning of “place” in four north-east England communities, Taylor and Townsend (1976) hypothesised that if the attachment to place is passed down from generation to generation, then it would follow that a “sense of place” has “developed as a reaction to the past experience of ‘deprivation’ of many North-East communities” (p. 135). Taylor and Townsend (1976) contend that one explanation might be “the effects of the pre-war depression and social deprivation in the North-East, which may account for the development of feelings of unity, ‘community’ based organizations and informal social institutions” (p. 134).

#### **9.4.2 Ageing in Place**

As discussed in Chapter 4, it is nearly impossible to separate the process of ageing and that of ageing in place as both are “powerfully associated with attachment to place”

(Gilleard et al., p. 597). Thus, the analysis of Easington participants' feelings about ageing in place necessarily relate back to the way they interpret attachment to their "place", be it in their physical dwelling, wider neighbourhood or social network. Although ageing in place, in its most basic form, refers to the desire to remain in one's home as long as possible during the ageing process, study results confirmed Wiles's (2011) view that ageing in place encompasses more than the consideration of functional issues. It is a holistic concept that points to assessing how ageing in place enhances one's overall quality of life.

The Easington study findings support several interrelated concepts referred to in Chapter 3 regarding ageing in place. These include: 1) Option recognition (Peace et al. 2011), 2) Geographical "fantasy" and Physical "Insideness" (including "area knowledge") (Smith, 2009; Peace et al. 2006; Rowles, 1978), 3) Imbibing a "sense of belonging" (Wiles, et al. 2011) , and 4) Fostering a "sense of control over one's movements" (Holland et al. (2005) as cited in Peace et al. (2006, p. 71). Figure 5 presents these points in the diagram below.

**Figure 5 - Theoretical Concepts Related to Ageing in Place**

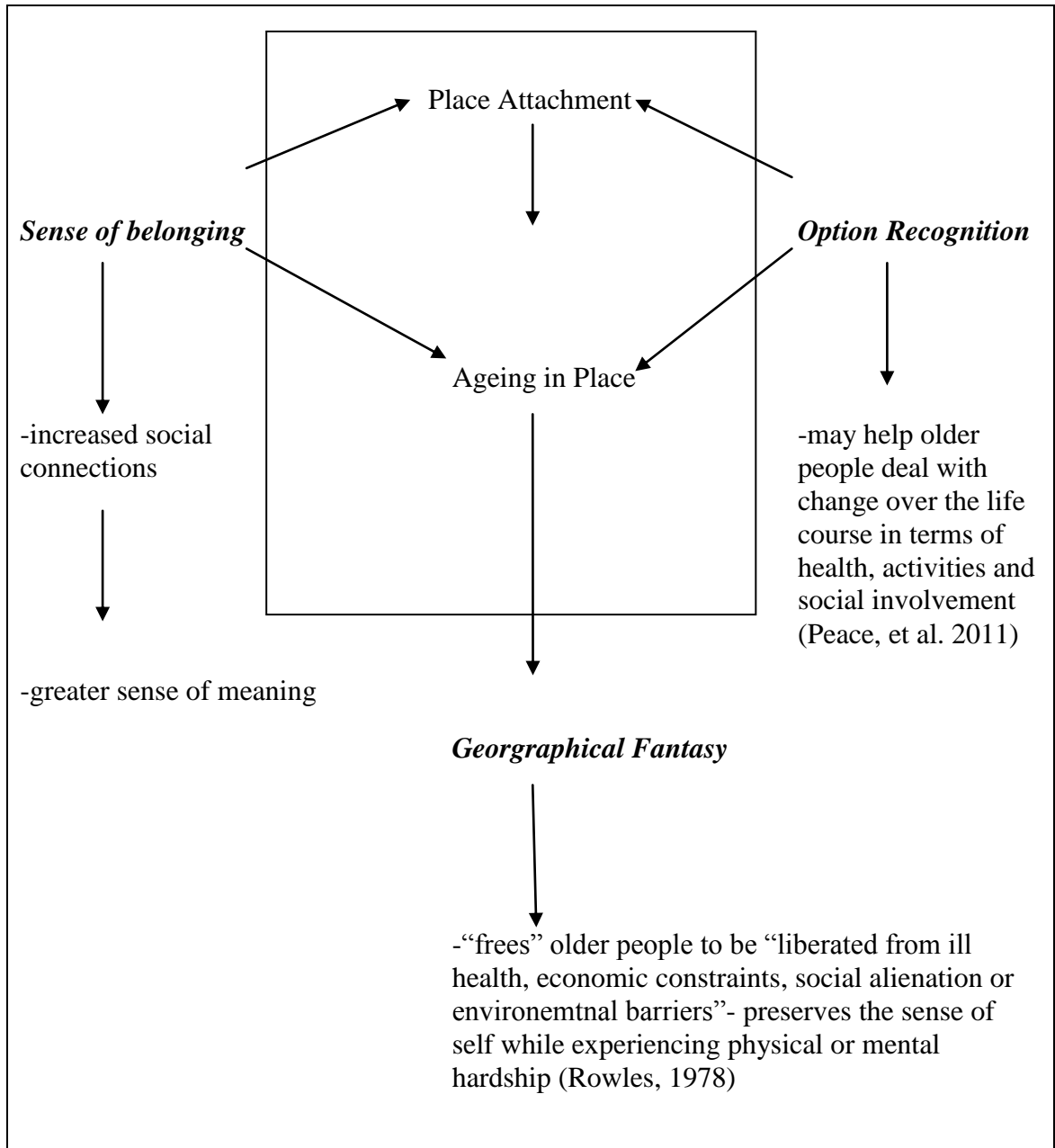


Figure 5 helps to illuminate how ageing in place helps to foster a sense of wellbeing in later life. Option recognition and geographical fantasy are key concepts in environmental gerontology and are useful in analysing the ways in which study participants cope with change and transition in Easington. “Positive” ageing in place for Easington participants also appeared to be influenced by the extent to which they could remain connected to their community through social participation in various activities and with friends and family. A more “negative” experience of ageing in place was felt by those participants who felt less connected to their surroundings either

through a move or by the perception of negative changes in their neighbourhood infrastructure and wider community (e.g. fear of crime, lack of shopping options, few opportunities for social participation). Easington study findings corroborate Gabriel and Bowling (2004) (discussed in Chapter 3) concerning factors which positively influence quality of life as people age. They found that some of the most important measures which influenced quality of life were social relationships, home / neighbourhood and psychological well-being. Easington study findings also reflect results from Victor, et al. (2005) which shows that quality of life is hugely influenced by the social environment and by social relationships developed over the life course.

Ultimately, ageing in place is a complex concept as it involves assessing not only the desire to remain in one's home and neighbourhood during the ageing process, but also the way in which an older person ascribes *meaning* to their daily life while residing in that "place". The quality of the "ageing in place" experience for older Easington participants appeared to be influenced by their objective circumstances (home environment), but almost more so by the wider, macro issues such as options for outside social interactions. What must not be forgotten in this discussion is the importance of personality and how one copes with their own "ageing in place" experience. What is clear is that despite the social, economic and cultural changes in the area over the past decades, participants have each found their own way of "ageing in place" and have experienced varying levels of social cohesion and social participation.

#### **9.4.3 Neighbourhood and Community Cohesion**

The transformations in the social composition of neighbourhoods, their changing spatial boundaries, and the disappearance of sites of previous symbolic significance like the local pub or the local shop may render them less and less familiar to those who have chosen, or are compelled, to 'age in place' (Gilleard and Higgs 2005, p. 129).

*This place was a lot better years ago. I mean when we were kids there were lots of shops on the front street. Now there is just a fish shop (Mrs. Scott).*

The study data on neighbourhood reveals that participants inculcated strong feelings about their social environment and are affected by their changing surroundings. They commented not only on changing neighbourhood demographics, but also on what it

feels like to live in their chosen area and how they cope with the effects that social change has had on their daily lives. During the life course of study participants, Easington has experienced extraordinary social change. Historical and cultural shifts during the past eighty years are nothing short of profound. As previously discussed (chapter 8), the social solidarity which characterised the colliery environment greatly influenced perceptions and expectations of what it means to live in an Easington neighbourhood. Study data related to the perceptions of neighbourhood, revealed mixed views concerning neighbourhood and cultural change. These strongly held views reflected the way in which social change has directly affected participants' willingness to join in social and community life.

It is evident from this study's data that there are shared norms and cultural values which continue to be meaningful to older Easington residents. During the interviews there was a great deal of reflection upon and consideration of the past sense of social cohesion which existed when the collieries were in full operation. Participants seemed to accept that there was no going back to the days when people didn't lock their doors or weren't worried about crime. When the mines dominated the local economy people were dependent on colliery companies to care for workers and their families. Although the mining culture was in a relatively stable position after World War II, there were continuing hardships for individuals and their families. While mining wages were at times intermittent, the free housing, free coal and "secure" job meant today's older Easington residents grew up in a time of relative certainty compared to the current economic and social environment. Also, although the Easington study sample size was modest, it appears that level of education did not make a difference in the activity levels of study participants.

#### **9.4.4 The Physical Environment**

The majority of participants expressed disappointment with the physical environment of their modern-day local communities. They described a pride in "the old days" which motivated householders to keep streets tidy and houses as clean as possible in spite of the filth of pit life. It is unclear how this disappointment exactly affects them on a daily basis, but one issue which was repeatedly mentioned was that of crime and fear for their safety (citing drugs and young people "hanging out" on street corners). Fear of crime is

a well known phenomenon in inner-city areas (see Van der Meer, Fortuijn and Thissen (2008) and Scharf et al (2005, 2006). Both studies examined vulnerable and non-vulnerable adults in deprived and non-deprived areas and found that vulnerable adults who reside in a deprived neighbourhood are less satisfied and feel lower levels of safety than vulnerable adults from non-deprived areas.

Perceptions of threats to personal safety as evidenced by Easington study participants can be debilitating and have a deleterious effect on a positive quality of life. Study participants who felt the least empowered (the “side-liners” referred to in Chapter 8), exhibited the strongest feelings about fear of crime and its effect on them and their neighbourhood. It is surmised that these people felt the effects of neighbourhood crime more than those who were most willing to take leadership roles in the community. In other words, the participants most burdened with the fear of crime experienced this fear as a barrier to their desire for social participation. Thus, factors such as current geographic residence, perceptions of safety, as well as health factors and personality, all contribute to feeling physically safe in an area. Commenting on the idea of “community attachment” and perceptions of neighbourhood, Taylor and Townsend (1976) mentioned their research sample in Spennymoor, a former mining area near Durham: “the sample as a whole suggests that the relationship between perception, attitudes and behaviour in physical space is essentially related to spatially limited social and geographical mobility; this in turn is related to the individual’s place in the class structure and the associated personal experiences which go with it” (p. 145).

The physical and structural changes in Easington over the past twenty-five years are also reflected in the closure of many high street shops. This has required study participants to travel outside their local area to obtain household goods. The effects of this change were felt most acutely by participants who didn’t have a car and whose health made it difficult to carry shopping back on public transportation. Thus the closure of local businesses has altered the life patterns of participants to a significant degree. In response to this major structural decline in Easington, participants described how they had changed their shopping habits to cope with advancing age, relying on friends and family who had access to transport and could make up for what had been lost on the high streets of Easington. This may not make up for the experience of

participating in the local community via local high street shopping, as the lack of facilities has led to reduced opportunities for everyday social interaction. This author suggests that environmental gerontology in its various forms (environment-fit/press, place attachment, ageing in place) is well suited to aid any analysis of the complexities of the lives of Easington participants from both a micro and macro perspective.

### ***9.5 Part III: Poverty and Socio-Economic Deprivation***

What is clear is that there is not a single theory which explains the nature of deprivation in later life and the ways in which individuals attach meaning to ageing in a socio-economically deprived area. The appeal of the life course theory is its broad applicability to describing the life events from a structural perspective as well as from an agentic viewpoint. The elements of the life course theory, namely historical time and place, timing, linked lives and human agency, suited a qualitative research approach such as the one employed in this research. By using biographical research methods, underpinned by phenomenological concepts, and allowing the participants to tell their stories, themes are discovered and analysed. One element of the life course theory which seems to be especially valuable as it relates to studying an area like Easington is the emphasis on historical time and place. Easington is known for its rich history and it is this history which pervades the corners of each participant's life. In other words, the world of the study participants cannot fully be appreciated without emphasising Easington's historical background and social and cultural norms. In addition, the intersection between the choices human beings make, the timing of those choices and the social world they inhabit helps to present a comprehensive picture of participants' lives.

While the major theoretical emphasis for this study was the life course theory, in reality it can be argued that the social phenomena discussed may be explained by elements of other theoretical approaches mentioned in Chapters 3 and 4. Cumulative advantage/disadvantage (CAD) is useful in conceptualising how socio-economic deprivation may accumulate from a young age and carry on into later life. The primary way in which this theory may be applied to the present study is in the context of analysing educational and occupational choices. It is the "inequality of opportunity"

study participants experienced which increased their risk of cumulative disadvantage. Although the life course of several participants may be seen through the lens of CAD, this approach did not fully take into account other factors which offset this disadvantage, such as concepts of personal coping and resilience. While the CAD theory considers individual decisions, those decisions are placed in the context of social processes which are intrinsic to social and cultural norms and are influenced by structural constraints. For study participants, lack of finances and material resources were less of an issue, although people were not particularly well off. While study participants were warm, housed and clothed and able to take part in local activities, the removal of facilities and poor or absent public transport could easily push people into a more social isolated position that their material circumstances would make it difficult to overcome. Of course not all older people are financially challenged in Easington, and younger, more active cohorts of older people (aged 60-70) may increasingly have greater disposable income with which to protect and maintain their quality of life. However, for study participants, hints of previous inequality of opportunity no longer appeared to be as important. Results of the study also fit into CAD's emphasis on gender-related disadvantage in that the women in the study all experienced some form of disadvantage based on their gender, mostly related to employment, but also in the area of housing for one participant.

Arguably, CAD is related to both structured dependency and political economy theories, both of which have varying degrees of relevance to this study. Taking a political economy approach to the study results, it may be argued that the inequalities experienced by participants are, like CAD, related to structural inequalities, such as labour market policies affecting retirement. The political economy approach is also used to explain older people's diminished social status after retirement. While a few participants mentioned their feelings about how society perceives them as an older person, the majority did not appear to internalise negative societal views. Rather, they perceived they that they still had a certain level of control over their future and did not want to appear as dependent on anyone or any social institution.

In studying socio-economic disadvantage in later life, it is useful to employ theoretical concepts from a variety of approaches, with special emphasis on the life course theory



in order to understand the “lived” experience of older individuals. Heinz and Kruger (2001) comment on the importance of both structure and agency when considering ageing across the life course: “One of the most productive fields of life-course theorizing focuses on the intersection of structural and individual dimensions with respect to age and gender. The links between life-course stages, transitions and institutions such as the educational system, the family, the labour market and the welfare system are mediated by these two ascriptive categories with structural effects on the shape of the life course” (p. 37).

#### ***9.6 Part IV: The Life Course Theory***

##### **1. Human development and ageing are lifelong processes**

The data concerning human development and ageing predominantly describes the social life of Easington participants as children and young people which paint a picture of freedom and a sense of shared community activities. Logic would seemingly dictate that participation in social activities at an early age would influence the extent and type of social and community participation in later life. While the role of parents in shaping their children’s social life course is paramount, cultural influences cannot be underestimated. Regardless, the social patterns which develop in childhood help set the social life course. Study results indicate that participants’ mothers had very little “free” time due to the unique time constraints involved in caring for a family in which the husband, and often sons, worked in the pits. Outside of socialising in the community and perhaps attending church on a Sunday, “pit women” had very little discretionary time as the backbone of family life. The mostly happy memories study participants held for their childhood, of freedom to play in a safe environment, contrast sharply with their views of Easington neighbourhoods as they exist today, sensing infrastructure decline and fearing crime. Thus, while it is impossible to make an association between levels of childhood social participation and the same in later life, study data reveal that participants have strong and generally positive images of their childhood social activities. To evaluate the actual effect childhood social participation has had over their life course would require a longitudinal study.

Human development and ageing may also be seen in participants' perceptions of their identity as an older person. Whether individuals continued to see themselves as contributors to their social world either as a participant or volunteer appeared to have an effect on how they viewed their "ageing experience". The complex concept of personality, discussed in Chapter 8, was also a factor in an individual's decision concerning how they desired to live their lives as an older person. This was especially pertinent in the area of participation in social activities. Desiring to learn a new skill, meeting new people or visiting new places, in part, may be related to an individual's human development over the life course, especially the way in which people deal with such experiences. Participants in this study were, in the main, a "more involved" group, who, despite their less "advantaged" situation, clearly thrived and negotiated numerous barriers to living a good quality of life. While this thesis did not set out to explore issues of "the ageing self", it was clear from study results, that participants were keenly aware that how they experienced later life was, in no small part, related to their own identity as an older person.

## **2. Historical time and place: the life course of individuals is embedded in and shaped by the historical times and places they experience over their lifetime**

Findings concerning historical time and place encompass the educational opportunities, social world, and retirement experiences of study participants. Firstly, results reveal data on a small group of individuals whose employment lives mirrored the national scene in the world of paid work. It is indeed difficult to analyse occupational choices without considering educational opportunities. The culture of mining villages often dictated the type and amount of education women received, which had a direct bearing on their future life choices. Study participants conformed to cultural and parental expectations when seeking employment. While the range of available jobs in the Easington area, such as domestic service, factory work and civil service posts including post mistress and dinner nanny, reflected the type of work many women did nationally, the educational options for young women reflected the socio-economic situation of many Easington parents. Some participants mentioned that their parents wanted them to seek further education but the family could not afford it. Other parents simply assumed that their daughters, like their sons in the mines, would start work immediately after leaving school as very few working class families in this era (1950s-1970s) sent their children to university. This may reflect what could be called the "disadvantaged future"

as it appears that parents of a few participants did not seem to think their daughters needed to attend further education to obtain decent work. On the other hand parents' reluctance might have been due to sheer desperation to add cash to the family purse.

Analysing employment patterns and choices of study participants involves consideration of the structural and personal factors which influenced decisions concerning paid work. Regardless of the type of work in which women engaged, the entire study sample expressed a sense of accomplishment at being able to support themselves and their families over their life course. This achievement has contributed to positive life satisfaction during their later years. Although study participants experienced various hardships, such as becoming the breadwinner due to a husband's illness or pit accident, paid employment helped them develop the resilience and the economic, social and psychological coping skills needed to manage in such difficult times. Employment also brought the social support of a work environment.

Although the sample size of the Easington study was modest, the results reflect a distinct division in matters of employment. The younger women in the study (those under age 70) found that while cultural, educational and other structural constraints still existed, there were greater opportunities for employment. The oldest participants came of age during a time in which options for paid work were very restricted. All the women, but especially those older than age 80, were limited by socio-cultural constraints which dictated available employment opportunities over their life course. These constraints may be analysed within a framework of historical time and place. Study participants were a product of their historical time in terms of career options and were also influenced by the "place" through which they inculcated cultural values. These values were transmitted to them through their parents as well as social institutions including schools, churches and other community groups. Also, the way in which participants perceived their working lives had a direct effect on their transition from and adjustment to retirement. As was shown in Chapter 7, the timing of retirement for many participants was beyond their control and for some, was dictated by wider economic circumstances

### **3. Timing: the antecedents and consequences of the life transitions and events vary according to their timing in a person's life;**

It is easy to underestimate the importance of timing when determining when and where to seek employment or when or how to retire. Easington women were faced with “timing decisions” once they left school and encountered the new challenge of supporting themselves and their families. In this context, timing relates to participants’ various employment opportunities and the effect that related decisions had on them, their family and friends. Study participants viewed their retirement as an “event point” on the continuum of their life course. Although participants who were made redundant were not anticipating such an early exit from the labour force, they were able to make the most of their circumstances despite what could have been perceived as “negative” timing. There did not, however, appear to be a major difference between the retirement experiences of Easington women and those of other women in their age cohort, confirming a number of studies (Price and Balaswamy, 2009, Zimmerman, et al., 2000). The unique factors concerning the retirement process of Easington participants seem to have more to do with macro-economic processes, such as class and gender-related issues, and reflect the lack of opportunities such as education and training for women who came of age in the “pit culture” of the mid-20<sup>th</sup> century.

The results of the Easington study corroborate the findings of Zimmerman et al. (2000), as participants provided similar data on both the timing of, and their adjustment to retirement. Easington women participated in careers which, thanks to limited educational options, didn't allow them to obtain many qualifications, thereby disadvantaging them in terms of career choice. Although this fact is very important when considering individual's employment options, it may have less relevancy in retirement as the reasons participants retired or took redundancy have little to do with class or education. It is argued that if Easington women had been able to take advantage of greater educational opportunities, they may have been able to obtain more lucrative employment. There were four primary reasons why Easington participants retired. Family issues, health concerns, work-related constraints, and “willing retirement” all affected the timing of interviewees' retirement decision

#### **4. Linked lives: lives are lived interdependently, and social-historical influences are expressed through this network of relationships;**

The concept of linked lives involves a complexity of relationships which are profoundly influenced by a web of family ties, friendships and external social networks.

Participants mentioned the importance of family assistance which was primarily provided on three levels: emotional support, help with practical tasks and assistance with other caring duties. The importance of maintaining friendships in later life was also recognised as a source of practical, neighbourly help. Friendships contribute to a sense of social cohesion and satisfaction with neighbourhood surroundings and participants appeared to place great value on local friendships developed through community activities, work and neighbour contacts. As discussed in Chapter 8, not all social networks are positive and a negative social network was significant for one participant and the lack of family support has dramatically altered his “ageing experience”, lowering his expectations of the quality of later life. In general, however, the Easington study supports the contention of Bowling et al. (2006) that social support and networks may offset or buffer the stressful effects of ageing in the context of socio-economic disadvantage.

Concerning social participation, generally speaking participants engaged in a wide variety of social activities after retirement. Participants’ social involvement was motivated by several contributing factors. The life course theory is valuable when assessing participation in social and community activities. For example, as mentioned in Chapter 2, Easington and other similar mining areas were known for their social and cultural cohesion. Participants grew up during a time when there was more of a shared socio-cultural experience, a social “connectedness” which, according to study results, no longer exists to the same extent. The pit village offered a unique set of social norms including high expectations that people would participate in the wider life of the mining community. Social participation is also influenced by the timing of life events and the transitions people experience. For example, several of the female participants mentioned the need to work outside the home, often due to their husband’s or father’s illnesses. This fact would obviously have limited a woman’s chances for extensive social activities in the community, although, as has been shown, participants’ social networks may actually have been stable or have improved as a result of meeting new friends through work.

The linked lives concept of the life course theory holds that individuals and groups influence each other over time. Social participation necessarily depends on social interaction with a variety of groups and other “players” at the community level. The linked lives concept may be applied even further when analysing the ways in which older people in general are encouraged, invited, cajoled or bribed to attend group activities or sessions. Study participants often remarked that it was a friend who invited them to attend an activity that they may have not otherwise known about. In addition, the concept of “linked lives”, as it relates to social participation, has at its heart the way in which individual relationships are formed and how those relationships promote a positive quality of life. For Easington study participants the motivation, or lack thereof, to participate in community activities may be explained by three factors: 1) the extent to which they participated in community activities over the course of their lives, 2) their vision for their role in retirement and 3) their distinct personalities. This reflects Caspi’s (1987, p. 1210) “interactional framework” which accounts for the interaction between personality, social roles and historical change.

Williamson (1982), in his book on his grandfather’s experiences of pit work in Northumberland, suggests that there is a deeper meaning to social participation than meets the eye. Social participation must be understood in an historical context, as “the activities which confer meaning and significance in everyday life [and] change throughout time”, (p. 103). He cites Burns (1967, p. 742) who argues that social participation gives structure to daily life, stating that “structures of leisure exist as repositories of meaning, value and reassurances for everyday life”. Although Williamson wrote in the early 1980s about his grandfather’s life in the early and mid twentieth century, his comment concerning social participation is very contemporary: “leisure cannot be understood simply as a compensation for the deprivations of work. Rather it reflects the way in which people organise their lives, express their autonomy and create meaning and significance for their actions” (p. 103). Reflecting upon his grandfather’s experiences of living in a colliery community, Williamson believes that his grandfather’s actions “should not be viewed just as an aspect of a style of life but as reflecting the structure of the community and society in which he lived. That community was both a setting and a resource” (p. 103). Regrettably, since Williamson’s day there are fewer community resources (both economic and structural) with which to develop and sustain social activities in Easington. While the types of

structural barriers to social participation may have changed over time, it is clear that many older people continue to find it challenging to fully participate in community life. The study sample recruited turned out to be a more “involved” group of individuals who have negotiated many barriers to remain socially connected. For “less advantaged” older people, the structural barriers to participation may be immense.

Elder (1998) suggests that linked lives are greatly influenced by macro-level events such as war or economic decline. For the cohort of individuals under study, Easington, with its unique social and cultural history, appears to still possess elements of social cohesion which encourage people to get involved in social groups. While this may not be unique to former mining villages, the hardships of pit life and the attendant social consequences of such a life has forged a strong sense of social solidarity. As a result of pit closures from the early 1960s to the 1990s as well as the pit strikes of the 1970s and 1984-85, there was massive economic and structural upheaval in the Easington area. Study findings indicate that despite the fact that social cohesion during those times ebbed and flowed, participants’ social networks remain strong, both in terms of friends and family.

##### **5. Human agency: individuals construct their own life course through choices and actions they take within the opportunities and constraints of history and social circumstances**

The life course theory recognises the importance of human agency in influencing the whole of the life course (from where to live, social networks, choice of career (or not) and when and how to retire). This fact cannot be underestimated as it was clear from the study results that each individual felt strongly about how their choices shaped their life course. It is interesting to consider that although participants discussed the way in which structural factors influenced them, they chose to focus more on how they overcame related constraints and emphasised the ways in which they employed personal “resources” to “just get on with it”. These findings echoes Elder and Liker’s (1982) work which showed that through times of difficulty, coping skills are forged which are useful in later life. Of course, it should be noted that, as mentioned in chapter 8, not all participants participated at the same level.

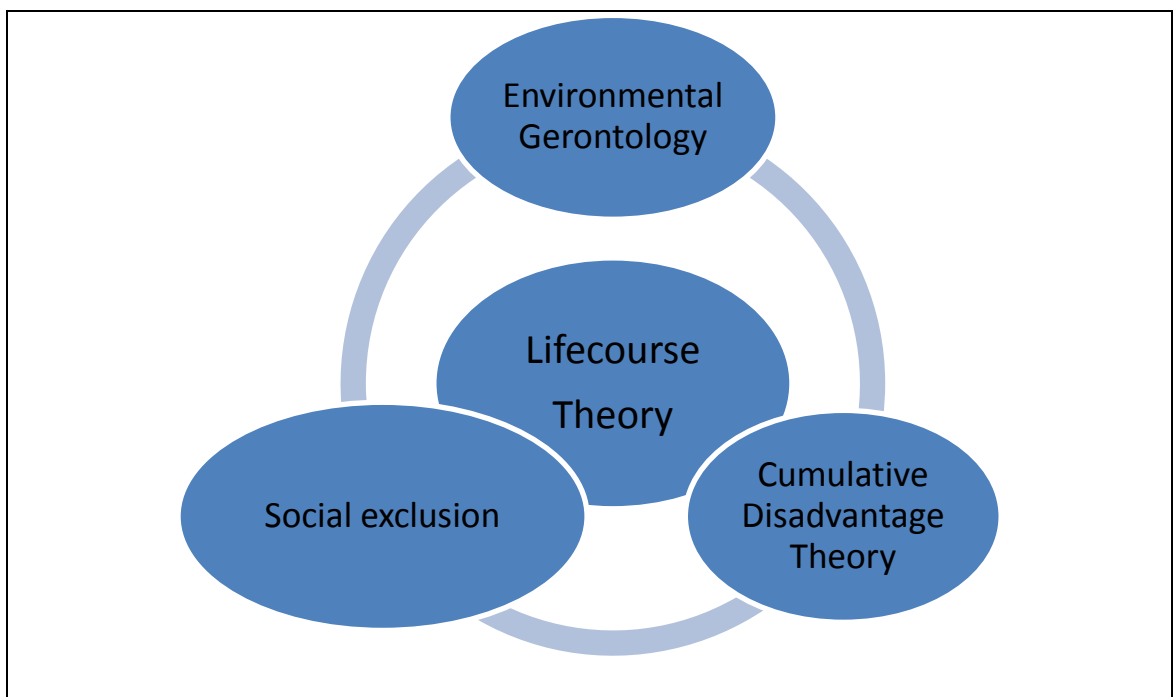
### ***9.7 Study Contributions to Social Gerontological Research***

The goal of research is to contribute to the knowledge base of a particular field. Social gerontology has grown in its influence over the past two decades and the field continues to produce valuable research which aids researchers, service providers and planners of services for older people. Contributions from this study may be divided into three categories: 1) Theory, 2) Method and 3) Policy.

#### **9.7.1 Theory**

This thesis utilised a multifaceted theoretical approach to analyse the “lived experience” of older people in a socio-economically deprived area. The study confirms the advantage of combining environmental gerontological concepts as well as the life course theory in order to fully encapsulate both an individual life and the structural issues they have dealt with and may face in the future. Merging the analysis of an individual’s physical and social living environment as well as the historical, cultural and social elements of their life course helps to create a wholistic view of later life. While the life course theory was the theoretical “hub” of this research, other theoretical approaches were used to ensure that as many aspects of participants’ lives were analysed and discussed (see diagram 3).

***Diagram 3– Integrated Theoretical Approach***





Gerontological research at times suffers from attempting to analyse study findings through “one-size fits all” theoretical lens. The complexity of studying the “lived experience” of older people requires a multifaceted theoretical approach. The life course theory and its emphasis on seeing an older person in their historical, social and cultural context is a natural complement to environmental gerontology concepts which consider later life through the prism of place and what it is like to “age in place”. The Easington study supports Wahl and Weisman’s (2003) contention that diversity allows for a more robust interpretation of the range of older peoples’ lived experiences. Future social gerontological research examining the lives of older people who reside in a socio-economically deprived area may benefit from such a plurality of theoretical approaches.

### **9.7.2 Methods**

This study contributes to the social gerontological research base by confirming the efficacy of using qualitative research methods to capture the lived experienced of older people. In particular, findings show that by taking a qualitative approach, the social world of older people is better understood and interpreted. This study has shown that qualitative research techniques are of great help in uncovering the reality of how the world of older people is interpreted and understood. In addition, the interpretivist position used in this study is a useful philosophical foundation for qualitative social gerontology research in that it takes into account “multiple realities” experienced by older people. Study findings also go some way to addressing Jaimeson and Victor’s (2002) contention mentioned in Chapter 5 that research on the life course of older people is often poorly theorised. The methodological approach undertaken in the Easington study shows that theory informs method and vice versa. This research confirms that biographical interviewing techniques and in depth data analysis using the constant comparison approach are very useful when examining the life course old older people.

### **9.7.3 Implications for Ageing Policy and Service Development**

As discussed in Chapter 2, population projection data for Easington and County Durham reveal that the population is ageing at a rapid rate. This fact has implications for service development as well as activity and care provision for the older population. Accurate statistical information is essential for policy and community-based planners to

assess service provision needs. However, the Easington study confirms that ageing involves more than statistics can measure. Issues raised by study participants consistently suggest that older people place great meaning on their social environment. This fact is often overlooked by policy planners and sometimes results in development of services which do not help the intended recipients. Individuals working on behalf of older people may find it useful to consider the planning implications of the importance ascribed to the social environment by older people in this study.

### ***The meaning of social environment to older people***

Recognising the meaning many older people attach to their environment is, in fact, crucial when developing service plans. Willingness to participate in social activities is strongly affected by neighbourhood characteristics which in turn influence feelings of being “socially connected”. It is also important to recognise that individuals have different methods of dealing with neighbourhood change. Considering the living environment and the related challenges faced by an older person may also help in understanding the factors which contribute to or hinder social participation. It may be that older people would like to participate in community life, but feel unable to do so. This fact is especially true for older people in socio-economically deprived areas who face greater structural challenges than wealthier communities. For vulnerable older people, removing facilities and/or services may prevent them from remaining socially active.

A great deal of work has been published within the social gerontology literature on the concept of “successful ageing” as it relates to social participation. Rowe and Kahn (1997) claim that activity is central and a key outcome measure for ageing well. Elements of this model are applicable to the Easington study participants’ experiences as interviewees who had higher levels of functioning appeared to embrace their later life phase more robustly than those who had functional limitations. That said, those participants who were conscious of their “role” in later life (such as volunteer, carer, or friend), no matter their functional status, may also consider that they are ageing well. Therefore, “successful ageing” to study participants must be influenced by the more intrinsic, individual factors which have developed over their life course, in spite of any functional limitations.

Developing and sustaining community-based services for older people in areas like Easington requires a strong partnership between older people, community groups, and professionals working on their behalf. In order to ensure that activities and services are having a meaningful effect on older peoples' lives, measurement of health and social care interventions must go beyond statistical "tick box" exercises. The value older people place on neighbourhood and social environment should be factored into community planning and related research. This research process often requires time and resources, yet it is essential to undertake such work if community planners and policy makers wish to have a deeper understanding of the issues which affect older people.

### ***The importance of a "life course" approach to service development***

When developing community services and activities, planners will want to consider the factors which have influenced an older person throughout the whole life course. It is easy to view the older person strictly at the point in time in which they enter the health, social care or community activity "system". This study's research emphasises the importance of "looking behind the scenes" of an older person's life when conceptualising services and activities. Community-based needs assessments should incorporate elements of the life course theory when conceptualising new projects and services in order to more fully appreciate the older person as an individual with a past, who lives in the present and has a future. Ageing is a lifelong process and is influenced by historical time and place, timing, social networks and human agency. These facts are at times forgotten, or at least underappreciated in the arena of service development and policy formation.

### ***9.8 Future Planning***

As mentioned in Chapter 2, retirement issues will affect increasing numbers of older people in North East England, given the population demographics in Easington and County Durham. Economic realities may push many mature workers into retiring sooner than planned, while others will be forced to work longer than anticipated or desired. The Easington study revealed that retirement adjustment issues are ubiquitous and affect older people from all social classes and backgrounds. However, service development and policy planners must especially consider "life after retirement" for those older people who reside in socially-economically deprived areas including

Easington. The structural issues mentioned most often by study participants are those which have a direct effect on quality of life after retirement for all older people. Thought should also be given to the way in which the physical environment impacts the ageing experience in retirement. The concept of living well in retirement should be holistic and focus not only on the physical factors which influence health, but also the social and structural issues which share the stage of ageing in the modern era.

### ***9.9 Reflections on the Research Process***

As stated in Chapter 1, the origins of this thesis were borne out of the desire to learn more about ageing in an area which has experienced massive social, cultural and economic change over the past 40 years. The mining culture and history fascinated me and I wondered what it might be like to live in the Easington area as an older person. I was interested in finding out about participants' experiences over their lifetime and wanted to know about their past and how it might have influenced their present experience as an older person. As mentioned in Chapter 5, although I had worked for the County Durham Primary Care Trust for six years at the time of the fieldwork, and felt I knew the area well, I was also aware that as a North American, I was an "outsider", a "foreigner". However, study participants did not make me feel like an outsider. On the contrary, I was warmly welcomed into their "space" and at no time did I sense that participants were not forthcoming in their answers due to my status as an "outsider". I believe that it was because of my role as a Health Improvement Specialist with the Primary Care Trust that individuals were willing to talk openly with me about their lives, thus my immigration status proved not to be an issue. Perhaps it was this "institutional" affiliation which allowed me to more freely obtain information from participants.

Prior to beginning the fieldwork, I anticipated that the "topic guide" (see Appendix C) would be a useful way to ensure that all relevant topic areas would be covered in the interview. However, I soon learned that it was difficult to always adhere to the guide, as participants desired to discuss some topics in depth and others topics, not at all. For example, I expected to talk at length with participants about health-related issues as many older people are rightly concerned about their health status. However, this topic was rarely discussed during the interviews. Instead, when "health" was discussed, it concerned the health care "system", and how it has changed for the better or worse. All

participants had some form of health concern, but to a person they chose not to make it a central focus of the conversation.

My interview technique also changed over the course of the fieldwork. After listening to the first few interviews, it was apparent that I was interjecting more than listening to what the participants were saying. Ironically, this was in direct contradiction to the biographical interpretive approach which I had planned to use (discussed in Chapter 5). My concern with the “right” way of conducting the interviews was an early barrier to obtaining quality data. After consulting with my supervisors, I endeavoured to listen more carefully and to allow the interview to unfold naturally. This technique was fruitful and I realised that the open interview approach allowed for more free flowing conversation. Concerning the analysis, I thoroughly enjoyed the coding process as it helped me discern the issues of importance to participants. While time consuming, the hand-coding proved very useful in terms of identifying interview themes. I also enjoyed discerning “results” of the interviews and ascertaining meaning from the conversations with participants. Engaging with participants in the study reminded me why I decided to centre my career on social gerontology in the first instance, as their candour, humour and wisdom encouraged and inspired me to tell their stories.

## **Conclusion**

This study has examined the lives of a small group of older people in Easington and has considered several factors which have influenced their life course and ageing experience. The research question posed in Chapter 1 (what has the Easington context, with its historic mining culture, contributed to older residents’ experience of ageing?) was explored in depth throughout the thesis and relevant academic literature was examined to determine the salient issues for older people residing in socio-economically deprived areas. The meaning of ageing has changed dramatically over the past half century as society has experienced a major transformation in attitudes toward older people and their role in community life. Science has advanced tremendously over the past several decades in attempting to discover the biomedical keys to the ageing process. Equally fruitful work has also been completed in social sciences and gerontological research. Understanding social and environmental factors which influence an individual’s ageing is a task which is made easier by effective qualitative research methods. While there is no “one size fits all” approach to understanding the

multifaceted social-psychological issues of ageing, several theoretical approaches discussed in this thesis attempted to address these issues. Despite living in a socio-economically deprived context, the lives of study participants are rich in texture and meaning and provide evidence that people can transcend their environments.

## **Appendix A – Participant Information Leaflet**

### **The Easington Ageing Study**



**Please take the time to read this participant information leaflet. It contains all you need to know about the study and who to contact should you have questions.**

**You are being invited to participate in the Easington Ageing Study. This research is being conducted by the Institute of Health and Society at Newcastle University. Before you decide whether to take part, it is important to let you know why you were chosen and why this research is being carried out. If there is anything that is not clear, or you need more information, please ask. You will find contact details at the back of the booklet. This leaflet is yours to keep.**

**1) What is the purpose of this study?**

**Not only are people living longer, but many are living healthier lives, encouraged by advances in medical care, improved fitness and leisure opportunities, and greater emphasis on good diet. Never have there been more opportunities to maintain good health and a high quality of life in old age. But this is not the case for all older people, some of whom may suffer from poverty, social isolation and loneliness. This project is interested in finding out about the problems older people in the District of Easington may have in their lives and what helps some individuals stay healthy and independent whilst others are not doing so well.**

**2) What effect will this research have?**



**This research will be used to help find ways for older Easington residents to stay healthy, independent and active in later life.**

**3) What will I be doing if I take part?**

**Broadly speaking, you will be asked to tell us about what life was like when you were younger and what life is like now. If you do decide to participate, you will be asked to sign a consent form, a copy of which will be given to you. You can still change your mind and withdraw at any time without having to give a reason.**

**4) If I want to take part, how do I get involved?**

**If you agree to take part, you will be contacted about the most appropriate way to share your views. You may prefer to have a home-based interview or take part in a group discussion at a nearby place.**

**5) What if I have health or memory problems?**

**The researcher has a great deal of experience working with people in your age group. It is understood that some individuals may have health or memory problems and might feel anxious about taking part in a research project. All views are very important and the interview**

**can be adapted to suit your individual needs, e.g. with shorter visits and/or a family member or carer present at the interview.**

**6) What are the possible benefits of taking part?**

**While there are no immediate benefits to you for taking part in this study, it is hoped that the information gained will help us understand how life was lived during a time of great economic change and upheaval and how people survived and thrived. It is also hoped that you will enjoy taking part!**

**7) What are the possible disadvantages of taking part?**

**It is very unlikely that you will experience any harm by taking part in this study. If you do find that taking part causes you any distress or concern, you are free to withdraw.**

**8) Will my taking part in this study be kept confidential?**

**All the information that you provide during the course of this research will be securely stored in either locked files or a secure computer database and kept strictly confidential. The answers to your interview questions will be kept separate from your personal information and will only be identified by a special code number. No individual will be identified or identifiable in any publication arising from the research.**

**9) Who is organising the research?**

**The research study is sponsored by Newcastle University's Institute of Health and Society and is part of the principle researcher's PhD programme.**

**10) Who has reviewed the study?**

**The study has been reviewed and approved by a Newcastle University Ethics Committee.**

**11) Whom can I contact for further information?**

**Should you have any questions or concerns about the study or your participation, please contact Julie Englund, by telephone, post or e-mail. Your help is very important to us and we hope that you will agree to take part!**

**The Easington Ageing Study**

**FAO - Julie Englund**

**Newcastle University**  
**Institute of Health and Society**  
**Claremont Place**  
**Newcastle-upon-Tyne**

**Telephone number:**

**(0191) 370 9965**

**e-mail: [julie.englund@ncl.ac.uk](mailto:julie.englund@ncl.ac.uk)**

**I would like to take part in the study**

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

**Telephone number:** \_\_\_\_\_

## Appendix B – Consent Form

NEWCASTLE UNIVERSITY  
INSTITUTE OF HEALTH AND SOCIETY

PhD Research Project

**Growing Old in Easington: A life course study of ageing and the social environment in the former mining villages of Easington, County Durham**

---

I,

**Hereby agree** to participate in this study to be undertaken by Julie Englund, PhD student, and I understand that the purpose of the research is to address the experience of ageing for older people in Easington in relation to the following issues:

- |                     |                         |
|---------------------|-------------------------|
| -physical health    | -mental well-being      |
| -social networks    | -socio-economic factors |
| -access to services | -gender                 |

**I understand that:**

1. Any questionnaire used to obtain information will be coded and my name and address kept separately from it.
2. Any information that I provide will not be made public in any form that could reveal my identity to an outside party and that I will remain fully anonymous.
3. Aggregated results will be used for research purposes and may be reported in scientific and academic journals.
4. Individual results **will not** be released to any person except at my request and on my authorisation.
5. That I am free to withdraw my consent at any time during the study in which event my participation in the research study will immediately cease and any information obtained from me will not be used.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

## Appendix C – Topic Guide

Describe project

Ethics form

Name

Place of Residence

Age

---

1) Where were you born?

-siblings?

-parents? – where from, occupation, education

2) Early life

-memories of home life

-school, friends,

3) Local area/memories of the area

-how did the pit affect village life?, -when mine closed?

-war years?

4) Local Area

-how much or little do you feel at home in Wheatley Hill (for example)?

-what are the good things about living here?

-what are the bad things about living here?

-how do you think people from outside the community view this area?

-how good or bad do you think this area is as a place to grow old in?

-what would make this a better place to grow old in?

5) Economics

-what things do you feel you need for a good standard of living?

-what things would be considered necessities

-is there anything you feel you need to go without? – if so, what and why?

-do you ever have to make difficult decisions about what you can afford to buy?

-some people claim benefits in addition to their state pension, - have you ever tried to increase your income by applying for state benefits

-compared with people around you, how well off do you think you are?

6) Health – changes in health (system) through the years

7) Social

– opportunities to visit friends? – where do you meet?

– is there anything that prevents you from seeing people?

– do you make and receive visits from neighbours?

- do you currently receive help with any daily living activities?

- transport?

8) Quality of Life

-off all the good and bad things you mentioned, which one is most important to you?

-what single thing would improve the quality of your life?

FINALLY

- If there was one message you could pass on to government about older people living in the District of Easington, what would it be?

## Appendix D - Ethical Approval



**Faculty Research Strategy Group  
Faculty of Medical Sciences**

Newcastle University  
The Medical School  
Framlington Place  
Newcastle upon Tyne  
NE2 4HH United Kingdom

### FACULTY OF MEDICAL SCIENCES: ETHICS COMMITTEE

29 February 2008

Miss Julie Englund  
Institute of Health and Society  
21 Claremont Place

Dear Julie

**Title: Growing Old in Easington: A life course study of ageing and the social environment in the former mining villages of Easington, County Durham.**  
**Application No: 000013/2008**

On behalf of the Faculty of Medical Sciences Ethics Committee, I am writing to confirm that the ethical aspects of your proposal have been considered and your study has been given favourable ethical approval.

Best wishes,

Yours sincerely

A handwritten signature in black ink that reads "M. Holbrough".

**Marjorie Holbrough**

**On behalf of Faculty Ethics Committee**

cc. Professor T E Cawston, Dean of Research  
Ms Lois Neal, Assistant Registrar (Research Strategy)

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## Appendix E- Case Studies

1) Miss Smith – Female – resides in Blackhall -Interviewed on 9 January 2009 in her home

Miss Smith was born in 1929. At the time of the interview, she was 80 years old. She has lived in that area all of her life and is the youngest of four children, having two older brothers and a sister. Her maternal grandparents were among the first residents in Easington Colliery who worked on sinking the Easington pit. Her father worked in the mine at Easington Colliery but was killed in the pit disaster in 1947. To help support the family, her brothers also worked in the Easington colliery. When her father died, her mother received his meagre widow's pension which was used to support herself and her daughter. War time rations had an impact on Mrs. Smith as she felt that although she and her mother had very little to live on, others were in a similar situation. Her mother also took in lodgers to help pay the bills. She lived in a colliery owned house and described it as comfortable and "cosy". She recalls that a central feature of the house interior was the coal fire which heated the oven and warmed the house. She and her family were very active in the Methodist church in Easington Colliery and she especially recalls her weekly attendance at Sunday school. The church also provided her with a strong social network of friends.

Miss Smith attended school until age 15 because her mother desired that she stay in school as long as possible to give her the best future. After leaving school, she went to work in a drapery shop. She gave her wages of twelve shillings and a ha penny to her mother, who then gave her some pocket money. Her mother remarried a few years later and the family moved to Horden where her step father worked in the Horden colliery. She next began work at a large telecommunications company in Hartlepool and earned enough money (combined with the inheritance from her mother and step father) to buy her own house in Blackhall. She never married and it was unusual and sometimes problematic at that time (the 1950s) for a single woman to buy a house. She persevered and has lived in the same house ever since. She was made redundant from her telecommunications position at age 56, which was devastating for her. She decided not to apply for other jobs, but to live on her redundancy until she reached pensionable age.

Her house is a comfortable two -bedroom bungalow centrally located in the village of Blackhall. She is able to walk to the nearby shops and is very active in the local community centre and church. She said that her personality in later life was definitely influenced by her early life with her mother who was hard working and independently minded. The community spirit in Blackhall still exists to some degree and people "look after one another". Although she never married, she said that she has had "a good life....I have no complaints."

2) Mrs. Sanders – Female – resides in Easington - Interviewed 10 December 2009 at the Healthworks Community Centre, Easington

Mrs. Sanders was born in Tyne and Wear in 1937. She is one of eight siblings, four of whom are her step siblings who were born after her mother remarried after her father died. Her father worked in the Sunderland ship yards as a gas fitter. Her mother did not work outside the home and received a widow's pension when her husband died. She did not have "much to do" with her father and doesn't have very fond memories of him. Three years after her father died, her mother remarried. She commented on how well her mother coped when her father died, never complaining, just "getting on with life". She left school at 15 years of age and did not expect to go on to university, commenting that for young women, there were not many career options other than nursing, or working in an office or shop. After leaving school she went to college and completed a degree, working in the education field until she got married. She married her first husband when she was 20 years old and, after becoming pregnant, (she has one daughter) she left her job. Soon thereafter, she and her husband moved to Australia for his job. She felt very homesick while living in Australia and came back sooner than planned. Her husband joined her 10 months later and they then bought a home in the newly created town of Peterlee. She was overjoyed that there was a great deal of green space in Peterlee compared to her old home in Sunderland. People from the pit villages needed to move out of pit houses when the pits closed or houses were demolished, so they jumped at the chance to buy, modern house with "good facilities" in Peterlee.

She and her husband divorced after 13 years of marriage and she suddenly had to find a full-time job. She managed to obtain a post as manager of a newly built local children's nursery. After three years of being single, she married her second husband but divorced him after 20 years of marriage. While working at the nursery, she had the opportunity to attend Durham University to obtain a social work degree. She completed her degree and felt very proud of her achievement. She retired at age 54 due to ill health resulting from job stress and her deteriorating marriage. She was devastated to leave her work, but she was soon encouraged by a friend to apply for a post as a magistrate. She was accepted and worked as a magistrate for 15 years until she was forced to retire at age 70. This forced retirement, based solely on age, was something that deeply affected Mrs. Sanders. While she accepted the decision, she felt that such policies make older people feel like second class citizens. After a time spent deliberating what she would do next, she decided to volunteer at the local community centre in Easington, as well as a local charity. While she said that her heart was not completely in volunteering, she realises that by staying active, she has the best chance for a positive quality of life. Her health has not be very good in recent years, e.g. high blood pressure, high cholesterol, thyroid problems, etc., but she said that she refuses to give up or give in to feeling sorry for herself. She credits her mother for positively influencing the way she lives her life. When asked her motto for life, she replied, "just do it".

3) Mr. Troy – Male – resides in Easington Colliery - Interviewed on 28 September 2009 at his home

Mr. Troy was born an only child in Hetton-le-Hole in 1928. His grandparents were tin miners in Cornwall and moved to the northeast in the early 1900s seeking work in the coal mines. His father started work at age 14 in the South Hetton pit but had to quit work early due to ill health. He said that he has vivid memories about WWII, e.g. the air raids, shortages of food, but he believes that people in the Easington area fell on harder times before the war (in the early 1930s) as the pits were only on “part time working”. As an only child, he said he seems to remember more about his early life than perhaps others with siblings. He recalls a tremendous sense of freedom when he was young as he was able to come and go as he wished. There was a positive community spirit in the Easington area when he was young. He felt that neighbours would help his family when needed and feels now the “everybody is suspicious of each other”.

He went to grammar school and left at age 16. Attending university would have cost money which the family didn't have. His father did not want him to work in the pit so he initially worked in a local library for a year. He then joined the navy, but had to change to the army due to a disabled foot. After being stationed in the desert for six months, he went to work for the National Coal Board, primarily in management, working both above and below ground. He continued to work for the Coal Board, retiring after 38 years of service at age 55. He said that he missed the comradeship and socialising, but not the work itself. Since “retirement” he has not worked in paid employment but has held voluntary posts such as Meals on Wheels, Secretary of the Working Men's club, etc.

His first wife died in 1984 and he remarried in 1988. He and his wife's life have been very influenced by their move to a sheltered accommodation bungalow. After the move, they both felt the change in their connection to the “community”. Neither of them said that they feel completely comfortable going out at night without their car and believe that the “young ones” have “ruined” the local area around the community centre in Easington Colliery through drugs and drinking. He is grateful to “have his health” and the companionship of his wife. He said that having a car definitely helps him maintain access to activities. His wife's son lives close by and visits them often. Their home is very comfortable, decorated to a high standard and is situated within walking distance to the front street shops in Easington Colliery. While there is no supermarket in Easington, there are numerous shops which provide for their daily needs.

4) Mrs. Knight – Female – resides in Horden - Interviewed on 16 October 2008 in her home

Mrs. Knight was born in the Lanchester area of County Durham in 1909. At the time of the interview she was 99 years old. She and her family (four brothers) moved to the Horden area in the early 1920s so her father could work in the mine at Blackhall. Her father “retired” from pit work due to ill health. While her mother did not work outside the home, Mrs. Knight reported that her mum worked hard to care for the family in a domestic capacity.

Mrs. Knight left school when she was 14 years old and immediately went to work in a paper shop where she also helped with cleaning jobs. A few years later she then began work “in service” for a doctor who lived in a large house in Hartlepool. There she cooked and cleaned, waited on tables and did the washing. With the encouragement of her mother and a neighbour who had already moved there and wanted another “northeast girl” to help her, Mrs. Knight moved to Manchester a few years later to work at a large house in the city. She returned to the Horden area during World War II and met and married her husband. He died suddenly in 1941, when their son was only one year old. Mrs. Knight then had to find a job to support her family. She soon found a position working full time in a munitions factory in a nearby town where she stayed during the week while her children were taken care of by her mother. She also held a variety of other jobs in the local area after the war, e.g. working in the school kitchen.

She has fond memories of the full social life she led as a younger person. She attended many dances and organized activities for children at the local community centre. While she isn’t able to join in many community based activities due to her advanced age and fragile health, she still manages to keep in touch with family and friends. Both her vision and hearing are poor, but she still manages to receive several visitors each week and is in contact with Age Concern who help her engage in social activities. She lives in an Aged Miner’s Home bungalow in the centre of Horden. Her street and the surrounding area are full of densely packed bungalows and terraced houses and the immediate environment feels slightly urban, even though it is only one mile from a North Sea beach. Although small, her home was warm and welcoming. She likes to knit thus there was a glut of yarn and sewing items near in her lounge. Her home is near the main front street, but she is not able to walk to the shops. Her daughter helps regularly and does the weekly shopping trip. She also has a son who lives nearby. Her attitude toward ageing may be summed up in her answer to the question, “did you retire when you were 65”? She replied, “Oh I never retired at all” [laughter].

5) Mrs. White – Female – resides in Seaham - Interviewed 18 March 2008 (she died in November 2008) in her home

Mrs. White was born in Dawdon, near Seaham, in 1922. She had two older brothers and one younger brother, each of whom worked in the Dawdon colliery. Her father was a miner and also a local bandleader and her mother was a homemaker and managed the domestic life in the home. Her mother also helped “lay people out” to prepare them for the funeral and subsequent burial. Mrs. White remembers having a “marvellous” childhood in Dawdon. After leaving school at 14, she went to London to work “in service” for a wealthy family. With the threat of WWII looming, Mrs. White’s mother wanted her to come home so she returned to Dawdon and soon after got married (was married for 64 years) to her husband who also worked in the Dawdon pit.

Motherhood was a defining time in her life. Her first son died of a brain tumour when he was just two years old. She was pregnant at the time and her second son was stillborn two days after her older son died. She was extremely affected by these events and said that not a day goes by without thinking about them. Eventually she had two daughters who live locally and visit her often. Her husband suffered ill health after a pit related accident at age 50, but he didn’t pursue any treatment thus he eventually was deemed unfit to continue working in the mine. He was offered a job on “workfare”, to “put in his time”, but he couldn’t manage much physical labour after his accident. He subsequently had a stroke, but lived several years after the stroke, dying in 2002. Mrs. White went to work at a frozen foods factory when she was 52 years old to help support the family when her husband became ill. She also cared for her mother for three years until her death as well as her brothers who suffered ill health in later life as a result of pit work. In her younger years she was very active attending many of the dances which took place all over Easington. She was on three dance committees and was treasurer at the Dawdon Club.

For the past four years she has lived in a local sheltered accommodation centre in the centre of Seaham. Financially she is relatively well off as result of her husband’s disability pension from the mine accident. Her mobility is very limited and she does not get out as much as she used to which makes her feel somewhat sad. Her daughter helps with her shopping needs other daily necessities. She is a member of the local Catholic church and values visits from the priest each week. She does feel that Seaham has changed in a negative way over the past two decades. A consistent theme in the interview was her feeling concerning the lack of social cohesion in the area, compared to when she was young. She stated that a reason for this is, in part, the lack of respect the youth have for older people. When asked what would improve the quality of her life, said that if her health was better, she could get out more often.

6) Mr. George - Male – resides in Dawdon, a part of Seaham - Interviewed on 11 July 2008 at the home of a friend

Mr. George was born near Seaham Harbour in 1937. He was one of eight children (the third oldest). Several decades previous, his grandfather had moved to the area from Cockermouth in Cumbria to take advantage of the excellent fishing off the Seaham coast. When Mr. George was 4 years old, he and his family moved to Parkside in Seaham. When he was 9, they moved to Dawdon, a close knit, densely populated enclave near Seaham Harbour. They moved because Mr. George's father was a miner and by living in a colliery house, they did not have to pay monthly rent. Life was tough financially and the family lived day to day as there was very little possibility of "planning for tomorrow". His mother took in washing from the schools and the patrols during the war to make extra money. She also was a singer and travelled around clubs in County Durham to aid the family financially. His father was made redundant from the Dawdon pit when he was 57 years old and received a pension of a mere £500 for 50 years employment at the pit, something Mr. George remained bitter about throughout his life.

Although Mr. George enjoyed school, he left formal education at 15 years of age and went straight to work in the Dawdon pit. His desire was to see the world, so he enrolled in the army when he was 20 and travelled extensively in the Far East, returning to the pit at age 27. He initially viewed pit life with distain, but grew to tolerate it primarily due to the intense social camaraderie he felt with his mining co-workers. Pit life was hard, dirty and dangerous and but the social network within the mining community made it tolerable. Mr. George worked on the coal face until 1972 when ill health forced him to work on a power loader instead. He worked in the Dawdon pit until 1992, when it finally closed for good. He was heavily involved in the 1984-85 miners' strike and has remained an influential union representative. Over the past ten years, he has helped many people with health compensation claims as a result of mining related ill health. The camaraderie which Mr. George valued in the pits has continued over the years as he often meets with his former pit colleagues at the local club.

He was married but his wife died ten years ago. He is sadly estranged from several of his five children, due his remarriage. This estrangement has had a serious and detrimental effect on Mr. George's mental wellbeing, a fact which he discussed during the interview. The interview was conducted at a friend's house a few streets away from Mr. George's residence. The area of Dawdon consists of street after street of tightly compacted colliery row houses. There is very little green space in the neighbourhood and it still has the feel of colliery life. While the houses may appear to be crowded on the outside, the interior environment is spacious and pleasant. Dawdon has changed in the last five years as many private landlords are buying properties and letting them to "outsiders", a fact which Mr. George feels has radically changed the social networks in the area. Mr. George remains very active in the community life in Dawdon, despite the changing social fabric. His life in the pit and various strikes has had a tremendous influence over the whole of his life and remains a large part of "who he is". When asked what is important to him now, he commented, "health and money".

7) Mrs. Scott – Female – resides in Wingate - Interviewed on 29 April 2009 in her home

Mrs. Scott was born in 1930 and at the time of the interview she was 79 years old (exact birthday not obtained). She was born and grew up in Station Town, one of nine children. Her father worked in the Wingate colliery, but had to stop work due to ill health when Mrs. Scott was 14 years old. After she left school at 15 years of age, she began work in domestic service, working as a housemaid / cook at a house in Hartlepool. She did not like that type of work so returned home after a few years. She married her husband, also a miner, in 1950, and had one son when she was 22 years old.

When the Wingate pit closed in 1962 she and her husband moved to north Yorkshire so he could work in the colliery in that area. Many of the Easington pits were in the process of closing so there wasn't much work available for miners at that time. She described the vast difference between the quality of the housing stock between Station Town and her new home in Yorkshire (a "posh bath" instead of a tin one – a toilet and bath in the bathroom). The improved physical environment made her time in Yorkshire bearable, given that she missed her family terribly. She moved back to the Station Town area because her husband had been diagnosed with cancer and only had months to live. He died when he was 59 years old. Her son also sadly died young (age 54) of a rare health condition. She felt that a major influence in her life was her mother, who was a very determined, hard working woman.

She remains independent and able to care for herself, but has some long term conditions such as arthritis and heart disease. She spoke at great length about her respect for the NHS and how much the system has helped her over the years saying that "the medical care now is 100 percent better than it ever was". Her financial situation is also an improvement over that of her parents and she expressed a positive attitude toward the pensions system and possibilities of "financial top ups" from the government. Her declining mobility means that she has to rely on other people to help with any major shopping trip to Peterlee, but she is able to take the bus into Wingate to make smaller purchases. She commented that there are not many social activities available in Station Town. Her house is located in a quiet residential section of Station Town. She gets along very well with her neighbours who help her with household repairs if required. Her home interior is spotless with delicate decorations on the mantel piece. The rooms are decorated with pictures of her family and the front room is airy and comfortable. A primary influence in her life has been and remains her siblings and their families ("what would I have done without these sisters of mine"?). They live nearby and she sees them often.

8) Mrs. Jones – Female – resides in Station Town - Interviewed on 20 April 2009 in her home

Mrs. Jones was born on 4 November 1940 in Station Town, a small village outside of Wingate. Her parents owned and operated the local pub in the village. She had one brother who died in 2006. Her earliest memories of childhood were of a carefree life as “tomboy”, spending hours out in the woods near her home with friends. Since her parents were very busy with the pub, she had a great deal of leisure time on her own. After she left school at 15 years of age, she began work at a local wool factory in Darlington, taking the bus, a trip which lasted an hour each way. She remained in that job for four years when she then went to work in a large telecommunications company in Hartlepool. Differing from other interviewees, Mrs. Jones’s mother encouraged her to apply for a nursing course. However, Mrs. Jones exhibited no interest in attending such a course, a fact she said she has regretted later in life.

After 26 years of employment in Hartlepool, she was made redundant. She remains bitter about the redundancy as she felt it was the fault of the then Conservative Government whose policies were encouraging industry to “send work elsewhere”. Around the time of her redundancy, a position as a convener in the union became available and in the last year of her tenancy, she took up that role within the union. In her role as convener, she represented the work force and also had to tell employees that their jobs were “finished”. She too decided to “get out” while she could and ended up taking redundancy. She did not engage in paid work after her redundancy.

Her social life is quite busy as she is chairman of the parish council, is a church warden, chairman of the community association and is a member of related partnership organisations. She also commented about the decline of churches in the area, due to ageing congregations. Her feeling is that there is also a downside to current community life in the Easington area, as local and national government funding for community venues has decreased over the past decade. She lamented the fact that there is very little funding with which to start new activities in the village. This is coupled with apathy from residents concerning becoming involved in community life. Mrs. Jones is very animated by liberal political causes and she feels that her role within the union as well as canvassing for the Labour party has greatly influenced the way she has lived her life. She said “I am a Socialist...I don’t hold my tongue”.



9) Mrs. Green – resides in Wheatley Hill - interviewed on 11 September 2008 in her home

Mrs. Green was born in Easington Village in 1916. At the time of the interview, she was 92 years old. She was one of 11 children (7 children from her mother and father and 4 from her father's first marriage). During her early years, she lived with her family atop her grandparent's bakery in Easington. As a result of slum clearance (including the demolition of her grandparent's bakery), when she was 14 years old she moved to a council house in Easington. During the 1926 pit strike, Mrs. Green took and passed her exam for secondary school. Unfortunately, her father, who worked as collector for an Insurance Company, did not make much money at that time. Therefore, Mrs. Green was not able to attend secondary school. This has been a source of regret during her life. Mrs. Green left school at 14 years of age and immediately started work as domestic assistant in a home near Easington. She looked after the young daughter as well as kept house, cooking and cleaning. To earn a bit of extra money, Mrs. Green moved to Manchester at age 17 to work as a domestic assistant. She resided in Manchester until she was 23, when she moved back to County Durham and again began work in domestic services. She married her husband in 1940 and they went on to have two sons. Her husband worked in the Wheatley Hill pit until he was 59 years old and had to "retire" due to ill health (chronic bronchitis). During her husband's working life she lived in a colliery house which she "loved" due to the neighbourliness of her street. After her husband retired and in order to support her two sons at college, Mrs. Green went to work, first as a cleaner at the local primary school and then as a dinner nanny at the same school. Although it was mandatory for her to retire at 60, she indicated that she would have liked to continue working far beyond age 60.

Mrs. Green has lived in an Aged Miner's bungalow in Wheatley Hill for the past 25 years. The bungalow is on one of the main streets entering Wheatley Hill and is within walking distance of the front street shops and Community Centre. It consists of a kitchen, one bedroom and a lounge. Mrs. Green uses a stick to aid her walking, but appeared to negotiate her "space" with ease and comfort. She has learned the craft of card making and several of her finished products are on display in her lounge. In later life, she has kept active by volunteering at the Wheatley Hill Community Centre and the local branch of the British Legion. She also helps organise activities in her local sheltered accommodation residence, such as her much loved card making class. Mrs. Green is in relatively good health, but has had some serious health problems in the past including breast cancer and lymphodema. Mrs. Green also said that, in a relative sense, she is much better off as an older person than her parents were at her age.

She appeared to have a positive attitude about her life in Wheatley Hill, although she bemoaned the decline in culture in the village and the increase of perceived anti-social behaviour of the youth. She said that older people in Wheatley Hill have no excuse not to be more active due to the increased provision of activities over the last few years. For Mrs. Green, coping with life in Wheatley Hill can be summed up in the following comment: "...a place is as good as you make it yourself, it is. Nobody else can make it good for you, you have to make it good for yourself".

10) Miss Black – Female - resides in Wheatley Hill - Interviewed on 8 July 2009 in her home

Miss Black was born in 1931 in Wheatley Hill. She has a sister nine years younger and was privileged to grow up near many aunts and uncles, as both her parents came from large families. Her dad was a miner at Thornley Colliery (he walked four miles from Wheatley Hill to Thornley to work). Not dissimilar to other women at the time, her mother did not work after she married, other than to “lay people out” in preparation for the funeral and burial. Miss Black mentioned that although she grew up during the depression and the war, and life may have been difficult for her parents, she did not feel deprived in any way, be it food or clothing.

She attended grammar school and left at age 16 to work at the local post office, remaining there for 33 years. After her mother died, she lived with and cared for her dad who had suffered several falls. She went “on the dole” for one year until her benefit ran out at which time she was forced to find other work at a local crisp factory. Not sure if she could “last” the week, she ended up staying there for nine years until she turned 60 and could claim her pension. Although she did not relish the factory environment, she participated in social trips with work colleagues as there were several women at the factory who were her age. Commuting was difficult at times because she did not drive, so had to rely solely on the bus, no matter the shift. After retiring from the crisp factory, at first she found her free time to be “wonderful”. However, she soon found that she needed to “do something” to keep herself busy so she volunteered for meals on wheels and recently has started volunteering at the local Heritage Centre.

Commenting that Wheatley Hill as a village has declined over the past 20 years, she said that “Wheatley Hill is dead”. There are very few high quality shops, but there is a good sized Co-op which is well stocked. The library was recently closed as was one of the sheltered accommodation centres. She feels that the benefit of the regeneration money which was funnelled into the area 10-15 years ago has not had much if any impact on the physical or social environment in Wheatley Hill. The one bright spot in the social landscape is Wheatley Hill Community Centre where she attends the luncheon club once a week as well as the occasional exercise session. Again, transport is an issue because it is a bit far to walk from her house to the Centre which is at the top of a slight bank, hence the bus or taxi are the only options. She does feel that she is better off financially than her parents were at her age.

She lives in semi-detached council house, but is waiting to see if she may be moved to a bungalow in Wheatley Hill as she does not want to climb stairs as she gets older. Her house is spacious and clean, but needs updating and some repair. She smokes cigarettes, thus there is a strong smell of smoke throughout the house. She said that she takes each day as it comes and doesn't “plan too far ahead”. Liking her own company has helped her to feel comfortable in her home, reading books and occasionally watching TV.

11) Mrs. Frost – Female – resides in Wingate - Interviewed on 28 April, 2009 in her home

Mrs. Frost was born on 5 October 1943 in the Barnsley area of Yorkshire. Her father was a miner and her mother was a homemaker. She was one of four children, including a brother and two sisters. In her early years, she and her family lived with her paternal grandfather who was own after his wife died suddenly leaving five sons and a daughter to care for. Her mother took over the care of her husband's siblings which Mrs. Frost said was quite a shock for her mother. Her father spent his entire working life in the Yorkshire mines and he died due to heart problems Mrs. Frost believes were exacerbated by working underground. As Mrs. Frost grew up, her mother worked in a grocer's shop and then a family owned pet shop.

At 15 years of age, Mrs. Frost left school and immediately began working at the local sewing factory. This was a large factory with high sewing "targets" which had to be met. Due to her family's meagre financial resources, she was not able to continue her education, despite the fact that her ambition was to be a nurse. While this was a disappointment for Mrs. Frost, she felt that she needed to "help the family" financially. Her next job was at another local sewing factory which she said she "loved" due to the social relationships between employees. When she was six months pregnant with her first child, she left the factory due to the stress and strain of such physical work. She has a son and a daughter.

In the early 1980s, she moved from Barnsley to the Northeast so that her husband could start a new job. While she was not pleased to leave her family in Yorkshire, she quickly made new friends in her neighbourhood and began working at a local factory. Her husband died suddenly in 1984 of a heart attack which left Mrs. Frost devastated and unsure how to continue on in life. Her siblings moved from Yorkshire to be near her and her local friends rallied around to offer support. In 1994 she married her second husband with whom she was with for 12 years until his death in 2006. After leaving the workforce, she has volunteered at local community venues and feels happy that she can contribute to the local social life. She lives in a modern semi detached home, in a well kept middle class neighbourhood. Her home is spacious with a large garden and is near to shops, GP surgeries, the post office, etc. She also drives which helps her feel connected to the village.

She was very influenced by her close knit family, especially the example of her parents who taught her the value of money and how to deal with life's hardships. Women in her family were expected to work outside the home to contribute to the family income. Mrs. Frost's life story also deals with issues of change and transition, e.g. relocation, at the effect of such change on the individual and those around them. Reflecting on her life she commented on how fast time goes: "So you have to cram as much enjoyment into your life as you can."

12) Mrs. Johnson - Female – resides in Trimdon Colliery - Interviewed on 14 May 2009 in her home

Mrs. Johnson was born on 14 April 1947 in Trimdon Colliery, County Durham. She was 62 years old at the time of the interview. She is the oldest of three children, two girls and a boy. Her father came from a long line of miners who worked in the Trimdon Colliery mine. He worked in the mine nearly his entire working career and her mother was what she termed “a stereotypical housewife of the time”, mainly focusing on domestic work in the home. When the Trimdon mine closed, her father retrained to work in a local factory, a job which, according to Mrs. Johnson, he never liked or felt entirely comfortable. For the first four years of her life, she lived in a pit owned house with no running water or electricity. She still remembers when, at age 5, she and her family moved into a council house with all the “modern conveniences”. Mrs. Johnson went straight to work as an apprentice hairdresser after finishing school at age 16. The family expectation was that she would leave school and begin contributing to the family income. Further education was not an option for her due to the lack of family finances. She married her husband in 1966 and they soon moved to Nottinghamshire in 1967 because the Deaf Hill pit (near Trimdon) where he was working had closed. In 1972 they moved back to Kelloe, (also near Trimdon) to work in the pit there, because she felt homesick for her family.

She worked in various jobs involving physical labour, e.g. cleaning the pit offices and as a cleaner at Durham University. During the pit strike in 1984-85, she was the sole breadwinner for her family, but the stress and burden on her proved too much so she “went on the sick” until she reached pensionable age. The pit strikes (in both the 1970s and 1980s) proved to have a major influence on Mrs. Johnson’s quality of life during mid-life. She and her family had very little to live on and they were forced to “do without” on many occasions. She is thankful to have a strong social network of family and friends and she helps care for her mom who lives close by. She has a daughter and son. There is very little in terms of local amenities such food shops, thus most residents need to travel 3-5 miles to obtain the daily necessities. Trimdon Colliery was once a thriving village, but outward migration to larger towns has depleted the population over the past two decades. Many social activities take place at the local community centre, where Mrs. Johnson volunteers regularly.

Despite the hardships she has experienced, Mrs. Johnson feels that she is a “survivor” and is very grateful that she and her family are now relatively financially comfortable. Since leaving paid work, and despite some serious health concerns, she and her husband are very active in parish activities and say that they don’t know how they ever had time to work. She and her husband are homeowners of a comfortable semi-detached home in a small estate in Trimdon Colliery. She credits her parents for exhibiting a work ethic of patience and perseverance which has seen her through a variety of difficult situations.

## Appendix F – Sample Transcription

### Sample 1

JE - How do you think your Sunderland friends are ageing, are their differences between their lives as opposed to your life here?

E2 - My friend Lillian, she is year older than me, she tap dances, she swims, but yes, it is not so much community based, like we meet one friend for coffee and go swimming and one friend...but I think as far as the ageing, there isn't much difference between us. I perhaps don't feel that there is a collective feeling in Sunderland area. - lack of social cohesion in city

JE - How do you view your own ageing?

E2 - I hate the fact that I am fat and really I should do something about it, and I do occasionally, but you know, then I don't do it. I do go the gym here, I haven't for the last few months because I broken, that is why I have got sensible shoes, I hate sensible shoes, I have worn...shoes all my life, I have fractured two metatarsals, and around the side of my foot, because I haven't been to the gym I have put weight on, I look at myself and I go...people say oh you don't look your age, but I am, no matter what I am 72. I used to wear glasses, and when I used to walk by the long mirror I looked sort of vision. I had the cataracts out and now I have 20-20 vision and I walked past this mirror and I can see myself in this mirror and I hate it, I really hate it. Not for vanity's sake, I look at myself also; I am a bit frightened of my own mortality my friends around me are starting to die. As my friend says I have a long past and a short future. I often sit there and think, am I doing this because I am frightened not to do something, and I think there might be something in that. I certainly don't use my mind now, as a magistrate you did training. Nothing I do is taxing, you know.

JE - Would you like to do some training?

E2 - Yes, I would, I would like to do something taxing. I am reading a lot. I don't always read cookbooks, I read fiction as well. No, and then I've got to sometimes stop and if I am doing something, I get out of breath and I think come on you are 72 and I think I need to do it. And then like moving something, I have a microwave and I had to move it and I sat down and I thought oh, I need to rest. But I would rather do it than not because I hate to ask people to do it. But it will kill me in the end [laughter]. I think after leaving at 70, I certainly have taken a back step, because I was told, we don't want you, and I don't mean that, but you know, you are no good and one of the big things my friends say, the likes of Boots, that has teh perfume to spray, if you have got white hair, they won't touch you. And it is true, we have all done this, they have a sample, you aren't even asked. We have all tested this - they don't say would you like this, oh no. And, yeah, you know, I don't like that at all, but I think, and another thing, the family which are fabulous to me I have to say, but when we go out just because I am on a pension, they will say, oh we'll pay for you, and I say oh no you don't, and they go oh no, we are all working, and we'll take you and I say no you don't and that is defiantly an ageist thing. But once again, they don't see it as treating me as a second class citizen. And if I said this to them they would be very hurt. If I can't pay for it I don't go, I don't do it.

JE - If you had some sort of motto, in terms of how you have lived your life and how you would like to live your life, what would you say as "words to live by"?

health-problems

change in challenge since retirement

feelings about retirement

feeling about aging

-don't want to depend

that I am "old" person

## Sample 2

1 ST2 - Well, they used to manage it and that is that.

2 JE - What did you do after you finished school?

3 ST2 - Well, I just went to work at Patons and Baldwins. I was a wool factory. It no longer  
4 exists now. It was in Darlington. I used to have to get up to get the bus at 6:30, to go through  
5 to Darlington, hail rain and snow.

6 JE - How long of a journey was that?

7 ST2 - About an hour.

8 JE - How old were you at the time?

9 ST2 - I was 15 and then I stayed there, well, about four years and then I went to work in  
10 Hartlepool, for GEC. That is where I met Nora, 'cause Nora worked there a while, didn't  
11 you? [her friend who had come to visit during the interview].

12 JE - Was it expected that once you finished school you would get a job?

13 ST2 - Well, you could, you could go anywhere. Mom wanted me to go for nursing. But I  
14 said, oh no, I don't fancy being a nurse, which was silly. It would have been good, but I  
15 didn't.

16 JE - Was it different for women who were slightly older, in terms of working?

17 ST2 - I think so. Kath [her neighbour] came from a large family and they were all expected  
18 to have a job. Kath came to work at the corner house for a spell and then she went to work  
19 for these wealthy people in Hartlepool doing housework and then she came back to the  
20 Corner House and then she went to the pit canteen and she worked there.

21 JE - What was your job like?

22 ST2 - Lovely, I loved it. I was very ambidextrous; I could do anything me [laughter],  
23 mechanisms for the telephone exchange. The wool factory didn't close when I was there, it  
24 closed in the '60s and it became a cigarette factory for Rothmans, because of course all the  
25 wool was being produced in the far east and where ever else. I was at GEC for 26 years.

26 JE - Did you officially retire?

27 ST2 - No, I got my redundancy. It was during the days when they were running all the  
28 industries down, in the '80s. Can I say whose term was it? It was during the Thatcher years.  
29 They were running the coal mines down, they were running the shipyards down and they  
30 were running the factories down and we were hit hard.

31 JE - Why was the factory closed?

32 ST2 - Because they were sending work elsewhere, you know, sending work everywhere else.  
33 You see in those days the unions were quite strong. I was in the fortunate position to be a

Women  
employ-  
ment  
- factory  
- long  
commute

school leaving age

work place - GEC

Women  
Education  
aspiration  
career expectation from family

Women  
age cohort  
domestic  
sic

work -  
engaged  
at job

politics  
Economic  
subsidies  
Industry

Unions

### Sample 3

1 JE – I would imagine that your grandparents perhaps didn't travel as much as you and  
2 your parents did. Is that right?

3  
4 WH3 – But, funnily enough, my grandfather bought a car which was unusual and my dad  
5 never had to sit a driving test. Because he said that they went to get a car, my grandfather  
6 and him. They went to this garage and a man took him out for a test drive, showed him  
7 how to work the gears which wouldn't be much then. And there wasn't the traffic on the  
8 roads. He showed him how to work the gears and the steering and all that. They went  
9 back to the garage, bought it and he [dad] drove it home, no tests or anything. I mean,  
10 eventually the car went and my dad got married and he said he would love a car.  
11 Anyway, he bought one, a terrible high purchase. An [xxxx] was the first car we had, we  
12 thought it was brilliant and we went all over the place, you know. And then we got rid of  
13 that and we got a Riley. It was a bigger car. It was a better car. It was all second hand.  
14 It had an arm rest which came down in the middle of the back seat. It was like being the  
15 queen [laughter]. I can always remember, we were on a trip out and we went through  
16 Barnard Castle and they were having a fair. And the police were there when the fair  
17 started, to keep the road clear. And people were lining the sides and we were waving  
18 [imitates the Queen's wave – laughter].

*Car ownership  
- pride/  
importance  
of  
"hips  
out"*

19  
20 JE – Was it very common for women who left school at 16 to go immediately into work?

21  
22 WH3 – Oh yes, then. The War changed all that. I mean, women didn't go out to work  
23 before the war, but with the War you worked. It changed everything. They had their  
24 own money. They were independent.

*war/  
women's  
role  
change/  
independent*

25  
26 JE – You mentioned earlier [when I first came in] that you would much rather have been  
27 at work than doing the house work. How did you feel about working and then retiring  
28 from the post office?

*R-*

29  
30 WH3 – Well when I first retired, I thought, oh brilliant. I actually did less housework  
31 when I retired than I did when I was working. Because you had your certain days off and  
32 things that needed doing you did them while you were off. When I came to be retired, I  
33 can do it tomorrow, tomorrow. But tomorrow never came! I found I did less house work  
34 when I retired, then I did when I was working.

*Retirement  
Feelings  
about  
retirement*

35  
36 JE – Do you miss working?

*R-*

37  
38 WH3 – Well, I enjoyed it when I first finished. I thought this is brilliant. I can go to bed  
39 when I like, get up when I like. Then I thought, oh I am going to have to do something.  
40 You see getting a paid job would have affected my pension. And I saw it advertised for  
41 meals on wheels and May was in charge of it for Wheatley Hill. And so I rang her about  
42 it and it was on a Tuesday, so I went to volunteer on Tuesday.

*Retirement  
- Need to be  
active*

43  
44 JE – Did you enjoy that?  
45

## **Appendix G - Timeline and selected historical dates related to the lifetimes of Easington Study interviewees:**

- 1914-18 World War I
- 1926 General strike by Trade Union Congress in support of striking and locked out coal miners
- 1928 women over age 21 get the vote
- 1939-45 World War II
- 1947 UK coal industry nationalised and placed under the control of the National Coal Board
- 1948 National Health Service established
- 1951 81 people die in the Easington Colliery explosion
- 1978-79 "Winter of Discontent" widespread industrial action
- 1984-85 UK miners' strike - year-long, national conflict between the National Union of Miners and the Conservative Thatcher government
- 1994 - Wearmouth Colliery in Sunderland closes, the last colliery in the Durham coalfield.



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