Positive Ageing – A Critical Analysis

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Introduction

Throughout the world governments are beginning to respond to the challenges of population ageing, often in rhetoric implying that ageing will bring about a 'crisis'. These responses generally centre on the fiscal implications of retirement income support and health care services (OECD, 1998). The OECD notes the need for a broad and holistic approach to ageing, reflecting the interdependence of policies, but this can be a daunting prospect. The New Zealand government has taken up this challenge through its Positive Ageing Strategy (PAS) and is not alone in this; there have been similar initiatives in other countries. In examining these policy documents it is clear that there are common underlying values. This paper critically examines PAS, and makes comparisons between it and strategies on ageing from Australia and the United Kingdom. The paper argues that the three strategies reflect a positive discourse on ageing that has implications for both current and future generations of older people.

The New Zealand Positive Ageing Strategy – policy context and antecedents

PAS was one of a number of interlinked strategies developed after 1999 by the Labour government, which included the Health of Older People Strategy (Ministry of Health, 2002), the Disability Strategy (Ministry of Health, 2001), the Transport Strategy (Ministry of Transport, 2002) and the Housing Strategy (Housing New Zealand Corporation, 2005).

These policy statements were influenced by trends in social/public policy thinking which have resonated through the developed world in recent decades. In the 1990s beliefs about the welfare state were strenuously challenged (Davey, 2000). The term 'welfare' became linked to dependency and family dysfunction, whereas 'wellbeing', the desired state, implied capability, self-reliance and positive contributions to society. A centre-right National Party government in New Zealand strongly espoused these ideologies, which culminated in a proposal to devise a Code of Social and Family Responsibility (Davey, 2000).

At the same time, increasing attention on population ageing placed older people in the spotlight as major beneficiaries of public expenditure. In the late 1990s the OECD published a series of reports which were influential in New Zealand and informed the development of PAS. *Maintaining Prosperity in an Ageing Society* (OECD, 1998) delivered strong messages about the fiscal impacts of pensions and health spending, advocating the discouragement of early retirement and increasing the capacity of older people to remain economically productive. This was followed by *Reforms for an Ageing Society* (OECD, 2000), with information from member countries on population ageing and their policy responses.

By 1996 'positive ageing' had been embraced in New Zealand as a concept (Senior Citizens Unit, 1996; Prime Ministerial Taskforce on Positive Ageing, 1997). Increased participation of older people in society was a policy goal (Department of Social Welfare, 1996) and the benefits of continued productivity in older age were being promoted (Senior Citizens Unit, 1996).

Since 1999 the Labour government's approach to social policy has been guided by the Social Development Approach (SDA) (Ministry of Social Development, 2001a). Although the SDA was still under development when PAS was published, the documents share an emphasis on collective action by the state as well as by individuals and the community to reduce social exclusion, with a focus on mutual responsibility. The influence of the SDA is acknowledged in the 2001 PAS Status Report (Ministry of Social Development, 2001b).

The SDA and PAS envisage a pathway from social exclusion to wellbeing and participation, in contrast to the previous government's welfare dependence to self-reliance pathway. Nevertheless, an emphasis on participation, wellbeing, self-reliance and responsibility survived the policy shift from National to Labour, as did a cross-sectorial approach, and these concepts underlie PAS.

These concepts are also replicated in overseas policy statements, developed as a response to population ageing. The next section considers the similarities between PAS and two comparators, and explores the view of ageing that is being promoted.

The New Zealand Positive Ageing Strategy and two comparators

Several underlying themes can be identified in analysing the PAS statement, encapsulating its core values:

- fostering a positive view of ageing;

- promoting attitudes which respect and value older people;

- recognising and supporting older people's participation and contribution;

- valuing self-reliance, independence, individual responsibility;

- acknowledging diversity among the older population.

Table 1, using direct quotations, shows how the first four themes identified in PAS are reflected in the *National Strategy for an Ageing Australia* (Andrews, 2002) and the United Kingdom's *Opportunity Age – meeting the challenges of ageing in the 21st century* (HM Government, 2005). These comparators were selected as providing similarly wide-ranging views of the policy implications of population ageing and a shared emphasis on the need for engagement and action from all sectors of the community, including business, community organisations and individuals, as well as government.

Fostering a positive view of ageing

All three documents adopt a positive tone when discussing ageing (Table 1). PAS acknowledges that the growth in the older population will provide New Zealand with a 'valuable resource' with 'significant

policy implications' and 'many opportunities' (Dalziel, 2001, p.9). *Ageing Australia* describes an increase in the proportion of older people as 'an enormous positive' (Andrews, 2002, p.vii), while the UK's *Opportunity Age* seeks a 'new view' of ageing as an 'extension of opportunities for individuals and society' (HM Government, 2005, p.3).

The 'positive ageing discourse' challenges assumptions about older age as a period of inevitable decline and focuses on the modifiable effects of lifestyle, attitude, skills and technologies. The approach aligns with the rejection of the 'disengagement' theory of ageing, which suggests that adjustment to old age is best achieved through a mutual withdrawal between the individual and society (Cumming and Henry, 1961). Instead, the strategies support the alternative 'activity' theory of ageing. This emphasises the need to remain actively engaged in society in order to adapt successfully to older age (Havighurst and Albrecht, 1953).

Underlying the strategies' positive view of ageing are concepts of 'healthy', 'successful', 'positive', 'active' and 'productive ageing', which have emerged in recent decades. Healthy ageing was promoted by the World Health Organisation as early as 1980, with a focus on the potential to overcome the 'problems' of older age through medical advances. An emphasis on 'active and productive' ageing followed, amidst an increasing focus on the economic implications of population ageing (Bass, Caro and Chen, 1993). 'Productive ageing' sees older people as a resource and emphasises the importance of their ongoing participation in society (OECD, 1998). 'Active ageing', promoted by the United Nations in 1999, suggests that stereotyping of older people as frail and dependent will be challenged as active older people became more visible and better integrated into society. Concepts of 'successful' and 'positive' ageing emphasise physical, intellectual, emotional and spiritual wellbeing, consider psychological adjustment and autonomy, and often incorporate a focus on the rights of older people (Rowe and Kahn, 1987; Baltes and Baltes, 1990).

Nowhere, however, is positive ageing defined in PAS, beyond a statement that the concept embraces 'a number of factors, including health, financial security, independence, self-fulfilment, community attitudes, personal safety and security, and the physical environment' (Dalziel, 2001, p.9). That the years of 'older age' should be viewed and experienced positively is stated as an 'underpinning

Table 1: Policy strategies for an ageing society – underlying themes

Themes	*New Zealand Positive Ageing Strategy*	*National Strategy for an Ageing Australia*	*Opportunity Age (UK)*
Fostering a positive view of ageing	Positive attitudes to ageing and expectations of continuing productivity challenge the notion of older age as a time of retirement and withdrawal from society. (p.9)	Together we can ensure that the ageing of our population is a positive experience. (p.v).	An older Britain is something to celebrate not fear. (p.3)
Promoting attitudes which respect and value older people	Older people are important members of society and have the right to be afforded dignity in their senior years. (p.9) Goal 8 – People of all ages have positive attitudes to ageing and older people. (p.22)	Positive and informed attitudes to and by older Australians are fundamental to an ageing nation. (p.x) A touchstone of a civilised society is that it values and provides support for older people … and respects their right to dignity. (p.8)	Older people … have the right not to be discriminated against. We will take steps to ensure that older people are able to maximise their potential, unhindered by prejudice. (p.31)
Recognising and supporting older people's participation and contribution	The choice to work in later life is important in meeting the challenge of positive ageing. (p.10) Flexible employment practices [will] support older people in the workforce. (p.13)	Ongoing engagement of mature age workers will be important to achieve sustained economic growth as the population ages. (p.x)	We must explode the myth that ageing is a barrier to positive contribution to the economy and society, through work and through active engagement in the community. (p.v)

premise' of positive ageing. It is claimed that 'the benefits of positive ageing for individuals are obvious: good health, independence, intellectual stimulation, self-fulfilment and friendship are just some of the valued outcomes' (Dalziel, 2001, p.11).

The positive discourse on ageing apparent in all three strategies has been criticised for its emphasis on economic activity and for presenting an overly optimistic view of older age. The concepts of 'active' or 'productive ageing' have been seen as serving the needs of dominant societal institutions and structures, especially the drive for economic growth (McFee and Rowley, 1996). These concerns will be considered in later sections of this paper.

Promoting attitudes which respect and value older people

Positive ageing, according to PAS, requires society to address ageist attitudes, to value older people, to award them respect and dignity and to acknowledge their contributions. These sentiments are echoed in the Australian and UK strategies, which suggest a variety of ways in which this can be done. PAS Goal 8 (see Table 1) is accompanied by actions to ensure that government agency advertising and publicity campaigns portray positive images of older people; to promote intergenerational programmes in schools and communities; and to foster collaborative relationships between central and local government, business, and non-government

and community sectors.[1] *Opportunity Age* seeks more involvement by older people in local decision making (HM Government, 2005, p.74) and the establishment of a Commission for Equality and Human Rights, with powers to tackle ageism (HM Government, 2005, p.19). The Australian strategy calls on governments, business, the media and communities to promote and support more positive images and attitudes to ageing and older people (Andrews, 2002, p.34).

Recognising and supporting older people's participation and contribution

The PAS 'vision' calls for opportunities for older people to participate and contribute 'in the ways that they choose'. However, the goals link such opportunities to paid work (economic activity) or community contribution (volunteering), with the emphasis on the former (Table 1). The economic tone of PAS continues, as older people are described as a 'valuable resource'. However, full participation may be prevented by lack of access to resources and facilities (indicating a need to scrutinise policy) or by ageist attitudes (requiring a change in society). Limitations based on ill-health or frailty are not mentioned.

The emphasis on continuing economic contribution in the form of paid work links to OECD calls for 'productive ageing'. It is developed much more explicitly in the UK and Australian documents, both of which devote whole chapters to increasing workforce participation in mid and later life.

All three strategies discourage early retirement. Compared to the UK and Australia, New Zealand has few incentives to early retirement. An increase in the age of eligibility for New Zealand Superannuation during the 1990s promoted much higher labour force participation in the 60-plus age group.[2] In contrast, retirement on contributory pensions is common in the UK before state pension age, and in Australia many pension funds have been accessible at age 55.

Access to training and educational opportunities are closely linked with efforts to prolong workforce opportunities. In contrast to the Australian and UK strategies, educational opportunities for older people do not figure prominently in PAS. Under Goal 10 – Increasing opportunities for personal growth and community participation – the specified action is a somewhat vague call to 'improve opportunities for education for all'.

The OECD itself and many government statements advocate 'sticks' in the form of fiscal disincentives to retirement and reductions in pension benefits. More positive approaches include phased retirement and flexible working conditions (Yeatts, Folts and Knapp, 2000). Such initiatives are not highly prominent in any of the strategies, even though PAS includes Goal 9 – Elimination of ageism and promotion of flexible work options. The action advocated relates to the implementation of human resource policies that support employment of older workers, but refers only to the public sector.

Valuing self-reliance, independence, individual responsibility

Consistent with the model of the OECD's 'active society' and the 'active citizen' (Walters, 1997; Davey, 2002), all three documents make reference to self-reliance and independence among older people, linking with the concept of individual responsibility (Table 1). *Opportunity Age* explicitly adopts 'Active Ageing' as the topic of one of its three substantive chapters. Older people are called upon to maintain independence and control 'even if constrained by health problems'.

The Australian national strategy also implies that older people must exhibit individual responsibility, take up training and employment opportunities, and keep themselves healthy (Andrews, 2002, p.40). The onus is on people not only to contribute and to be economically active, but to finance their own retirement and to live healthy lives (hence reducing concerns about the affordability of pension and health care provision in the future). The responsibilities are summarised in PAS: 'Effective policies on positive ageing will … enable older people to take responsibility for their personal growth and development through changing circumstances' (Dalziel, 2001, p.17).

Responsibility is not, however, seen as purely one-way. Individual responsibility is to be balanced by supportive action by the state, implying shared responsibility and reciprocity. The three strategies call for action from all sectors of society – central government, local government, business and community organisations – as well as individuals.

1   A recent initiative in this area was a photographic competition, in collaboration with Age Concern New Zealand, in which young people sought to capture positive images of ageing and older people.

2   Between 1991 and 2004, rates for the 60–64 age group rose from 35% to 66% for men and from 17% to 45% for women (Household Labour Force Survey, Statistics New Zealand).

Acknowledging diversity among the older population

A fifth theme features in the PAS principles: acknowledging diversity among the older population. This calls for affirmation of the values and capacities of older Maori and Pacific people specifically, but also of people with other cultural identities. The principles also acknowledge different issues facing older men and older women, and older people in urban and in rural areas. The approach is encapsulated in the principle, 'Recognise the diversity of older people and ageing as a normal part of the lifecycle' (Dalziel, 2001, p.16). Differences based on ethnicity, gender and location are not given as high a profile in the UK and Australian documents. The former acknowledges that black and minority ethnic elders (BME groups) may have difficulty in accessing services and benefits, and there is a short section under 'services that promote wellbeing and independence' on tackling rural exclusion (HM Government, 2005, p.62). Australia's national strategy principles call for services appropriate to diverse needs (Andrews, 2002, p.2), but there are only passing references to ethnicity, in the discussion of demographic change.

A critical view of strategies on ageing – now and in the future

All three strategies promote active and productive ageing and support the concept of positive ageing, with an emphasis on improving wellbeing and promoting positive attitudes to ageing. The strategies promote the value of older people's contributions and seek increased participation, promoting the benefits for both individuals and society.

The healthy/active/positive ageing discourse promoted in the three strategies has been criticised for failing to acknowledge the range of realities of later life. By placing a high value on independence and activity, the strategies tend to underplay the experience of people who suffer frailty and dependence in later life. Critics argue that the positive ageing discourse fails to acknowledge the significance of later life, thereby allowing society to avoid thinking about and creating a respected place for the oldest in society (Moody, 1988; Phillipson, 1998; Katz, 1999; Opie, 1999). Furthermore, the positive ageing discourse portrays older people as able to counteract the effects of ageing through personal effort, thus identifying individuals as being responsible for their fate. Policy strategies that over-emphasise independence, self-reliance and individual responsibility may do so to the detriment of cooperation, reciprocity and interdependence.

The underlying activity theory emphasises the benefits of maintaining the level and pattern of activity of middle age for as long as possible, but has been accused of assuming a simplistic relationship between activity and life satisfaction. For activity to enhance life satisfaction, certain conditions need to be met, including that activities are freely chosen and matched to capabilities. Policy and planning will need to ensure opportunities for involvement in a wide range of activities. Critics seek an increased emphasis on gender, ethnic and socio-economic constraints and a greater examination of the meaning and the role of old age.

The positive discourse on ageing presents an image of active and healthy older age that for some may not be achievable. It reduces the visibility of old age and risks enhancing a negative view of dependency and frailty. Over-promotion of the positive image may result in insufficient attention being given to the needs of the frail old in policy and planning and increased denial of ageing amongst individuals. As a consequence, individuals may not prepare adequately for increasing dependency and may find it harder to adapt.

The productive ageing approach has also been criticised for an emphasis on economic activity that fails to incorporate notions such as work/life balance and does not acknowledge the societal benefits of recreational, creative and spiritual pursuits. While reference is made to the variety of ways that older people contribute, the three strategies emphasise the value of ongoing workforce participation and pay minimal attention to non-economic activities. The overall emphasis on workforce participation detracts from a holistic approach to wellbeing and reduces the visibility of those who by choice or circumstance are no longer active workers or volunteers. This approach may increase, rather than reduce, the risk of social exclusion amongst older people who are 'economically inactive'.

Will PAS and its comparators meet the needs of oncoming generations of older people? As notions of retirement change and boundaries between middle and old age become blurred, the 'new old', the ageing baby boomers, face uncertainty. They have grown

up during a period of wide-ranging technological, economic and social change. These changes have both positive and negative impacts on the ability to remain active and independent in older age, on the nature of participation and contribution, and on family support networks. While boomers are more educated than their parents, a significant proportion of them have experienced economic recession and unemployment, with consequential effects on skills development and ability to save for retirement. A less predictable life course may mean that financial arrangements in older age are less secure and there may be more inequality in material living standards among older people, especially if fiscal pressures threaten state retirement income support. Where policies place a high value on self-reliance, how will they treat people who can no longer be economically independent?

The ability of PAS and similar strategies to respond to change, such as the movement of baby boomers into later life, and to growing diversity among the older population will be limited unless they remain dynamic, realistic and relevant. Ongoing monitoring, regular review and comprehensive evaluation of the strategies will be beneficial. Policy will need to be flexible to meet the needs of changing families, and anticipatory, bearing in mind the needs of both dependent and independent within current and future cohorts.

Conclusion

Prevailing models of social policy, beliefs about the role of the state and the responsibilities of its citizens, and about the role and value of older people in society have influenced and shaped the three strategies examined in this paper. Their rhetoric of positive or active ageing requires ongoing participation in productive activity, with a particular emphasis on extending labour force involvement. It encourages individuals to accept responsibility for maintenance of health and economic activity so that older individuals may remain independent, thereby reducing the demand on health and social services.

Those who are ageing in good health and are engaged in productive activities may benefit from increased opportunities if the strategies achieve their objectives. But the approach is problematic for those who are not, or who can no longer be, self-reliant and independent. Those who make demands on health and welfare services may be stigmatised and blamed for not making

sufficient preparation or taking due responsibility for their health and wellbeing. The strategies therefore provide an opportunity to improve the situation of older people in society by drawing attention to the negative effects of age discrimination and exclusion from opportunities to participate. However, some aspects of the underlying concepts of active, productive and positive ageing remain questionable. Without a broadening of these concepts there is a risk that the frail old may be further marginalised. It may be only the active old who benefit.

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