

BEYOND AGEISM. THE REDEFINITION OF SOCIAL CATEGORIES TO ACCOUNT FOR COMPLEXITY

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Abstract: *Given the need to assign categories while also fostering free thought when conducting research, the aim of this paper is to highlight how the third and fourth age categories are addressed risks inducing ageism in the current ageing society. Considering the role that language plays in the construction of the world (Berger & Luckmann, 1966), this literature review aims to identify the ways that the third and fourth age categories have been applied in social science research. Therefore, the potential to avoid the dichotomization of old age necessarily lies in placing things in context so that we comprehend the complexity of old age, e.g., the third or fourth age.*

Key words: *ageing, third age, fourth age, literature review, mosaic of the seniority*

1. Premise

This research is based on a theoretical foundation that is “Values and Sociological Research” (1954) where Burgess, defining the social scientist as “irrevocably committed to one value, namely, freedom: freedom of thinking, freedom of teaching, freedom of research; in short, freedom to seek, to find, and to report the truth” (Burgess, 1954, p. 18), invites us to take up the latter’s weapon (ivi, p. 20), that is, research.

Therefore, as an inexperienced social researcher, I feel free to pick apart social categories as they are applied to the study of ageing, starting from the premise that classification itself is not an inconsequential action but rather produces value and thus behavior.

The query that accompanied this research was “*To what extent can the categories of the third and fourth age be applied to the contemporary ageing society?*”.

The main assumption of the research is that social categories may be construed only from within the dominant culture, in the name of the cultural relativism that we come face-to-face with daily and according to which values, categories, and classifications take on different forms and meanings and transitions caused by endogenous and exogenous factors yield different outcomes.

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2. Introduction

Studying ageing entails delving into its inherent values, contexts, and classifications, factors affecting age structure seeking to describe the status quo and issues of ageing countries (Burgess, 1960) since “The prolongation of life and cessation of productivity well in advance of death creates psychological and social problems that do not arise in societies composed of younger persons [...]Everywhere there arises a need for turning the attention of scientists and the new personnel they are training within these fields to the problems of the aging process and to the care of elderly people”(Anderson, 1960, p. 357) .

This research originates as a stumbling block within more extensive empirical research, and in particular in becoming aware that, as Strauss stated, the direction of activity depends on the particular ways in which objects are classified and that this classification not only orients the overt action, but sparks a series of expectations with respect to the classified object (Strauss, 1959). It is precisely when these expectations are not met in empirical research that we unexpectedly come up against the impasse of adopting pre-existing classifications as the key to understanding contemporary reality, giving rise to a critical reflection on the adoption of the historically accepted categories of the third and fourth age.

Age is one of the foremost social categories that, along with gender, facilitates the attribution of characteristics which implying people’s homogeneity and allow the construction of stereotypes and common meanings around categories used both in sociological analysis and in everyday life. Drawing on Erikson’s four-phase model of the human lifespan (1950;1968), demographic historian and sociologist Peter Laslett (1987;1989) establishes a quadripartite division of the entire lifespan stating “first comes an era of dependence, socialization, immaturity and education; second an era of independence, maturity and responsibility, of earning and of saving; third an era of personal fulfilment; and fourth an era of final dependence, decrepitude and death” (Laslett, 1987, pp. 134-135; Laslett, 1989, p. 4). This paper focuses on the third and fourth age that he outlines. Acknowledging changes in life expectancy and demographics, his is a dualistic view of ageing, previously described by Neugarten (1974) with the concept of the young-old and old-old. To stimulate policymakers and gerontology students, he turns his attention in particular to what he considered " the real issue of the late 20th century, older age" as Eric Midwinter put it (2005).

Considering inevitable changes in political and economic backdrops linked to the ageing population, the aim of this research is to discuss why the categories adopted nowadays can no longer be the only ones used to analyze ageing taken as a social issue.

3. Material and Methods

The chosen method was a literature review on the use of the third and fourth age categories attributed to ageing in papers from the social sciences field. I opted for the digital library Scopus, among other databases, and the selection criteria were: articles

published between 1987 - 2022² that contained the words “third age” or “fourth age”; articles published in western societies (my intent in this choice was methodological rather than discriminatory, in seeking to gain context); papers selected from the Social Science Subject area³, excluding articles referring to third and fourth “age” taken as an “era”. Finally, I mostly analyzed articles that had already been published excluding those in the process of publication, and only those written in English.

4. Results

These results are not intended to be definitive or exhaustive, but rather as food for thought that can be a catalyst for future research adopting qualitative methods.

Of the 116 papers selected, 10 were excluded because one was impossible to access, three used “third” and “fourth age” as key words—but they do not appear in the text—and finally, six of the papers do not apply the concept of third and fourth age as social categories. A whole 106 papers adopt definitions of the third and fourth age, 53% of which attribute the terms to Laslett, citing him while the rest use them as conventional terms (Table 1).

Table 1

Articles that cite Laslett using third age, fourth age, or both as social categories

Percentage of columns [%]	Third age	Fourth age	Both	
Laslett is mentioned	30	0	72	53
Laslett is not mentioned	70	100	28	47
TOTAL	100	100	100	100

My review shows the use of the two categories in a mutually exclusive manner, as concepts that coexist only in that liminal phase of transition from one status to another. In fact, the concept of the third age is fleshed out as a “period of leisure characterized by mature experience and expertise in many fields” (Gibson, 2000, p. 774), a privileged status of adults (Carr, 2009) enjoying good health, a wide array of opportunities, personal development and societal contributions (Carr & Manning, 2010), later life without care, associated with consumption and agency (José, 2020). Hence, a stage of life as “some sort of humanitarian gratitude for a ‘Second Age’ job well done” (Midwinter, 2005, p. 16) which precedes those times of frailty and dependency since it is marked by the physical and mental decline of people who “have let themselves go” (Townsend, Godfrey & Denby, 2006, p. 897).

² The 1987-2022 time interval is justified by the intention to refer to the categories of old age as defined by Laslett from *The Emergence of Third Age* published in 1987.

³ A search field which pulls up documents related to Social Sciences (all), Social Sciences (miscellaneous), Archeology, Development, Education, Geography, Planning and Development, Health (social science), Human Factors and Ergonomics, Law, Library and Information Sciences, Linguistics and Language, Safety Research, Sociology and Political Science, Transportation, Anthropology, Communication, Demography, Gender Studies, Life-span and Life-course Studies, Political Science and International Relations, Public Administration, and Urban Studies.

Often referred to as the dependent age, the fourth age is defined based on that which the third age is not. In fact, only 3% of the papers examined uses “fourth age” exclusively, while 57% contain both categories used here. However, 40% of the articles use the term third age exclusively (Table 2).

Table 2
Articles that use the categories of third age, fourth age, or both

Percentage of row [%]	Third age	Fourth age	Both	TOTAL
Laslett is mentioned	23	0	77	100
Laslett is not mentioned	60	6	34	100
	40	3	57	100

This apparently descriptive data reveals a greater emphasis on that stage of independent working life, worthy of scientific attention, and especially how the literature focuses on the study of the third and fourth age, painting a picture of one or the other in opposition to the economic, medical, social-identity and, finally, technological spheres.

4.1. Market and consumption: Third age consumers vs. fourth age consumers

Economics has always been decisive in the classification of age—in the definition of those stages of life that enshrine the entry into the world of work and retirement from it, thus drawing a divide between those who actively participate in the country’s Gross Domestic Product and those who instead need to withdraw from the job market and end up enjoying goods and services guaranteed by social security policies.

In a consumerist society, the definition of identity associated with the third age consumer and fourth age consumer emerges from the marketing strategies adopted by stakeholders who address people of the third age as negotiators of their lifestyle and consumers of the fourth age as needing social welfare. These strategies deal with the socially constructed representation of the older adult consumer. In this regard, Twigg (2018) points out—referring to the strategies of effacing, diluting, fragmenting, and endorsing that magazine publishers use geared towards elderly women—the need to dissolve the tensions that fashion implicates in the context of “becoming older women”. In addition, third age consumers are conveyed as identifying with Fit, Fashionable, Functional and Flexible, i.e., the four “F”s (Marshall & Rahman, 2015) which celebrities embody as tools for the promotion of products. Even when they are involved in designing products for ageing (Hitchcock et al., 2001) they are recruited to identify and satisfy their needs and their aspirations in the guise of the third ager.

On the other hand, the fourth age represents “the biggest group amongst the many impoverished groups of consumers of health and social care” (Gilleard & Higg, 1998, p. 236) whose consumption is linked to “will to health” (Higgs et al., 2009) which invests not only personal desire, but also the approach of policies focused on healthy ageing (Green, 2013). Thus, health consumption and forms of care (José, 2020), the adoption of

assistive technologies and ICT both in private homes and in long-term care facilities (Schlomann et al., 2020) depict seniors—and especially those of the fourth age—as a health problem causing the heavy impact of the Baby Boom on the economy to split, during retirement, into healthcare and social care consumers when referring to the fourth age, and into consumers of products or leisure in the case of third age.

This review brings out the distinction made in identifying consumers of health services when it comes to the fourth age, and consumers of anti-aging products and leisure activities when the focus is instead on the third age.

4.2. The performance of older people: Engagement or coping

What emerges from the review is that the performance of older people takes the form of engagement when referring to the third age, and instead of coping strategies when such actions are referred to the fourth age.

Third-age activities have always been at the heart of government policies (Collis & Mallier, 1996), and in particular the agency of third-agers is strictly linked to activities carried out while in the full possession of their physical capacity and mental faculties, which allows for choosing actions rather than being subjected to them. Hence comes the choice of the term engagement as an umbrella term that allows us to describe the activities that the literature associates with seniors, taken as the action of engaging, but also the state of being engaged, in activities.

On the other hand, work that takes into consideration fourth agers' agency utilizes terms like persistence, dignity (Lloyd et al., 2014) life changes that can be explained with the concept of coping (Pearlin & Schooler, 1978).

To give some examples of this dualistic view, first of all, senior participation in organizations is correlated with a healthy lifestyle, since organizations (either religious or to spread knowledge) and community programs tend to enlist active people with optimistic life attitudes as promoters in the moment when the organization is achieving success and these seniors are going through the ageing process (Kozerska, 2016; Boyes, 2013) in tandem. Conversely, older people in poorer health tend to spend less time publicly engaged, especially in full-time work (Moen & Flood, 2013).

In addition, being engaged through physical activities is one of the dimensions identified in the engagement of the third age as a means to grow old successfully. It is collocated not only in the social construction of the “stay healthy” and “anti-ageing” canons of contemporary society, but also in people's individual choice to use technologies on themselves, as explained by Foucault (Allain & Marshall, 2017). This, in order to achieve their own happiness, empowered to do what they like most, (Hurd Clarke, Currie & Bennett, 2020) which becomes essential in the self-esteem of those whose cells are biologically ageing and causing a decline during the so-called fourth age not generally associated with physical activity.

Among the engaging experiences linked to active seniors, learning is the most mentioned in the literature that identifies old people as older adult learners, older learners, senior learners or older students. What grabs our attention is not the specific knowledge or skills learned by them, but rather the impact of experiences like language

learning (Pot, Porkert & Keijzer, 2019) and music long-life education (Laes, 2015) in becoming tools to slow the decline of cognitive abilities during ageing, promoting the empowerment of older adults as able and free to make their own choices. On the contrary, when the focus is on people of the fourth age who decide to take up studies, it does not reflect in commitment activity, but in a sort of willingness to cope with the difficulties of everyday life. In fact, even when activities like music learning are experienced by fourth agers as a means for social interaction, developing new skills and as a means for creative self-expression (Varvarigou et al., 2013); it poses implications for musicians working with older adults who therefore need strategies to shift from being musicians to facilitators of guided musical activities in the development of strategies to meet the diverse needs of older people. Among the papers analyzed, 19.6% mention the university of the third age, but this would require further study, not feasible for lack of space herein. In keeping with what Laslett held, that is, that “for those preparing for self-realization in the Third Age, the established educational system is indispensable” (Laslett, 1989, p. 168), what is significant is the emphasis that such works place on the years worth being lived—those of the third age—in terms of the social, physical, and emotional benefits that participation and involvement in life settings afford us.

4.3 Technology and Covid strike the social construction of ageing

Given the need to take into account the influence that context has on the study of ageing, one must inevitably consider two recent phenomena with a strong impact on the social construction of the third and fourth age: digitalization and the Covid-19 pandemic. Both, despite being intrinsically different external factors, are perceived as food for thought on these two age categories’ applicability in contemporary society.

First, it is important to highlight that the term digitalization in this review concerns the adoption of technology, and specifically the extent of its use, leaving the design and advertising that were partially addressed above by the wayside. In both cases, whether we refer to third and fourth agers’ use of technology, the focus is on the benefits that ICT brings to seniors, those who need assistance from health professionals in nursing homes (Swane, 2018), and also on those who regularly use social networks to retrieve general information or to get in touch with family and friends or take part in other activities such as guided tours or theatrical and cultural events (Gitto, 2021).

Secondly, although it seems evident how the Covid-19 pandemic context has exacerbated the polarization between active old age and vulnerable old age, the policy strategies adopted to mitigate the spread of the virus have led to reuniting senior citizens in a common sentiment of experienced discrimination. On the one hand, the high number of fatalities in nursing care where, as Higgs and Gilleard argued (2021), fourth ageism was manifested in the implicit assumption that the population of nursing homes was a less important category for politicians than other groups when decisions were made on their needs, considering their death sometimes inevitable or at least less important than that of the young or adults. On the other hand, seniors also felt anger at the use of conventional age groups in politics to justify restrictions imposed to mitigate the spread of the virus, getting the impression of being “nothing but a number” (Higgs &

Gilleard, 2021) experimenting the legitimate and institutionalized use of age taken as "the assumption of intra-age-category similarities and differences between age-category beyond the date of birth", (Fletcher, 2021, p.487) ignoring that each category has its own characteristics, values, and definitions.

5. Discussion and Conclusions

In an attempt to understand the reason why the social categories of the third and fourth age struggle to mirror contemporary society, what emerges is how these are used in antithesis; a paradoxical approach that depicts the third age as a valuable, active period in life, which contributes to a positive image of ageing in the public space, politics, and scientific discourse, active consumers of products, services, protagonists of their lives. Whereas the fourth age is presented as potentially problematic, which embodies that notion of ageing as a problem. What happens is we are seemingly urged to remain in the third age phase as long as possible, by emphasizing lifestyles related to physical activity, consumption, entertainment, positive attitude, rejecting vulnerabilities including those that come with the fourth age—that political discourses on active ageing seek to eliminate at all costs—or rather to encourage the reduction of the years lived in that "black hole" of ageing (Gilleard & Higgs, 2010) that otherwise leads to consider old people with health problems as "the other" of the older people category.

The second consideration is the undesirable transition of status from the third to the fourth age, a passage devalued precisely because it is not socially desirable and does not provide for cooperation between the protagonists who live it and those who are on the other side of the fence. It is in fact taking into account that, as Glaser and Strauss argued the desirability of a passage is the product of a collective review (Glaser & Strauss, 1971), therefore the undesirability of the transition to the fourth age is attributable to the social and cultural context in which the awareness of finiteness close to the liminal experience in fragility has increased, conceptualized as the point of transition through which an elderly person passes from the third to the fourth age (Nicholson et al., 2012) which is in turn sanctioned by health professionals who establish when a person loses autonomy and management of daily life.

The third point to address is the conventional classification that leads to the tendency to group people with particular characteristics which exclude individuality together into that social construct of the third and fourth ages that doesn't necessarily match the older respondent. This is evident doing fieldwork when "heroines" appear (Townsend, Godfrey & Denby, 2006), continuing to care for others in their fourth age, to keep busy, to learn new skills, or those counter-stories that challenge the biomarker of biological vulnerability and affect the views of dominant groups (Phoenix & Smith, 2011).

Last but not least, the pivotal reflection of this research concerns the risk of ageism incurred when conducting research and deciding to adopt the categories of the third and fourth age. Defining ageism as a serious national problem as "prejudice of the middle-aged against the old [...], a personal revulsion to and distaste for growing old, disease, disability; and fear of powerlessness, "uselessness," and death" (Butler, 1969, p.243), we may establish that the adoption of preconceived labels for older people risks

joining the processes of discrimination as they bypass the individual choices that form one's identity. Although trying to avoid the risk of using the term ageism as an overextended concept, and sometimes used too broadly (Higgs & Gilleard, 2020) one concludes that the social sciences risk venturing into the realm of discrimination by using preconceived labels for the classification necessary to scientific research, feeding ageism.

In conclusion, this research does not seek to deny the importance of using categories such as the third and fourth age, but rather stresses the importance of contextualizing because when social changes occur, as it is the case with the above-mentioned covid pandemic, they question the meanings attributed to classifications and make some categories difficult to apply to increasingly complex contexts, providing inspiration for researchers to rethink the category of old age not in terms of a dichotomy, but as a mosaic of the seniority in which each piece asserts its presence depending on the time and place from which the mosaic is observed.

6. Limits

Research limits are related to the review's retrieval of exclusive content in digital format, in addition to the selection of articles only and not books. Finally, the linguistic choice to include works written only in English is also a limit.

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