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POSITIVE EFFECTS OF MODERNIZATION ON LATER LIFE

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Positive Effects of Modernization On Later Life

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Summary

Early gerontological theories (e.g., role theory, subculture theory, disengagement theory, activity theory and modernization theory) on the study of the elderly used to concentrate on the discussion of the effects of various kinds of social change on individuals' later life adaptation. Modernization has conventionally been perceived as a bad dream for most elderly people. It is the modernization which deskills them, devalues their experiences, take away their authority, ... and finally leaves them in misery.

The validity and applicability of this simple relationship between modernization and the misery of later life as a result of the decline of social status have been challenged by more recent comparative studies on a number of developing and non-western developed societies. There are also growing evidences in both developed and developing societies showing that the quality of life is improving rather than deteriorating.

This paper, by presenting some of the findings of the author's survey of 198 elderly people and 245 younger adults in Hong Kong, tries to demonstrate the possibility of the existence of some positive effects of modernization on later life. This paper also tries to highlight the conceptual and methodological biases of the traditional elderly research on which the negative association between modernization and the social status of the elderly is based.

Introduction

Early gerontological theories used to concentrate on the discussion of the effects of various kinds of social change on individuals' later life adaptation. The initiation

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1 This paper was presented at the 31 Annual Meeting of the Canadian Sociology and Anthropology Association held on June, 1996, at Brook University, St. Catherines, Ontario, Canada.
and development of the role theory (Phillips, 1957; Cottrell, 1942) in the 1940's, activity theory (Havighurst and Albrecht, 1953; Burgess, 1953-54) in the 1950's, aged subculture theory (Rosow, 1967; Rose, 1965) and disengagement theory (Cumming and Henry, 1961) in the 1960's and the modernization theory (Cowgill and Holmes, 1972) in the 1970's demonstrate researchers' special interest in the study of the relationship between social change and late life adjustment or successful aging with special focus on changes of social roles and social status of the elderly.2

A shared and prevailing assumption among these theories is that old age is associated with a decline in health status, functional inability, reduced income, loss of social status, and increased social isolation. With this assumption, later life has always been regarded as problematic to individuals. It has also been perceived to be costly to society in terms of health care, social services, housing, and retirement payments. The continual rapid growth of the elderly population witnessed in both more developed and less developed societies, accordingly, has been treated as a new and urgent social problem which deserves academic researches and policy measures. These preoccupations of the nature of later life and of the social consequences of population aging are widely reflected in the conclusions of most western elderly studies (early elderly studies in particular) on the life pattern, adaptation problems, and health status of the elderly, on social attitudes towards the elderly, as well as on related policy papers and documents.

One of the major social structural causes for the misery of later life, as argued by these early gerontological theories, is rapid socio-economic development or modernization which consequently deskills the elderly, separates them from their family members, and takes away their employment opportunity. With the

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2 On top of these well-known theories, there are also other theories receiving relatively less attention, such as continuity theory (Fox, 1981-82; Morgan, 1976; Atchley, 1971), labeling theory (Gubrium, 1973; Kuypers and Bentson, 1973), and exchange theory (Dowd, 1975; Martin, 1972).
predomination of the social disorganization perspective in the sociological study of social problems at that time, early sociological studies on the elderly also witness strong commitment to the study of the effects of social change on the individual's later life adaptation. Several social processes of social change, such as industrialization, urbanization, nuclearization of family structure, and technological development, have been identified as the major structural transformations which lead to role loss, decline in social status, weakening of intergenerational social interaction and support, and reduction of the social and economic well-being of the elderly.

The validity and applicability of this simple relationship between modernization and the misery of later life has been challenged by more recent studies on a number of developing (e.g., China, India, Thailand, Nepal, Pakistan, Sri Lanka, Chile, Dominican and Kenya) and non-western developed societies (e.g., Japan, Hong Kong, and Korea). There are also growing evidences in a number of developed societies, such as the United States, showing that the quality of life of their older citizens is improving rather than deteriorating. It is also evident that the social welfare and social service measures for the elderly in most developed and developing countries have significantly been improved during the last decades.

This paper, by presenting some of the findings of the author's survey of 198 elderly people and 245 younger adults in Hong Kong\(^3\), tries to demonstrate the possibility of the existence of positive effects, apart from negative effects as emphasized by traditional gerontological studies, of modernization on later life. Let us start with a review of the early and contemporary gerontological studies on the elderly with a special focus on the relationship between modernization and the social life situation of later life.

\(^3\) The survey was conducted in 1991. The population of the survey was the elderly, aged 60 or above, who were living in Kwun Tong and Eastern Districts of Hong Kong. The response rate of the elderly sample was 69.0%. It was 66.0% for the adult sample (aged 18-59).
Early Gerontological Study on the Elderly: The Emergence of Negative Views Towards Later Life

In line with Linton's and Cottrell's work on later life adjustment in the early 1940's, most early gerontological and sociological researches on the elderly attempt to conceptualize and measure the adjustment of individuals to their later life and to identify the social characteristics, life patterns, as well as the factors that may affect the individual's process of adaptation to changes as they grow old. The social implications of the growth of the elderly population or the expansion of longevity have been seen societally more in problematic terms rather than with a sense of celebration. The growth of the elderly population has widely been seen as a new crisis to society, a burden on society and their careers, or a new sort of social problem requiring both academic and policy reactions as well as appropriate institutional resolutions. To individuals, the process of aging has become synonymous with problems requiring individuals' adjustment or adaptation.

(1) Role theory

The role theory has always been recognized as the earliest theory to try to understand individuals' adjustment to old age in the context of role loss (Hooyman and Kiyak, 1991; Kart, 1985). The theory postulates that people play a variety of social roles throughout their life course. Every society used to convey social roles and related age norms to individuals through the process of socialization. Growing old in an industrial society will lead individuals to a situation of experiencing role loss. Adjustment to such a role loss becomes the most determining variable to successful aging, usually indicated by the degree of life satisfaction.

For example, when people grow old they may lose their roles as husbands or wives after the death of their spouses. They may also suffer from loneliness when they lose their close friends. More importantly, mandatory retirement will make them lose
their master role, the worker role, in a modern society. In addition, as modern society is basically a youth-oriented society, norms that exist for the elderly, if any, tend to reflect middle-aged standards. Such biased age norms may in turn not only make the elderly become roleless, but also may reinforce negative stereotyping to the elderly which may consequently hurt their self-concept and cause them to feel worthless, depressed, and unhappy in later life (Hooymen and Kiyak, 1991:134-36).

Such a relationship between role loss and adjustment to old age has been substantiated by Phillips’ study. Among the interviewed respondents, it was found that those who were suffering from any one of the above-mentioned role loss, such as the retired or the widowed, would show significantly more maladjustment to old age, as indicated by self-reports about the amount of time devoted to daydreaming about the past, thinking about death, and being absent-minded than those who could retain the worker role or the spouse role (Phillips, 1957).

(2) Activity theory

The activity theory asserts that it is desirable for the elderly to maintain as many middle-age activities as possible, and to substitute new roles for those that are lost as a result of retirement and widowhood (Lemon, Bengton and Peterson, 1972). It is the central idea of the theory that the more activities individuals engage or participate in, the higher degree of life satisfaction they will more likely obtain (Havighurst, Neugarten and Tobin, 1968).

The theory gains empirical support from both the studies of Lemon, Bengton, and Peterson (1972) and of Knapp (1977). Activities were classified by them into three types: informal (with friends, relatives, and neighbors), formal (participation in voluntary organizations), and solitary (maintenance of household). It was found that the greater the amount of informal activity, the greater the life satisfaction. However, the relationship between formal activity and life satisfaction was found to be negative
whereas a very weak but positive relationship between solitary activity and life satisfaction.

Crandall (1991:103-4) interpreted the results as a conformity to the belief of the activity theory that increasing age would inevitably face many losses. These losses could lower self-concept of the elderly. Informal activity, which was by definition more intimate than the other two types of activities, could provide the elderly with some support to lessen the negative impacts of such losses. Therefore, the more intimate and frequent the activity, the greater the likelihood of support.

The activity theory has been one of the most popular theories in the field of the study of the elderly. Its proposal has always been most welcomed by the care-givers. It also gains merit for its suggestion of an active later life. Cockerman (1991:53-54) concluded that the theory was an approach to understand the social behavior of the elderly in terms of how well they denied the fact that they were elderly.

(3) Disengagement theory

The disengagement theory can serve as an antithesis of the activity theory. Compared to the activity theory, the disengagement theory suggests a totally different proposal for individuals to adjust their later life. Instead of being active in order to be well adjusted, Cumming and Henry (1961) suggested that the elderly should decrease their activities, interact less frequently with others, and seek more passive roles. The theory postulates disengagement from major social roles as inevitable and mutual when one grows old. Not only should the elderly try to disengage from society, through the development of norms and laws, they should also try to push the elderly to disengage.

Accordingly, disengagement from major social roles in later life is both functional to society and beneficial to individuals. Disengagement of the older members from society can give more opportunities to the younger members and
maintain successful social equilibrium and social stability. To individuals, disengagement from major social roles may also release them from heavy duties. The degree of life satisfaction of the elderly is, therefore, associated with the amount of reduction of the number and importance of their roles.

(4) *Subculture theory*

The subculture theory was developed by Rose in the early 1960's (Rose, 1965). The theory shares a common view with the activity theory and disengagement theory that old age will bring along some kinds of change of activity and behavior. The central proposition of the theory is that old people will interact more frequently with other old people and less with the young as they grow old, thus forming an aged culture with distinctive ideas, beliefs, values and behaviors.

Rose identified a number of demographic, ecological, and social-organizational variables that may contribute to the formation of an aged subculture. These included, for example, the rapid growth of the elderly population, the segregation of the elderly in inner cities, and the centralization of elderly social services in inner cities. In addition, negative stereotyping or image held by other younger members of the society towards the elderly and the decline of employment opportunities of the elderly also contributed to the exclusion of the elderly in participating in normal social activities and interacting with other social groups (Crandall, 1991; Kart, 1985).

Concentrated interaction among the elderly will positively lead to the development of aging group consciousness and accordingly enhances their self-conception or life satisfaction (Longino, McClelland, and Peterson, 1980). However, the aged subculture may also lead to physical and social segregation of the elderly. The theory has received empirical support from studies of old-age segregated settings, particular in retirement communities (Sherman, 1975; Bultena and Wood, 1969).
(5) Modernization theory

The modernization theory is basically a theory of social change. The application of the modernization theory to aging or the study of the elderly was pioneered by Cowgill and Holmes in the early 1970's. They asserted that there were systematic relationships between the extent of modernization of a society and the social status of the elderly.

Cowgill and Holmes (1972), through comparative studies of fifteen societies, identified four major aspects of modernization which would consequently lead to the decline of the social status of the elderly. These aspects included advances in health technology, application of scientific technology in economic production, urbanization, and improved rate of literacy and introduction of mass education. On the one hand, while enjoying the benefits of extended longevity from advanced health technology and new job opportunities from industrialization, the increase in number of old people sharpened the intergenerational competition of job between the elderly and the younger adults. Given that most of the elderly received less education than the younger adults, they were eventually forced out of the labor market or left in less prestigious positions. By losing the work role and the prestige from employment, most elderly would suffer from a reduction of income and eventually from a declined social status.

At the same time, urbanization would lead to increased geographical mobility and accordingly separate the elderly from their adult offspring and weakened the intergenerational interaction and support. The promotion of mass education made the younger generation become more educated and skillful than their parents. All these changes associated with modernization would generate an increase of both social and intellectual segregation of the elderly, and in turn lowered their social status.

After the initiation of Cowgill and Holmes, the modernization theory has received growing concern and empirical support, though with some modifications
(Palmore and Manton, 1974; Palmore and Whittington, 1971). The theory has become the most dominant theoretical perspective in the field until the early 1980's. Major criticisms on the modernization theory center on the cultural diversity among different societies which lead to the inability of the theory to be applied in non-western societies.

To sum up, early gerontological studies on the elderly emphasize effects of various aspects of social change generated by the process of modernization on the later life adjustment process. To be able to cope with this, individuals have to either disengage from the major roles that they used to perform or replace them by new roles or activities. On top of the emphasis on the social roles, social status, and life satisfaction of the elderly as well as their adjustment problems, another stream of their interests in elderly studies is on the study of the beliefs, attitudes, and opinions held by various social groups towards the elderly. Specific areas of interest include, for example, social attitudes towards the elderly, social image of the elderly, and social stereotyping of the elderly. Several proposals have been made for the elderly to be able to achieve successful aging. The underlying assumption of most sociologists as well as those social gerontologists is predominantly based on the view that modernization, in terms of industrialization, urbanization, technological advancement, and promotion of mass education, may lead to the decline of social status and the loss of major social roles of the elderly and in turn make adjustment in later life become not only necessary but also difficult.

Guided by such an assumption, applied or problem-oriented studies of the process of individuals' adjustment, of structural transformations that may affect individuals' successful aging, and of social attitudes and perceptions towards the elderly have predominated. The continual growth of the elderly population and changes associated with old age are simply seen as sources of elderly problems. The elderly, as a problematic social group or socio-economic burden, are always deemed
to be suffering from a declined social status, loss of important social roles, negative stereotyping, and is in need of institutional rearrangements.

Research findings during the 1950's and 1960's had always demonstrated that old age was associated with a number of negative characteristics. It was most often found that the social image of old persons were physically unattractive, asexual, decline in intelligence, loss of energy, and suffering from various forms of physical and mental deterioration (Kogan, 1961; Tuckman and Lorge, 1958). The personality characters of old persons had also been characterized as conservative, narrow-minded, bad-tempered, and with lowered self-conception (Slater, 1963; Golde and Kogan, 1959; Barron, 1953).

In addition, old persons were always labeled to be socially isolated and segregated, lonely, religious, inadaptive, unhappy, and in need of social assistance or social services (McTavish, 1971; Tuckman and Lorge, 1958). Last but not the least, they were found to be stereotyped as economically independent, non-productive, and suffered from poverty or reduced income (McTavish, 1971).

Contemporary Gerontological Study on the Elderly: Rethinking of the Negative Views on Later Life

Gerontological interests in the study of the elderly have experienced some shifts since the mid-1970's. In sociology discipline, for example, one of the shifts is on the reconceptualization of the social definitions and meanings, as well as the sociological significance of aging. The elderly problem is no longer perceived simply as a sort of social problem caused by various forms of social disorganization during the process of modernization or socio-economic development. Rather, the study of aging and its related problems are recognized as a special field of sociology. Aging, being conceptualized as one of the major structural features and as a fundamental social process of all societies, has invited numerous sociological investigations on the interrelationship between aging and social change and between aging and social
interaction, and on the structural factors that may affect the successful aging of the individual.

Sociologists and many other social gerontologists have also put explicit efforts on testing the applicability of various theories and theoretical perspectives initiated during the early period of the development of the field, and on examining methodological issues involved in conducting elderly research. The growth of comparative studies on the testing of the prevailing negative relationship between modernization and later life (e.g., Kaiser, 1993), the testing of role theory (e.g., Richardson and Kilty, 1991), activity theory (e.g., Turner, 1992; Khullar and Reynolds, 1990), and disengagement theory (e.g., Johnson and Barer, 1992; Hazan, 1982), the development of age stratification theory (e.g., Riley, Foner and Waring, 1988; Streib and Bourg, 1984), the introduction of life course approach (e.g., Arber and Evandrou, 1993; Hareven and Adams, 1982), and the growing applications of various longitudinal research designs (e.g., Sabin, 1993; Zimmerman, Jackson and Longino, 1993) in elderly research are some examples.

The study of social attitudes towards or social stereotyping of the elderly and later life remains one of the most popular areas of study in the field. However, the very focus of this area of investigation has been shifted from the identification of various types and forms of social stereotypes to empirical tests of the validity of the prevailing negative stereotyping of the elderly, to methodological issues in measuring the social perceptions of the elderly, and to the debunking of myths towards later life.

Let me cite some research findings to demonstrate the inadequacy of the assumption on the negative relationship between modernization and the social status of the elderly and the possibility of the existence of positive effects of modernization on the quality of later life.

Kaiser found that the elderly in Chile, Dominican, Sri Lanka, and Thailand could make important contributions to family and community life in terms of their active participation in organizing domestic, social, and cultural activities. They were
also major contributors to the economic stability of their families. There was, therefore, no evidence to support a decline of social status due to modernization (Kaiser, 1993). Martin in studying other groups of countries, including Bangladesh, India, Nepal, Pakistan, and Sri Lanka, obtained similar results. He further concluded that the status and well-being of the elderly would be closely tied to the economic development of their countries and to the distribution of increased benefits to the elderly (Martin, 1990).

The elderly in Japan and Korea can also retain their relatively high status and receive respect from the younger generation because modernization did not breakdown their strong cultural heritage of both family and social support and identity (O'Leary, 1993; Suh, 1992). The maintenance of the social status of the Japanese elderly is also a product of the promotion of respect and gratitude towards the elderly in the moral curriculum in Japan's elementary and secondary school education (Nakamura, 1994).

On the other hand, some negative effects on the social and economic well-being of the elderly resulting from structural transformations accompanied with modernization are also found to be plausible. For example, the reduction of contacts with and opportunities to be co-resident with adult sons and daughters resulting from the nuclearization of the family structure and urbanization have always been seen as important reasons for the elderly losing social and financial support from their offsprings and have accordingly led to negative effects on their social and economic well-being (Demos and Jache, 1981; Green, 1981). However, as Hareven (1995) surveyed, the reduction of contacts with some members of the family did not necessarily lead to social and economic difficulties for the elderly, if the major caretaker remained undetached because caretaking for older parents was always not by multiple caretakers. Huyck (1995) also found that contacts and feelings did not end when an individual moved from a family of orientation to a family of procreation. In
other words, when adult offsprings left their older parents, changes in relationship styles, rather than in intensity, were most likely to happen.

The growth of bureaucratic structures and the expansion of the serving sector during the process of modernization, according to DeViney and O’Rand (1988), had created new job opportunities for most of the elderly, specially for the older women. Moreover, Clark (1992-93) also suggested that, after analyzing data collected from 51 countries by the World Bank, modernization was negatively associated with the relative access of the elderly to professional and technical positions, but not to administrative, managerial, and serving positions.

The relationship between modernization and the decline of social status has also been challenged by growing evidences showing that the quality of later life is improving rather than deteriorating. The introduction of social security and social insurance programs in most western societies and some developing countries have already made later life become more secure in terms of economic stability (Haber and Gratton, 1994). The expansion of societal resources allocated to welfare and social services, to health care systems, as well as to social assistance for the elderly also make the majority of the elderly to be able to be freed from most of the hardships caused by reduced income, unemployment, degeneration, and widowhood (Cox, 1993; Cockerham, 1991; Brown, 1990; Foner, 1986).

With improved quality of life and guaranteed social security, some research findings have already indicated that later life in modern society is much better than that in the traditional society. Some elderly are even found to be economically better off than the young. They in turn have always been the target group of marketing. The welfare of the elderly can also be guaranteed by the growing political influence (senior power) of the elderly population in election. The growing influence of the elderly on policy formulation make them become one of the major social groups that most politicians seek support from and negotiation with (Aiken, 1995; Elder and Cobb, 1984; William, Evans and Powell, 1981).
Concerning the negative stereotypes towards the elderly, a large volume of research, using a variety of research designs, has been conducted to substantiate that the prevailing stereotypings of the elderly and later life are incorrect or just reflect the life style and situations of the minority rather than the majority of the elderly. Among them, the research of Harris and his associates (1981) has been frequently cited. Based on the data collected through a nationwide survey on more than three thousand Americans, they found that only one-fourth or less of the elderly respondents matched with the listing of the most serious elderly problems by half or more of the respondents of the younger age groups (aged 18-64). In other words, there was a clear discrepancy between what people thought the later life would be and what it actually was. The conclusion of Harris and his associates is further supported by many other research findings of similar kinds (Aiken, 1995; Cockerham, 1991; Austin, 1985; Tuckman and Lorge, 1983).

A number of social stereotypings of the elderly and later life has been empirically proved to be just myths, rather than facts. The majority of old people are not lonely and isolated from their families, in poor health, religious as they aged, less productive than the younger ones, living in poverty and ended up in nursing homes and other long-term care institutions (Kart, 1994:7-16). Old people are also not found to being inflexible or resistant to change (Kupetz, 1994; Irion and Blanchard-Fields, 1987), incompetent in learning new things or knowledge (Ryan, Szechtman and Bodkin, 1992; Anooshian, Mammarella and Hertel, 1989), suffering from bad memory (Bowles and Poon, 1982), more probe to accidents (Hoxie and Rubenstein, 1994; Harrell, 1991), and experience reduced activities or increased stress after retirement (Krause and Jay, 1991).

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4 The elderly problems listed by most of the younger age groups were fear of crime, not enough money to live on, inadequate transportation, loneliness, and not enough job opportunities.
Conceptual and Methodological Biases in Elderly Research

The prevailing assumption on the negative relationship between modernization and quality of later life is a combined product of the conceptual and methodological biases embedded in most early gerontological theories and research. Let us highlight some of them.

The first conceptual bias is the neglect of the possible positive effects of modernization in supporting the social status, social and economic well-being, and the later life adaptation of the elderly. In the previous section, attempts have already been made to demonstrate that more recent research findings support the existence of positive effects of modernization on the quality of later life.

Another conceptual bias come from the popular practice of early researchers who treat the elderly as a homogeneous group. Studies of ageism and social perceptions of the elderly consistently find that there is a discrepancy between the relatively negative perceptions of the elderly as a group and the relative perceptions of specific elderly individuals. For example, in studies where individual ratings of the elderly and the young are compared, it is always evident that elderly individuals are more likely to receive the same rating scores as young individuals (Hummert, 1993; Braithwaite, 1986; Green, 1981).

Recent research findings of the study on the social stereotyping of the elderly confirm that not all elderly are the same. More and more sociologists argue that the early researchers often overlooked individual differences of the elderly (Dannefer, 1987; Braithwaite, Gibson and Holman, 1985-86). The term "aged heterogeneity" has been coined and the voice to call for examinations of the diversity among the elderly has been growing stronger (Nelson and Dannefer, 1992; Dannefer, 1988; Maddox, 1987). New classifications of the elderly have accordingly been suggested so as to differentiate them into more meaningful analytical categories, such as the young-old, middle-old, and the oldest-old.
Treating the elderly as a homogeneous group will also lead to neglecting the influence of sociological variables in the study of the elderly. Older persons with different socio-economic background (e.g., educational level, preretirement occupation, religious belief, ethnic origin) and different personal resources (e.g., saving, property, social support network) may encounter different problems in later life (Morris, 1991; Blandford and Chappell, 1990). Individuals with different health status, later life expectation, and marital status are also found to have different degrees of life satisfaction (Stevens, 1993; D'Amato, 1987). Research on the identification of the determinants of life satisfaction or successful aging have also demonstrated the importance of the variable of coping strategy. Individual elderly with different socio-economic background, personal resources, expectation, and health status will cope with later life differently (Aldwin, 1991; David, 1990). It is also found that men and women will age and respond to aging differently (Barer, 1994; McDaniel and McKinnon, 1993).

All these variables in later life adaptation suggest that not all old people will age in the same way and react to aging in the same manner. More importantly, it illustrates that the negative effects of modernization on later life adaptation can be moderated by a number of social variables and cultural characteristics.

Methodologically, the validity of traditional research instruments or techniques in measuring the social attitudes towards the elderly is also questioned by a number of social gerontologists and sociologists. Some researchers have demonstrated that the strongest support for negative stereotyping towards the elderly is derived from the common research practice that respondents are asked to describe the typical old person on a set of rating scales or to compare the typical old person with the typical young adult in a list of qualities or traits (Braithwaite, 1986; Green, 1981). This kind of practice, regardless of types of research designs, has been charged for blowing up the negative social image of the elderly.
Several measurement techniques have been developed and tested in order to alter these overestimated stereotypes. For example, by asking the respondents to rate or to compare an old person with specified qualities, less negative, and sometimes even positive, evaluations on the elderly are found (Puckett et al., 1983). The major reason for such difference lies in the fact that not all elderly are alike. Levin (1988) concluded that stereotypes were basically exaggerations of reality that were applied to entire groups of people.

Another methodological charge upon the early gerontological research is the confusion between age effect and cohort effect which is mainly resulting from the misuse of cross-sectional research designs. For example, some researchers have found, by using cross-sectional research design, that there is a negative relationship between age and score on intelligence tests. They, then, conclude that cognitive abilities will decline with aging. In fact, such differences may probably be due to the lower educational level of this cohort of the elderly as compared to the younger adults, but not to age.

The same logic can also be applied to clarify many other stereotypings of the elderly. For instance, the perception that old people are more religious than the younger adults may also be a consequence of the cohort effect, rather than of age because the society might be less secular when they were young. It is also popular for a researcher to assert that the later life of an individual is problematic, such as lonely, poor, and unhappy, if he is found having but a few friends, seldom dining in restaurants, and having relatively low life satisfaction. However, there is also a probability that he is just having the same life style and expressing the similar feeling of life satisfaction as when he was younger.

The third methodological charge is upon the use of biased samples. Many studies of the elderly are based on samples of old people who are socially underprivileged, institutionalized, poor in health, or recipients of social services. Those elderly who are in better social position, not institutionalized, or are physically
well-fitted are always undersurveyed (Aiken, 1995; Harris, 1990). Readers who are laymen in research methodology will easily fall into these traps of overgeneralization and biased observations. As a result, later life will then often be seen as problematic and the problems associated with old age will also always be exaggerated.

The Case of Hong Kong

Hong Kong is undoubtedly a modern society with a high degree of urbanization, rapid economic growth, and a growing predomination of the nuclear family. It is also a typical young-oriented society in which efficiency and competition are emphasized and professionalism is valued. With these properties, followers of the modernization theory will not find any difficulty in asserting and justifying that the social status of the elderly in Hong Kong has declined and will further decline. Is this the real situation? Let us examine the social status of the elderly in Hong Kong.

There is a Chinese saying that "an old person in a family means a treasure to the family". The general acceptance of this statement can serve as an important indicator of a relatively high social status of the elderly. The data in Table 1 indicates that there is no significant difference between the proportion of acceptance of the younger adults and the elderly respondents of such a traditional Chinese saying. About 83.5% of the elderly respondents, as compared to 84.8% of the younger adult respondents, showed positive attitude to the statement (57.8% "agree" and 25.7% "strongly agree"). Only 1.6% reported "strongly disagree" and 6.4% "disagree".

Concerning the changes of the status of the elderly in family and society, a comparatively more positive view was found among the respondents of the elderly sample, particularly in the change of social status. Four out of ten (41.6%) elderly respondents, as compared to 34.5% of the younger adult, reported that the status of the elderly in the family had "increased" as compared to that of the elderly of the previous
generation. Both samples had around 28% of respondents answering "similar" (Table 2).

When the elderly respondents were asked to compare the social status of the elderly in the present society with that of the elderly in the previous generation, 58.0% of them (46.6% in the younger adult sample) answered "increased". Only 17.8% of them (26.9% in the younger sample) answered "reduced". The gap pertaining to the answer "similar" between the two samples was less than 3%, with a higher percentage in the younger adult sample (Table 2).

Consistent with the view of the younger adult respondents, when asked to compare the number of tasks that the present cohort as compared to the last cohort of the elderly are capable of performing, the majority (55.7%) of the elderly respondents answered "more", with another 19.9% answering "similar". Only 24.4% answered "less". When comparing the contributions between the two cohorts of the elderly to society, 62.0% replied "more", 23.5% "similar" and only 14.5% "less". The respective figures for their answers relating to their contributions to family were 48.0%, 30.6%, and 21.4% (Table 2).

To sum up, the image of the social status of the elderly, as perceived by the younger adult respondents of the present study is quite positive. Such a result is quite in line with more recent studies of the social status of the elderly in western literature as outlined in the previous sections.

On top of these, findings of the present research show that the majority (79.4%) of the respondents of the elderly sample expressed different degrees of sufficiency of income, only 3.5% of them answered "very insufficient" and 11.8% answered "insufficient". Over half (54.9%) of the respondents expressed that they were happy with their present life, with another 11.3% feeling "very happy". Only 10.3% of the respondents felt unhappy with their present life and 1.0% felt very unhappy.
The majority (78%) of the respondents also expressed that the frequency of interaction with their sons and daughters was about the same before and after they reached 60. There were more respondents with the answer "increased" rather than "decreased" (13.9% versus 7.9% for sons and 13.6% versus 7.5% for daughters). Concerning the closeness of relationship, the majority of respondents (about 73%) answered "quite the same as before". The proportion of respondents with the answer "improved", again outnumbered the answer "declined" (23.0% versus 3.3% for sons and 24.5% versus 2.0% for daughters). When the respondents were asked to compare the number of adult children with contact, the situation became most supportive. A total of 91.2% of the respondents answered that the number of sons with contact was "quite the same as before", 6.8% replied "increased", and only 2.0% answered "decreased". The situation of the number of daughters was about the same. About 88.9% reported "quite the same as before", 6.3% "improved", and only 4.9% "declined" (Table 3).

To sum up, research findings of the present study support that later life is not necessarily problematic. Most elderly respondents are not suffering from declined social status, loss of important social roles, poverty, and weakening of social relationship with offspring as a result of modernization. The social status and general quality of life of the majority of them have been improving rather than declining. Most of them are satisfied rather than dissatisfied with their present life situations. In addition, they continues to be respect by most younger adults and their contributions to both society and family are ratified by the younger generation. What are the major reasons for such a positive portrait of later life? To answer this question, let us try to look at some positive effects of modernization on later life.

Despite the fact that the economic modernization and development in Hong Kong over the past decades have deskilled the traditional farmers and the factory workers, it unquestionably created more job opportunities both for the male and female. The unemployment rate in Hong Kong since the mid-1980's has always been
one of the lowest among the developed societies. For example, the unemployment rate was 9.0% in 1975, 3.8% in 1981, and 2.8% in 1986 (Census and Statistics Department, 1986:8; 1990:10). In 1991, it was only 1.8% (Census and Statistics Department, 1993a:29).

The introduction of compulsory education in the 1970's accompanied by the rising status of women in Hong Kong reinforced the female's opportunity for developing a career of her own. For example, the proportion of female with the educational level of upper-secondary or above has increased from 8.6% in 1961, to 15.2% in 1971, 28.3% in 1981, and 41.8% in 1991.\(^5\) The respective proportion for female with post-secondary level of education or above has also increased from 1.4% in 1961, to 2.0 in 1971, 5.0% in 1981, and 9.4 in 1991 (Census and Statistics Department, 1976:58; 1994a:73).

As a result, the majority of young married couples in Hong Kong are employed. For example, the labor participation rate of married women in the age group of 25-34\(^6\) in 1991 has already reached 54.9% (Census and Statistics Department, 1994a:90), even much higher than the overall female labor participation rate (49.5%) in the same year and that of 1981 (49.5%), 1971 (37.1%), and 1961 (32.3%).\(^7\) This in turn provided the elderly with opportunities to work for and to contribute to their families, at least in housekeeping. Their status in the family may then be retained. This situation is more likely to happen when the young couples have children that need their parents to take care of.

\(^5\) Calculated by the author based on data of the main report of the 1986 Hong Kong By-Census (p.25), and the main report of the 1991 Hong Kong Population Census (p.73).

\(^6\) The selection of the age group of 25-34 for reference is based on the fact that the median age at marriage for male was 29.1 and for female was 26.2 in 1991.

\(^7\) The female labor participation rates of 1971 and 1961 were recorded in the report of the *Hong Kong Social and Economic Trends, 1964-74* (p.5). The overall female labor participation rate in 1981 was recorded in the main report of the 1991 Hong Kong Population Census (p.90).
The family structure of Hong Kong is undoubtedly predominated by nuclear families. More than two-third of the families in Hong Kong are nuclear families (Lee, 1991:130). It is also a fact that most young couples prefer neolocal residence after marriage rather than to live with their parents. However, one of the by-products of the economic development of Hong Kong is the exceptionally high land prices. The land price has risen at least ten times since the mid-1980's. At the same time, the standard of living of Hong Kong has also increased markedly. The median household income has increased from 2,955 Hong Kong dollars in 1981 to 5,160 dollars in 1986, and 9,964 in 1991 (Census and Statistics Department, 1994a:63). In 1971, the figure was only 708 Hong Kong dollars (Census and Statistics Department, 1993b:13).

With these exceptional high land prices and standard of living, most young couples have to defer their plans in purchasing new homes or in renting apartments. This may be the reason why the headship rate of the age group of 65 and over (53.6%) is much higher than that in the age group of 25-34 (29.3%) as reported in the 1991 Census Report in Hong Kong (Census and Statistics Department, 1994a:68). It is, therefore, reasonable to expect that most old people may still have their adult children living with them.

It is quite universal that modernization always brings along with it improvements in social welfare and services. The introduction and the expansion of the social security program since the early 1970's may, to a certain extent, remove absolute poverty and income insecurity from most of the elderly, especially for those who could not afford any investment while they were young, are not eligible to apply for a low rent public estate flat, or are suffering from disability. The continual expansion of the variety of social programs in meeting the different interests and needs of the elderly may also make retirement become a time for leisure, a chance for self-actualization, and for completing tasks that they might not have time for when they were young. In addition, the relatively inexpensive access to television
entertainment, newspapers, and other broadcasting programs may make time go by faster and more enjoyable.

Moreover, Hong Kong is also a good place for shopping and widow-shopping. Almost every household in Hong Kong has a television set and radio player which may provide most older people with inexpensive entertainment. In fact, most studies of the leisure activities of the elderly consistently find that watching television, listening to radio, and shopping are some of the most popular leisure activities of the respondents. Later life may, then, become more enjoyable rather than lonely.

We may also note the mediating function of culture in the process of modernization. On top of saving for emergencies, another cultural heritage of the Chinese is to buy an apartment as a long-term investment or for old age security. For those who cannot afford to own an apartment, the majority might be eligible for renting a low rent public estate flat which is in practice a life long contract. According to the data of the 1991 Census Report, 38.2% of the living quarters of Hong Kong belong to such rental flats subsidized by the government (Census and Statistics Department, 1994a:102). The latest statistics show that around half of the population in Hong Kong are benefit from such subsidized housing (Hong Kong Government, 1995:209).

As expenditure in housing constitutes a significant proportion in the consumption pattern of most Hong Kong people, being able to own a flat or to rent a flat with low rent not only can assist the elderly in maintaining their economic well-being after retirement, but can also help them retain their social status, for ownership of scarce resources always imply power and influence. The development and advancement in communication networks and mass transit systems in our small territory may also limit the negative effects of the nuclearization of the family on the interaction between the elderly and their family members not living together.

All these factors may constitute a situation where not only can most of the elderly retain their social status and maintain stable social interactions with their
family members, but also secure certain degrees of their income stability and economic independence after retirement as well as preserve the meaningfulness and enjoyment in later life.

In-depth interviews with the elderly during the stage of exploratory study of the present study also revealed that most of the elderly who responded are quite satisfied with their present life. The major reason for such satisfaction is based on their views that the later life of their parents were comparatively more difficult than they are. The standard of living, health status, as well as social services provision for the elderly, as compared to their parents, have significantly improved as Hong Kong experienced its process of modernization in the past decades.

Concluding Remarks

The major purpose of this paper is to try to remind readers of elderly research reports and policy-makers of elderly social services that there is a possibility of positive apart from negative consequences of modernization on later life. The neglect of such a kind of consequence may lead to negative social stereotypes towards the elderly and later life. In fact, a review of the elderly research in Hong Kong has confirmed that most elderly research, especially conducted by the social work profession, indicates that the study of the positive effects of modernization on later life has always been a missing research agenda (Law, 1995).

However, it is not my intention to say that later life is free of problems. It is also undeniable that a considerable proportion of the elderly may be in poor health status, separated from their family members, are suffering from poverty, and feel lonely and unhappy, yet they never represent the majority.
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Table 3  Self-evaluated changes in social interaction with offspring in later life(%)  

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<td>Daughter</td>
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<td>(152)</td>
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