Social research for empowerment: the case of South African seniors

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Abstract

Community organizations and non-governmental bodies in South Africa are concerned about the benefits accruing to their constituencies from social research. The article addresses social research questions from the perspective of the emergent grey-power movement in South Africa. The advantages and disadvantages of isolating the elderly as a separate research category are discussed drawing on comparisons with other marginalized social categories. The paper reviews the role of social research in promoting emancipation of the elderly during the apartheid and transition period. It is argued that during the apartheid era attitude studies provided the few means for the disenfranchised elderly to voice their grievances concerning social inequities. It is recommended that research on ageing during the transition period move beyond problem-oriented studies of the elderly to discover the positive contributions which older South Africans can make to post-apartheid society. Better knowledge of the strengths as well as the weaknesses of the elderly are essential to build a database for grey power.

Research on ageing and the aged in South Africa has a short history. This is to be expected in a society which is youthful in demographic terms. African societies are more concerned with youth issues. "Ordinary Africans still tend to think of old age as a time of rest and honour for *a small number of people*" (Peil, 1987: 459, emphasis added). The bibliography of Southern African publications in the field of gerontology shows that the volume of research on ageing expanded rapidly between 1970 and 1990 (Ferreira, Esterhuysen, Rip & Setiloane, 1991). Fifty publications are listed for 1990, compared with only eight for 1970. It is evident that a greater number of researchers have been attracted to the field and that the range of topics under investigation is widening.

From the viewpoint of the professional researcher the increase in the volume of gerontological research might be construed as a positive sign of the growth of knowledge about the older segment of the South African population and its concerns. For target groups and other parties involved in the research enterprise this interpretation may not be self-evident. Although there is great respect among lay persons for good social research which subscribes to the basic principles of scientific inquiry, there is considerable public debate about the benefits to be derived from basic and applied research. In more recent times public opinion tends to favour applied research which produces emancipatory benefits for target groups. Applied research which addresses social equity and underdevelopment issues is placed high on the social research agenda of community groups and non-governmental organizations. Increasingly, marginal or disadvantaged target groups are commissioning their own policy-relevant research and inquiries which fit the description of what is commonly known as action or advocacy research.

The emergent culture of entitlement to which many disadvantaged groups in South African society subscribe adds a new twist to the contemporary debate about the public benefits of social science research. From the vantage point of disadvantaged groups, many basic research endeavours appear callous in that they do not address social equity issues which require urgent attention. While many socially disadvantaged target groups may have a high regard for scientific integrity, they also acknowledge a partisan interest in the research conducted on their behalf. In their quest for empowerment these target groups are particularly concerned about the selection of foci of research and personnel, and about the manner in which the research is conducted.

South Africa's emergent grey-power movement[1] may share the concerns of other community initiatives. The movement can be expected to have a vested interest in gerontological research to realize its objective of empowering elderly individuals and furthering their collective cause. The empowerment task is made more difficult because the movement caters for a heterogeneous elderly population made up of diverse socio-economic and ethnic groups. To date the movement has attracted its main support from the privileged white sector of the population (Ferreira, 1991). This following includes the more militant activists who advocate collective action to further the cause of the elderly. Among the black urban sector of the population the luncheon club movement (Mzizi, 1987, 1989) fulfills many of the aims typically associated with grey power. It is possible that the more tradition-oriented rural blacks, who are the numerically strongest group of elderly in South Africa, do not support the activist stance. Recent studies suggest that the majority of the black elderly subscribe to the ideals of the veneration society (McCallum, 1991), which regards as self-evident that advanced age is or should be a social advantage. The common concern about quality care for the frail aged, which conforms to the veneration ideal, cuts across the many socio-economic and cultural divides in South Africa's plural society.

A legitimate question posed by the grey-power movement is how its following of both the activist and veneration persuasion can derive maximum benefit from the social research endeavour. It is against the background of the contemporary

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South African debate on the utility of social research that trends in gerontological research are reviewed.

This article addresses three focal questions:

(1) What are the consequences of singling out a particular social category, such as the elderly, for special consideration in social research?

(2) How should research roles be redefined to empower members of the grey-power target group?

(3) Which research products make the largest contributions to a database for empowerment?

Special studies of the elderly

The first question concerns the need for a special research status for the elderly. Before attempting to provide an answer it is important to consider that the elderly are inadequately represented in regular research efforts. There is a tendency to overlook older cohorts in general population surveys conducted among South Africans. It is noteworthy that exclusion criteria linked to chronological age discriminate against the old and the young in equal measure. Cut-off points for defining the target population for opinion polls and general population surveys are usually fixed somewhere at 16 – 18 years at the lower end and 60 – 65 years at the upper end. The younger and older age cohorts are treated as marginal groups for research purposes. Exclusion is usually justified on technical and convenience grounds. The substantial extra costs of sampling small segments of the population are cited as an excuse for an age cut-off. This can be resisted. In a society that has denied the vote to its numerically stronger minorities, responding to attitude surveys and opinion polls represents one of the few channels for participation in the democratic process. In terms of its mission statement the grey-power movement would be advised to urge seniors to exercise this vote.

Comparative studies of different age groups and special case studies of the elderly are alternative research options to general population studies. In the case of studies which deal exclusively with the advanced age group, caution is advised concerning the choice of topic for study. Special studies could have serious negative implications for the empowerment of seniors. Literature reviews of studies dealing with specific groups in society suggest that special case studies have tended to focus exclusively on problem issues. In the South African case, numerous problem accounts concern the plight of the white elderly, the inadequacy of their nursing homes, and service centres. Highlighting the problems of a particular group creates social awareness but also tends to stigmatize and marginalize the broader social category to which the problem group belongs. This is the case when negative stereotypes pertaining to problem groups ''rub off'' on the category as a whole. Once branded as a problem category, it may be difficult for members of the senior lobby to regain their position in mainstream society.

In modern-industrial society there is a danger that problem-focussed research may reinforce the negative image of ageing. Widely publicized results of problem-oriented research may reinforce the ''poor dear'' or sympathetic endearment approach to issues concerning the elderly, rather than the image of the competent elderly which is conducive to senior empowerment (Giesen & Datan, 1980).

Comparisons with other peripheral age and occupational groups, such as the youth and the unemployed, provide useful insights. Unlike the youth, seniors may experience greater difficulties in undoing negative publicity fostered by problem accounts or using it to their collective advantage. There may be fewer chances to repulse negative images. Seniors, unlike the youth, cannot ''outgrow'' negative stereotypes. Media coverage of the ''lost generation'' of South African youth has inspired strong policy reactions which may increase the younger generation's chances for rehabilitation and reintegration into the mainstream of society. It is questionable whether the elderly can evoke such strong sentiments, which would target them for affirmative action measures to redress past disadvantage.

The comparison between the situation of the elderly, who are retirees and pensioners, and the unemployed is also pertinent. The unemployed (under the high rates of unemployment which South Africa is currently experiencing) are not a homogeneous group. The category includes both men and women and vast age differences. Problem accounts tend to overlook these finer distinctions.

Research has revealed that the unemployed cannot identify with what amounts to a negative reference group (Møller, 1990a). In the absence of an alternative positive reference group, they reject the negative stereotypes attached to their social category by making subtle distinctions between good and bad elements among the unemployed. Unemployed individuals sustain morale by aspiring to move out of the category and distancing themselves from negative elements. Older South Africans who cannot come to terms with the negative image associated with the social category of the ''aged'' in a youthful society may have similar aspirations. Unsympathetic problem accounts which publicize only the negative aspects of growing older heighten society's negative anticipation of ageing and shape distorted intergenerational attitudes. An antidote of positive social reports may be needed to strengthen the self esteem and morale of the elderly. Unlike the unemployed, the elderly cannot and do not need to move outside of their social category to gain self esteem. Here the elderly have a distinct advantage over the unemployed in that they have access to a positive reference group in the local grey-power movement, which embodies a strong and healthy image of ageing.

The grey-power following of the activist and the veneration variety have in common the need for social recognition if their demands are to be met. Their personal images of strength may be undermined by research efforts which concentrate on the negative aspects of ageing. If the route of special studies of the elderly is taken, foci of study which give older people the opportunity to be seen in a positive light would be a recommendation. For example, case studies of the older adults who participate actively in service groups and community life would fit into this category.

To return to the question posed at the outset, whether it is in the interests of elderly South Africans to encourage separate studies of their situation, the compromise solution would be to judge the merit of specific research projects bearing in mind the need to sustain positive images of ageing. Members of the grey-power lobby may deem it in their interests to appoint a research ombudsman to assist with this task. Alternatively, the consumer forums advocated by Ferreira (1991) could fulfil the watchdog role.

Another means of overcoming the senior research dilemma may be to seek a better balance between case studies of problem groups and inquiries into the circumstances of the rank and file elderly. Social reports on the rank and file elderly may go a long way toward dispelling some of the myths surrounding ageing in South Africa.

In South Africa, research among the ''normal'' elderly has already begun. The first baseline study of the social circumstances of persons 60 years and older was conducted in 1990-91 by the Centre for Research on Ageing at the Human

Sciences Research Council (Ferreira, Møller, Prinsloo & Gillis, 1992).

Trends in South African gerontology suggest that the sheer volume of research activity in the field should in time produce a more balanced picture of ageing with its positive and negative facets, thus promoting a healthier image of seniors in our society. The Co-operative Research Programme on Ageing has a mission to promote such a balance.

The research process

The second question addressed in this article concerns the benefits to be derived from specific research roles. Which research roles empower the elderly and which roles deepen their marginal position vis-à-vis mainstream society? Empowerment suggests the notion of seniors playing active roles in the research process as equal-status subjects and research partners.

Marginal groups in society tend to be treated as objects of research which play passive roles. Therefore a starting point for empowering the elderly through research is to encourage seniors to become actively involved in the study of the issues which concern them most. There are several local and international examples which demonstrate different models of senior-driven research.

In Germany special adult education courses have been developed to train volunteer elderly researchers (Garms-Homolova, 1988). A Durban inquiry into the housing situation of older residents conducted in the 1980s confirmed that local seniors can fulfill useful roles as field workers (City Engineer's Department, 1986). Lay persons were trained in the techniques of data collection and were remunerated for their field work in the Durban study. In Lenasia, Johannesburg, over 30 volunteers resident in the area, most of them elderly persons, underwent training as interviewers and applied their skills in a community study of the elderly (Padayachee, 1989).

The community self-survey (Lund, 1982), pioneered with great success among South African youth, may represent an equally challenging research task for seniors living in retirement communities. The self-survey method involves residents as investigators who pose the research questions, and then design and carry out their own investigation. The Lenasia study referred to earlier was initiated in this manner. The consumer forums, adapted by Ferreira (1991) from the Australian model for local conditions, apply the same self-determination principles underlying the local community self-survey at the regional and national levels of community.

Community participation, in this case the involvement of older persons, can be built into most research designs. This can be done by enlisting the assistance of individuals or groups in the formulation of research questions and the development of appropriate instruments, and the interpretation of results. The extensive life experience of the elderly can be put to good use in these research roles.

With regard to reporting on research results pertaining to senior issues, members of the grey-power lobby, for example through the proposed consumer forums, might volunteer their services to advise authors on the use of non-offensive language. Many academic journals prescribe the use of non-sexist language. Grey power might present a similar case for banning ageism from scientific journals.

Research outcomes

It is chiefly with the research product which one associates empowerment. Products which contain knowledge about the ageing process, the social circumstances of the elderly, the demographic composition of the older cohorts, the diversity of lifestyles and needs, and the economic and health challenges which the elderly face are powerful tools for policy intervention. Pro-active strategies aimed at improving the quality of later life can result from this knowledge. The question is which direction should research for policy formation take if it is to achieve maximum impact?

Bekker (1991) defines development as the process of improving the life chances and living conditions of all members of society, particularly the poor. In his review of development research undertaken over the past two decades he identifies distinctive phases which may also apply to research on ageing, with particular reference to studies of the disadvantaged elderly. Development research undertaken in the late 1970s to mid-1980s, during what Bekker calls the "apartheid continuity phase", concentrated on the failure of the homelands and urbanization policies to provide for decent living circumstances for the poorer section of South African society. Judging from a cursory review of the Southern African bibliography, referred to earlier, the same trend may be observed concerning limited research output on black ageing.

During the apartheid continuity phase, research was mainly descriptive in nature and focussed on the iniquities of the apartheid system as they affected the everyday lives of the black elderly. Social research was one of the few channels of reaching out to the suppressed black minority and amplifying their needs and aspirations (Lawton, 1981, 1989). The researcher created a legitimate forum for voicing complaints for the voiceless minority. This may have afforded an increment of empowerment to the disadvantaged minority subjects. However this author is of the opinion that inadvertently apartheid continuity research may have entrenched the status quo and retarded black advancement by creating a reliance on research. Given the situational constraints of the period there was little scope for the emancipation of the black subjects resulting from this research.

Social transformation is a major focus of development studies in the "post-apartheid" era. New roles are defined for the research participants. There is a shift in the dominant research paradigm with a greater emphasis on the partnership relationship between target groups and social researchers. The researcher may be called upon to act as a technical consultant, rather than the initiator and director of social inquiry (Zulu, 1991). In order to enhance the emancipatory benefits of research to the target group, subjects participate actively in all stages of research, including the definition of research goals and the tools of inquiry. In some cases the ownership of the research product is negotiable. The principles of good research are not in question. Where a conflict of interests arises between the various participants in the research enterprise, the researcher is entrusted with upholding the values of the professional research community to ensure the legitimacy of the research product and its value for all parties involved.[2]

The most prominent examples of apartheid continuity research among the aged are inquiries into social pensions issues (Human Awareness Programme, 1983). The state old-age pension is one of the most researched and debated topics in South African social gerontology in the past 20 years. However it is doubtful whether this genre of research contributed to the emancipation of social pensioners (Møller, 1986).[3] Research conducted at pension pay points involved a captive audience, a situation which did not lend itself to engaging pensioners as active and equal participants in the research process.

During the "transition" period it is foreseeable that empirical research and academic debate will continue to focus on how best to redress past inequities and apply affirmative

action measures where appropriate (Le Roux, 1990). In order to increase pensioner participation a new approach to the dominant research topic of the apartheid continuity era may be apposite. There are two facets to pensioner benefits: they can be considered a right or a privilege (Møller, 1986). The ageism related to preferential treatment for the elderly can be as harmful to self esteem as affirmative action is beneficial to redressing past damages. The manner in which affirmative action measures are implemented often results in patronage which undermines personal power. Results from the Centre for Research on Ageing's multidimensional survey referred to earlier clearly demonstrate the need for personal power among all groups of South African seniors. It was found that feeling in control of one's life, possibly mediated by self esteem, made a significant positive contribution to life satisfaction.

Evaluation research to ensure that measures taken to redress past inequities do not retard the emancipation of pensioners, may represent a new angle on a familiar theme which is a particularly pertinent one for the transition and post-apartheid period. In addition, the post-apartheid research phase may call for topics of inquiry which go *beyond* redressing the inequalities of the past. Research on intergenerational conflict resolution, confidence building, and social identities are but a few examples of new age topics.

In the transition period it is foreseeable that the competition between generations will intensify. Studies which identify divisive tensions and common interests may supply useful tools for conflict resolution between the generations. In order to bring pensioners back into the mainstream of society there is a need to select research topics which cut across the age divide to address multigenerational interests.

One example is the research commissioned by the KwaMashu Christian Care Society into community reactions to training for senior women in educare. Findings (Møller, 1990b) suggest that training enhances the social status of older women, while equipping them to participate in education, a central value for the younger generations. The KwaMashu Christian Care Society has acted upon these results: educare training is now available to KwaMashu women of all ages (Personal communication; letter to the editor of *Thambodala*, 2(2), September 1991).

Another example is the development of a practical manual for lay caregivers (Lund & Madlala, 1991), the result of two years of participative community research. The manual addresses simultaneously the needs of the middle generation of caregivers and the older generation of care recipients.

It is proposed that in the transition era there will be a need to shift away from purely problem-oriented research to topics which better lend themselves to empowerment. Examples are studies which show that seniors are capable of adapting to change in society and even taking on leading roles. In a positive research vein, one might make a case for promoting the study of factors which enhance wellbeing rather than concentrating on the depressive symptoms which affect the elderly.

This is not to deny that positive gains for empowerment can be made from carefully designed problem studies and their implementations. The aged are easy targets of the crime and violence which have increased during the transition period. Data emergent from victimization studies may assist the elderly to better protect themselves and their life-styles (Glanz, 1991). Action research on the ways and means of empowering the elderly might usefully include an evaluation of practical crime prevention programmes for the elderly based on crime studies.

Research on personal competence may assist grey power to gain the self confidence and drive to make real contributions to building a better society. Many of the interventions which are currently being applied to empower marginalized youth may have useful applications among the elderly, particularly the "young old" (persons aged 60 – 74 years). Skills training workshops and leadership training courses to build self confidence may be as useful to seniors as incontinence (Vilakazi, 1990) workshops. Information collected for a project on senior luncheon clubs suggests that seniors respond positively to such training. Further research is required to test this supposition.

We mirror ourselves in society. It is not enough for the elderly to overcome their social handicaps and make the most of their life chances. Sustained self confidence requires social recognition. By definition grey power seeks to overturn age discrimination and prejudice. Social intolerance is characteristic of the transition period. We can therefore expect social prejudices, including ageism, to increase in the near future.

Seniors require better knowledge of the image they project to society if they are to fight the prejudices directed toward them. Research on the age stereotypes which exist in South African society can contribute to combating ageism. An attitude survey undertaken by Nair (1990) in the Durban area reveals that the elderly are generally viewed in a positive light. The insights gained from Nair's research may assist the middle and older generation to accommodate each other's needs and fears.

Comparison of Nair's findings with those of the Centre for Research on Ageing's multidimensional study (Møller & Ferreira, 1990) referred to earlier suggests that the middle and older generation share many common values, at least within specific population groups. White seniors seem to take immense pride in their physical and social independence which matches the expectations of the middle generation. Similarly, the younger and the older generation in the black community appear to agree on lifestyles. Results from the multidimensional survey intimate that black seniors are adept at using research for making known their grievances as originally intended by the social indicators research movement. Another interpretation is that the overemphasis of the negative aspects in their lives in response to the inquiry is a leftover from the apartheid continuity era. Nair's research suggests that the middle generation of blacks may resent the "complaining ethic" of the older generation (67% of Nair's (1990: 29) respondents agree with the statement "Old people are often too demanding". Making too many demands on the younger generation is the most negative quality of older people identified in Nair's research).

Nair's attitude study is but one example of basic research into age stereotypes with applications in promoting better intergenerational understanding and communication. Research into the grey-power identity – auto stereotypes – may be one of the most challenging research topics for social gerontology in South Africa in the new era. Further media and attitude research is needed to discover positive identities for seniors which cut across the gender and racial divides in South African society.

To conclude the discussion on the need for research into grey power, it is apparent that the research agenda is wide open. In the transition period there will be a need for good research which fits into the various moulds of basic research, which stands up to scrutiny from the scientific community; policy-relevant research which aids decision makers, and research which produces results which are of direct emancipatory benefit to target groups. Aspects of particpation which enhance empowerment can be built into most kinds of re-

search. There is plenty of scope for social research which will equip South African seniors with the special insights and wisdom that they require to face their future with confidence. New policy research trends outlined in this article should ensure that seniors can anticipate that ageism will not feature in the "new" South Africa and that the elderly will achieve the social recognition which is their due.

Notes

1. The grey-power movement in South Africa is a non-political interest group. Eckley (1991) gives a working definition for the South African movement which reads as follows: "Grey power refers to the potentially strong collective identity of older persons who are sensitive to issues which affect them as a group; it enables the group to shape its political, social and economic choices."

2. The stakeholders in community projects in Third World countries typically include funding and development agents, local authorities and policy makers, as well as the target group and researchers. The discussion in this article focuses only on the participants in the research process: the professional researcher and the target group/subjects.

3. A time lag may be involved here. Descriptive studies of pension issues conducted for the second Carnegie Inquiry into Poverty and Development in the early 1980s (Wilson & Ramphele, 1989) may have paved the way for the compilation of practical guidebooks for prospective pensioners (see Association for Rural Advancement (1990) among others).

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