



Univerza v Ljubljani



Cumulative advantages and disadvantages of Portuguese older men

PORTUGAL'S TEAM FINDINGS

OLD GUYS SAY YES TO COMMUNITY
Final Conference, Ljubljana, 11. May 2019

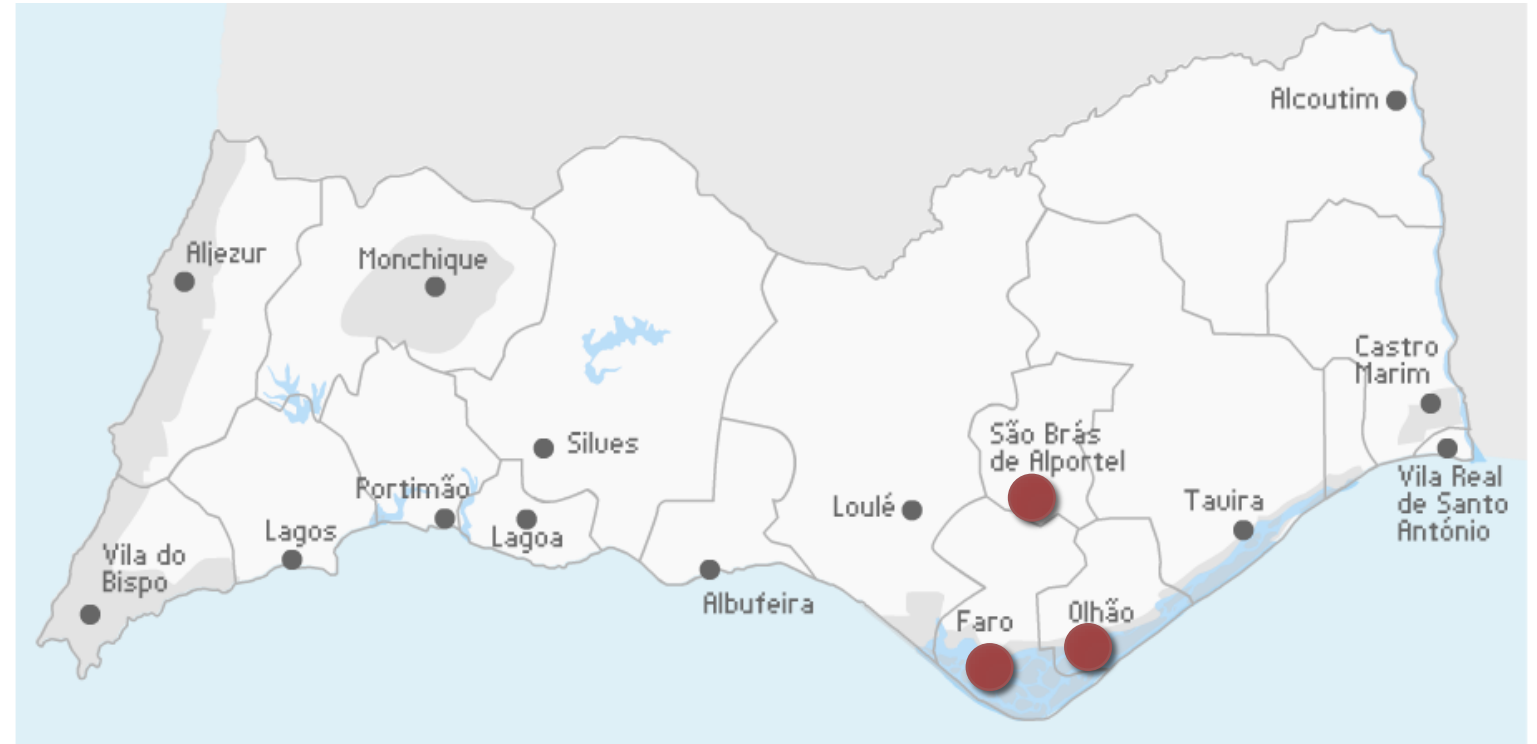
DEJAVNEJŠA UDELEŽBA STAREJŠIH
MOŠKIH V SKUPNOSTI
Zaključna konferenca, Ljubljana, 11. maj 2019

Portugal's Team Findings

- Context
- Methods
- Results
- Discussion
- Conclusion

Investigation context

- In Southern Portugal there is a big gap (geographic, economic, social, cultural) between the urban/ coastal areas and the rural/ inland areas
- We selected two urban areas – Faro and Olhão – and one rural area – S. Brás de Alportel





Methods

- Qualitative research approach
- Semi-structured interviews
- Non-structured focus groups debates
- Emergent content analysis

90 men interviewed based on the following criteria:

1. Educational background
2. Situation regarding work
3. Income
4. Geographic distribution
5. Activity in civil society organisations, clubs, etc.

6 focus-groups debates (participants: members of SCO; local administration)

Analysis: Difficult, until we separated men into 3 groups:

1. urban areas with a very low educational background
2. rural areas with a low/medium educational background
3. urban areas with a medium/high educational background

Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Education and Working Life**

- 4 years of school or less (very common among the working class during the dictatorship regime 1926-1974)
- The majority started to work at the age of 8-12 years old
- Manual occupations or a diverse range of non-qualified occupations
- Although some have a continuity in their professional lives, the majority has an history of going from a non-qualified job to the next one
- Some worked in the informal economy (or were tricked by their employers), compromising their retirement incomes
- A very low financial capital, influencing the remaining life dimensions
- Volumes of social and symbolic capitals: low, not adequate to social mobility



Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Financial capital, Pensions and Goods**

- Almost none with driver's license
- Very few owned or own a car
- Not all have a TV; no computers
- Not all have a cell phone (basic use)
- Very low / survival pensions (180-200€, for example): some have to keep working
- A few have financial support from their relatives
- Live in precarious conditions, within the threshold of poverty or poverty
- Not all have a place to stay
- Some do not have enough to eat – dependent of daily meals from institutions



Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Financial capital, Pensions and Goods**

These men do not have the capacity to react to unexpected events/ problems

When unexpected events take place, such as serious health problems, accidents, the death of their spouses, etc.

- Likely to cause depression, poor mental health
- Provoke some disability or forced retirement
- Reduce the mobility capacity
- Make socialisation more difficult

In short: it deepens their global situation of poverty

Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Transitions to retirement**

Some men cannot retire

The majority face problematic transitions to retirement, which worsen their situation in the post-retirement life.

Major causes:

- Very low income (only a minority receive financial support from their families)
- A problematic mobility, dramatic if they have some disability
- Low mobility and low income compromises socialization
- Social networks tend to be small and unsatisfying
- The majority has problems of isolation and solitude
- Relationships with neighbours are superficial
- To be a widow is generally traumatic and poses a number of practical problems, cause depression and even suicidal thoughts

Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Transitions to retirement**



“I go to the doctor or go to Faro in an ambulance, but I go and come back alone, it’s a sadness.. not too long ago I asked to a grandson of mine ‘come with me to visit your grandmother at the home’ and he told me ‘I don’t have time’. Well, if he doesn’t have the time he doesn’t, it is a sadness (...). I watch TV and seat by the front porch for some hours waiting for the time to go by, I see it go by”.

“There is only motivation when there’s a job so that we feel good; one needs a goal in life. I still have some objectives, but the rest is lacking, work is lacking, a house to live is lacking (...) Tell me, what strengths you think people like me have left to live, the way things are today?”

“Now I feel I’m like a dog and sometimes I say this because I’m wishing to die so I don’t suffer anymore. Why don’t I die? I would lay down now and not awake anymore, because I’m alone.”

Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Transitions to retirement**

A minority of men, however, was able to make transitions to retirement with a noticeable degree of subjective success.

Major causes:

- Some keep an occupation (even if forced to do so...)
- Keep hobbies or activities they have done for some time – e.g. fishing
- Meet regularly with friends in the city public spaces (market, parks, coffee shops, etc.)
- Play games together (cards, dominos, etc.)



Results: Group 1

- Men from urban areas with a very low level of educational background - four years of schooling or less
- **Main activities today**

- Very few have a regular physical activity (if not required by the occupation)
- None participate in learning activities regularly
- Although some have participated in clubs or associations of some kind, they are not active anymore
- Socialisation is the only regular activity which most of these men keep (mostly in public spaces)



Results: Group 2

- Men from rural areas with a low/medium educational background – most from 4 to 9 years of schooling, a few with 12 years
- **Education and Working Life**

- ❑ Almost all started working very earlier, helping their parents in some kind of rural occupation (8-10 years old)
- ❑ The majority are still today small/ subsistence farmers or manual workers
- ❑ A significant percentage works or has worked for the City
- ❑ Low financial capital, influencing the remaining life dimensions
- ❑ Volumes of social and symbolic capitals: low, not adequate to social mobility

Results: Group 2

- Men from rural areas with a low/medium educational background – most from 4 to 9 years of schooling, a few with 12 years
- **Context, goods**

The social-geographical space strongly influences a set of life dimensions:

- A mountainous rural area, structured around small clusters of houses, often isolated, in places that lack the most basic services
- Schools, kindergartens, health centres, pharmacies, etc., are kilometres away – only accessible with a car!
- There is 1 public bus once a week
- Opportunities for culture consumption are rare
- Neighbours are few; meeting places are few and only accessible with a car
- The majority have cars; some are too old to drive
- They all use cell phones (basic use)
- A minority use computers

Results: Group 2

- Men from rural areas with a low/medium educational background – most from 4 to 9 years of schooling, a few with 12 years
- **Transitions to retirement**

For the majority it makes no sense to talk about transitions to retirement:

- If they were farmers they keep their activity after retirement (the younger generations usually do not want to follow their parents occupation)
- Even if they were not farmers, after retirement they have some rural activity in small pieces of land

Major problems they face:

- Mobility difficulties, that influence their socialisation capacity
- Isolation and solitude (socio-geographical in its base)
- Most have sons/daughters, etc., living far away
- Social networks: small and some times problematic
- Access to public health



Results: Group 2

- Men from rural areas with a low/medium educational background – most from 4 to 9 years of schooling, a few with 12 years
- **Main activities today**

Main activities :

- Regular physical activity – typical of rural life
- None participate in learning activities regularly
- Very few have access to culture
- Socialisation is difficult because of the fragmentation/ isolation/ access

Results: Group 3

- Men from urban areas with a medium/ high educational background – most from 9 to 12 years of schooling, some with higher education
- **Education and working life**

- ❑ 9 to 12 years of schooling, some with higher education
- ❑ The majority had access to white collar occupations
- ❑ Access to occupations that yield a good financial capital
- ❑ Their financial capital allowed them to travel, consume culture and accumulate resources that work as a buffer to face unexpected events
- ❑ Significant social capital, cultural and symbolic capital
- ❑ Interest progression in their careers
- ❑ Some had access to local politics; some were a part of cultural movements and leaded or lead associations, clubs, etc.



Results: Group 3

- Men from urban areas with a medium/ high educational background – most from 9 to 12 years of schooling, some with higher education
- **Goods**

- The majority owns a house/flat and have a comfortable life in material terms, property, etc.
- The majority has a car (a significant number is still driving regularly)
- Almost all have and use daily computers, internet, email, social networks, etc.
- All have and use cell phones



Results: Group 3

- Men from urban areas with a medium/ high educational background – most from 9 to 12 years of schooling, some with higher education
- **Transitions to retirement**

The majority has overcome successfully transitions to retirement.

Major factors:

- The accumulation of financial, social and cultural capital – autonomy and financial independence
- Some help their families in financial terms (crisis, unemployment, health problems, etc.)
- Social networks: relatively big (profession), allowing to give and receive social support
- Capacity to tackle health problems or other unexpected events
- Intense patterns of cultural production and consumption, good immersion and participation in the community life
- Intense patterns of diverse activities (including learning)

Results: Group 3

- Men from urban areas with a medium/ high educational background – most from 9 to 12 years of schooling, some with higher education
- **Transitions to retirement**

This does not mean that there were no obstacles during the transition period. More common challenges:

- The enchantment with the increased freedom/ getting rid of the schedules obligations, etc... lasts only for a few months
- Unexpected events such as health problems
- The reduction of socialisation with younger people/ people from the professional networks (very noticeable among those with higher education)
- Questioning their social usefulness/ the social meanings of their new situation

Even so, most of these men could mobilise a set of resources that allowed them to reach a good situation after retirement

Results: Group 3

- Men from urban areas with a medium/ high educational background – most from 9 to 12 years of schooling, some with higher education
- **A focus on social networks**

- Social networks tend to be crucial both to the transition and the post-retirement of these men
- Family occupies a central place in these networks
- Some of these men had build these networks professionally – and this tends to reduce significantly. However:
 - There are evident signs of bonding social capital: a bigger concentration on the partner/ family/ grandsons and granddaughters/ old friends
 - The ones who build their networks in the community (clubs; associations; sports; local administration; theatre groups, etc.) tend to keep these bonds
 - The capacity of making new friends reduces



Results: Group 3

- Men from urban areas with a medium/ high educational background – most from 9 to 12 years of schooling, some with higher education
- **Main activities today**

- A significant part of these men keep a regular physical activity (even if it means some basically walk or walk with pets...)
- They keep significant socialisation activities with friends and family; still travel, etc.
- Only a few participates regularly in formal education or learning (for example, as voluntary teachers in third age universities)
- Most participate regularly in **non-formal** and **informal** learning activities in the community; very active in civil society organisations of some kind

Discussion

- Transitions to retirement

- Most of the factors influencing transitions to retirement are acting over the life course – and not just near the transition period
- The life course perspective is adequate to capture people's experience, and the life changes occurring along the process (Duberley, Carmichael, & Szmigin, 2014)

Our results show that:

1. The majority of the men have problematic transitions to retirement and see themselves in complicated situations in the post-retirement
2. In most cases, the explanations for this fact are found in structural factors that accumulate over the life course and...
3. ... have also effects over secondary factors (ex: health)
4. Only a few men show an agentic capacity to overcome structural problems

Discussion

- Transitions to retirement



Our results show that:

5. Work is one of the most crucial life dimensions to understand transitions to retirement (Schmidt-Hertha & Rees, 2017); however the access to a decent work is strongly constrained by the educational background
6. To get rid of professional obligations can be experienced as a relief (Reeuwijk et al., 2013). But for some men this lasts only for some time
7. Bonding social capital can be important to increase support and self-trust during the transition and after retirement
8. There are important processes of informal learning that help men to tackle transitional challenges (Valadas, Vilhena & Fragoso, 2019)

Discussion

- Cumulative advantages and disadvantages

The theory of **cumulative advantages/disadvantages** has been used to explain inequalities in old age (e.g. Crystal, Shea & Reyes, 2017; Heap & Fors, 2015; Ponomarenko, 2016; Read, Grundy, & Foverskov, 2016)

Our results regarding the men in group 1, show clearly how inequalities can be accumulated and magnified along the life course (Cristal, Shea, & Reyes, 2017)

These disadvantages are also reinforced through timing, that is, through disadvantage at a crucial moment in life (e.g. health problems that lead to early retirement) or through long term exposition to social disadvantage, that is, duration (Ponomarenko, 2016).

Only a few men in group 1 escaped the terrible situation that affects the majority. Although processes of accumulation of disadvantage can be modifiable by human agency, this not an easy process in old age (Heap & Fors, 2015; Walsh, Scharf, & Keating, 2017).

Discussion

- **Cumulative advantages and disadvantages**

In this group 1, it was clear that financial capital in later life is determined by the previous employment history and, therefore, influenced by educational level and occupational status – as confirmed by previous research (e.g. Möhring, 2015; Scherger, Nazroo, & Higgs, 2011).

The men in group 3 depict the reverse situation, that is, how advantages can be cumulative over the life course and have a positive effect in the lives of older adults.

Overall, education plays a crucial role in the cumulative advantages/disadvantages process throughout the life course. Education influences:

- the choice of occupation (Van Kippersluis, O'Donnel, Van Doorslaer, & Van Ourti, 2010);
- life expectancy (Rogers, Hummer, & Everett, 2013);
- financial planning (Tamborini & Kim, 2017);
- cultural participation (Scherger, Nazroo, & Higgs, 2001)



Conclusion

- Echoing the results of previous research (e.g. Grundy & Sloggett, 2003; Mirowsky & Ross, 2005; Schreger, Nazroo & Higgs, 2011; Wildman, Moffat, & Pearce, 2018)...
- ... our study shows that educational background is central to the quality of life of older adults.
- The long-lasting debate on the tensions and connections between social structure and agency
- The importance of fighting the visions on older adults as homogeneous
- The importance of recovering categories such as social class, gender, etc., to explain the inequalities among the older adults.



Thank you

For your attention

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