This chapter presents the way in which gerontologists have understood the relevance of ethnicity and culture to the study of ageing and old age, and the implications that the globalization of international migration have for these understandings. The chapter argues that gerontology’s understandings of these backgrounds needs to be further developed since advancements made by social scientists who specialize in ethnicity have yet to permeate the gerontological imagination. It is worth noting that few efforts seem to have been made to systematically review the gerontological literature on ethnicity. Less than a handful of handbooks in gerontology or ageing published over the past decade have, for example, dedicated a chapter to ethnicity per se (one of the exceptions is Williams & Wilson 2001). The few attempts that have been made have had a limited scope, such as a focus on health and health care for older ethnic groups (e.g. Koehn et al. 2013). On the basis of a scoping review of the research on health and health care for older people with minority backgrounds, these gerontologists argue that ‘theoretical perspectives that incorporate race/ethnicity/culture are not well-developed in the ageing literature even today’ (Koehn et al. 2013: 439). This chapter hence aims to assess the current state of understanding of ethnicity and culture in gerontology, suggesting that the time has come to develop new models.

The chapter is divided into three sections. It begins with a short account of the historical context in which gerontology’s interest in culture emerged. The sub-field of gerontological inquiry known as ethno-gerontology—which is the field that focuses on ethnicity’s (and lately also migration’s) relevance for ageing and old age—grew out of gerontology’s awareness of the relevance of socio-cultural values for the way in which ageing and old age is experienced and understood (cf. Torres 2011). Anthropo-gerontology provided, in other words, the context in which the ethno-gerontological imagination was awoken. The second section of the chapter provides a summary of the major themes that have been addressed by ethno-gerontologists, once this sub-field of gerontological inquiry established itself. As such, this section sheds light on where the ethno-gerontological imagination has been. The third and final section addresses the ways in which the globalization of international migration is challenging gerontology in general, and ethno-gerontology in particular, to develop its understandings of ethnicity, culture and migration.

At the core of the chapter is the argument that the globalization of international migration has not only brought about increased ethnic diversity, but is also challenging gerontologists to
re-think the way in which they regard ethnicity, culture and migration. The chapter aims, in other words, not only to shed light on where we have been and are as far as ethno-gerontology’s understanding of ethnicity is concerned, but also to propose where we might head if we were to regard ethnicity as a theoretically profuse source of information, from which we could expand the gerontological imagination (cf. Estes, Binney & Culbertson 1992). Unleashing the potential to regard ethnicity in new ways requires, however, that we move from the essentialist / primordial understanding of ethnicity we originally departed from to a more constructionist understanding of what ethnicity and culture can mean and why.

**Anthropo-gerontology is born**

Gerontology’s interest in ethnicity grew out of anthropo-gerontology’s interest on culture as a geographical locality that has implications for socialization through the values, attitudes and frames of reference that characterize this locality (for insight into anthropo-gerontology’s history see Rubinstein 1990 and Torres 2011). This interest dates back to the middle of the 1940s when Simmons (1945, 1946), through ethnographic information from 71 non-Western and ‘primitive’ societies, drew attention to the fact that socio-cultural contexts play a role in the way in which the process of ageing, and the stage of life known as old age, are regarded. Another seminal anthropo-gerontological work on culture that is also regarded as important for this field is the work of Cowgill and Holmes (1972) and Cowgill (1974), who compared various societies in order to examine the impact that industrialization, urbanization and modernization have on the status that is accorded to older people (for insight into more recent works that have also had an impact on how gerontology regards culture see Fry *et al.* 1997 and Keith *et al.* 1994). Anthropo-gerontology offered, in other words, the backdrop against which gerontology developed its understanding of the relevance that ethno-cultural values have for the way in which ageing is experienced and understood. The ethno-gerontological imagination grew, in other words, out of an understanding of culture as frames of reference that determine who we are. This understanding of culture is often referred to as the primordial or essentialist understanding of culture and ethnicity (Cornell & Hartmann 1998), since it builds on the assumption that cultural (and ethnic) values are important to people because they are the first ones they are exposed to.

It is worth noting here that in anthropo- and ethno-gerontology, the term ethnicity is often used interchangeably with the term culture. There is, however, a difference between these terms since ethnicity is a background variable used to denote the social group to which a person is believed to (or claims to) belong, while culture is the term used to refer to the ways in which this type of ‘belonging’ is meaningful. Ethnicity is, in other words, the term that denotes the attachments between people that are based on common descent, which is why Jary and Jary (1991) define it as ‘the shared (whether perceived or actual) racial, linguistic, or national identity of a social group’ (Jary & Jary 1991: 151). This why the word ‘belongs’ was written in inverted commas above; ethnic identity is always a situationally determined matter. Wallman (1979) claims that the idea of perception is pivotal to our understanding of ethnicity since ‘ethnicity refers generally to the perception of group difference . . . and the sense of difference which can occur when members of a particular cultural . . . group interact with non-members’ (Wallman 1979: ix). Though these terms are often used interchangeably, it is important to note that the primordial/essentialist understanding of culture and ethnicity was abandoned long ago by social scientists specializing in these areas, as this understanding could not capture the complexity entailed: the fact that people—especially in global times such as ours—often come from many places and cannot be pinned down to a specific locality (which means that they cannot
be assumed to uphold specific cultural values), and the fact that cultural values can be taken up and abandoned through the life course (cf. Torres 2004).

Gerontology is, however, still operating primarily (though not exclusively, since there are some exceptions, e.g. Wray 2007) under the assumption that ethnicity can be understood in the primordial/essentialist manner (cf. Koehn et al. 2013). This is why most gerontologists still take for granted that ethnicity is a background that can affect how people regard ageing and old age; that migrating to a culture that greatly differs from a person’s culture of origin is bound to affect this person in numerous ways; and that ageing in a culture that does not share one’s understanding of ageing and old age can be a challenge.

### Ethno-gerontology establishes itself

Although there have been gerontologists interested in raising the discipline’s ethnicity-awareness for more than 4 decades, it was not until the establishment of The Gerontological Society of America’s (GSA) Task Force on Minority Issues in Gerontology in 1987 that one could begin to speak of ethno-gerontology as an area of inquiry of its own. The establishment of GSA’s Informal Interest Group on International Migration and Ageing in 1993 also attests to American gerontologists’ awareness of how migration can impact the way in which ageing and old age are experienced and understood. In the British context, Blakemore and Boneham (1994), reflecting on the reasons why British gerontology lacks an ethno-gerontological tradition of its own, comment,

> it is understandable that in societies where ‘ethnic politics’ matters, or where there are much larger minority communities than those in Britain, commentators have sought to define a separate field of ethnogerontology.  

(Blakemore & Boneham 1994: 138)

Boneham (2002) has suggested, in turn, that British gerontologists’ seeming lack of interest in ethnicity is based on the assumption that there are few ethnic ‘others’ in Britain—an assumption that could be questioned. Blakemore (1997) suggests instead that British gerontologists’ lack of interest in ethnicity lies not necessarily in the assumed lack of numbers, but rather on the ‘understandable concern … that reliance on “culturalist” explanations can problematize or pathologize minority groups’ (Blakemore 1997: 29). This perhaps explains why both argue against ‘cutting off minority studies in a “research ghetto”, while making it more difficult to incorporate ethnic and cultural comparisons in “mainstream” gerontological research’ (Blakemore & Boneham 1994: 138–9). Regardless of whether or not we think that ethno-gerontological inquiries should ‘segregate themselves’ into a field of their own, the fact remains that there is—at least in the United States—a specific field of gerontological research that is concerned with ethnicity and migration-related issues and that is often referred to as ethno-gerontology.

Once ethno-gerontology established itself, the primary focus became the study of ethnic differences and the social inequality that is often associated with ethnic minority status. Green (1989) has argued that ‘ethnicity has come into ageing research primarily as a concern with a social problem’ (Green 1989: 377). This may explain why most ethno-gerontological research seems to be concerned with measures of coping, adjustment, adaptation and satisfaction, against a backdrop of social inequality (cf. Burton et al. 1992). Two theoretical perspectives are often associated with the study of ethnicity’s relevance for ageing and old age: the double jeopardy and age-as-leveling hypotheses. The former takes for granted that there are two sets of disadvantages that have relevance to older ethnic minorities: those prompted by their marginal status and
those prompted by old age (cf. Dowd & Bengtson 1978, Jackson et al. 1982). In contrast, the age-as-leveling hypothesis proposes that old age exerts a leveling effect on the disadvantages that are found in younger groups (cf. Kent 1971). Both hypotheses have been questioned on numerous occasions (e.g. Blakemore & Boneham 1994), yet most research in gerontology that focuses on ethnicity continues to be informed by them.

Most ethno-gerontological research is, in other words, informed by a structural understanding of what brings about inequality. Characteristic of this research is therefore an understanding of ethnicity as a background that determines not only who we are (as the primordial understanding of ethnicity takes for granted) but also what we have or lack as far as resources are concerned. This understanding is often referred to as the structuralist or circumstantialist understanding of ethnicity (Cornell & Hartmann 1998), and is the one that appears to be implicitly guiding most gerontological research on older migrants at present (e.g. Warnes et al. 2004, Torres 2012).

To this end it seems worth mentioning that some studies have focused on those who migrated early in life and are ageing as migrants (see e.g. Bolzman et al. 2006) while others focus on those who migrated late in life (see Treas & Mazumdar 2002, Casado-Diaz et al. 2004). The latter have sometimes done so after retirement for amenity seeking purposes (such as those often referred to as international retirement migrants; see e.g. Dwyer 2000, Howard 2008) and sometimes for family re-unification, as is the case for those who have migrated in order to join their adult children and their families (see Blakemore 1999, Torres 2006a). Irrespective of which type of migrant the research has focused on, a small number of issues have received attention: older migrants’ post-migration situation (Casado-Diaz et al. 2004, Howard 2008, Torres 2012); intergenerational support (Baldassar 2007, Treas & Mazumdar 2002, Warnes et al. 2004, Zechner 2008); welfare rights (Dwyer 2001, Dwyer & Papadimitriou 2006, Nam 2008); access to care (e.g. Koehn 2009, Warnes et al. 2004) and health-related issues (Emami & Torres 2005, Solé-Auró & Crimmins 2008). Central to all of these strands of research is the assumption that older migrants are more vulnerable than their non-migrant counterparts.

It is also worth noting that ethno-gerontological research is often described as a data-rich yet theory-poor field. The inequality-oriented lens that guides most research in this field—which Burton et al. (1992) referred to as ethno-gerontologists’ ways of thinking—is often blamed for this lack of theory. The atheoretization has, however, also been attributed to other factors. Torres (2004) has argued, for example, that ethno-gerontology lacks theoretical frameworks of its own because the field has yet to regard the migratory life-course as a theoretically profuse source of information about ageing and old age. Or to put it another way, the argument is that older migrants tend to be regarded as empirically interesting research subjects (if we study them, we understand them) as opposed to theoretically profuse ones (if we study them, we understand us). Kramer and Baker (1994) have offered a different explanation for ethno-gerontology’s theoretical stagnation. They have argued that the theoretical state of affairs in which ethno-gerontology finds itself has been prompted by the relatively obsolete understanding of ethnicity that permeates the field. To this effect, when reviewing a series of books on ethnicity and ageing, they write:

In these and many other works on the elderly, ethnicity is presented largely as a fixed, static, invariant characteristic of individuals in homogenous social groups.

(Kramer & Baker 1994: 412)

Ethno-gerontological studies tend, in other words, to regard ethnic background as an attribute, which is why most gerontological inquiries tend to focus on the outcomes that ‘ethnic belonging’ brings, as opposed to focusing on the processes that bring these outcomes into being. This tendency does not chime well with contemporary discussions of ethnicity that regard this background
as ‘a situationally-invoked phenomenon’ rather than something that is an ‘invariant characteristic of individuals in homogenous social groups’ (Kramer & Baker 1994: 412). By understanding ethnicity in this way we are failing to recognize what Green (1989) argues so poignantly, namely that ‘a more powerful ethnogerontology would be one in which the emergent quality of ethnicity, its salience rather than its giveness, would be the starting point’ (Green 1989: 383).

With regards to the current status of this field and where it should be heading, it is important to note what Kramer and Barker (1994) have already stated, but which remains a challenge; namely, that for advancements to be made we need to stop simplifying ethnic groups into large homogeneous population blocks, since this can lead to a confusion of ethnicity with minority status, a conflation of ethnicity with the experience of being an immigrant, and a disregard for the kind of cohort, sex, class, historical and regional differences that are at the very core of what the study of culture—understood as context—is actually about. It is this conflation of ethnicity with the experience of being a migrant that makes the social phenomenon known as the globalization of international migration particularly important for ethno-gerontology.

**Challenges posed by the globalization of international migration**

The globalization of international migration has increased the ethnic and cultural diversity of ageing populations across the world (Warnes et al. 2004), and poses challenges to gerontological research, policy and practice (Torres 2006a). Globalization, for example, disturbs the way in which we study culture because ‘culture has long had connotations tying it to the idea of fixed locality’ (Tomlinson 1999: 27). It also challenges the understanding of migration as a process that entails a move ‘from here to there’, since nowadays (through internet and travel, for example) migrants’ lives are characterized by being ‘neither here nor there’ but rather ‘in between’ (Torres 2013). The globalization of international migration has also brought about greater differentiation as far as migrants are concerned (Castles & Miller 1998).

All of this challenges the assumptions we often used to make about their being almost always disadvantaged. As Warnes et al. (2004) poignantly stated it: ‘older migrants include people who are among the most deprived and excluded in our societies[. . .]and others who are in the vanguard of innovative, developmental and positive approaches to later life’ (Warnes et al. 2004: 310–11). Thus, the differentiation that the globalization of international migration has brought about urges us to abandon the homogenizing ways in which we have tended to regard older migrants in gerontology (cf. Torres 2006b). It suggests also that we need to expand the ethno-gerontological imagination in ways that allow us to focus not only on the differences there are between ethnic groups but also on the differences within them.

Globalization has led scholars to increasingly move on to regard ethnicity in the social constructionist way. This means that some now focus on the ways ethnic and racial identities are built, rebuilt and sometimes dismantled over time and place interactions between circumstances and groups at the heart of these processes. [The constructionist understanding] accepts the fundamental validity of circumstantialism while attaining to retain the key insights of primordialism, but it adds to them a large dose of activism: the contribution groups make to creating and shaping their own identities.

*(Cornell & Hartmann 1998: 72)*

Ethno-gerontologists’ persistent focus on who ethnic minorities and older migrants are (or where they come from) needs, in other ways, to give way to a focus that explores what migration (as a process) and migrancy (as a social position) mean to the way in which ageing and old age
is experienced and understood, as well as to how ethnicity and migrancy as social positions are mediated by other social positions such as gender and class.

**Conclusion**

The globalization of international migration is challenging gerontology in general, and ethno-gerontology in particular, to move forward—as most social scientists interested in ethnicity and culture already have—by embracing the social constructionist approach to these issues. This approach proposes that culture and ethnicity (as well as the social position that being a migrant often entails) must be understood not solely as backgrounds that determine who we are, or the resources that we have (or lack), but rather as backgrounds that are made meaningful in interaction (i.e. ethnicity and culture are, in other words, interesting angles if we want to understand what people do). In this respect it is interesting to draw attention to Koehn and colleagues’ (2013: 456) critique of gerontology’s focus on single categories that hide the heterogeneity of ethnic groups, and its reliance on methodologies that cannot address ‘the inherent complexity of the inter-relationships between markers of differences like ethnicity, socio-economic status, gender and immigration status’.

Gerontologists need, in other words, to shift their attention from the what of ethnicity, which is what the essentialist/primordialist perspective focuses on, to the when and how of ethnicity, which is what the social constructionist perspective draws attention to (i.e. under which circumstances and within which contexts are these backgrounds expected to mean something, to whom are they expected to mean something and how?). Time has come for ethno-gerontology to shift its focus from the research object par excellence so far (in other words, the ethnic ‘Other’) to the phenomena that—using Cornell and Hartman’s phrasing—build, rebuild and dismantle the vulnerabilities with which these groups are associated (e.g. the structures and processes that allocate or deprive them of resources, the conditions under which they interact with others and the ways in which these conditions expand and contract their agency depending on which other social positions, besides ethnicity and migrancy, are at stake). This means that ethno-gerontologists need, as Williams and Wilson (2001) have suggested, to become self-critical about the reasons why they collect and analyze data on ethnicity as well as how they go about making sense of their findings. It is now necessary for us to reflect on the ways in which gerontological research, policy and practice in and by itself constructs ethnicity (and migrancy) in different ways (cf. Torres 2006a).

**References**


