Successful ageing among low-income older people in South Korea

SOONDOOL CHUNG* and SOO-JUNG PARK*

ABSTRACT

The aim of this study was to investigate 'successful ageing' among low income elderly people in the Republic of Korea (South Korea). A sample of men and women aged 65 or more years who received welfare benefits and social welfare services from senior welfare centres and who had good cognition were identified and recruited by the staff of eight such centres in Seoul, the capital city of the country. Face-to-face interviews were conducted with a structured questionnaire using measures and instruments that were selected following a literature review and previous studies of low-income older people. The survey instrument was pre-tested with seven subjects to ensure the comprehensibility of the items, and 220 main interviews were conducted in the respondents' homes and at senior welfare centres during October and November 2006. Factor analysis identified three factors in successful ageing: 'a positive attitude towards life', 'success of adult children', and 'relationships with others'. Men reported higher scores on successful ageing than women. It was concluded that the concept of 'successful ageing' does apply to low-income elderly people in Korean, although its components have little to do with material or social success as conceived by previous studies of the general elderly population in either western or Asian countries.

KEY WORDS – successful ageing, low-income older people, community residents, strengths, South Korea.

Introduction

In the Republic of Korea (hereafter, South Korea), population ageing is proceeding rapidly because of increased life expectancy and the improvement of the standard of living. The population aged 65 or more years reached 9.3 per cent of the total in 2006, and it is expected to rise to 14.3 per cent by 2018 (Administration on Statistics 2006). With prolonged life expectancy, older people wish for the best quality of later life and to maintain good physical and mental health. Asking older people what they

* Graduate School of Social Welfare, Ewha Womans University, Seoul, South Korea.

understand by 'successful ageing' reveals what they find positive in their lives and the conditions that promote satisfaction with their lives.

Although there have been many studies of 'successful ageing', most papers have been abstract discussions of the concept (Rowe and Kahn 1997; Young, Frick, and Phelan 2004), and most investigations have focused on older people's hopes and aspirations (Baltes and Lang 1997; Kendig 2004; Mitchell 2002). In South Korea, moreover, most empirical studies have focused on middle-class older people, partly because they have drawn convenience samples from the 'senior welfare centres' where mainly comparatively active and affluent older people gather (Hong 2005; Kim *et al.* 2005; Paik and Choi 2005; Park and Lee, 2002). The centres provide social and recreational facilities. Most of the attenders at their social and educational programmes are not poor, however, and only approximately 30 per cent are welfare-recipients, or more generally, low-income older people (Lee and Cho 2007). It is more difficult for re-searchers to gain access to the latter. In addition, studies of successful ageing in most countries have targeted older people living in the community (Charbonneau-Lyons, Mosher-Ashley and Standford-Pollock 2002; Chou and Chi 2002; Reker 2002; Torres 2003).

The very term 'successful ageing' encourages the general notion that it refers to achievements, but if it is interpreted as 'success in achieving high social status or income', successful older people will equate to those of high status – those who attain wealth and honour and are recognised as 'successful' by other people. As most researchers are aware, however, for most people a successful life is not defined by the same criteria that would be applied by the professional, landed or wealthy classes (Choi, Back and Seo 2005; Schulz and Heckhausen 1996). All older people can enjoy 'success' according to their own criteria and objectives. In other words, success is not necessarily as defined by others or by societal or class norms. While an individual low-income person does not have wealth or enjoy prestige in society at large, she or he can have very high life satisfaction, but there has been little research into what 'successful ageing' entails among low-income elderly people. This study attempts to correct the neglect, by identifying the prevalence of successful ageing among this group in South Korea, and by identifying and evaluating the associated or predisposing factors.

The concept of successful ageing and its predisposing factors

The early discussions of successful ageing saw it as rather similar to life satisfaction or quality of life (Fisher 1995; Meeks and Murrell 2001; Poindexter, Valentien, and Conway 1999), but recently there has been

more attention to its intrinsic meaning. The notion has triggered several related concepts that are distinguished by a profusion of adjectival qualifiers of ageing, namely 'active', 'productive', 'optimal', 'affluent', 'robust' and 'healthy' (Butler 1985; Garfein and Herzog 1995; Laidlaw, Power, and Quinn 2004; Lassey and Lassey 2001). Rowe and Kahn (1997: 433) argued that the concept of successful ageing included 'three main components: low probability of disease and disease-related disability, high cognitive and physical functional capacity, and active engagement with life'. In this framework, an improvement in the quality of life is successful ageing, and successful ageing improves the quality of life. In this study, however, successful ageing is defined as 'being satisfied in old age with one's quality of life, and adapting successfully to various changes and losses that accompany ageing'. It is further asserted that 'success' is independent of social or economic success but is achieved when a person is satisfied with their later life.

Many studies have devised hypotheses about the factors that contribute to successful ageing. These must vary, however, not just with socio-cultural conditions but also with each individual's physical, social and economic attributes. The common factors of successful ageing have not yet been described. Ryff (1989) identified six criteria for successful ageing, which consisted of positive interaction with others, a sense of purpose, autonomy, self-acceptance, personal growth, and environmental fit. Several scholars have proposed additional dimensions, particularly good health and (adequate) income (Collings 2001; Fisher and Specht 1999; Hsu 2007; Young *et al.* 2004). Some scholars have suggested that supportive family relationships or friends are an important component of a successful old age (Guse and Masesar 1999; Laferriere and Hammel-Bissell 1994), which has a strong reference to the person's social and care support networks.

In 'robust ageing', the four factors productive condition (or capacity), emotional condition, functional condition, and cognitive condition have been proposed as components of successful ageing (Chou and Chi 2002; Garfein and Herzog 1995). Baltes and Lang (1997) also nominated cognition as an important factor, and added integrity of the sensory functions, vitality for exercise, personality and social resources. Cultural variations in successful ageing have rarely been explored. Torres (2003) found that Iranian immigrants in Sweden had changed their view of successful ageing after their migration. A Taiwanese study found that elderly people valued health and independence, economic security, and family support (Hsu 2007). Similar findings are not yet available specifically for low-income older people, and the literature still tends to imply that each country has a single, homogeneous culture.

Low-income older people and successful ageing

In this paper, 'low' income is taken as equivalent to the level that is used by the Korean government to define poverty and as the criterion for an entitlement to three forms of material assistance: (a) a state welfare benefit (income support), (b) certain welfare services provided by non-profit community organisations, and (c) permanent rental housing. In a study of low-income older people's opinions about their lives, Lee (2000) found that, in general, they had positive attitudes despite their straitened economic circumstances. In particular, they were satisfied with the environment, their family relationships and daily occupations, although dissatisfied with their material standard of living. By contrast, Kirk and Rittner (1993) found from a study in Florida, United States, that approximately 70 per cent of low-income older people evaluated their quality of life as 'bad' or 'very bad', and felt lonelier or more unhappy than older people in general. Son and Jung (1999) also found that among older people living in the community who received welfare benefits, few made positive or strong negative assessments of their lives, and that more than one-half expressed feelings of boredom, melancholy, loneliness, fatigue, disappointment, uneasiness, criticism or anxiety.

Because there has been little research on successful ageing among low-income older people, the most relevant evidence to date is from studies of life satisfaction. From a study of the relationship between cohabitation with family and life satisfaction among low-income elderly people, Chung (2003) concluded that cohabitation, self-efficacy, mental health and age were important correlates of life satisfaction. Other studies have found that conjugal support and the filial piety of adult children are major factors promoting the subjective well-being of elderly people who receive welfare services (Crosonoe and Elder 2002; Laferriere and Hammel-Bissell 1994; Roos and Havens 1991), and there is evidence also that good physical health, adequate household income, religious belief, self-esteem, and satisfaction with community welfare services are influential (Chang, Choi, and Kim 2004; Lim and Lee 2003).

Design and methods

Research subjects and data collection

The subjects were low-income people aged 65 or more years who were welfare recipients or clients of social welfare services. Convenience sampling from the users of senior welfare centres was used partly because no other sampling frame of older people was available. Elderly people

with good cognition who could answer the questions were identified and recruited by the staff of eight centres in Seoul, the capital city of South Korea, and only those who gave informed consent were included in the study. Cognitive functioning was not formally screened but influenced the staff selection and, in a few cases, the interviewers found that the participant could not comprehend or respond to the questions. All the respondents had normal cognition or were only mildly impaired. As to physical functioning, all the respondents had one or more limitations in either the Activities of Daily Living (ADLs) or the Instrumental ADLs. The questionnaire items were pre-tested for comprehensibility and validity with seven older people who attended a self-help group of the residents of a rental apartment block. The main survey was conducted during October and November 2006. The face-to-face interviews were conducted by social welfare graduate students in the participants' own homes or at self-help group meetings. The interviewers were trained for three days using an instruction manual. Altogether 220 participants completed the questionnaires and formed the sample for analysis.

The measures and scales

The first step in the development of the measures was to generate scale items that captured the required constructs. The likely factors and items were identified through a literature review, with modifications and supplementary items pertinent to low-income older people in South Korea. As most previous research used items relevant to active older people with relatively intensive non-family social lives, it was unclear whether such items would apply to low-income older people. As the literature review showed, it is not easy to identify the factors specific to those on low incomes. For example, family relationships, self-esteem, social support, social relationships, physical health, and economic conditions are relevant to all income groups. Measurement tools were therefore developed that would be sensitive to various hypothesised factors, including those shown to be relevant to the general older population and those thought relevant to those on low incomes. Some items specific to Korean indigenous culture were also considered (Kim *et al.* 2005).

The total number of items in the questionnaire was 73. Of these, 29 were those administered by Charbonneau-Lyons *et al.* (2002) to represent the seven factors: social and family relationships, financial status, independence, self-worth, cognitive function, physical appearance, and achievements. These were supplemented by 44 items that came to notice through the literature review. Nineteen of the 20 items on adults'

perceptions of successful ageing administered by Phelan *et al.* (2004) were included (the other was in the Charbonneau-Lyons *et al.* set). Twenty of the 30 items used by Kim *et al.* (2005) to measure successful ageing in the specific context of Korean culture were also included. Three items used by Choi *et al.* (2005) were added: an agreeable and stable daily life, ability to self-manage, and having formal social support were selected and used. 'Self-acceptance' was added, being a construct suggested by Ryff (1989). Each item was to be scored by the respondents using a Likert scale with five categories, from 'strongly agree' to 'strongly disagree'. Higher scores indicated more successful ageing. The items selected are specified in Table 1.

Analysis

First, exploratory factor analysis was performed using maximum likelihood extraction of the principal components and direct oblimin factor rotation with Kaiser normalisation. Differences of means for the sub-groups of the sample were examined using *t*-tests.

Results

Characteristics of the respondents

Altogether 220 interviews were completed, 181 (82%) with women and 39 (18%) with men. The age of the respondents ranged from 65 to 93 years and the average age was 77.5 years. As to marital status, 77 per cent had been widowed, 10 per cent were married (with the spouse alive), eight per cent were divorced, and four per cent had never married. Four-fifths (80%) were living alone and 76 per cent were religious. As for self-rated economic status, 78 per cent said it was 'very bad' or 'relatively bad'. By comparison, a national survey found that 50 per cent of the general elderly population rated their economic condition as bad (Chung *et al.* 2005). Reflecting the sampling criteria, 91 per cent of the respondents received the 'basic living allowance' from the government, and the remainder also had low-incomes. Turning to self-rated health, 70 per cent rated their health as bad, which compares with 49 per cent of the general Korean elderly population in the national survey (Chung *et al.* 2005). A large majority (84%) had more than one chronic disease, and 60 per cent and 47 per cent answered that they had no limitations in respectively the Activities of Daily Living (ADLs) or Instrumental ADLs. In the national survey, however, 92 per cent and 78 per cent reported no limitations in ADLs and IADLs (Chung *et al.* 2005).

TABLE 1. *The factors of successful ageing and their structure among low-income older people, South Korea 2006*

Factors and items	Loading	Communality	Factors and items	Loading	Communality
Factor 1. Positive attitude toward life (27.2%)[1]			**Factor 2. Success of adult children (7.9%)**		
I have adapted myself to changes in old age.	0.822	0.620	When I need, my children help me materially and emotionally.	0.867	0.631
I have the kind of genes that help me age well.	0.788	0.606	I am fully cared for by my children and can talk unreservedly.	0.828	0.595
I keep thinking in the right direction (*i.e.* positively).	0.765	0.584			
I have a positive attitude.	0.749	0.612	I keep in touch with my children and meet them frequently.	0.637	0.459
I can satisfy all my desires.	0.735	0.585			
I will keep in good health until close to my death.	0.710	0.502	My children have no financial worries.	0.611	0.373
For the most part, I am satisfied with my life.	0.698	0.541	My family is always there for me.	0.597	0.456
I can cope with challenges as I age.	0.678	0.565	My children have made their way socially.	0.536	0.367
I will have a long life.	0.672	0.447	All my children are married and are getting along amicably.	0.535	0.422
I am in good health.	0.630	0.472			
I am happy.	0.629	0.465	My future will see further progression (improvements).	0.480	0.392
I am content with what I have achieved.	0.610	0.607			
I am generally content.	0.552	0.409	I have a good relationship with my children.	0.460	0.248
I feel satisfied with myself.	0.544	0.637			
I am engaged in pleasant activities everyday.	0.543	0.637	**Factor 3. Relationships with others (5.9%)**		
I am proud of the things I have done.	0.530	0.469	My neighbours and I support each other.	0.758	0.590
I act by my own inner standards and values.	0.472	0.467	I have good friends.	0.695	0.446
I contribute to others.	0.445	0.310	I enjoy the company of others.	0.693	0.478
I exercise regularly to keep in good health.	0.443	0.253	I am valued by people around me.	0.671	0.622
I have had positive influences on others' lives.	0.423	0.285	Others say that I am valued.	0.509	0.441
			I keep involved with my town/community.	0.421	0.218
			Factor 4. Sense of control (4.6%)		
			I am in control over my life.	0.507	0.592
			I live in a pleasant town/community.	0.506	0.375
			I don't feel loneliness or isolation.	−0.479	0.415
			I feel no repentance about my life.	−0.405	0.380

Notes: The principal components were extracted using maximum likelihood and the rotation method was oblimin with Kaiser normalisation. 1. The percentages indicate the proportion of the variance associated with the factor.

Factor analyses

There were five steps in the analysis to identify the factors in successful ageing. At the first step, the descriptive statistics (means, standard deviations and skew) of all 73 variables were examined, as recommended by DeVellis (1991). No outliers were found for any item, so none were eliminated. At the second step, the criterion that at least 100 cases are required for factor analysis was applied (Lee and Lim 2005): three items that had scores for no more than 14 respondents were excluded, leaving 70 items. At the third step, the 'missing values' were surveyed. Eight items about adult children had been answered by just 106 of the 220 respondents. The non-response was almost certainly because in South Korea, if a low-income older person is to receive the welfare benefit, they must prove that they have no children who can provide support. Many of our respondents therefore avoided straight answers to the questions about children. These eight items were not excluded, however, because in each case there were at least 100 responses. At the fourth step, the rule was applied that variables with item-to-total correlations of less than 0.30 should be excluded, on the grounds that the item is aberrant or idiosyncratic and inappropriate for the overall explanation (Choi *et al.* 2005; Roobina 1990): 17 items were deleted, leaving 53 for analysis. At the fifth step, multi-colinearity among the items was examined through correlation analysis. Two items had a correlation stronger than |0.8|, and that with the greater variance was excluded (Stevens 1992), which finally left 52 items for analysis.

Exploratory factor analysis

According to Hong (1999), researchers using exploratory factor analysis should not only have a good knowledge of previous research on their topic, but also prior views or a theoretical model about the likely number and nature of significant factors and a rationale for how they contribute to an understanding of the phenomenon that is being studied. Although the number of factors influencing life satisfaction among low-income elderly people was not exactly known, previous research suggested that four factors would be influential (Choi *et al.* 2005; Chou and Chi 2002; Crosnoe and Elder 2002; Sung and Cho 2006).

Several factor solutions with different numbers of factors were initially considered (Thompson and Daniel 1996). The four-factor solution was however most consistent with the theoretical formulations. Following the selection criteria recommended by Lueg and Finney (2007) and Stevens (1992), items with low (<0.4) factor loadings were deleted, which left the four factors with 39 items as shown in Table 1. Factor 1 comprised 20 items and was named 'Positive attitude toward life', Factor 2 had nine items and

was named 'Success of adult children', Factor 3 had six items and was named 'Relationships with others', and Factor 4 comprised four items and was named 'Sense of control'. The four factors accounted for 46.2 per cent of the variance (see Table 1 for the contributions of each individual factor). The factor loading values of each retained item were relatively high, ranging from 0.41 to 0.83.

The two factors 'Relationships with others' and 'Sense of control' are similar to those identified by previous studies for the general elderly population (Fisher and Specht 1999; Ryff 1989). On the other hand, 'Positive attitude toward life' was more distinctive for it has rarely appeared in previous studies. It was identified in Lee's (2000) study, and others have identified an inverse effect from negative attitudes (Kirk and Rittner 1993; Son and Jung 1999). The second factor, 'Success of adult children', was also a distinctive result. It reflects circumstances that are both specific for achieving a successful old age among low-income elderly people in Korean culture and society (at its present stage of social and economic transformations), and the long established custom that children are the primary source of material support and care for elderly parents of reduced capacities.

Reliability analysis

To establish the level of internal consistency in the results, Cronbach's alpha coefficients of reliability were calculated. Among the four factors, 'positive attitude toward life' had the highest value (0.92), followed by 'success of adult children' (0.84) and 'relationships with others' (0.76). Alpha for 'sense of control' was 0.33 and therefore too unreliable to accept. Accordingly, this fourth factor was withdrawn and the final model and scale comprises three factors with in aggregate 35 items. Cronbach's alpha for the overall model was 0.93, indicating that the measures and scales were reliable.

The successful ageing scores

The level of successful ageing among the sample is shown in Table 2. The overall average score was 3.03 (on the five-point scale). The score on 're-lationships with others' was 3.39 meaning that overall the respondents evaluated their relations with others as positive, corroborating Ryff's (1989) finding that the factor is a strong correlate of successful old age. 'Positive attitude toward life' also scored highly (3.14), replicating the finding of Lee's (2000) study of low-income older people in Korea. These two high scores indicate that, although many in the sample were in material hardship, their experience of old age had many positives and

T A B L E 2. *Level of successful ageing among low-income elderly people,
South Korea 2006*

Factor	Means			*t*
	Male	Female	Total	
Positive attitude toward life	3.58	3.04	3.14	3.68***
Success of adult children	2.25	2.07	2.10	1.12
Relationship with others	3.41	3.39	3.39	0.15
Total	3.30	2.97	3.03	2.71**

Levels of significance: ** *p* < 0.01, *** *p* < 0.001.

perceived strengths. By contrast, the score for 'success of adult children'
was below average (2.10), indicating that, although this factor was an im-
portant component of successful ageing, its achievement was variable and
on average low. There was a significant gender difference in successful
ageing, with the score for men (3.30) being higher than that for women
(2.97), much of the difference coming from significantly different scores for
'Positive attitude toward life' (see Table 2).

Discussion

The aim of this study was to analyse the factors associated with successful
ageing among low-income elderly people living in the community in
South Korea. After extended consideration of the possible factors and
measures, and meticulous inspection of the statistical properties and re-
liability of the variables to ensure the legitimacy of their inclusion in factor
analysis, the outcome was a three-factor solution built from 35 items. By
far the most important factor, which 'explained' 27 per cent of the vari-
ance, was having a 'positive attitude toward life'. Neither this factor nor
the third, 'success of adult children', had been identified by similar
analyses of general older population samples in Korea and other coun-
tries. They appear to be distinctive either to older people on low incomes
or to Korean older people during the first decade of the present century.
The second factor, 'relationships with others', accounted for eight per cent
of the variance and is similar to a factor that has been identified by studies
of general samples of older people. It was also found that the level of suc-
cessful ageing was higher for men than for women.

   This research has shown that successful ageing is a relevant and im-
portant concept for low-income elderly people in South Korea, and that a

strong component of its achievement is having a 'positive attitude toward life'. This finding challenges the widespread and prejudiced opinion in Korean society that low-income older people have 'failed lives' and low self-esteem. In other words, the findings might contribute to dissolving a class prejudice in Korea and beyond in our understanding of 'successful ageing'. Several practical implications stem from the findings. First, it is important to register that low-income elderly people themselves assert that strong 'relationships with others' and having a 'positive attitude toward life' are important conditions of a successful old age. Chapin and Cox (2001) advocated a 'strengths perspective' in social work with older people; given that many older people are at some time bereaved and then live alone, this perspective emphasises the importance of not only helping those on low incomes to maintain amicable relationships with neighbours or friends but also facilitating the development of such informal support.

Secondly, the results suggest that the 'success of adult children' is an important factor for low-income Korean older people and that this might be related to particular cultural values or to the country's very rapid socio-economic changes in recent decades. Middle-aged people tend to regard their children as a potential source of support in later life (Chung 2008). Although traditional family values and customs have significantly weakened and the belief is fading that children should take the main responsibility for the support and care of their elderly parents, Korean people still tend to believe that 'the children's success is the parents' success' (Yoo 2006). In addition, approximately 30 per cent of those aged 40 or more years living in Seoul have not saved money for their later-life expenses and have not contributed to a pension because they have to provide caregiving for their children (Anon 2007). Therefore, an education programme focused on improving relationships between adult children and low-income elderly people should be provided to both populations.

Thirdly it was found that on average men have higher scores for successful ageing than women. As women accounted for approximately 80 per cent of the study sample, interventions to support older women should be given priority. It is assumed that the reason for the gender differential is partly explained by age – elderly women live longer than elderly men, and therefore a greater percentage have been bereaved of spouse, which may also mean that their average income is lower than men's. These are further reasons for according priority to women in welfare interventions.

The research and the analysis have a number of limitations. First, it was a convenience sample of older people living in Seoul and the results may not be generalisable to the remainder of South Korea, let alone beyond.

Secondly, as the respondents avoided answering several questions about their adult children, the findings about the importance of their success require further research and replication. Despite these limitations, this study has been the first to examine successful ageing among low-income older people in a very rapidly developing country, and has generated original findings that deserve wide consideration.

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Address for correspondence:
Graduate School of Social Welfare, Ewha Womans University,
11-1 Daehyun-dong, Seodaemun-gu, Seoul, 120-750, Korea.

E-mail: sdchung@ewha.ac.kr