Everyday Consumption and Perceptions of Oldness: Barnhart and Penaloza Extended

James Gentry, University of Nebraska, USA
Lynn Phillips, University of Nebraska, USA
Michelle Barnhart, Oregon State University, USA

Marketing focuses on a diminishing youth market globally, as opposed the burgeoning over 60 segment. The recent Barnhart and Penaloza JCR article offers insights into consumption issues facing an aging world. This paper extends that article by investigating perceptions held by senior workers of those Not Old versus Old.

[to cite]:

[url]:
http://www.acrwebsite.org/volumes/1016654/la/v3_pdf/LA-03

[copyright notice]:
This work is copyrighted by The Association for Consumer Research. For permission to copy or use this work in whole or in part, please contact the Copyright Clearance Center at http://www.copyright.com/.
Everyday Consumption and Perceptions of Oldness: Barnhart and Penaloza Extended
James W. Gentry, University of Nebraska-Lincoln, USA
Lynn Phillips, University of Nebraska-Lincoln, USA
Michelle Barnhart, Oregon State University, USA

INTRODUCTION

The world is older than it has ever been before and, further, much of it is aging at a more rapid pace. People are living longer and fewer babies are being born. Yet the consumer research literature has paid amazingly little attention to our elders and has maintained its focus on the “youth market” despite its relatively dwindling size. The dramatic global shift towards a greater percentage of elderly people has moved Gentry (2013) to identify the quality of life of the elderly globally as THE consumer research issue of the future.

The relatively limited academic literature in marketing on the elderly has done very little to prepare business for the vastly changing environment of the future. The 2013 JCR article by Barnhart and Penaloza (2013) is a marvelous first attempt to fill this vacuum. Barnhart and Penaloza (2013) attack the dominant stereotype of very old consumers as “solitary survivors” that has been generated by the extensive literature on the family life cycle; they make clear that the very old are not social isolates, but rather are members of consumption ensembles that include family and/or paid caregivers. Further, they challenge the chronological perspective of age by introducing the “old” and “not old” categories, with the latter including people who are seen to be much younger than their chronological age might indicate. We believe that this distinction will be very useful in determining whether a firm markets to the elderly themselves, or to their caregivers.

Responding to Barnhart and Penaloza’s (2013) call to move beyond chronological age as a measure of oldness, we investigate how perceptions of oldness relate to consumption behaviors. Previous consumer research in the area, using the chronological age perspective, has looked at cognitive decline (John and Cole 1986; Law et al. 1998; Yoon 1997), vulnerability (Lee and Geistfeld 1999), cognition and decision making (Cole et al. 2008; Nasco and Hale 2009; Williams and Drolet 2005), needs and wants when shopping (Myers and Lumbers 2008; Pettigrew et al. 2005), and brand choices and loyalty (Lambert-Pandraud and Laurent 2010). Further, none of these studies included respondents older than 80, limiting insights as to the old old. Similarly, we find some fault with much of the work by George Moschis, the first consumer researcher to focus on the elderly decades ago, which used 50 and over as the operational definition of elderly. Like Barnhart and Penaloza, we approach “old” not as an objective measure of time on earth, but as a social construction and identity that we assign to others and that we (if we are lucky) will one day claim. Approaching “old” in this manner makes it possible for us to consider not just how the elderly consumer’s “age” influences his/her consumption, but also how the perceptions of others influence it.

The purpose of this paper is to investigate the framework generated in the Barnhart and Penaloza (2013) study in greater depth through a survey of older working adults’ perceptions of the Old and Not Old, and of the relationship between those perceptions and everyday consumer activities.

THE RAPIDLY AGING WORLD

For the first time in recorded history, there are more old people (>60) on the planet than there are young children (under 15). The world has never been so OLD. Moreover, the world is getting older rapidly. In the last six decades, the percentage of people in the world over 60 increased from 8% to 10%. In the next two decades, it will increase to 22%, seeing an increase from 800 million people over the age of 60 to two billion. Most systems, including marketing ones, are not prepared for old culture. Ashenburg (2011) noted that “old age is a largely unexplored and unmapped country obscured by prejudice and myth.”

Until the 20th century, the average life expectancy globally was 30 (Williams and Krakauer 2012). Over ten years ago, the Economist (2002) noted that, despite obvious aging and the role of Baby Boomers in the economy, business remained largely obsessed with youth. It does not appear that much has changed since then. Carstensen and Ford (2012) noted that the world is still immersed in cultures oriented to lives half as long as the ones people are living, and stated (p. 12) “not only are cultures youth-oriented in the popular sense of favoring the young, but physical and social environments and institutions are quite literally built by and for young people.” Hayes (2004) reported that Jane Bradley, the director of sales and marketing of the 50Plus magazine, estimated that only 5% to 10% of media spending is directed at the 50-plus demographic, though its free-spending members represent nearly half of the North American population. Similarly, Milner, Van Norman, and Milner (2012) assert that 95% of ads target those 35 or younger. The cultural shock of dealing with a very old consumer market in most of the world (with exceptions such as India, the Middle East, and Sub-Saharan Africa) will require major adjustments. While some areas are younger now than most of the world, even those areas will see increasing numbers of people over 60, and changing family norms will present complex quality of life issues for the elderly. For example, while the median age of Africa today is less than 20, its number of people over 60 is projected (Aboderin 2012) to increase from 56 million in 2010 to 716 million by the end of the century.

BARNHART AND PENALOZA FRAMEWORK

In their study of older consumers (ages 82-90) and their adult children and paid caregivers, Barnhart and Penaloza (2013) distinguish chronological aging from “getting old;” that is, becoming a member of the old age group as it is socially constructed in contemporary American culture. From informants’ descriptions of “old people” and explanations of what it means to be old, Barnhart and Penaloza derived 13 meaning continua that are instrumental in distinguishing those who are Not Old from those who are Old: flexible to rigid, joyful to joyless, sharp to confused, aware to unaware, clean to dirty, productive to unproductive, active to inactive, engaged to disengaged, safe to at-risk, independence to dependence, integration to isolation, control to deference, and reciprocation to unilateralism. For each continuum, informants in the study associated the first meaning with being Not Old and the second, less culturally valued meaning with being Old.

Limiting their analysis to the context of consumption, Barnhart and Penaloza defined each of the meaning continua as follows. Flexible to rigid refers to how adaptable a person is to new situations, willingness to try new products and services, and flexibility in his/her daily routine. Joyful to joyless denotes finding joy in and happily engaging in consumption activities. Sharp to confused signifies having consistent preferences and understanding, remembering, and synthesizing information. Aware to unaware indicates one’s degree of awareness of her surroundings and the condition of her clothing.
Clean to dirty describes the cleanliness of the body, clothing, and home. Productive to unproductive concerns one’s degree of productivity and creativity expressed in consumption. Active to inactive refers to physical movement and is often associated with going outside the home. Engaged to disengaged denotes how engaged the older person is in consumption events as well as how well s/he keeps up with market innovations. Safe to at-risk signifies how physically and financially safe one is when she consumes. Independence to dependence concerns the degree of assistance one receives from others in consumption activities. Integration to isolation describes the degree of social contact one experiences in consumption. Control to deference represents the degree to which authority in a consumption event is exercised by the older person or yielded to others. Finally, reciprocation to unilateralism indicates the degree to which provision of assistance is reciprocated.

Barnhart and Penaloza (2013) further investigated informants’ production of these meanings in their everyday consumption activities, identifying ten categories of activities with which older informants received assistance or that informants anticipated the older consumers would need help with in the future. Categories included personal care such as bathing and dressing, driving, doctor visits, shopping, organizing and taking medications, preparing meals, housekeeping, home and yard maintenance, personal business such as responding to mail and paying bills, and travel. Barnhart and Penaloza found that the ways in which the elderly person consumes is influenced by his/her interpretation of whether he/she is old or not old. Furthermore, the ways in which the older person performs consumption activities influences others’ interpretation of whether or not she is old and how they treat him/her when assisting him/her with an activity. For instance, a daughter who believes that her father sometimes gets confused may accompany her father to a doctor’s appointment to discuss her father’s care plan with her doctor. In doing so, they may not provide her father much opportunity to participate in the conversation, thus treating him as if he is disengaged. In their talk and actions, the daughter and doctor reveal their perception of the father as an old person who is confused and disengaged. In addition, they treat him as if he is an old person, a categorization possibly inconsistent with his identity.

Barnhart and Penaloza’s study provides unique insight into the complexity of oldness in contemporary American society as experienced by older consumers, their family members, and their paid service providers. In the current research, we use Barnhart and Penaloza’s framework as a starting point for a quantitative investigation of perceptions of oldness commonly held by adults working in the United States. Specifically, we investigate these adults’ assessments of others whom they view as “young for their age” and “old for their age.”

**METHOD**

In this study, we quantify Barnhart and Penaloza’s (2013) framework to identify the strength and relative importance of the various characteristics they identified as indicative of being Old and Not Old, and we relate participants’ perceptions of these characteristics to their perceptions of the elderly person’s health and comfort with consumption tasks. To do this, we first operationalized Barnhart and Penaloza’s (2013) list of consumption activities and the thirteen pairs of opposing attributes they identify as meaning continua into a set of survey items.

Attribute pairs were turned into semantic differential items. Some attribute pairs were taken directly from the previous research (e.g., Flexible to rigid), while others had to be adapted to ensure that respondents would understand the meaning of the terms outside the context of the original research findings (e.g., “control/deference” was transformed to “In control, makes his/her own decisions/Deferent, others make decisions for him/her.”). In addition, the meaning continuum “safe/at risk” was separated into the two components of its definition, physical and financial safety (“physically safe/physically at risk” and “financially safe/financially at risk”) to avoid double-barreled questions.

Respondents were first asked to think of an older individual they knew personally, such as a family member or friend, who seemed young for their age. With this individual in mind, the respondent was asked to give his or her perceptions of the person’s health (poor to excellent), to provide assessments of this individual on the semantic differential scales of the Old and Not Old attributes, and to evaluate the individual’s comfort with various consumption tasks. Respondents were then asked to complete the same questions with regard to an older individual they knew who seemed old for their age. In addition, age and gender of the respondent and the gender of the referent individual were collected.

The sample selected for this study was senior faculty and staff at a large Midwestern university, a total of 424 individuals. The survey and its accompanying materials were created and administered online via Qualtrics. Individuals were emailed three invitations (one initial invitation and two reminders) including information regarding informed consent, and a unique survey link that prevented multiple entries. All responses were anonymous. No rewards were given to respondents in exchange for their participation. Of the 424 sampled individuals, 174 clicked the link in the email to reach the survey and 119 completed the survey, for a final AAPOR Response Rate 1 of 28%. Though we cannot be certain that all respondents have been or are caregivers, we assert that the sample selection was conducted so that the respondents could be expected to have (or have had) aging parents.

**RESULTS**

The individuals selected as Old were rated significantly more negatively (positioned more towards the less culturally valued, Old characteristic on the semantic differential scales) on all 14 continua as well as on the overall health assessment at p<.001 in paired t-tests. Thus, respondents were able to see Old and Not Old to be very different constructs on the continua uncovered in Barnhart and Penaloza (2013).

When asked to identify the five characteristics most strongly associated with being Old, “Receives but doesn’t give help” was the characteristic most commonly selected (82%), followed by “needs assistance from others” (69%), “being at physical risk” (69%), “confused” (50%), and “inactive” (48%). On the other hand, the characteristics associated with being Not Old were “mentally sharp” (65%), “engaged” (58%), “in-control” (52%), “independent” (52%), “flexible” (52%), and “active” (50%). Thus, Old assessments is based primarily on the need for assistance (more physical than mental), while mental acuity is central to being Not Old, followed by activity.

Exploratory factor analyses were performed on the characteristics’ ratings for Old and Not Old, and the results are shown in Table 1. For the Old evaluations, the three factors generated appear to be “physically unable to do things independently,” “sociability,” and “financial awareness.” However, one of the authors of the Barnhart and Penaloza study noted that it appears that “financially unsafe” was interpreted by respondents to mean “poor,” as judged by its close linkage to “dirty.” In the Barnhart and Penaloza qualitative study, financially safe did not relate to being poor or wealthy, but rather to being vulnerable to fraud or making costly errors in managing one’s finances.
For the Not Old ratings, the factors appear to be “mental acuity,” “activity,” and “sociability.” Independence loads on the “physically unable to do things” factor in the Old findings, but on the “Activity” factor in the Not Old ratings. Thus, people may be perceived as Old when they start needing help from others because they are physically unable to do things by themselves. The Not Old retain the physical prowess to do things on their own.

<table>
<thead>
<tr>
<th></th>
<th>OLD</th>
<th>NOT OLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flex</td>
<td>.34</td>
<td>.27</td>
</tr>
<tr>
<td>Joyful</td>
<td>.16</td>
<td>.70</td>
</tr>
<tr>
<td>Mental</td>
<td>.51</td>
<td>.26</td>
</tr>
<tr>
<td>Aware</td>
<td>.27</td>
<td>.03</td>
</tr>
<tr>
<td>Clean</td>
<td>.10</td>
<td>.07</td>
</tr>
<tr>
<td>Prod</td>
<td>.61</td>
<td>.66</td>
</tr>
<tr>
<td>Active</td>
<td>.47</td>
<td>.28</td>
</tr>
<tr>
<td>Engage</td>
<td>.59</td>
<td>.63</td>
</tr>
<tr>
<td>FinSafe</td>
<td>.28</td>
<td>.37</td>
</tr>
<tr>
<td>PhySafe</td>
<td>.83</td>
<td>.58</td>
</tr>
<tr>
<td>In Cntl</td>
<td>.62</td>
<td>.24</td>
</tr>
<tr>
<td>Soc Int</td>
<td>.23</td>
<td>.14</td>
</tr>
<tr>
<td>Ind</td>
<td>.87</td>
<td>.81</td>
</tr>
<tr>
<td>Helps</td>
<td>.47</td>
<td>.28</td>
</tr>
</tbody>
</table>

Table 1: Factor Analyses of the Characteristics Ratings

We next related the daily consumer activities included in the Barnhart and Penaloza study to the characteristics for both the Old and Not Old. In addition, we included the sex of the individual being evaluated as an independent variable, as well as the assessment of the individual’s overall health. In general, the variance explained by the characteristics was much higher for the Old than the Not Old, possibly indicating that the Old construct was perceived more homogeneously than was the Not Old construct. Our regression results for Old and Not Old are discussed for each consumer activity.

Traveling Outside the Home

For the Old, physically safe when performing activities, physically active, flexible, and independence were significantly related (p<.05), and the R2 was .53. For the Not Old, socially integrated was related most significantly (p<.001), followed by mental sharpness, with an R2 of .42. Venturing outside the home is primarily a physical issue for the Old, but a social issue for the Not Old.

Taking Medicines

Financially safe was the best predictor for the Old, with an R2 of .47. For the Not Old, awareness was the best predictor, with an R2 of only .06. If respondents did indeed interpret “financially safe” as meaning “having adequate financial resources,” this finding could point to perceptions that the ability to afford a care manager is critical for the elderly to take meds properly, whereas the Not Old are perceived to be aware enough that they do not need assistance.

Housekeeping

Females were seen to handle this better for both the Old and the Not Old. Traditional gender roles seem to be very much in play. For the Old, though, being physically safe predicted even better than gender, the R2 was .56. For the Not Old, independence was significantly related to doing housework along with being female, with an R2 of .32. It would appear that experience plays a critical role in this domestic work.

Driving a Car

Driving is one of the bigger worries that adult caregivers have about the elderly. For both the Old and the Not Old, being a male was seen to relate to driving, but much more significantly for the Not Old. Here too, experience would seem to be reflected in the male being seen as driving better, reflecting past gender norms. Independence, physically safe, and mentally sharp were linked more strongly to the Old driving than being male, with an R2 of .56. For the Not Old, mental sharpness was also significantly related, with an R2 of .32. Combined these findings would seem to reflect the complexity of driving as a physically and mentally challenging activity, as well as driving’s close relationship to the concept of individual independence in North American culture.

Preparing a Meal

Gender was the most significant predictor (p<.001) for both the Old and Not Old. For the Old, being productive and in control also related significantly to meal preparation, with an R2 of .55. For the Not Old, awareness and independence were the other significant predictors, with an R2 of .34.

Yardwork

The R2 values were nearly equivalent (.43 for Old, .42 for Not Old). Activity was a very significant predictor for the Old, as well as for the Not Old, with other significant variables predicting Not Old yardwork comfort [independence, social integration (negatively), cleanliness (negatively), and being male]. It would appear that Not Old males are seen as preferring yardwork to social activity and not minding getting dirty. That gender did not relate to yardwork for the Old may be explained by the old having moved to homes without yards (e.g. condos or senior apartments) and/or their physical inability to do the work.

Personal Care

For the Old, being physically safe relates to personal care, followed by being female and awareness, with an R2 of .50. For the Not Old, the R2 was only .10, with independence and ability to help others being marginal predictors. These findings point to perceptions that the Old are uncomfortable performing personal care alone because they fear physical injury (such as breaking a hip by falling in the shower) and/or they are too unaware to know when such personal care is needed.

Shopping

The amount of variance explained is quite comparable (Old .51; Not Old .49). For the Old, independence, physically safe, and female predict comfort in shopping. Independence and physically safe predict shopping comfort for the Not Old, along with social integration, flexibility, and financially safe, but not gender. Apparently Not Old men are seen as shopping as comfortably as their female counterparts.

Summary

For the consumption activities investigated, respondents’ perceptions of various referent characteristics predicted respondents’ perceptions of the referents’ comfort performing the activity. Importantly, the significant predictors for referents who were seen as Not Old were often different from the significant predictors for those seen as Old. For people who respondents considered Old, physical safety and independence most commonly predicted comfort with consumption activities. In addition, seven other characteristics were found to be significant predictors. Likewise for referents who were viewed as Not old, the list of significant predictors included six char-
acteristics that were specific to various activities. Thus, respondents were highly specific in relating their perceptions of comfort with particular consumption activities to particular characteristics related to being Old or Not old.

In addition, respondents see more issues facing male Old people in areas such as preparing meals, housekeeping, personal care, and shopping, but see Old women as having more issues with driving. These findings point out an obvious observation: while gender norms have changed for younger segments of the population, the Old have lived through times of greater gender separation. Marketers need to take note of this, as it would appear that one’s own gender expectations may be inappropriate for those who have reached the Old stage.

**DISCUSSION AND CONCLUSIONS**

This investigation of caregivers’ perceptions of the elderly provides strong support for the framework generated by Barnhart and Penaloza (2013). Caregivers are clearly able to distinguish between the Old and Not Old on the continua uncovered through Barnhart and Penaloza’s depth interviews, indicating that the continua have rich potential in separating the Old from the Not Old.

For marketers, this research both highlights the challenges of and offers hope for making wise decisions about whether and how to market directly to the elderly or go through caregivers. Such decisions would seem to be both complex and extremely sensitive. Barnhart and Penaloza found that the elderly guard their independence very carefully, which is very understandable given their many decades of experience as responsible adults. The frequent correlation between independence and comfort performing consumption activities found in the current study would seem to indicate that acknowledging that one needs assistance with an activity is a substantial threat to that independence. Thus, blatant attempts to bypass the elderly and market to their caregivers may well insult those elderly who see themselves as independent. At some point in the lives of many elderly that independence may become illusory. Nonetheless, without consideration of how sensitive these issues are to the elderly, animosity toward firms’ offerings may prevent those offerings from fulfilling their potentially helpful usage. In identifying the specific characteristics related to comfortably performing various consumption activities for the Old and the Not Old, this research provides initial insights into how the independent performance of various consumption activities are either attributed to or seen as resulting in specific positive or negative characteristics. Marketers of products and services for the elderly should use such insights to ensure that their marketing strategies are sensitive to the close relationship between some activities and desirable or less desirable characteristics.

A limitation to this study is that we did not investigate issues from the perspective of the elderly consumers themselves. We hope to use the scale developed in this paper to investigate both the perspective of the individual elderly consumer and of his/her primary caregiver. We expect discrepancies in the perspectives and argue that the caregivers’ perspectives are likely to be more accurate. Heckhausen and Schulz (1995) note that the human need to have behavioral (primary) control is reshaped by cognitive (secondary) control processes as they age. For instance, one may value goals differently in later life or learn to interpret success and failure differently. Thus, as one’s mental and physical abilities decline, one attempts to maintain self-esteem through such secondary control processes. They note that older individuals see “the elderly” as having diminished abilities, but are slow to categorize themselves as “elderly.” Thus, they use contrasts with their stereotypes of “elderly” as a downward social comparison process to maintain self-esteem. Thus, their self-evaluations are likely to be more optimistic than those of their caregivers.

In addition, the findings from this study indicate that marketers need to be sensitive to the gender norms perceived by elderly. While gender norms have changed for younger segments of society, apparently they have not for many members of the elderly segment. That there are different role expectations for elderly males and elderly females than for their younger counterparts necessitates more emphasis on traditional positionings to the elderly market. That need will change over time, but apparently current politically correct social norms are not held by many elderly.

Marketing has not only paid insufficient attention to the transition between the Not Old and Old stages, but also needs to give greater attention to those who are firmly in the Old group and nearly the end of life. One skill that is not uncommon among marketers is creativity; that creativity needs to refocus on the lives of the elderly in general and on the end of their lives in particular. Facilitating death with dignity has received virtually no attention from marketers. Many alternatives have yet to be developed, in large part due to a lack of attention from the most creative minds in marketing. Yes, we are talking about a dying market, but it is going to become a HUGE dying market.

**REFERENCES**


