



**Research Highlights: Ageing, wellbeing and development:
A comparative study of Brazil and South Africa**

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In Brief

The study examines the wellbeing, livelihoods and social inclusion of older people in Brazil and South Africa with a view to throwing light on the linkages existing between ageing, wellbeing and development in developing countries.

The research focuses on the dynamics of wellbeing among lower income households with older people in the two countries, and on the impact of social policies reaching older people. It provides a comparative study over time and across countries.

The main findings from the study are that average levels of wellbeing experienced by older people in South Africa and Brazil have improved over time. Among low income households, pension income, especially non-contributory pension income, remains essential to the wellbeing, livelihoods and economic inclusion of older people in the two countries. The upward trend in wellbeing levels among older people and their households nets out significant changes in household wellbeing over time. Between 2002 and 2008, some households exited poverty while others fell into poverty.

The study

The study develops knowledge on the linkages existing between ageing, wellbeing and development in Brazil and South Africa. A conceptual framework is developed to capture the influence of individual ageing on wellbeing, livelihoods and social inclusion of older people and their households in a developing country context. The focus of the empirical analysis is a sample of households with older people in Brazil and South Africa, who participated in a survey in 2002 and who were re-visited in 2008. The main objective of the project is to track wellbeing changes over time and understand the dynamics of individual ageing in a developing country context.

The study collected information at three levels: (i) a household survey of around 1000 households each in Brazil and South Africa, providing detailed information on their demographic and socio-economic status, and including a supplement on all persons aged 55 and over; (ii) over 30 in-depth interviews of selected survey respondents in each country; and (iii) social and ageing policy and institutional environment in each of the countries. The household survey data enabled the construction of a longitudinal dataset (combining data collected in 2002) with standard variables across time and countries.

The research will be successful if its findings throw light on the dynamics of wellbeing, livelihoods and social inclusion of older people and their households in Brazil and South Africa.

The study focuses on the following research questions:

1. Which theoretical frameworks are most appropriate to examining older people's capabilities?
2. How do experiences of individual ageing interact with wellbeing, household dynamics, and livelihood patterns?
3. To what extent do social pensions and other anti-poverty programmes offer sustained protection from poverty and vulnerability, and facilitate older people's contribution to development?
4. Which institutions, policies, and interventions do most to promote active ageing?

This research has much to contribute to shaping policy on ageing in developing countries. Population ageing is unfolding at faster rate in developing countries than it did for currently developed ones. As a consequence, developing countries have less time to set in place the institutions needed to meet the challenges of population ageing, and are disadvantaged by resource and governance constraints. Brazil and South Africa are leading countries in their respective regions, with far reaching and innovative social policies addressing poverty and vulnerability.

Approach and Methods

The underlying conceptual framework of the study combines theoretical approaches to wellbeing stressing the primacy of functionings and capability. Wellbeing is evaluated from a multidimensional perspective which captures basic functionings, income and consumption, and older people's perceptions of life satisfaction and social and economic integration. A focus on the contribution of older people to the development of their households and communities is justified by the developing country context.

In 2008/9, the study collected a second wave of household surveys in Brazil and South Africa (a first wave was collected in 2002). The surveys sample over 1000 households with older people in each country, including rural and urban settings. The survey instruments included a household questionnaire and older person supplement. The survey data provides valuable information on the social-economic, household dynamics, livelihoods, and quality of life dimensions of households with older people. A new longitudinal dataset was constructed including households observed in 2002 and 2008/9, enabling an exploration of the dynamics of wellbeing, livelihoods and social inclusion.

In addition over 30 semi-structured interviews were collected in each country. The interviews are nested in the quantitative samples and focused on the oldest respondents. The data they generate provides an in-depth understanding of key aspects of the livelihoods of older people from their own perspectives.

The policy and institutional environment was investigated on a comparative basis, through the analysis of country documentation and interviews with key informants.

The data generated by the study enables a comparison across time and countries.

Research questions and Findings

Analysis to date has produced several key findings:

Capturing wellbeing among older people in developing countries requires a multidimensional perspective and a focus on households. In Brazil and South Africa, and especially in low income households, older people's wellbeing and livelihoods are interlinked with those of their extended families, whether or not they co-reside. This makes it harder to assess older people's wellbeing separately from that of their families. In the context of Brazil and South Africa where older people have access to relatively large income transfers, they make a large financial contribution to their households and communities.

Overall, comparisons of older people's wellbeing levels in 2002 and 2008 show improvement. This is true for a range of well-being indicators: per capita household income and expenditure; multidimensional measures; and life satisfaction measures. On average the wellbeing of older people and their households in the two countries improved from 2002 to 2008.

Individual ageing is not necessarily associated with an inevitable decline in wellbeing in developing countries. In both countries, analysis of the panel sample, that is individuals and households observed both in 2002 and 2008, indicates that on average ageing by six year does not correlate with decline in wellbeing. On the contrary, wellbeing indicators suggest wellbeing improves with ageing. However, further research will attempt to identify the extent to which improvements in wellbeing among older people and their households are explained by demographic change and policy changes. Changes in the size and composition of households could lead to improvement/decline in wellbeing with household income remaining constant. Changes in the value of transfers could be responsible for changes in wellbeing in the absence of changes in household composition.

The overall improvement in older people's wellbeing nets out significant change in wellbeing at the household level over time. Analysis of changes in household poverty status for both countries show a high incidence of transitions between 2002 and 2008, and differences in the incidence and direction of transitions across the two countries. Focusing on per capita household income as the wellbeing indicator and on the South Africa sample, nearly one sixth of all households managed to exit poverty by 2008; but close to a third of all households had fallen into poverty by 2008. For the Brazil sample, close to one in five of all households exited poverty by 2008; and around one in ten of all households fell into poverty by 2008. Brazil's stronger performance reflected substantial rises in pension benefits and a generalised improvement in economic performance.

Overall, a majority of older people in Brazil and South Africa are satisfied with their lives. Whether they are asked about their current lives, or their lives taken as a whole, a majority of older people feel satisfied or very satisfied with their lives. A higher share of Brazilian older people is satisfied with their lives compared to their South African counterparts. A majority of older people in each of the two countries reports being satisfied with their intra-family relationships and with the respect they receive from others.

For low income households, pension income, especially non-contributory pension income, is essential to their wellbeing, livelihoods, and social inclusion. In the absence of pension income, households with older people are likely to be significantly poorer, less resilient, and less well integrated economically. In both countries, non-contributory pensions act more as an income transfer to poorer households than individual retirement income.

Other dimensions of social policy are important to the wellbeing of older people too. An increased proportion of survey households in both countries reported receiving child and disability benefits, reflecting the expansion of income transfer programmes directed at children in poor households in the two countries. A third of Brazilian households surveyed in 2008 had joined a new national scheme providing low interest loans for pensioners. Despite a national programme of affordable medication a quarter of Brazilian households reported not having access to necessary medication, compared to less than three percent of households in South Africa.

Key Policy Implications

Large scale pension transfers are essential to the wellbeing, livelihoods, and social inclusion of older people, but need to be complemented with policy interventions addressing other dimensions of wellbeing.

Brazil and South Africa represent different models of social policies for addressing ageing. Their success in promoting the wellbeing of older people in disadvantaged settings shows that there is no single “best practice” approach.

In developing countries, older people’s wellbeing is strongly influenced by economic performance, labour market conditions, and social policy.

It is useful to combine indicators based on per capita income with other approaches to wellbeing, included reported satisfaction and multi-dimensional indices. Together, they have the potential to provide robust and comprehensive insights into temporal and spatial variations in wellbeing.

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