Synthesising self: the quality of life of older Chinese migrants in Manchester

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Abstract

Whilst there has been a high volume of research exploring quality of life, the specific issues important to the quality of life of people from older black and minority ethnic groups living in the United Kingdom (UK) remains relatively under explored. The aim of this research was to explore and understand the concept of quality of life held by older Chinese migrants living in the UK. The findings of this study provide an understanding of what is important to older migrants and why, as well as providing insight into the issues involved in cross-language and cross-cultural research.

A qualitative approach was taken utilising grounded theory methodology. Data was collected using semi-structured interviews. 29 participants aged between 52 and 78 were interviewed; 17 interviews were undertaken in Cantonese with the aide of an interpreter. Quality of life emerged as a multi-dimensional concept and numerous influential factors were identified. Data analysis also resulted in a conceptual explanation of why these factors were important to participants - the concepts of identity, belonging and value systems emerged playing a crucial role in their lives and migration and ageing were identified as key variables. This led to a substantive grounded theory being developed that demonstrates that
participants are involved in an ongoing process of constructing a harmonious sense of self across their lives, and that this is paramount in their quality of life.

The research findings are related to existing theory and knowledge and how they extend or challenge them is discussed. The research supports the proposal that quality of life is a multi-dimensional, complicated concept and extends this to demonstrate that the sense of self is important in its construction and retention. Recommendations are made regarding application of the research findings and for the design of cross-language and cross-cultural research.
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Chapter 1

Introduction
“There is nothing like looking, if you want to find something…

You certainly usually find something if you look, but it is not always quite the something you were after.”

(Tolkien 1937 p. 78)

The aim of this research was to investigate the concept of quality of life held by older Chinese migrants living in the Manchester area of North West England. It explored what they feel is important in bringing quality to their lives and identified specific things they believe add to and detract from their quality of life. Why those things are important and what they represent to the participants was also explored and the process they use to construct quality of life was identified. I took a qualitative approach, employing grounded theory methodology; the theory developed is, therefore, fully grounded in and supported by the data collected and reflects the participants’ main concerns regarding constructing and maintaining a good life.

The participant group has rarely been included in previous research undertaken in the United Kingdom (UK); therefore, the findings of this study offer new insight into what is important to older Chinese people living and ageing in the UK. The outcomes of the research are discussed in comparison with existing theories about ageing, quality of life and acculturation, which are drawn mainly from gerontology and psychology. The thesis also explores issues inherent in cross-
language and cross-cultural research, discussing how these influenced the research design and may have affected the research process and the findings. I also provide my personal reflections on the research process, including the issue of being an outsider researcher, as well as discussing what I learned during my time as a research student.

This introduction to the thesis discusses the background to and context of the research undertaken, my motivation for choosing this area of research, and how the unformed idea evolved into a fully focussed research project. Information about the participants involved in the research and how they were recruited is also provided, as is information regarding the writing style of the thesis and the conventions used when transcribing interviews. The chapter closes by providing the structure of the remainder of the thesis and giving a brief description of the contents of the coming chapters.

1.1 Background to the research

In mid-2007, for the first time, there were more people living in the UK aged over state pension age than people aged under 16 (Office for National Statistics (ONS) 2007a). The first release of the results of the 2011 census for England and Wales shows that the population continues to age, with 16.4% of the population aged 65 – this was larger than any earlier census. The oldest old has also increased by approximately 90,000 since the 2001 census (ONS 2012a). The picture in Northern
Ireland reflects this trend and in the 10 years since the previous census, there was a 93,400 increase of people aged between 40 and 64, an 18% increase in the number of people aged 65 and over, and a 35 percent increase of those aged 85 or more (Northern Ireland Statistics and Research Agency 2012). There were no census results published for Scotland at the time of writing. Projections suggest that by 2035, there could be just over 29 million people aged 50 and over living in the UK (ONS 2011).

Projections also forecast that not only will the absolute numbers of older people increase, but also that the ethnic composition of that group will change (ONS 2007a). The ethnic breakdown of the entire 2011 UK census was not published at the time of writing; however, 14% (7.9%) of the population of England and Wales classified themselves as being a member of an ethnic group other than white (ONS 2012b). The most recent figures available for the whole of the UK are from the 2001 census when 7.8% of the UK population (4.6 million people) classified themselves as being a member of an ethnic group, other than white, and 4% of the UK’s older population were from black and minority ethnic (BME) groups (ONS 2001). It is important to consider that this cohort will increase as people who migrated to the UK during the latter half of the twentieth century age (Blakemore and Boneham 1994). Lievesley (2010) notes that by 2026, there may be 3.8 million people aged 50 and over from BME groups living in the UK, advising policy makers that this
needs to be considered when formulating policies which impact on the lives of older people.

It is important to recognise that, although people now live longer, there is evidence that, for some, their quality of life may fall as they age. Information gathered by the English Longitudinal Study of Ageing (ELSA) highlights this as a cause for concern:

“...for both women and men, CASP-19 (an instrument used to measure quality of life) scores decrease from state pension age onwards with the fastest decline occurring after the age of 70.” (ONS web page 2007b)

There is thus a clear need to focus on the health and well-being of older people living in the UK. Moreover, the issue of older BME people’s quality of life and delivering services tailored to meet their needs has been recognised as a priority. The National Service Framework for Older People (Department of Health (DOH) 2001) states that service providers should:

“ensure that local services are culturally appropriate, meeting the needs of increasingly diverse communities of older people.” (DOH 2001 chapter 3.1)
The draft care and support bill (DOH 2012), which was under consultation at the time of writing, continues to recognise the need for culturally appropriate services:

“We know that BME communities want to be able to access services that are more culturally desirable and personalised to their needs and aspirations.” (p147)

Although this new legislation focuses on people accessing services via individual budgets rather than providing statutory provision.

As the ageing population increases, understanding and identifying the issues which are important to older people and the factors they feel are influential in them having a good life become a higher priority. Walker (2005) highlights that older people have been treated as a homogenous group and that little attention has been paid to recognising their diversity. Phillipson (2007) highlights the needs to investigate and understand the impact of globalisation on older people. Furthermore, evidence suggests that the quality of life of older BME people living in the UK is under-researched (Blakemore and Boneham 1994; Bajekal et al. 2004; Grewal et al. 2004); consequently, the need to explore cross-cultural issues in quality of life has been recognised as a priority for research (European Quality of Life Forum 2003a, 2003b; Walker 2005; National Institute for Health and Clinical Excellence 2008).
1.2 What is quality of life?

Sirgy et al. (2006) explore quality of life research from several different perspectives and outline its history, noting that philosophers deliberated on the good life from the time of Plato. They highlight that the first measurement scale was developed in 1929 and research into the topic increased greatly from the 1960s onwards. There is evidence of a continuing high volume of research into quality of life, for example, a recent search of the EBSCO health, psychology and sociology databases, limited to peer-reviewed journals published in the past five years, returned 78,591 hits. However, there still remains no true consensus regarding what quality of life actually is (Fallowfield 1990; Hunt 1999; Hyde et al. 2003).

In a review of the research developing and testing quality of life instruments, Garratt et al. (2002) identified 1,275 separate instruments and Bowling (2005) reviews over 80 instruments. Evidence suggests that, particularly with older people, health has previously been used as a proxy for quality of life (Hyde et al. 2003; Bowling 2009). Reviews of health-related quality of life measurement with older people found that the 36-item Short Form Health Survey (SF-36) (Ware and Sherbourne 1992) was used in almost 50% (Hickey et al. 2005) and 36% of studies examined (Halvorsrud and Kalfoss 2007). Other instruments such as EQ5D and the Nottingham Health Profile are also used with older people, although to a much lesser extent than the SF-36 (Haywood et al. 2005; Hickey et al. 2005; Halvorsrud and Kalfoss 2007). However, this approach is problematic because
being healthy does not guarantee a good quality of life (Fallowfield 1990); neither
does having poor health always result in a poor quality of life (Albrecht and
Devlieger 1999).

An alternative perspective is the multi-dimensional approach viewing health as
one of numerous factors important in quality of life, for example, in the UK, the
Audit Commission (2005) produced a set of 45 key measures, including:
community safety, culture and leisure, and housing, as well as health and well-
being. Internationally, the World Health Organization’s (WHO 1997) continuing
definition of quality of life also proposes that it has a multi-dimensional nature,
including the following factors:

“...physical health, psychological state, level of independence, social
relationships, personal beliefs and their relationship to salient features of
their environment.”

Recent quality of life research undertaken in the UK reflects this multi-
dimensional perspective, and numerous factors including health, physical
functioning, relationships, social activities, financial and physical security and
independence have been identified as being influential (see Bowling 1995; Bowling
et al. 2002; Bowling et al. 2003; Hyde et al. 2003; Bowling and Gabriel 2004; Gabriel
1.2.1 The influence of individual differences on quality of life

Cohen et al. (1996) and Albrecht and Devlieger (1999) offer clinical support for the impact of individual differences on the perception of quality of life, for example, Cohen et al. (1996) cite a cancer patient reporting that although her condition had worsened, her quality of life had improved. Her explanation of this was:

“Nothing that is happening to me has improved. In fact, physically I am feeling worse. What is different is how I am taking it.” (p. 1)

Carr et al. (2001) explored factors which affect an individual’s construction and assessment of their quality of life, finding that the following factors were influential: age, gender, social economic status, ethnicity and culture. These can vary across the life course. Hunt (1999) takes a strong relativist approach, viewing individual differences as paramount:

“…is not the presence of symptoms or limitation in function which affect quality of life but rather the meaning and significance of them for individual patients” (p. 229)
However, evidence suggests that, although individual differences are important in people’s evaluation of quality of life, some values and concepts are shared, making an extreme relativist approach problematic. Bowling and colleagues (Bowling et al. 2002; Bowling et al. 2003; Bowling and Gabriel 2004; Gabriel and Bowling 2004; Bowling 2005; Bowling and Gabriel 2007) found evidence that individuals commonly hold: health, well-being, family and other interpersonal relationships, social role, social activities, neighbourhood, access to amenities, financial security, and independence, as being important in their quality of life, although the value placed on these factors varied between individuals. In a cross-cultural study, Grewal et al. (2004) found that six factors related to quality of life - “having a role; support networks; income and wealth; health; having time and independence” (p758) - were shared by all the ethnic groups participating, but how they influenced people’s quality of life differed across cultures. One perspective employed in cross-cultural work provides a useful framework in which to locate such research findings; universalism (Herdman et al. 1997, 1998; Lonner 2000) accepts that human beings have some shared beliefs, values and behaviours, but how these are manifest in their lives is influenced by culture and context.

Suh et al. (1998) and Grewal et al. (2004) highlight that culture can affect people’s concept of quality of life and research developing quality of life measures has also explored this issue. For example, the World Health Organization Quality of Life
group (WHOQOL group) has been working on a cross-cultural measure of quality of life since the early 1990s (WHOQOL group 1995; Skevington 2002; Skevington et al. 2004), and the International Quality of Life Assessment Project has tested the SF-36 cross-culturally (Bullinger et al. 1998; Gandek and Ware 1998; Ware and Gandek 1998; Ware 2000). It is crucial to recognise, however, that the design of such research, as well as how and what is actually validated, should not be taken at face value (Byrne and Campbell 1999). Bowden and Fox-Rushby (2003) suggest that there is a bias towards a statistical approach, which neglects the importance of conceptual equivalence. In a systematic review of the translation and adaptation of generic health-related quality of life instruments, Bowden and Fox-Rushby (2003) found that 65.5% of the work reviewed had no or only minimal investigation into conceptual equivalence. Failing to explore the conceptual foundations on which the instrument is based may lead to cultural bias; for example, Hunt (1999) found that some of the items on the Nottingham Health Profile were inappropriate to use with Egyptians, and research by Herdman et al. (1998) found that the Kenyan concept of family is different from that which is adopted in some commonly used quality of life tools. Even when culture is taken into account during development, further testing assessing validity may return to statistical procedures. For example, the WHOQOL-OLD developed by Power et al. (2005) is a module focussing on older people that bolts onto the main WHOQOL measurement tools (WHOQOL group 1995; Skevington 2002; Skevington et al. 2004) and was designed to be cross-culturally valid. Molzahn et
al. (2011) report on the secondary analysis of data collected in the pilot stage involving 22 centres across the globe, highlighting cross-cultural differences in the importance older people place on different aspects of quality of life. Finding that these differences reduced when health was controlled in the analysis, they proposed that health is a crucial variable in older people’s perceptions of quality of life. However, an important limitation to Molzahn et al.’s (2011) work is that it was purely quantitative; to be able to fully understand why older people rated some aspects of quality of life more highly than others requires further qualitative research.

1.2.2 Measuring older people’s quality of life

The WHOQOL-OLD (Power et al. 2005) highlights an important issue – that older and younger people may hold different concepts of quality of life; other researchers have also recognised this. The following section will focus on three instruments specifically designed to measure the quality of life of older people: CASP-19 (Higgs et al. 2003; Hyde et al. 2003), ICEpop CAPability measure for Older People (ICECAP-O) (Grewal et al. 2006; Coast et al. 2008a; Coast et al. 2008b) and Older People’s Quality of Life questionnaire (OPQOL) (Bowling et al. 2002; Bowling et al. 2009). I recognise that other instruments are available; however, selected these for review because they were developed and tested in the UK, so are relevant to this research, and they take a multidimensional approach to the concept of quality of life (but have key differences).
When developing CASP19, Higgs et al. (2003) and Hyde et al. (2003) took a needs-based approach with the a priori assumption that quality of life involves the satisfaction of four domains: control, autonomy, self-realisation and pleasure. Data from the second phase of testing led to the four domains being collapsed into three: Control and Autonomy, Pleasure and Self-realisation (Wiggins et al. 2008). The domains of CASP19 are associated with Maslow’s needs hierarchy (1943, 1968, 1970), which is problematic as Maslow’s work has been criticised as failing to properly consider the impact of context, culture and individual differences (Diener and Lucas 1999). Indeed, Bowling (2009) reports problems regarding the cross-cultural validity of CASP19. Furthermore, although older people were involved in developing and testing both the wording and appropriateness of the test items, and although Hyde et al. (2003) do not discuss the ethnicity of these participants, due to the cohort involved it is likely that most or all were white British. This suggests that the concepts used in CASP19 do not adequately represent those held by people from BME groups. However, the picture is unclear because research with Gujarati Indian Hindu, Jamaican Caribbean, Punjabi Pakistani and white British participants found evidence that the CASP19 domains were shared by all four groups (Grewal et al. 2004), although consistent with the universalist perspective (Herdman et al. 1997, 1998; Lonner 2000), how the domains manifest in participants’ lives varied.
The ICEpop CAPability measure for Older People (ICECAP-O) (Grewal et al. 2006; Coast et al. 2008a; Coast et al. 2008b) has five domains: attachment, role, enjoyment, security, and control, and older people were involved in all stages of the development of the instrument. An original aspect of ICECAP-O is that rather than simply measuring what people have, it measures quality of life in terms of capability; this recognises the influence of issues such as health and finances and that people have agency and choose what they wish to achieve. ICECAP-O is intended to be applicable to the broad population of older people; consequently, the sampling aimed to be representative of age, gender, health, and SES during development (Grewal et al. 2006). One aspect of ICECAP-O has positive benefits as well as problems – this relates to the terminology of the scale, which was refined by participants (Coast et al. 2008a). On the plus side, lay terminology should make an instrument more user-friendly, but the researchers’ claim that it strengthens validity is questionable, principally as only 19 people developed the final wording. Additionally, all the participants were white British (Coast personal communication, email, 4.3.2009); therefore, the terminology may only be valid for that cohort and require adjusting to account for culture and the effect of time. At the time of writing, ICECAP-O had limited cross-cultural testing (Makai et al. 2011) and no validation of its utility with people from BME groups.

Older People’s Quality of Life questionnaire (OPQOL) (Bowling et al. 2002; Bowling et al. 2009) is a multidimensional measure of quality of life based on the
input of a sample of 999 older lay people living in the UK, existing theoretical knowledge and the wealth of research undertaken by Bowling and her colleagues. As with ICECAP-O, older people were involved in refining the terminology; however, this was a much larger and less homogenous sample. The input of such a large number of older people strengthens the validity of the OPQOL by recognising the value of and including their opinions. OPQOL assesses a wide range of factors and has been thoroughly tested against CASP19 and WHOQOL-OLD, performing well (Bowling 2009; Bowling et al. 2009). However, although older people from BME groups were involved in the development of the measure, psychometric testing questions its validity with people from those groups (Bowling 2009). This suggests that there may be problems with applicability of the domains and/or their constituent factors; Bowling (2009) highlights that this requires further testing.

Walker (2005) notes that there is a distinct lack of theory regarding the quality of life of older people and recommendations have been made regarding the need to develop such theory and promote its use (the European Forum on Population Ageing Research 2003a; Hennessey 2004); the work done by the researchers cited above makes an important contribution to developing such theory. Nonetheless, this brief review demonstrates that despite ongoing research, there remains limited evidence regarding how older people from BME groups who are living in the UK, particularly Chinese people, conceptualise quality of life.
1.3 Context of this research

Among many initiatives intended to improve the quality of life of older people living in the UK is the New Dynamics of Ageing (NDA) programme (NDA 2006). This is a seven-year programme funded by five UK research councils that focuses specifically on older people and draws on the expertise of researchers from numerous disciplines. One of the constituent projects of the NDA programme was the Community Action in Later Life – Manchester Engagement (CALL-ME 2008) project. CALL-ME aimed to investigate the benefits of social engagement for people aged 50 and over who were living in three specific disadvantaged neighbourhoods of Manchester (CALL-ME 2008). While I was a PhD student I was engaged on CALL-ME and worked on developing participatory action research projects involving health and well-being, undertaking my PhD research parallel to this work. Whilst I learned valuable research skills and knowledge from my time with CALL-ME, it is important to state that, although my PhD research also involved participants aged 50 and over, it was wholly independent of the main project and the fieldwork was undertaken in a number of different areas of the city.

1.3.1 Evolution of the research topic

At this stage, to add to the narrative of the thesis, assist the reader in understanding why the specific research topic was chosen and locate me as a researcher, I discuss my motivation and relevant experience.
I was brought up with the belief that good health is the most important thing in life and, as I was usually healthy, never conceived of anything else being as influential in my quality of life. However, in 2001, my father was diagnosed with lung cancer in his 70s; as a non-smoker and a very successful amateur athlete, this came as a shock to him, the family and his friends. How he reacted to his illness challenged my concept of quality of life and motivated me to gain a broader understanding of what was important to people and why.

Within six months of his initial treatment, and minus a lung, my dad returned to his sport, cycling many miles each week with his friends. For him, his life was good, although for us looking on from outside, it certainly did not look that good – pain, mouth ulcers and hair loss being a few of the side effects of his chemotherapy and radiotherapy. I was sceptical that, in reality, he was just being stoical and putting on a brave face; however, I came to understand from both talking with my dad and observing what went on that he was happy because he could still cycle, and also that some things had improved for him. He had met a lot of new people during his hospital treatment and was clearly popular with the nursing staff; he certainly had more visitors at home and if he wanted or didn’t want to do something, he had a ready reason that nobody would question. Dad had several recurrences of cancer and although this reduced the distance he could cycle, being able to still “get on the bike” made life good. Only when Dad could no longer cycle did his perception of life change; he didn’t mourn his loss of
health, but he grieved losing his sport. I realised how limited my understanding of quality of life was and became motivated to find out more.

During my MSc in Health Psychology, I learned that most psychometric instruments were developed with a white Western population and although they were translated into other languages and items were changed to reflect cultural differences, this did not necessarily ensure cultural equivalence. This was reinforced at a conference when a person, who worked in rural India, highlighted that the people they worked with had a different concept of quality of life from instrument designers and that translation and item substitution failed to address this. I also knew from working with migrants living in the UK that, due to acculturation, it is equally problematic to apply paradigms developed in one culture to people who have migrated to a host culture. For example, one man who had retired to Pakistan, only to return to the UK, said this was due to him changing whilst living in the UK and described himself as:

“Too English to be Pakistani but too Pakistani to be English”

My initial ideas for PhD research, therefore, centred on assessing the suitability of using existing quality of life instruments with older BME migrants living in the UK; advice from the PhD progression led me to reduce the scope of my research. I knew from previous work that one ethnic group, the Chinese, were very under-
represented in research (Hanley 2005). Chau (2007) highlights the issues older Chinese people who wish to participate in consultation and initiatives face: the language barrier and failure of others to recognise this is a problem. Yu (2000) found that only 3 out of 100 older Chinese people interviewed thought it was easy to access and use public services, desiring “a specific service to understand needs and problems” (p. 33). Furthermore, Shek et al. (2005) found that there has been little research into quality of life with Chinese people per se, highlighting that, as a consequence, theories developed with Western communities are used to explain the quality of life of Chinese people; they suggest that due to cultural differences between these groups, this may be invalid. Furthermore, whilst I found research that specifically investigated the concept of quality of life of older BME people living in the UK, such as Bajekal (2004) and Grewal et al. (2004), at that time, none involved Chinese elders. Personal communication with one of the researchers highlighted that they felt this was an important area for research (Nazroo, email, 21.10.2009). This highlighted that there was a significant gap in the knowledge regarding understanding what brought quality to the lives of a specific cohort of people living in the UK. However, since beginning this research, Bowling et al. (2009) have included a small number of Chinese people in their later work on the OPQOL.
Thus, my research evolved from my original, unrefined idea about exploring quality of life to being focussed on understanding the concept of quality of life held by older Chinese migrants living in the UK.

1.4 The participant group

1.4.1 Background information of the UK Chinese population

The Chinese community in the UK is possibly the oldest in Europe (Pieke 2004), with Chinese people first migrating to the UK in the 17th century and living in Limehouse in London. The 1911 census showed there were 1,319 Chinese people living in England and Wales (Society of Anglo Chinese Understanding 2012) and the UK now has one of the largest populations of Chinese migrants in the world (Pieke 2004). At the 2011 census, 393,141 people identified themselves as being of Chinese origin, which equated to 0.7% of the population of England and Wales and 6.8% of the non-white population (the figures for Scotland and Northern Ireland were not published at the time of writing) (ONS 2012b). In 2001, Chau and Yu highlighted that approximately one quarter of the UK’s Chinese community were UK born.

Members of the Chinese community in the UK come from many different backgrounds and origins, which reflect to some extent the historical context of migration to the UK. The majority of the early Chinese migrants to the UK were
seaman who lived around busy ports, particularly London, Liverpool and Cardiff (Wong and Richman 2003). Later migrants settled in many areas of the UK and Yu (2000) notes that, due to the economic necessities of the catering trade, Chinese people generally do not live close together, except in the instance of China Towns. Thus, they are usually the smallest ethnic group in a local authority area and consequently, mainstream services often fail to deliver culturally appropriate services (Yu 2000, Chau and Yu 2001).

Post World War 2 migration was predominantly economic and involved people mainly from Hong Kong who became involved in the catering industry (Luk 2009; Pieke 2004); due to land reforms many of these were from rural areas (British Museum 2008). After the end of the Cultural Revolution, professional people such as academics and university lecturers also moved to the UK (The Manchester Chinese Archive 2011). Additionally, when Hong Kong returned to the sovereignty of the People’s Republic of China 50,000 people were given British citizenship. While there are no figures showing how many of these migrated to the UK, what is known is that the majority of older Chinese people living in the UK are from Hong Kong (Yu 2000; Chau and Yu 2001). Other recent migrants are from diverse areas, for example, Taiwan, mainland China, Vietnam and Malaysia, and changes to UK legislation mean that many are highly skilled (Luk 2009). Although, Pieke (2004) notes that Fujianese migrants tend to be unskilled and fill
catering jobs that well educated, socially mobile second generation Chinese migrants reject.

Nazroo (2006) highlights economic inequality within the UK’s Chinese population; with some households in the top quartile for income, but substantially more are in the lower quartile. Nazroo (2006) also reports that while 23% of Chinese people were educated to at least degree level - this was greater than all other BME groups – another 20% had no qualifications.

1.4.2 Manchester’s Chinese community

Consistent with other regions of the UK, the Chinese population of Manchester is one of the smallest of the ethnic groups in the city; again this may be due to people involved in the catering industry, in particular takeaways, needing geographical distance between competing businesses (Yu 2000). The 2011 census showed that 13,639 of the population of Manchester classified themselves as Chinese, which equated to 2.7% of Manchester residents; this represents an increase of 1.4% since the 2001 census (Economic and Social Research Council Centre on Dynamics of Ethnicity 2013). The migration pattern of Chinese people moving to Manchester is similar to that of the rest of the UK (The Manchester Chinese Archive 2011), The first significant number of migrants arrived in the city at the turn of the 20th century with most being employed in private homes and laundries. Increased migration took place from the 1950s with people mainly working in the catering
industry and coming to join family already living in the UK (Manchester Chinese Archive 2011). Wong and Richman (2003) report that 90% of Manchester’s Chinese population are from Hong Kong and are Cantonese speakers, however the compensation paid to farmers by the Hong Kong Government during land reforms also enabled Hakka speakers from the New Territories to migrate to the city (Manchester Chinese Archive 2011). The full demographic data from the 2011 census had not been published at the time of writing; however, a report from Manchester City Council (2004) based on the 2001 census provides a brief description of the city’s Chinese population.

The report shows that 71% of Manchester’s Chinese population had migrated to the UK, males outnumbered females (113 males per 100 females), almost 14% were aged over 50 and 1.6% were aged over 74. Most households in the city consisted of married couples (26.4%) with very few parents and non-dependent children living together (3%). This suggests that there were few people living in traditional multi-generational households. Only, 10.2% of Manchester’s Chinese community lived in the inner city with the remainder distributed amongst all other areas of the city. Chinese residents lived in a variety of accommodation with 35.8% being owner-occupiers, 30% lived in accommodation rented from a private landlord, a friend or relative, or an employer - which was the highest of any group in the city - and 13.6% lived in rented social accommodation. The report also discusses the quality of these homes, finding that a higher proportion of Chinese people than
any other of the city’s ethnic groups lived in shared dwellings, were over-crowded and shared bathrooms and toilets with other households. This may be linked to the large proportion living in privately rented accommodation.

The Chinese population reported the best standards of health of all Manchester’s ethnic groups with only 5.5% stating they were in poor health in comparison to 12.5% for all groups. The report suggests that this may be due to the age breakdown of the different ethnic groups i.e. only 6.4% of the city’s Chinese population was aged over 65. However, although the relatively low numbers of older Chinese people may be an influencing variable, statistics for other groups suggest that age was not the only influence on standard of health. For example, 8.5% of the city’s Bangladeshi community reported being in poor health and only 3% of that community were aged over 65, and 9.2% of the Pakistani community said they were in poor health and 3.8% of the whole group were aged over 65.

A high percentage of Manchester’s Chinese population were professionals and skilled people with the most common occupations being: work in hotels and restaurants, education health and social work, and financial/business. Conversely, there were low numbers working in construction, processing and machine operating and public administration, defence and social security. There were large differences in educational standards - 37.7% of people held qualifications at levels 4/5 (degree level or higher), whereas 23.4% had no qualifications. There was
a correlation between age and educational standard; those people without qualifications were mainly in the older age groups: 63.7% of those aged 50-59, 79.4% of those aged 60-64 and 85.5% of those aged 65-74 had no qualifications. On the other hand, only 5.2% of people aged 16-21 and 11.8% aged 24-34 had no qualifications. This age related difference may be linked to migration patterns, as during the 1950s and 1960s most migrants were economic migrants and many were from rural areas (British Museum 2008), whereas recent migrants are highly skilled and better educated (Luk 2009). The city is also home to large numbers of Chinese students. The first Chinese student studied at The University of Manchester in 1910 (Manchester Archive 2011) and the university now has approximately 1,300 Chinese students and has established The Manchester Confucius Institute in partnership with Beijing Normal University (University of Manchester 2012). Manchester Metropolitan University (MMU) has had an office in China since 2010 with the aim of raising the university’s profile and encouraging Chinese students to apply to the university (MMU China 2012).

1.4.3 Services available to Manchester’s Chinese community

Manchester is home to the second largest China Town in the UK, which is a vibrant area with many businesses selling Chinese goods including: newspapers and magazines, food and clothing and providing services such as hairdressing, medicine and restaurants (Manchester Chinese Archive 2011). The city has a number of organisations that serve the Chinese Community, including: Chinese
Health Information Centre (CHIC), Manchester Chinese Centre, Tung Sing Housing Association and Wai Yin Chinese Women Society. These organisations offer assistance with health care, welfare benefits, housing and translation, they also provide activities such as exercise classes, luncheon clubs and outings.

The Chinese Health Information Centre, which focuses on health promotion and care, was established in 1987 to address health inequalities in the Chinese community (East Lancs Healthy Minds 2009). As well as having Chinese general practitioners on site, the centre provides a range of other services including diabetes screening, health information sessions and interpreters who are trained to translate medical terminology so can support non-English speakers at hospital appointments. (Race for Health 2008). At the time of writing, due to changes in NHS funding, CHIC had lost their contract to provide translation services at local hospitals.

Wai Yin Chinese Women Society is a charity that was established in 1988 with the aim of addressing gender inequality and discrimination against Chinese women, and initially provided support for women in abusive relationships. It has now grown to provide a range of bilingual services including: education and training, a mental health project, family support and an elderly project. Recognising that older Chinese people can potentially be isolated, The Wai Yin Chinese Women Society also has a focused service for older people based at the Sheung Lok Older
People’s Centre. The centre has a luncheon club and offers activities, for example, dancing, table tennis, Tai Chi and karaoke, and services such as a Chinese hairdresser and massage. The centre also provides outreach and befriending to older Chinese people in the community (Wai Yin Chinese Women Society 2011).

Part of the Arena group, Tung Sing Housing Association was set up to facilitate Chinese people accessing quality housing and also provided the first sheltered housing scheme for older Chinese people in the UK. The association has expanded into a specialist BME housing provider and has a number of apartment blocks close to Manchester’s China Town as well as having properties in other parts of the city (Tung Sing Housing Association 2010). Johnnie Johnson Housing Association, while not specialising in housing for BME elders, has a number of Chinese older people living in their sheltered housing schemes, for example Duxford Lodge in Crumpsall. The tenants and scheme manager arrange events to celebrate Chinese Festivals and Tung Sing Housing Association offers support, including translation services, to those tenants to facilitate them settling in their new homes (Johnnie Johnson Housing 2013).

The Manchester Chinese Centre was established in 2005 and is a charity that works in partnership with other organisations and the city council, for example on joint projects such as the Manchester Chinese Archive (The Manchester Chinese Archive 2011). The centre offers a range of services, which have a strong emphasis
on education for example language classes, cultural workshops, adult education and training. The centre also offers legal advice, translation services and works with Chinese migrants to help them adjust to their new homes and find employment and training. One of the aims of the centre is to highlight Chinese culture and the centre is involved in organising a range of cultural activities throughout the year such as the New Year and Mid Autumn Festival with celebrations in China Town, a Dragon Boat race and an annual performance from the Cantonese Opera Group (Manchester Chinese Centre 2012).

1.4.4 Participant information

The participants in this research were all migrants to the UK, aged from 50 upwards and resident in the Manchester area. All the participants identified themselves as being Chinese, with the majority being originally from Hong Kong and speaking Cantonese as their first language, although a small number were from mainland China and Vietnam. Participants had worked, and some were still employed, in a wide range of occupations including: administration, catering, information technology, medicine, tailoring, teaching and translating. The participants were interviewed either at the premises of two organisations serving the Chinese community or in their homes and interviews were undertaken in the language of their choice with an interpreter being engaged when necessary.
1.5 Structure of the thesis

Due to the selection of the grounded theory method, the structure of this thesis varies from the traditional pattern of reviewing the literature before the fieldwork is undertaken and the findings explored. Indeed, I did not review the literature that is relevant to the findings of the research until data analysis was complete; this is placed after the results chapters and before the discussion. Structuring the thesis in this way intends to both reflect the nature and process of grounded theory research and construct a coherent narrative that enables the reader to follow the route I took. Consequently, a review of the literature relevant to the selection of the research design and application of the methodology is reported in chapter two.

1.5.1 Content of the chapters

**Chapter two**: presents the research aims and explores how the research design was developed, demonstrating why specific decisions were taken. I provide the rationale for using grounded theory, including why I did not strictly adhere to a traditional Glaserian approach (Glaser and Strauss 1967). I also examine the implications of this, and the assumptions of and techniques used in grounded theory. The planned research procedure is explored in depth and demonstrates, with reference to relevant literature, that I considered the issues of cross-cultural and cross-language research, working with an interpreter, ethics, and recruitment of participants.
Chapter three: examines the implementation stage of the research, showing how it was refined using a pilot study before full implementation. The challenges I faced are highlighted and the strategies employed to overcome them are examined. This includes: the difficulties experienced recruiting participants, interviewing with an interpreter, and the quality assurance of the translation process. I also discuss the process of data analysis, demonstrating how grounded theory techniques were employed to develop the resulting theory.

Chapters four, five and six: present the categories developed during data analysis, which conceptualise what participants said was important in their quality of life – “identity – maintaining and modifying”, “belonging” and “value systems”. Throughout these chapters, the analysis is supported by data extracted from participants’ interviews.

Chapter seven: implicit throughout the discussion of the categories presented in the preceding chapters was the core category – the theory of “synthesising self”. In this chapter I present an explicit explanation of that emerging theory by highlighting the conceptual links between the categories of “identity – maintaining and modifying”, “belonging” and “value systems”, to show how they are involved in this dynamic process of “synthesising self”, which participants use to construct and maintain a consistent sense of self, and how this influences their quality of life.
Chapter eight: reviews and critiques the literature that is relevant to the findings of the research.

Chapter nine: discusses and evaluates the validity of the research findings in comparison with extant literature and knowledge. The similarities and differences between the emerging theory of “synthesising self” and existing theory and knowledge are explored and I highlight how this new, emerging theory supports and extends existing information and offers new understanding and insights.

Chapter ten: evaluates the research methodology, exploring the issues I faced regarding the use of grounded theory as well as those related to the cross-cultural and cross-language nature of the work.

Chapter eleven: concludes the thesis by considering whether the aims of the research were achieved and identifying its limitations. It also discusses the contribution the research has made to the body of knowledge regarding what is important in the quality of life of older people, and to designing research undertaken with participants from BME groups. I make recommendations for use of the findings of this research and for future research. In this chapter I also reflect on the study and explore my professional and personal development during my time as a research student.
1.5.2 Writing style

To reflect the qualitative nature of the research and highlight that it is my personal account, the thesis is written in the first person. This also gives me a voice and firmly locates me within the research (Hart 1998; Oliver 2004).

The theory developed from this research is grounded within the data collected and illustrated throughout by quotes from participants’ interviews and from interpreters. It is important to highlight that not all of these quotes have been presented verbatim and that some editing has been undertaken. For all the participants who spoke English, it was their second language, as was also the case for all but one of the interpreters; consequently, their speech was occasionally idiosyncratic. Whilst wanting to be faithful and true to the voice of the participants, using some quotes verbatim made initial drafts of the thesis difficult to read and the arguments awkward to follow. I decided, therefore, to edit some quotes with the aim of aiding the reader and maintaining the flow of the narrative. Furthermore, drawing on previous experience, I was cognisant that participants can be distressed by reading verbatim transcripts of interviews and unedited quotes as these can draw attention to poor grammar and the use of slang and colloquialisms. Additionally, information that would enable people to identify participants has been removed or amended.
Nevertheless, editing of quotes was only undertaken where appropriate and I never knowingly employed it in a manner that could have affected participants’ meaning. It is important to note that, as grounded theory research aims to explore concepts rather than actually analysing speech, editing quotes is not inconsistent with this method. Moreover, some interviews were undertaken with an interpreter; therefore, although the translation of questions and answers should be consistent with the participants’ and my utterances, some of the words used will be those of the interpreter. All quotes which were translated by an interpreter are annotated (via interpreter).

The following conventions are used when presenting quotes from participants’ interviews:

… Indicates where a quote is from a longer utterance and the whole utterance has not been used.

( ) is used where something has been removed, and what has been removed will be indicated in the brackets. This convention was commonly employed to remove data that could identify a participant, another person or a specific organisation.

[ ] is used where information has been added to clarify a quote.
Finally, to facilitate anonymity, I assigned all the participants a pseudonym; consistent with the fact that the participants used English names, I selected English pseudonyms.

1.6 Summary

This introductory chapter has discussed the background and context of this research, including: aspects of my personal motivation and how the project developed from an initial desire to understand more about quality of life to a focussed, well-defined research topic. Brief details of the participant group involved in the research have also been provided. The chapter then moves onto outlining the structure of the thesis and the content of future chapters, closing with an explanation of the writing style adopted and the editing of quotes.

The following chapters contain the main content of the thesis, beginning with a justification and presentation of the planned research method.
Chapter 2

Planned Methodology
The previous chapter provided the background context for this research, including: what motivated it, a précis of the participant group, and the structure and style of the full thesis. This chapter provides a rationale for and justification of the research design, demonstrating that selecting grounded theory as the method of enquiry is consistent with the aims of the research and explaining how the data source and mode of data collection were chosen. I consider the challenges involved when undertaking cross-cultural and cross-language research, such as insider/outsider researchers and interviewing with the aid of an interpreter, and demonstrate how strategies to address these were built into the research design.

2.1 Research design

When selecting the most appropriate method of enquiry for this research, I gave careful consideration to a number of issues, not least that the method employed would facilitate achievement of the aims of the research; these were to:

1. Identify the factors that older Chinese migrants living in the UK feel are important in having a good quality of life.

2. Understand why these factors are important and what they represent.

3. Identify and explore the process participants use to construct a good quality of life, developing a new theory if appropriate.
It was also important that the method was consistent with my ontological perspective and ethical principles (Mason 2002).

2.1.1 Data collection

Meeting the aims of the research required rich, in-depth information that could best be obtained via methods allowing the participants to be flexible in their responses and to provide as much or as little information as they wished; consequently, I rejected quantitative and fixed-response surveys and selected a qualitative approach. Mason (2002) offers guidance on whom and/or what may be able to provide the data necessary to address the research aims, highlighting that, where researchers are seeking people’s views and experiences and need rich, in-depth data, qualitative interviews may be appropriate. However, before making a decision, I considered other methods of data collection, such as open-ended surveys and written or spoken personal accounts, and also sought advice from professionals working in the Chinese community regarding the language and literacy skills of potential participants.

The professionals advised that the majority of older Chinese people spoke Cantonese, although a small number spoke Mandarin or Hakka; however, they highlighted that the Mandarin speakers were likely to also speak English and that the Hakka speakers often also spoke Cantonese. They also informed me that many potential participants were not literate in English and some were not literate
at all. Whilst this meant that some participants could have answered open-ended surveys or produced written accounts in their own language, due to the very high cost of translating material into English, these would have to have been written completely in English. I recognised that, due to these issues, gathering data via written accounts would exclude many potential participants; therefore, rejected them. I also considered participants recording an open spoken account, which would then be translated into English; however, this would not guarantee that the subject area of interest would be covered, neither would it be possible to probe further or seek clarification of what had been said. Consequently, I judged face-to-face interviews to be the best method of data collection.

Who should undertake the face-to-face interviews was also an important decision; employing Cantonese, Mandarin or Hakka speakers to interview participants in their own language with subsequent translation of the interviews into English was an option. However, this would again not guarantee that the necessary data was collected, neither would it be possible to probe for additional information during the interviews. This may have resulted in poor-quality data and a need to undertake further interviews with participants. The alternative was for me to undertake the face-to-face interviews with the aid of an interpreter; this would allow the participant to answer freely and in as much depth as they wanted, enable me to ensure the relevant subject areas were covered, and to probe for more information or clarification if necessary. Consequently, I decided that the
best option was for me to undertake the interviews with the aid of an interpreter and to record and transcribe them after completion for data analysis.

In addition to the qualitative data, I also needed to collect demographic information about participants. The university ethics committee directed that this data was collected via a fixed-response questionnaire that participants could either self-complete or, only when necessary, complete with the assistance of an interpreter or myself (see appendices 1 and 2).

The cost of translating the research documents from English into a second language was high and, as the professionals I consulted had advised that most potential participants spoke Cantonese and/or English, I decided to initially produce all the research documents in Cantonese and English, only obtaining Mandarin or Hakka versions on request.

2.1.2 Theoretical perspective

Whilst I had judged qualitative methodology to be the most appropriate to address the research questions, I was aware that qualitative work has been criticised as being descriptive, unscientific and lacking validity (Denzin and Lincoln 1994, 2005). Denzin and Lincoln (1994, 2005) discuss the criticism of qualitative research and how its rejection of traditional scientific methods, with their philosophical underpinning of positivism, has resulted in resistance to it
from hard science, such as physics and chemistry. One of the valued aspects of a
traditional scientific approach has been objectivity, where the effect of the
researcher is ignored and techniques are employed to control the impact of
variables, such as demand characteristics and bias. However, the paradox is that
attempting to control the human variables in experiments serves to admit that
they do have an impact on the research process and outcomes. In reality,
completely neutral and objective researchers do not exist in the usual sense;
however, Fay (1996) proposes that it is possible to be objective but in a fallibilistic
sense, which he calls critical inter-subjectivity. Objectivity is seen as a dynamic
social process that is achieved by basing the findings and research report on the
evidence, and being critical of the process of the research and oneself throughout
the whole period of the work. Additionally, the researcher needs to be open to the
criticism of others, to other evidence and how this may impact on the study.

During prior research and study, I had adopted an interpretative perspective and
agree with Charmaz’s (2003) assertion that researchers cannot be merely detached
recorders of data and that their interaction with participants impacts on the
research and how data is constructed and analysed. However, even though I
recognised the importance of the dynamic relationship between researcher and
participants and between researcher and data, an extreme constructivist
perspective was challenged by evidence from the literature review reported in
chapter one. For example, people cited common factors such as security (Grewal
et al. 2006) and relationships and standard of living (Bowling 1995) as being important in their quality of life. Balanced against this was the proposal that how things are conceived of and affect people’s lives is shaped by characteristics such as gender, age, culture and race (Herdman et al. 1997 and 1998; Lonner 2000; Grewal et al. 2004). I resolved this issue by retaining my interpretative perspective alongside following Fay’s (1996) advice; reflecting on my impact on the research throughout the course of the fieldwork, data analysis and writing up of this thesis and seeking feedback from others with both academic and lay backgrounds.

2.2 Grounded theory

One of the aims of this research was the generation of new theory developed from and supported by the data. It was crucial that the process of theory development was rigorous and transparent; grounded theory (Glaser and Strauss 1967; Strauss and Corbin 1998; Corbin and Strauss 2008) meets these criteria, therefore I judged it to be the most appropriate method for this research. Grounded theory is an established method used to generate new theory in a variety of research areas and can accommodate numerous research perspectives, both positivist and non-positivist. Glaser and Strauss (1967) developed grounded theory at a time when the emphasis in sociology was on verification of existing theory and the scientific method. Consequently, qualitative research was often viewed as being of inferior quality to quantitative; therefore, Glaser and Strauss (1967) didn’t just aim to address what they termed:
“...the embarrassing gap between theory and empirical research” (p. vii)

They also wanted to produce a method that generated theory directly from data via rigorous, systematic qualitative research that enabled the research findings and theory developed to be traced back to the data (Glaser and Strauss 1967; Bryant and Charmaz 2007). This is consistent with Fay’s (1996) guidance on producing high-quality qualitative research.

It is important to highlight that, since its development 40 years ago, Glaser and Strauss’ classic grounded theory methodology has been adapted in accordance with scholars’ and researchers’ own perspectives and epistemological backgrounds. Mills, Bonner and Francis (2006) discuss that there are now numerous adaptations of grounded theory in use and visualise this adaptation as a constantly evolving spiral based on Glaser and Strauss’ original work. Some traditionally oriented grounded theorists do not accept adaptations of grounded theory as being valid or indeed as grounded theory (Glaser 2002). Nevertheless, in practice, adaptations of traditional Glaserian grounded theory are recognised and referred to as grounded theory; therefore, even though my research deviated from Glaser and Strauss’ original design, for example, by incorporating techniques developed by Strauss and Corbin (1998) and Corbin and Strauss (2008), I term it as such.
2.2.1 Grounded theory – strengths and weaknesses

Denscombe (2007) suggests that the major strength of grounded theory is that it was developed to generate theory directly from the data collected and thus it has much to offer the qualitative researcher. Its rigorous methodology and transparent processes enable the researcher to demonstrate how their proposals and theory were developed, and provide evidence to support the theory’s validity. Data collection and analysis proceed in tandem, facilitating a flexible approach that enables the researcher to respond to the data and the developing theory. Grounded theory also provides an opportunity to raise qualitative research beyond a description of what is happening to conceptualisation of the data (Glaser and Strauss 1967; Strauss and Corbin 1998; Charmaz 2005, 2006; Corbin and Strauss 2008).

Nevertheless, traditional grounded theory has been criticised as being objectivist and positivist by researchers taking a social constructivist approach (Charmaz 2005; Bryant and Charmaz 2007), although Holton (2007), a grounded theorist steeped in Glaserian tradition, suggests that this fails to understand the very nature of grounded theory, positing that:

“...as a general methodology grounded theory transcends the specific boundaries of established paradigms to accommodate any type of data sourced and expressed through any epistemological lens” (p. 268)
Consistent with Glaser (2002), Holton does not recognise adaptations to grounded theory as being valid, but that grounded theory may be applied in any situation is accepted by both later evolutions and the classic Glaserian approach. This range of applicability whilst continuing to produce valid outcomes is one of the method’s main strengths. However, it is important to bear in mind Denscombe’s (2005) caution that there are instances where work is described as using grounded theory when the researcher has not adopted its rigorous and systematic approach.

Grounded theory’s rigorous approach involves a number of specific techniques, for example, coding data, writing memos and constant comparison (Glaser and Strauss 1967; Strauss and Corbin 1998; Corbin and Strauss 2008), with later publications offering additional techniques and guidelines to assist grounded theory researchers, especially novices (Strauss and Corbin 1998; Corbin and Strauss 2008). It must be considered that whilst this offers guidance, it is easy for a researcher to become focussed on the processes and on following the procedures rather than properly engaging with the data; indeed, Silverman (2005) notes:

“...used unintelligently it [grounded theory] can degenerate into a fairly empty building of categories or into a mere smokescreen to legitimise purely empiricist research” (p. 180)
One of the tenets of grounded theory, which can be difficult to negotiate and adhere to, is the requirement to avoid preconceptions; this applies not only to a researcher’s prior knowledge, but also to the phenomenon under study (Glaser and Strauss 1967). Although consistent with the aim of developing new theory, in practice this is not straightforward. As human beings, researchers bring their own knowledge, beliefs, values and experience and it is naïve to propose that these can be compartmentalised and kept separate from the research process and data analysis. At best, a researcher can be aware of this issue and engage in reflective practice, guarding against such factors having an unwarranted impact (Fay 1996).

The requirement to avoid preconception can also be problematic in relation to organisational requirements for project and ethical approval. Indeed, some of the usual steps involved in the traditional research process, such as undertaking a literature review prior to beginning research, having a specific research question, and a detailed, precise interview schedule, are discouraged by classic grounded theorists. The problem for the novice grounded theorist, particularly for those who are research students, is how to reconcile the organisational requirements for project and ethical approval with the principles of grounded theory research. I addressed this by undertaking a limited literature review that identified a gap in the existing knowledge regarding quality of life (see chapter one). This justified the need to develop new theory and supported the use of grounded theory, as
well as facilitating the production of a well-thought-out research proposal that also met the ethical requirements of the university.

An important issue in grounded theory research is recognising when theoretical saturation has been achieved and to stop collecting and coding data:

“…saturation means that no additional data are being found whereby the sociologist can develop the properties of the category.” (Glaser and Strauss 1967 p. 61)

Generating a grounded theory is not a linear process; in practice, data collection and analysis take place in parallel, with analysis commencing immediately after the first data is collected (Glaser and Strauss 1967; Strauss and Corbin 1998; Charmaz 2003; Corbin and Strauss 2008). If they have been able to adhere to analysing data straight after it was collected and use it to develop categories and a nascent theory, the researcher should recognise when categories are theoretically saturated. Dey (2007) highlights that data is collected not to provide verification of the developing theory, but to generate theory, and that the term “saturation” is misleading, proposing “theoretical sufficiency” (p. 117) as a better description. Nevertheless, it cannot be ignored that stating saturation has been achieved does involve subjective judgement on behalf of the researcher and it is possible to
prematurely close categories, which then provides weak support for the grounded theory developed.

Grounded theory is flexible and researchers may revisit any stage in the research process, including data collection, at any point in their work up to and including the final write-up, so if a weakly supported theory is produced, it remains possible to strengthen it (Strauss and Corbin 1998; Corbin and Strauss 2008). Indeed, researchers may choose to re-visit a piece of work after its initial completion to further develop, modify and refine their theory from a case-specific substantive grounded theory to a more generalised formal theory (Glaser and Strauss 1967; Strauss and Corbin 1998; Corbin and Strauss 2008).

2.2.2 Sampling

Sampling in grounded theory is purposeful, aiming to collect data from people who have knowledge and experience of what is being studied, rather than obtain a random sample (Glaser and Strauss 1967; Strauss and Corbin 1998; Charmaz 2003, 2005). When deciding on a sampling protocol, it is important to consider who and/or what could provide the information necessary to address the research aims. For this research, possible informants and information I considered included: older Chinese people, their families, professionals working in the Chinese community and existing documents and literature. However, addressing the research aims required first-hand, in-depth information; therefore, I selected
older Chinese people, all of whom had migrated to the UK, as the primary data source. To avoid pre-conception, I decided to only consult existing literature when the data collection and analysis were complete.

The specific techniques employed in grounded theory to analyse data and develop theory, which include constant comparison, coding, memo writing, diagramming and theoretical sampling, are best illustrated with reference to data, and I therefore discuss them in the write-up of the data analysis included in the next chapter.

2.3 Cross-language challenges

Discussions with professionals working with the Chinese community suggested that most participants would prefer to be interviewed in Cantonese or Mandarin because they either spoke no English or felt more confident with their first language. Consequently, consideration had to be given to the possible challenges of interviewing with an interpreter and how they might affect both the research process and the outcome. I realised that, although some unexpected issues may arise during the fieldwork and would have to be addressed at that time, other issues could be anticipated and developed strategies for addressing them which were built into the research design.
The participants and I having different first languages was clearly a factor which could impact on the research. The dilemma is that, whilst it is important to collect accurate data, evidence suggests that members of black and minority ethnic (BME) groups are often excluded or under-represented in research, precisely because researchers feel that a language barrier and the need to use interpreters present problems that are too difficult to resolve (Marshall and Whiles 1994; Frayne et al. 1996). Failing to recognise diversity within society has moral implications for researchers regarding the issues of exclusion and equality. It is also important to consider that excluding people from BME groups and/or non-English speakers from research may impact on its validity and the applicability of the findings. For example, as discussed previously, as psychometric instruments measuring quality of life have mainly been developed in a Western context, they may not be applicable across cultures (Staniszewska et al. 1999).

Although working with participants who speak a different language from the researcher presents methodological and ethical issues, as strategies can be developed and implemented to address them, language-related concerns should not therefore preclude such research from taking place. Rather than look for a reason not to undertake cross-language studies, researchers should consider the benefits of doing so and this was the approach I adopted in this study. Indeed, Hunt and Bhopal (2003) state:
“Issue of cross language data collection should be seen as a challenge and not an obstacle, a stimulus to innovative thought and the development of new techniques of investigation.” (p. 353)

The critical reviews by Wallin and Ahlstrom (2006) and Squires (2009) highlight the possible issues involved when undertaking cross-language research and make valuable recommendations to strengthen methodology. The choice of an interpreter and the process adopted should ideally be driven by the researcher’s perspective. Issues which should be considered are whether:

- The researcher sees the interpreter being an active player in the research, contributing to the dynamics of the interview, or just as a human translating instrument.
- The researcher feels that the benefits of working with an interpreter known to the respondents outweigh the problems this may cause.
- The interpreter should match the respondents in terms of age, gender, and ethnicity.

These issues are not always considered or satisfactorily addressed; Squires (2009) found that 33 of 40 cross-language qualitative studies involved methodological choices that she proposes affected the quality of the research. Wallin and Ahlstrom’s (2006) review found that there was no common approach to
addressing the methodological issues associated with interviews undertaken with the aid of an interpreter.

Pragmatically, particularly for student researchers, the action that can be taken to strengthen the research design may be limited. For example, whilst the choice of a suitable interpreter is crucial, in reality, the choice may be limited to who is available and/or whether their fees can be met. In such cases, it is important to consider and report how this may have impacted on the research process and the findings. Nonetheless, a number of the issues identified as being important in cross-language and cross-cultural research can be addressed and the remainder of this section discusses how strategies were developed to do so. I consider how successful the strategies were and how they were adapted when reporting on how the research procedure was applied during the pilot study and the main fieldwork.

2.3.1 Researcher-interpreter relationship

The relationship I had with the interpreter was a crucial element in the success of this study and Baker (1981) emphasises that it is important to spend time with the interpreter, ensuring that they are aware of and understand what is being investigated, and how this will be done. I decided it was important to build a rapport with the interpreter before undertaking any interviews so we met and discussed the research and its aims prior to the pilot study. I ensured that the
interpreter understood the aim of the research, the proposed interview schedule, what information was sought and what was expected of them. I also sought the interpreter’s input and feedback on the research design, having an open discussion where issues were resolved before the fieldwork began.

2.3.2 Number of interpreters

Working with only one interpreter has numerous benefits, not least of which is that it should be possible for the researcher and interpreter to build a rapport, and for the interpreter and researcher to become comfortable with the interview process and work as a team. Twinn (1997), in an investigation of the written translation of interviews, recommends using one interpreter to assist consistency. However, there is a major issue with working with only one interpreter: even though their translation may be consistent, it may be consistently biased or they may be consistently incorrect in their translation of both the researcher’s questions and the participants’ answers. Indeed, Kapborg and Berter (2002) suggest that the validity of their work may have been affected by them being unaware of whether the interpreter was accurately relaying questions and responses during their interviews with participants. The intention in this study was to use only one or two interpreters; however, to alert me to any translation-related issues or problems, my research design included a sample of the translated interviews being checked for accuracy and quality by another independent interpreter.
Nevertheless, I anticipated that, in practice, it may not be possible to always work with the same interpreters, for example, participants may have expressed a preference for somebody else or the interpreter may not have been available when needed.

2.3.3 Active or passive translation

The decision between using active and passive translation was influenced by my perspective; I conceive data as being created during the dynamic interaction between respondent, interpreter and researcher. Thus I viewed none of these people as being neutral actors and perceived all as being able to influence the resultant data. However, even with this paradigm, there are issues regarding how active the interpreter should be. The researcher may decide to use verbatim translation whilst still acknowledging that the interaction between the three actors affects the outcome. Alternatively, researchers such as Temple and Edwards (2002) take the approach that an interpreter is a key informant and that this assumption should be built into the research. Pitchforth and van Teijlinge (2005) discuss the impact of changing course during their research and revising the interpreter’s role from being passive to taking an active role, finding that the interviews flowed better and a better rapport was achieved. However, they highlight that this came at the cost of losing control of the research and, to some extent, the resulting data.
The aims of the research, the methodology and the type of information required are also crucial drivers in the decision as to whether the interpreter takes an active or passive role. If the methodology involves a structured interview or administering a questionnaire and/or the information sought is straightforward and factual, it may be appropriate to allow an interpreter to control the interviews. However, where rich, in-depth data is sought and unstructured interviews are used, it would be unwise to pass control entirely to the interpreter. In this research, although I accepted that the interpreter would be an active part of the research process, because in-depth information was sought and additional probe questions may have been needed to clarify a participant’s answers, it was not possible to allow the interpreter complete control of the interviews and still effectively address the research question. Consequently, except where it would influence the outcome of the research – in such instances, the interpreter was asked to inform me – I asked the interpreter to take a mainly passive role. Nonetheless, I remained cognisant that they would still have some impact on the process and outcome of the research.

2.3.4 Translation style

Closely linked to the issue of using active or passive translation is whether to interpret word for word (verbatim) or allow the interpreter to re-word and/or summarise the participants’ responses; where the interpreter is completely passive, it follows that the process will be verbatim. However, this assumes that
language is distinct from culture and evidence suggests that translating utterances word for word does not always convey or translate meaning. Lopez et al. (2008) note that colloquialisms may mean nothing or take on a different meaning when directly translated into another language, whilst Peria (2007) found that translating speech verbatim from English to Spanish did not always convey the required meaning. It is important to recognise that linguistic misunderstandings may not always be due to translation, but rather to cultural interpretation; therefore, Peria (2007) argues that cultural equivalence, that is, focussing on the meaning of utterances, must be considered during translation. This issue proved pertinent to this study; during a discussion I had with a potential interpreter, they emphasised the need to understand the meaning behind words, highlighting that what is said in Cantonese is not always what is actually meant. I therefore had to balance the need to control and direct the interviews with the issue of achieving cultural equivalence; I addressed this by asking the interpreter to indicate instances where they needed to modify what participants had said for it to have meaning in English, and also incorporated this into the post-interview debriefing.

Another style-related issue is whether to use the first or third person in the translation. This is moot for research where the interpreter is seen merely as a conduit between the researcher and the respondent; in such circumstances, it seems appropriate that the interpreter would use the first person and thus remain invisible in the research. It was important that this research was reported as being
a cross-language study and that the input of the interpreter was recognised. Larson (1998) (cited in Wallin and Ahlstrom 2006) suggests that one way of emphasising this and of making the interpreter visible is to use the third person; I decided therefore to employ the third person during translation. Understanding that some interpreters may not be comfortable with this, I decided to discuss this preference with the interpreter before any interviews took place.

In cross-language interviewing, translation may be done simultaneously or turns may be taken. As the research design required open questions with the responses influencing the following questions, I selected the turn-taking approach. The process is shown in diagram 2.1 below:

![Diagram 2.1: The turn-taking approach to translation.](image)

Although I recognised that this would be a painstaking process and could result in lengthy interviews, I judged it to be the best way to facilitate data collection in line with grounded theory methodology. This again was included in the discussion that would take place with the interpreter before beginning to undertake interviews, and it was also highlighted to the participant at the beginning of each
interview so that they would allow the interpreter enough time to translate their responses before moving on.

2.3.5 Accuracy of translation

It was crucial that the interpreters translated both the interview questions and the participants’ responses accurately without adjusting or censoring in light of their own opinions, understanding and beliefs, and I developed strategies to address and manage this issue.

Before the fieldwork began, I fully briefed the interpreters on the aim and methods of the research so that they understood the importance of ascertaining the participants’ personal views and that, should they amend, edit or censor either my or the participants’ utterances, this could have a detrimental impact on the research findings. Irvine et al. (2007) suggest that it is also good practice to clarify any confusion that occurs during translation of interviews, therefore I asked the interpreter to seek clarification of any misunderstanding of my questions and/or participant’s answers during the course of the interview; additionally, this issue was again included in the post-interview debriefing.

I built a quality assurance process into the research design and interpreters were told that a selection of interviews would be translated by a second interpreter. This second translation was designed to check the first translation for accuracy,
the identification of alternative understandings of the participants’ responses and also to detect whether any gatekeeping or censorship had taken place. I recognised that use of a second interpreter in the assurance process needed careful handling, but considered it to be a valuable strategy in strengthening the research design and subsequent confidence in the validity of the findings. This stage of the process is reported during the discussion of the application of the research procedure.

I also recognised that, in practice, it may not be practical to have all the interviews re-interpreted for quality, not least due to time and cost constraints. To address this, I built other techniques into the design; these involved triangulating data across interviews, checking for consistency and exceptions. This was entirely consistent with grounded theory methodology and also facilitated the technique of constant comparison.

2.4 Cross-cultural challenges

2.4.1 Matching the interpreter and participants

As discussed, there are particular advantages in using an interpreter who is from the same culture as the participants; as well as accuracy of translation, this also has the advantage of improving cultural sensitivity. Freed (1988) and Baker (1981) note that if the interpreter and participants are matched in culture, the interpreter
can make the interviewer aware of any possible cultural issues which may affect their answers, or of any questions which may offend the participants. This research had the added variable that the participants were all migrants to the UK and therefore lived in a host culture; Twinn (1997) suggests that to be effective in such circumstances, interpreters need knowledge of both the home and host cultures. Cognisant of this, all the interpreters involved in the interviews, as well as the second interpreter who quality assured the initial translation of the interviews, had experience of both home and host cultures.

The interpreters were also members of the Chinese community, from which the participants were drawn, so were aware of any local issues which may have affected the research and were likely to be attuned to what people may have found nonsensical, uncomfortable to answer or offensive; I asked them to alert me to any such issues. Some people may feel comfortable discussing their lives with someone they know being present, and others may not. For example, Alexander et al. (2004) found that people may prefer friends and/or family to interpret for them as they trusted them; therefore, having a known person either interpreting or in the room may put participants at ease. I addressed this by giving the participants the option of: having somebody they knew with them during the interview, being able to choose their own interpreter or having an interpreter I engaged. Although this offered the advantage that participants were comfortable with and trusted the interpreter, I was cognisant that it may affect their future relationship with others.
within their community; this was discussed with the interpreters before beginning the interviews.

2.4.2 Insider/outsider researchers

Being an outsider interviewing in a tightly knit community has both advantages and disadvantages. Fay (1996) proposes that it is possible for an outsider researcher to have some advantages over one who is a member of the community being researched, suggesting that an outsider may be more sensitive and open to information that an insider may take for granted and overlook as being important. However, an insider would be sensitive to context, have a shared understanding with participants and an awareness of issues that are important to the community, thus being able to better understand participants’ responses and identify what is being censored or avoided.

People may feel that an outsider may judge their community and be worried about the impression their answers make on the researcher and on the reader of any subsequent report. Consequently, they may censor their answers or be wary of giving their true opinion, providing instead what they feel is a socially desirable answer (Miller 2004). On the other hand, they may be more willing to share information with an outsider that they would not want their peers to know (contingent on their confidentiality being protected) (Sixsmith, Boneham and Goldring 2003). Censorship may also occur where individuals want to portray
themselves or their community in a particular way, or they may simply feel too inhibited to give a true response. As the research topic and questions did not involve any value judgements about the Chinese community or the service providers, I did not anticipate that participants would be inhibited in their response. However, Sixsmith et al. (2003) and Miller (2004) note that if researchers are to hear participants’ true stories and opinions, they need to gain their trust and this takes time and effort. This is a difficult issue to navigate, particularly as the researcher may be in a more powerful position than the participants; evidence suggests that people can feel exploited (Decambra et al. 1996). I addressed this by visiting the Chinese community project informally, meeting potential participants before the interview process began and talking with them about my research. The aim was to enable the possible participants to question me and to feel comfortable both in participating and being able to refuse to take part. I discussed anonymity with the participants and told them their answers would be kept anonymous and they would be assigned a pseudonym to avoid them being identified in the thesis. I reminded the interpreters about the need for confidentiality and asked them to sign a confidentiality agreement (see appendix 3).

2.5 Demand characteristics

Demand characteristics – when participants respond in the way they think the researcher wants them to – can bias research findings, and thus need to be considered. Clark-Carter (2004) notes that some researchers deal with this issue by
using deception; however, as well as being problematic ethically, deception was inappropriate for this research. Instead, I briefed participants on the aims and objectives of the research, emphasising that there were no correct responses and that their personal opinions were important.

2.6 Summary

This chapter has explored the planned procedure for this research project, and justifies why I selected grounded theory as the method of enquiry. The data source and collection were also examined and I demonstrated how these are consistent with and address the research aims. The challenges involved in cross-cultural and cross-language research were explored and I showed how I used the lessons learned by other researchers to develop strategies, which I incorporated into the research design, to address them. Nonetheless, I recognised that it would not be possible to anticipate all the issues that may have arisen during the course of the research and, furthermore, that it may not be possible to effectively resolve them all. I decided to record any issues and how I addressed them with the aim of strengthening the findings of the study, as well as developing and producing recommendations for future cross-language or cross-cultural research.

The next chapter explores the application of the planned research procedure, including: the use of a pilot study to test and refine the interview and interpretation process before undertaking the main interviews, the selection and
recruitment of participants and data collection. Ethical issues, particularly those related to informed consent and power in the research relationship, are discussed, and I examine how I addressed them. The chapter also discusses the process of data analysis and how I developed the resulting grounded theory.
Chapter 3

Application of Planned Methodology
The previous chapter discussed the planned research design, explaining how and why a qualitative approach was adopted and why the specific method of enquiry, grounded theory, was chosen. I examined the anticipated challenges of cross-language research and the strategies developed to address these during the fieldwork. This chapter discusses the application of that planned methodology, including how I used a pilot study to test and refine the research design. I examine the amendments made to the research design in response to the findings of the pilot study before moving onto discussing the main fieldwork. The data analysis is also presented, demonstrating how grounded theory techniques were employed to develop a substantive grounded theory.

3.1 Ethical approval

Before beginning the fieldwork, I sought ethical approval from the Keele University Ethical Review Panel (see appendix 4). The challenges involved in undertaking cross-language and cross-cultural research, explored in chapter two, were relevant in obtaining ethical approval, specifically obtaining informed consent and safeguarding participants’ identity when working with interpreters. The selection of grounded theory methodology also presented issues that required negotiation, particularly providing an interview schedule and details of prospective participants before the research began.
The grounded theory principle of avoiding preconception (Glaser and Strauss 1967) was in opposition to the requirement to produce a predetermined, fixed interview schedule. To address this, in addition to a schedule of interview questions, I provided the ethical review panel with details of: the probe questions that would be used to obtain clarification of participants’ answers, a brief explanation of how and when these questions may be used, and how the interview questions would evolve depending on the participants’ responses (see appendix 5).

Language issues were of concern when obtaining informed consent; as discussed in chapter two, intelligence gained from people working in the Chinese community was that most potential participants spoke Cantonese. To facilitate informed consent, therefore I had the information sheets and consent forms translated into Cantonese by a professional translation service and checked afterwards for accuracy and clarity by staff at an organisation serving the Chinese community (see appendices 6 and 7 respectively). As some potential participants may have been illiterate and unable to read either Cantonese and/or English, I decided to produce a recorded Cantonese version of the information sheet and informed consent form. English language forms were also produced for people who may have preferred to use English (see appendices 8 and 9). For interviews undertaken in English, I would ensure that participants understood the
documents and were giving informed consent, and for interviews undertaken in Cantonese, this would be undertaken by the interpreter.

I briefed all interpreters about confidentiality and asked them to sign a confidentiality agreement (see appendix 3).

3.2 Power in the research relationship

Although not part of the process of obtaining formal ethical approval, I was concerned about the issue of power in the research relationship, particularly as older members of black and minority ethnic (BME) groups may be multiply disadvantaged (Blakemore & Boneham 1994). My research had the approval of service providers working within the Chinese community and interviews would be undertaken on their premises. I considered, therefore, the issue that people may have felt pressured to participate in the research; to avoid this, before and at recruitment, all prospective participants were made aware that they were not obligated to participate in the research and could withdraw at any time. This information was included in the information sheet and consent form and I asked the interpreters to ensure that the participants understood this.

Although the issues of informed consent and obligation to participate were addressed, I remained uncomfortable with taking away data and analysing it without the participants’ input post-interview. As all interviews were recorded
and transcribed after each interview, I gave the participants the option of receiving a copy of the transcript or recording for checking. I recognised that some participants would not be able to read the English, but due to the high cost, it was not possible to routinely translate them into another language. Instead, I decided that should a participant request a transcript of their interview, an initial offer would be made of engaging an interpreter to read it to them or, where necessary, I would do this for interviews undertaken in English. If this was not acceptable to a participant, transcripts would then be sent for written translation.

3.3 The pilot study

A pilot study is a crucial step in the research process as it enables the researcher to test out, evaluate, and practise the research design before the main study is undertaken. The process of undertaking a pilot study assists the researcher to be better informed about the possible pitfalls of their research process and plan appropriate strategies to avoid or deal with them, be more confident that the research design is appropriate to the study, strengthen the research design by highlighting any necessary amendments to it, and also to avoid any wastage of resources (Jairath et al. 2000; Mason 2002; Clark-Carter 2004).

At face value, this research had a relatively simple design, that is, undertaking qualitative interviews with participants that would be analysed using grounded theory techniques. However, as the participants and I spoke different languages,
this introduced a number of factors that could impact on both the process and outcome of the study and these had to be carefully considered and addressed appropriately. I decided, therefore, to undertake a pilot study to explore and test the research design before beginning the main study. Recognising that understanding between the researcher and the interpreter is crucial in cross-language research (Wallin & Ahlstrom 2006; Squires 2009), I also considered that the pilot study was an appropriate method of beginning to establish this before the main fieldwork. The pilot study consisted of two in-depth interviews, which I carried out with the aid of an interpreter, and recorded. The specific issues explored were:

- The process and format of gaining informed consent from participants
- The process and format of the interviews
- The most appropriate style of translation
- The quality of the interview schedule

The pilot study was undertaken with two Cantonese speakers with the additional aims of:

- Enabling me to gain practice of interviewing with an interpreter
- Enabling the interpreter to gain practice of the interview process and schedule
3.3.1 Piloting the procedure

My first step was to meet with the prospective interpreters and discuss: the aim of the research, the interview schedule, how the interview process would operate, and their involvement. I explained the purpose of the pilot study, and feedback from the interpreters was positive as they felt testing the process before the main fieldwork began would reduce pressure on them. I highlighted that I viewed the interview process as a partnership and welcomed any advice, comments and input the interpreters had, especially regarding the cultural appropriateness and phraseology of the questions.

During the discussion about informed consent, I highlighted my intention to use recorded Cantonese versions of participant information sheets and the informed consent form with participants who were unable to read. The interpreters felt strongly that using a recording would not be an appropriate or effective way of addressing the issues of literacy and language, and that it would be better for them to talk through the documents with participants. The reasons cited were: some of the potential participants had hearing problems and could find a recorded version difficult to hear and that, in the interpreters’ experience, it was important to go through forms with people at their own pace so that they could raise queries
and seek clarification of any information as they arose, rather than having to wait until the end of a recording. I agreed to test this approach.

Both potential interpreters had experience of working with the target population and had interpreted in a variety of situations – both formal and informal. When asked whether they preferred to interpret in the first or third person, both stated they were more comfortable with using the third person. They explained that this approach avoided confusion about who was actually speaking and in the past, they had found that the person they were interpreting for also preferred this approach. As I wanted to ensure that the research was recognised as a cross-language study and this could be emphasised by quotes from participants’ interviews being in the third person, it was agreed that this approach would be taken.

I walked through the interview process with the interpreters and explained that I wanted to adopt the turn-taking approach rather than simultaneous translation, and why. Additionally, to evaluate which would be the better method for the main fieldwork, I stated that I wanted to test out two different ways of interpreting the interviews: verbatim and summarising. The interpreters agreed to do this but stated that, in practice, strictly adhering to either style is not ideal or practical and that, dependent on the speed and length of a participant’s responses, interpreters may move between styles within an interview.
When the interpreters and I were confident that all issues had been clarified and were comfortable with the process, the pilot interviews took place.

3.3.2 Findings and lessons learnt from the pilot study

The process of obtaining informed consent took far more time than was anticipated. Nevertheless, although the interpreters’ suggestion of talking through forms with participants added time to the interviews, it worked well and participants did ask questions about the research and me during the process. I answered all their questions, which seemed to put participants at ease; this reinforced the interpreters’ assertion that this approach was more effective than using recorded versions of the forms.

The participants were given the option of completing the demographic questionnaire themselves; however, they asked the interpreter to read the questions to them and complete their answers.

The first pilot interview was undertaken with the interpreter translating the interview questions and then summarising the participant’s responses. This facilitated a smooth flowing interview and at the post-interview debriefing, the interpreter said it assisted them because they did not have to remember every word the participant said. However, they also stated that although they had
summarised all the participant’s answers, they were concerned that this was not providing enough depth.

The verbatim translation style was tested for the second interview; this proved extremely difficult to adhere to for several reasons. At times, the participant did not allow the interpreter time to translate their answers before they continued speaking, and on a number of occasions, the interpreter interrupted them and asked them to wait until they had finished translating their earlier response. At the debriefing session, the interpreter said that they found verbatim translation very tiring to use, that they felt it affected the flow of the interview and that merely passively translating words may not convey the actual meaning. Furthermore, the interpreter advised that continually stopping participants speaking to translate their speech could be seen as impolite.

Possible resolutions to the above issues were discussed and I concluded that, although not perfect, the best solution was for the interpreter to move between verbatim and summarising during interviews, as they judged appropriate. I judged this middle ground to be the best way as it facilitated a flowing interview and avoided participants feeling restricted in their responses, whilst also providing all the information given. It also allowed me to follow up participants’ responses when appropriate. However, it removed some of my control over the interviews and increased the interpreter’s input.
The interpreter and I very quickly built up a good rapport and although I controlled the direction of the interviews, the interpreter appeared comfortable; this was evident by them making suggestions about possible phraseology, which proved very useful. During the debriefing sessions after each interview, we both gave opinions about how the interview had gone and areas for improvement were openly discussed. This was a fruitful strategy because it both strengthened our rapport and facilitated revisions to the research methodology. For example, one issue identified during debriefing was that during both pilot interviews, the participants praised the United Kingdom (UK) government and emphasised that they felt they had been treated generously. This was discussed and the interpreter suggested that it was possible that the participants thought that I worked for the government and that this may have influenced some of their answers. We agreed that at the consent stage of future interviews, it would be emphasised that I was independent of and not employed by the UK government.

I used the findings from the pilot study to identify areas for improvement and develop strategies for addressing them before undertaking the main study. Additionally, I judged the pilot interviews to be of sufficient quality to include in the data analysis and results.
3.3.3 Summary of revisions to the research design

- The interview schedule and prompt questions facilitated people talking freely about their quality of life, so were judged to be fit for purpose.
- Rather than use recorded versions of the Cantonese documents, the interpreter would talk through the forms with the participant.
- The participants would be given the option of completing the demographic questionnaire alone, or with the help of the interpreter or me, depending on the language being used.
- The interpreter would ensure that participants were aware that I did not work for the UK government.
- The translation style would move between verbatim and summarising, as appropriate during the interview.
- The interpreter’s input would be encouraged regarding the appropriate phraseology of questions; however, control of the interview would remain with me.

3.4 The main study

The main fieldwork followed the amended design developed from the pilot study, and I undertook open-ended interviews with participants, which were recorded and transcribed for analysis. The main study consisted of 27 interviews with participants; completed between July 2010 and February 2011 in a number of locations, including: a community centre, a health centre and individuals’ homes.
3.4.1 Sampling

Prior to beginning the research, I made contacts who were people employed by organisations working within the Chinese community and I anticipated that the majority of participants would be recruited via one contact. However, during the course of the fieldwork, that contact was lost and I had to find new contacts and follow up with existing contacts. This was problematic because, although organisations had agreed to help in principle, in practice I met with vigorous gatekeeping. I addressed this by emailing, ringing and visiting other organisations that had contact with potential participants and providing them with a letter introducing the research and inviting people to participate (see appendix 10 for Cantonese version and appendix 11 for English version), information sheets and contact details. Additionally, I visited places where potential participants lived, for example, a sheltered housing scheme, and the introductory letter, information sheets and contact details were left on display.

This strategy was time-consuming and did not result in the recruitment of any participants. I concluded that direct contact with potential participants was essential; however, this was difficult because, due to the language barrier, I was unable to informally approach and talk with people. Instead, I focussed on recruiting participants who spoke English and asked them to introduce me to other potential participants. This approach was successful and resulted in the recruitment of participants and I was introduced to another organisation working
in the Chinese community; this second organisation both assisted with recruitment and provided interpreters at an affordable rate.

3.4.2 The interpreters

My initial intention had been to work with one or two interpreters throughout the research; however, as the fieldwork continued, it became clear that this was not realistic. Part way through, I lost contact with the original interpreters, so other interpreters were engaged; these were from a commercial translation company and another organisation working with the Chinese community. Additionally, two participants requested that a friend interpret for them; in total, I employed five interpreters. All the interpreters were members of the Chinese community with knowledge of both the home and host cultures; three who were in the target population agreed to be interviewed.

During the main fieldwork, it became apparent that more people spoke English than I had been told to expect and 12 interviews were wholly carried out in English. Additionally, some participants who had requested an interpreter actually undertook their interviews with little assistance, only consulting the interpreter when they needed clarification of my questions.
3.4.3 Ethical issues

When designing the research, I was concerned that participants may have felt obligated to participate; I was reassured that that was not the case because a number of people declined participating. Several incidents also reassured me that the informed consent process was fit for purpose. For example, two participants who had agreed to be interviewed withdrew when they realised that the interviews could be lengthy and another asked for the recorder to be switched off for part of their interview.

I was acutely aware that as the expectation was that participants would answer the questions posed, this placed me in a position of power. I realised that it was not possible to completely negate this; nevertheless, during the fieldwork, I attempted to redress this balance in a number of ways. Participants were made aware that they did not have to answer anything they did not want to and some did decline talking about specific topics or asked not to have sections of their interview included in the transcript. I also gave participants the opportunity to ask me questions about both the research and myself, and when they did so, I responded openly and honestly.

3.4.4 The interviews

I began the interviews with open questions that enabled participants to offer their opinions and experience about quality of life (see appendix 5 for full details of the
interview schedule and prompts used):

“Please describe to me what you think is a good quality of life”

“You have just told me that you think is a good life – what things do you think make that a good life?”

As the research cycle progressed, in line with theoretical sampling, I focussed the questions on developing concepts and categories. However, as new data could emerge at any stage in the research process, to avoid premature closure of categories, the first questions I asked all participants were what they thought was important in having a good life and why.

Initially, working with an interpreter was challenging and at times it was difficult to keep track of what had and was being said. During the first few interviews I was more focussed on my research agenda than on the participants’ accounts and on occasion missed the opportunity to follow up on what participants had said. For example, Helen provided this list of things she felt were important in her life:

“The right to an education and skill, the right to the minimum wages, the right to say what you think, the right to have free
medical treatment, the right to travel, the right to practise your
religion.” (Helen via interpreter)

“Ah right” (JB)

“The right to vote. Absolutely brilliant!” (Helen via interpreter)

“Yes absolutely. Tell me about practising your religion.” (JB)

Fortunately, as I transcribed the early interviews immediately after recording, this
was quickly identified and I recognised that it was both a consequence of the
challenging interview process and an illustration of me exercising power as a
researcher. To address this, if participants wished to talk about other topics during
their interview, they were not cut off and I listened to what they had to say before
moving on. This facilitated collecting the required data, whilst also respecting the
participants’ personal input.

At the outset, I transcribed and analysed interviews immediately after their
completion; however, as interviewing progressed, it was not always possible to do
this. This was due to the need to match participants’ and interpreters’ availability;
on occasion, this resulted in more than one interview being done each day or
interviews taking place on consecutive days. Whilst recognising that this was not
ideal, I had to balance this against the risk of not being able to access participants at all. I took a pragmatic approach and undertook interviews but, whenever possible, at the very least, I listened to the recording of the preceding interview and made notes before undertaking the next.

3.5 The quality check of the translation of interviews

To ascertain the accuracy and quality of the translation, I built a second translation of a sample of interviews into the research design. I made the interpreters and participants aware at the consent stage that a second translation of the interviews may take place and all gave their consent to this. The second translations were undertaken early in the research process and I selected the interviews used because I intended to work with that interpreter – identified in this section as the original interpreter – throughout the interviewing cycle. The interpreter engaged for the second translations is identified in this section as the QA (quality assurance) interpreter; they had no other involvement in the research process.

Before the quality assurance process began, the QA interpreter and I discussed the best way of doing it. The QA interpreter had previous experience of such work and suggested that they would listen to the original interview recording with me and intercede to confirm accuracy and raise any discrepancies or omissions in the original translation; this was agreed. The QA interpreter highlighted that it is unlikely that two interpreters would translate speech using identical words, but
that the meaning of utterances should remain constant. As with the participant interviews, I recorded the quality assurance process and the outcome of the process is reported below.

3.5.1 The translation of questions posed

The QA interpreter stated that the questions I posed had been generally translated accurately by the original interpreter, for example, when reviewing the translation of my introduction to the interview:

“He said the same as you said.” (QA interpreter)

And when checking the translation of my questions:

“Yes, he [the original interpreter] asked the right question.” (QA interpreter)

Evidence emerged from the quality check that the original interpreter had also ensured that the participant fully understood the question:

“He [the original interpreter] asked twice … obviously the first time she didn’t quite get it so he asked it again.” (QA interpreter)
The QA interpreter noted that, at times, the original interpreter had found the direct translation of some English words difficult, but that the meaning conveyed was correct.

“You were just asking simply if they enjoyed socialising together but he [the original interpreter] tried to find a word for it, so that’s why he seems to be speaking for a long time. But he did ask the right question at the end.” (QA interpreter)

The QA interpreter noted that, on occasion, the original interpreter had added prompts to their translation of the questions; prompts can be problematic as they may lead the interviewee towards a particular answer, as the following example demonstrates. A participant had asked me for an example of what was important in my life and I responded with:

“… the most important thing for me is being able to see well and hear well so that I can read and do the things that I like to do.” (JB)

When the participant was asked the same question, the interpreter indicated that their reply simply agreed with my answer. However, there were examples of prompts being used to clarify the question and improve the participant’s understanding without influencing their response, for example:
“He [the original interpreter] asked the question you asked, ‘what is the one thing to raise your quality of life?’ But she [the participant] didn’t answer the question so he tried to give her some suggestions like about benefit or having some extra time or something like that, that could improve your life.” (QA interpreter)

In this instance, the participant’s reply centred on the importance she placed on having good health.

3.5.2 The translation of participant responses

Translations of the participants’ responses were again judged to be accurate, although there were instances of minor errors:

“‘What do you enjoy doing at (place name removed)?’ This question, you can say that the meaning is there but it is not exactly what you were asking. You asked them [the participant] what they most enjoyed doing at (place name removed)? He [the original interpreter] asked them “tell me what are the happiest things there?” So he is not directly translating but you can say the meaning is there.”  (QA interpreter)
Only one instance of comprehensive mistranslation was identified; this involved the word ‘secure’. Peria (2007) notes that different cultural understanding of a word can result in misunderstanding; this offers an explanation of this instance of mistranslation. My intended meaning of secure was feeling stable and settled in life; however, this was interpreted as feeling safe in the home. The participant, therefore, answered about home security and spoke about not being able to use the assistance alarm installed in their home because the operator at the other end spoke no Cantonese.

3.5.3 Additions by interpreter

The QA interpreter identified some additions made to the translation by the original interpreter; these seemed to have the purpose of promoting the service on offer from a local charity. I removed all these utterances from the data set used in analysis.

3.5.4 Action taken from the quality check of interviews

The QA interpreter rated the overall accuracy of the original translations as good and stated that they represented the meaning of both my questions and the participants’ responses. They also felt that any additions made by the original interpreter did not adversely affect the meaning of the interviews. Nevertheless, I took the following action:
- Any additions identified by the QA interpreter were removed from the data set.

- Any relevant additional information provided by the QA interpreter was added to the data set.

- Data which promoted the organisation for which the original interpreter worked and emphasised the need for its continued funding was removed.

I also took the following learning points forward to inform future interviews, both those undertaken with the aid of an interpreter and in English:

- Ambiguous terms and words should be avoided.

- The context in which words are used should be made clear.

- The interpreter should be asked to inform me if a participant did not understand a question or needed further clarification, rather than automatically provide it.

3.5.5 Triangulation of data

Throughout the fieldwork and analysis, I also used triangulation of data to check accuracy of translation, and compared interviews undertaken with the aid of interpreters with interviews undertaken in English and with each other. This process was especially appropriate for this research as it is built into grounded theory taking place during the process of constant comparison; therefore, it did
not result in any additional or redundant work. The content of the interviews was similar; there were many common factors and issues participants said were important in their lives, with only one example of unique data.

3.6 Data analysis

This section describes how I analysed the data and is linear for simplicity; however, in practice the process was anything but linear, although it did become more and more focussed as analysis progressed. I considered using a software package for data analysis and undertook NVivo training before the fieldwork. The software had the advantage of storing large amounts of data electronically and facilitated speedy retrieval of data and production of diagrams. However, I was not comfortable that I would be able to keep track of all the codes produced if I used software and was concerned about feeling removed from the data. I therefore undertook data analysis clerically, using paper copies of the interview transcripts, which I coded by hand.

Analysis began after the first interview; this involved listening to and transcribing interviews, then reading transcripts and coding data line by line, which Strauss and Corbin (1998) refer to as “microanalysis” (p. 57), where incidents, events and issues within participants’ accounts were labelled. I employed constant comparison (Glaser and Strauss 1967; Strauss and Corbin 1998; Corbin and Strauss 2008), which involved moving between data, comparing incidents with incidents
in the same narrative and across other participants’ narratives; labelling the similarities and differences identified. My aim was to encapsulate what was happening in narratives and to identify and link concepts within and between them. I defined and refined categories using grounded theory techniques, such as: constant comparison, writing notes or memos, and drawing diagrams with the intention of conceptualising rather than describing data.

3.6.1 Coding
My early coding was too descriptive and not conceptual enough; consequently, I produced many codes which described data; subsequently, the early categories I developed were also descriptive. For example, I grouped quotes about health together as “being healthy”, without properly exploring the context of the quotes and identifying all the reasons why health was important to participants. Although this failure to conceptualise was frustrating, I did not view it as a waste of time, but as valuable learning. Furthermore, I identified some of the early categories produced as properties of the final conceptual categories. For example, I initially gave the following quote the descriptive label, “kinship bonds”:

“Like a new baby is born and then you’ll be an auntie, once a baby is born you’ll be an auntie, you’re always auntie...When my son has a baby I’ll be a grandma, it will never change.” (Penny)
Here I had failed to consider what such kinship bonds represented for Penny. Penny’s family relationships gave her an enduring identity across time and distance. This was supported by her assertion that family is permanent, whereas other relationships such as friendships may end:

“I mean when you get on you’re friends, but when you don’t get on it doesn’t matter then. I don’t like you, you don’t like me and once that happens we’ll have a distance between us. And then maybe later we won’t see each other… The family, it doesn’t matter how wrong you are or how wrong one of the family is, you still stand by them… Friends, you have your loyal friends, loyal friends and true friends, it’s hard to have them but family is all including from the day you are born.” (Penny)

At a conceptual level and taken in context of Penny’s whole interview, the utterance above I originally labelled as “kinship bonds” was representative of the contribution family relationships make to aspects of the self and was relabelled as “family role”.

I was aware that my work was not achieving the explanatory power which Holton (2007) avers is necessary of a grounded theory; Strauss and Corbin (1998) advise
that when an analyst is fixed on description or struggling to distance themselves from the data:

“...it is time to seek consultation with either a teacher, a colleague or some other knowledgeable person who is willing to sit down with the analyst and help him or her brainstorm...Just having someone else listen often helps the analyst gain that distance.” (p. 148)

Contact was therefore made with an experienced grounded theorist, who offered a sounding board and coaching, as well as challenging the concepts and theory I was developing. These sessions resulted in a breakthrough, and links and overlaps between categories were identified and alternative explanations of the data were considered. When reflecting on this, I realised that during early analysis, I had focused on implementing grounded theory techniques at the cost of exploring what was happening in participants’ narratives and identifying social processes. I returned to the data with a focus on exploring meaning and context and identifying concepts within the data. I still employed grounded theory techniques but as an aid to conceptualising data rather than as procedures from an instruction manual. Questioning techniques proposed by grounded theorists (Glaser and Strauss 1967; Strauss and Corbin 1998; Charmaz 2006) proved valuable; whilst not adhering strictly to the questions they suggest, the principles of the technique
proved useful in driving my analysis forward conceptually. The questions I asked of the data included:

- Who is involved in this incident, and how and why are they involved?
- How does this incident relate to other incidents in the body of data?
- What does this represent to participants and others, and why?
- Is this represented elsewhere?
- What is the context of the incident in terms of time, location, and situation?

Attending to context proved a constructive way of focussing on concepts rather than descriptive detail. (See appendix 12 for an excerpt from a coded transcript).

3.6.2 Memo writing

I wrote memos from the outset of analysis and these had several purposes. Initially, they were simple records of incidents within the data, thoughts and ideas about their meaning, and the concepts being developed. As analysis progressed, the memos moved from description to being more conceptual and identified links between categories, and the processes participants were involved in. Appendix 13 shows an example of an early memo about health where I speculate about why participants said being healthy was important to them. As my embryonic grounded theory developed, memos became longer and more in depth, and I
sorted and re-sorted them when categorising the data and building the theory. I also used memos to record links and similarities between the data and extant theories (see appendix 14). This facilitated these ideas being parked for later use, and thus helped to avoid preconception and extant theory influencing my ongoing analysis.

I also found memos useful when faced with challenges during the fieldwork and used them to record and clarify issues, such as socially desirable responding, the construction of the data collected and reflections on the quality and content of the interviews (see appendix 15). This facilitated critical inter-subjectivity (Fay 1996).

As analysis progressed, I used memos to explore the concepts developed, linking them with participants’ accounts and other concepts with the aim of ensuring that the developing theory was grounded in the data. This enabled me to present the embryonic theory to other researchers and obtain feedback on its explanatory power and fit to the data. Feedback also highlighted possible preconceptions which enabled me to adjust my perspective and better understand participants’ accounts, resulting in better developed categories.

3.6.3 Diagrams

Diagrams provided pictorial representations of data and categories demonstrating how they hung together as a theory. They also provided a broader viewpoint and
assisted the identification of redundancies and duplication in the data as well as the links between categories. The conditional matrix developed by Strauss and Corbin (1998) proved valuable in highlighting the importance of the context of the data; locating incidents and concepts on the matrix in terms of their macro and micro context helped me to further hone categories, as the following example demonstrates. “Citizenship” was an early conceptual category that aimed to explain the participants’ perception of their rights and responsibilities as a citizen, how being a citizen located them in society and the value they placed on citizenship; appendix 16 shows an excerpt of a conceptual memo on “citizenship”. During memo sorting, increased links and overlaps between citizenship and other categories emerged, and I used the conditional matrix to locate incidents in their macro and micro contexts (see diagram 3.1).

<table>
<thead>
<tr>
<th>Structure</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>micro</td>
</tr>
<tr>
<td>Friends</td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td></td>
</tr>
<tr>
<td>Culture</td>
<td></td>
</tr>
<tr>
<td>Society</td>
<td>macro</td>
</tr>
</tbody>
</table>

Diagram 3.1: Adaptation of the conditional matrix (Strauss and Corbin 1998), showing the dimensions of the category “citizenship”.


This facilitated me identifying that the properties and underpinning incidents of the category “citizenship”, when placed in context, actually illustrated aspects of the macro levels of other emerging categories. Consequently, I collapsed “citizenship” into these two categories, and reassigned indicators and properties accordingly. Diagrams also facilitated a different style of thinking – they enabled me to take a holistic view of a whole category where its properties and dimensions could be seen at a glance (see pages 105, 148 and 189 for diagrams of each category).

3.6.4 Selecting the core category

During the data analysis, there were competing concepts, which initially appeared to have claim on being the core category, and I made several attempts at integrating the data, using different concepts as the core category. However, as analysis continued, it became difficult to separate some concepts and the divide between them was forced and inauthentic. Additionally, the initial candidates for the core category only had the power to explain some, but not all aspects of participants’ lives. For example, I tested “becoming” as a core category; however, although it represented the importance of change in participants’ lives, it did not explain the fact that there were also significant continuities. I resolved the challenge of identifying the core category by using Strauss and Corbin’s (1998) questioning technique, asking:
• “What seems to be going on here?”

• “What is the main issue with which these people seem to be grappling?”

• “What keeps striking me over and over?”

• “What comes through, although it might not be said directly?”

(p. 148)

Appendix 17 shows an excerpt from the storyline memo, which illustrates how I used these questions to clarify what was taking place in the data and provide a direction for integrating it into a theory. Using this technique facilitated a better understanding of what was happening in participants’ accounts and the clearer identification of the processes involved; this assisted me identifying and selecting the core category. The core category I selected was chosen because it encapsulates the conceptual analysis of the data, has explanatory power regarding participants’ narratives and what they represent, and is common to all participants’ accounts (Strauss 1987; Strauss and Corbin 1988; Corbin and Strauss 2008).

In the chapters that follow, I will discuss the three categories which underpin the core category before turning to demonstrate how they are conceptually related to each other when exploring the core category. I present the findings of the research in this manner to demonstrate that the conceptual categories are grounded in the data before identifying the links between them. During the discussion of the core
category in chapter seven, the antecedent to participants’ behaviour and the strategies they use to achieve their aim will also be discussed.

3.7 Summary

This chapter has explored my application of the planned methodology, the challenges I faced during the fieldwork and data analysis and how they were addressed. A rigorous approach to ensuring quality in the data collection and translation of interviews has been demonstrated, as has the adherence to ethical principles. The process of data analysis was discussed to illustrate how I used grounded theory techniques to develop a valid theory firmly grounded in the data. I also reflected on my influence on the data collected in the interviews and the research process, demonstrating how I developed my skills and strengthened the research.

The next four chapters present the core category developed during analysis – “synthesising self”, and its three underpinning categories – “identity: maintaining and modifying”, “belonging”, and “value systems”. Each category is discussed and I explore fully how they are involved in a dynamic process that helps people make sense of and deal with the challenges they meet during their lives.
Chapter 4

“Identity – Maintaining and Modifying”
The previous chapter discussed the testing and application of the planned methodology during the pilot and main fieldwork phases, showing how I incorporated lessons learned from the pilot into the design with the aim of addressing challenges and strengthening the research. The process of data analysis was presented and I discussed how I moved from a descriptive to a conceptual understanding of the data. I also demonstrated how I employed grounded theory techniques throughout the fieldwork and data analysis.

This chapter begins the presentation of the research findings and starts by providing demographic information about the participants of the research and how they were recruited. I then move onto exploring the category of “identity – maintaining and modifying”, which is concerned with how participants manage their identities across the life course and is one of the categories underpinning the grounded theory developed during this research.

4.1 Details of participants

Table 4.1 provides information collected via the demographic questionnaire that participants completed (see appendix 1) and from the interviews. Although all participants were asked to complete the demographic questionnaire, some did not provide all the details requested, for these participants, where possible, I have included information from their interviews. Blank cells indicate where the data was not available.
### Table 4.1 Participants’ demographic information

<table>
<thead>
<tr>
<th>Participant</th>
<th>Gender</th>
<th>Age</th>
<th>Marital status</th>
<th>Living arrangements</th>
<th>Years in UK</th>
<th>Recruited via</th>
<th>Place of interview</th>
<th>Date of interview</th>
<th>Interpreter used</th>
</tr>
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<td>With spouse/ partner</td>
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<td>Centre 1</td>
<td>15.7.2010</td>
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<tr>
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<td>Alone</td>
<td>45</td>
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<td>Centre 1</td>
<td>10.8.2010</td>
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</tr>
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<td>Anna</td>
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<td>52</td>
<td>Divorced</td>
<td>Alone</td>
<td>32</td>
<td>Direct</td>
<td>Housing association</td>
<td>12.8.2010</td>
<td>No</td>
</tr>
<tr>
<td>James</td>
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<td>Married</td>
<td>With spouse/ partner</td>
<td>40</td>
<td>Direct</td>
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<td>Snowballing</td>
<td>Friend’s home</td>
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<tr>
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Table 4.1 also shows whether the interview was undertaken with the aid of an interpreter, how participants were recruited, where they were interviewed, as well as identifying the two pilot interviews.

All the participants had migrated to the UK and were resident in the Manchester area (see appendix 18 for pen portraits of each participant). Participants were all aged 50 plus and the majority – 23 - were female. Their mean age was 63.5 years with an age range from 52 years to 78 years (2 declined stating their age, \( n = 27 \)).

The mean period of time participants had lived in the UK was 26.8 years (periods of time not clearly stated on the demographic questionnaire were excluded, \( n = 23 \)); the shortest period of residence was 7 years and the longest period 50 years.

The majority of participants (16) were married, 7 were widowed, 3 were divorced and 2 had never married (1 participant declined stating their marital status \( n = 28 \)).

12 participants lived alone, 10 lived with a partner or spouse, 4 lived with a partner or spouse and children, 2 lived with their children and 1 lived with extended family (\( n = 29 \)).

The participants were recruited as follows: via 2 organisations that offer a range of services to the Chinese community in Manchester; these are identified as centre 1
and centre 2. 11 participants were recruited from centre 1 and 8 participants from
centre 2. 7 participants were recruited via snowballing and 3 were recruited
direct.

6 participants were interviewed at centre 1, 12 at centre 2, 7 in their own home, 2 at
their friends’ home and 2 at a housing association site.

All the participants identified themselves as being Chinese with the majority being
originally from Hong Kong and speaking Cantonese as their first language.
However, the participants varied in other respects including: social economic
status, education, occupation and faith. Most participants were economic
migrants, although a very small number were refugees from mainland China and
Vietnam, and one participant came to the UK on retirement to join her children.
Participants’ standards of education varied; some were educated to degree and
post-graduate level, while others had little formal education and were illiterate in
both Cantonese and English. Since moving to the UK participants had worked,
and some still worked, in a wide range of occupations including: catering, clerical,
health care, commerce, retail and tailoring. Some had professions, although, the
majority had been employed in the catering industry, in restaurants and
takeaways; a number had owned their own businesses and others worked for
family or in other Chinese owned businesses. The interviews aimed to elicit
participants’ personal opinions about what was important in their lives, thus none were interviewed specifically as representatives of their profession.

The participants lived in various area of Manchester; some owned their own homes in both affluent middle class areas and less wealthy areas of the city, others lived in social housing properties in disadvantaged neighbourhoods. There was evidence that, compared to participants living in other areas, those living in the disadvantaged neighbourhoods experienced more problems with crime and antisocial behaviour and had greater difficulty in accessing services. Participants had various sources of income; a number remained in employment both full time and part time, some had private pensions that topped up their state pension and others relied on welfare benefits.

Participants who had a faith were Buddhist or Christian, although one followed both faiths. Those who were Christian attended church regularly and were also involved in activities linked to their church, such as bible classes and fund raising. No Buddhist participant spoke about visiting a temple, although they did talk about following their faith at home; some had small shrines in their homes and others read Buddhist texts. Although there was evidence of the continuing influence of the concept of filial piety no participants spoke about the Confucian tradition.
Most participants were in good health and active, as I was unable to recruit the oldest old this may be associated with their age. Although, there were four who had chronic pain, three of whom also had reduced mobility. Three of these participants lived in deprived neighbourhoods and relied on welfare benefits. While people who were older than the participants were used centre 1 and expressed an interest in my research none participated, although the narrative of one participant who declined stating their age suggests that she was aged 80+. Interestingly, during her interview Anna told me that people older than her (69) would not be interviewed as they were very private and “closed”. The majority of the service users I came in contact with at both centres were women, indeed there were very few men taking part in the activities I participated in at centre 1. Although, I did interview two men who took part in those activities and another who was a friend of somebody who used centre 1. I approached other men who used centre 1 but they declined participating.

The age and health of the participants may have influenced the research outcome, for example, participants’ emphasis on the importance of being independent. I recognise that accessing a wider range of participants, for example more males and the oldest old, may have produced other outcomes. However, the preceding discussion of the participants’ demographic information shows that, in many respects apart from gender, they reflect the characteristics of Manchester’s Chinese population, for example, the mix in educational standards, income, occupation
and housing (see pages 22-25). As my aim was to produce a theory that explained what was important to the quality of life of the participants in this research, the gender imbalance in the sample does not negate my findings. This information about the participants’ lives also supports Nazroo’s (2006) proposal of inequality in the Chinese population.

4.2 Definition of “identity – maintaining and modifying”

The terms ‘identity’ and ‘self’ are sometimes used interchangeably in literature; however, the understanding of identity I employ in this research is consistent with that of de Medeiros (2005), who highlights that identity:

“While influencing the self, is not the same as the self; identity addresses only small pieces of a much larger self.” (p. 4)

Evidence from participants’ narratives demonstrated that identity is a crucial aspect of their lives and that this can both endure and change. This may initially appear contradictory, but if the individual is conceived as having multifaceted identities which are part of the wider self, and are constructed and reconstructed over time, both are possible. I therefore conceptualise the processes of maintaining and modifying as affecting the constituent identities of self. See diagram 4.1 for a pictorial representation of the category Identity: maintaining and modifying.
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Diagram 4.1 Identity: maintaining and modifying
Aspects of identity which endure throughout the life course are those which are fundamental to who the individual is; this essence of self provides stability to counterbalance change. The aspects of identity that are more amenable to change involve the individual’s public expression of their identity and change is precipitated by the interface between the personal and social worlds.

“Maintaining” is the process by which participants preserve the core aspects of their identity that persist throughout their life courses, providing continuity and the sense of being the same person across time and place. This does not deny that people change and develop during their lives, but rather highlights that there are some aspects of self which are retained and reinforced over time. These are viewed as being central to the individual’s sense of self and threats or challenges to them result in tension to which they respond.

Challenges to the individual’s core identity can be positive or negative events; what is judged to be a threat or challenge depends on how an individual perceives the event and their response is dependent on their personal repertoire of strategies. A successful strategy results in maintenance of the core identity; an unsuccessful strategy may result in disruption of the core identity. There was evidence from participants’ accounts that changes to the core identity can occur across the life course. Such change occurs in response to a highly significant and permanent event, for example becoming a parent results in a new identity that is
incorporated and added to the core identity. In turn, this can be retained for the remainder of the life course by the process of “maintaining”.

4.3 Maintaining identity

Participants’ accounts consistently highlighted the importance of their core identity and there was evidence of its continuity over time. The interview questions specifically asked people about their present life and what was currently important in them having a good quality of life. Nonetheless, it was common for them to refer back to their childhood and earlier lives, relating these to their current older self and also to their anticipated future self. Indeed, reminiscences were an effective strategy used by participants to link their past and present, and thus maintain continuity of identity.

Whilst some aspects of core identity were common to the participants, such as cultural identity, others were more personal and were related to what was important to that particular individual, for example, occupational role or perceiving oneself as being an independent person. These personal aspects of the core self were often things that had proven useful to the individual and enabled them to function well within their social world. Given the importance the factors that construct the core identity have to the individual, it is unsurprising that participants were motivated to preserve and maintain them and reacted to challenges. Indeed, participants’ accounts contained examples of the strategies
they employed in maintaining identity and these were associated with personal capability and resources as well as the challenge itself. For example, some aspects of identity, which by their nature are innately permanent, such as being a parent, could be maintained simply by affirmation of that role. However, if something which could be impermanent was central to a person’s core identity, other strategies had to be employed to maintain it, such as preserving occupational identity by continuing in employment or by keeping up to date with new developments in that field of work.

The next section explores the specific identities which emerged as being central to the participants’ self, how they were manifested in their lives and how they were maintained.

4.4 Role identity

Participants’ roles within the family and the workplace emerged as being important aspects of their core identity and they held multiple roles which positioned them at a micro and macro level. Some roles were immutable, whereas others were impermanent, and how the process of “maintaining” was employed to preserve role identity varied with the role and its importance to the individual.
4.4.1 Family role

Participants’ roles such as mother, father, grandparent and sibling defined them and offered continuity of their identity over time; therefore, people’s accounts highlighted the importance of family and their role within it. Furthermore, family role also signalled an individual’s identity to other people, and participants’ narratives located them within their families and positioned them in relation to others. Anna’s narrative illustrates this pattern, which was especially prominent for parents, and shows how her role as a mother defined her and endured over time. She began and ended her interview by talking about the importance of family and she placed herself within the family hierarchy by calling herself “the mother figure” and “Po Po” (Cantonese for maternal grandmother), roles she emphasised throughout her interview. At one point, Anna affirmed the permanence of her identity as a mother when talking about her children who have now grown up, left home and live in different parts of the United Kingdom (UK):

“…a mother always worries about her children. Never mind how old your children are!” (Anna)

The enduring nature of family role was a common strand in participants’ stories, and kinship bonds were conceptualised as being different from other close relationships in both form and quality. Family relationships were paramount and prioritised above other relationships, for example:
“Nothing, you know, nothing is more important than family. Family is the most important thing.” (Rose via interpreter)

Questions asking why family are so important drew a number of responses, and whilst many participants spoke about love, caring and support between them and their family, the responses and body language from others suggested they were incredulous that the question should be asked or need answering:

“OK, so is family important to him then?” (JB)

“Of course! Very important!” (George via interpreter)

In such cases, family being important was simply viewed as a given. A strategy used by other participants to emphasise the difference between kinship and other relationships, as well as the permanence of family, may offer an explanation for this, that of evoking a sense of embodiment to family relationships:

“…because a friend is different from the family, they are all important but differently important to her.” (Sheila via interpreter)

“OK, could you explain that to me?” (JB)
“Because it is the blood, you know the blood relation?” (Sheila via interpreter)

Participants spoke about both family and friends offering support and help, about being able to rely on their friends and also about long-term friendships which had endured over time and distance; nevertheless, family relationships were commonly characterised as being different and superior in quality. The permanence and continuity of the family embodied in blood ties were contrasted with the fact that friendships can end. Penny illustrated this by defining family in terms of unbreakable kinship bonds:

“Like a new baby is born and then you’ll be an auntie. Once a baby is born you’ll be an auntie, you’re always auntie...When my son has a baby I’ll be a grandma. It will never change.” (Penny)

The immutability of family role meant that it could safely be incorporated into people’s core identity with minimal fear of it being lost, for even if family were to become estranged, the blood ties would always exist. Nevertheless, although the embodiment of family role could not be negated, this did not mean that participants took their family for granted and they spoke about maintaining and nurturing family bonds, as well as keeping in touch with family in the UK and
abroad. There was evidence of the existence of transnational families and that
distance had not lessened kinship bonds or negated family roles:

“My sister is in Shanghai, my brothers are in different parts of
China and one is in America. So she [participant’s mother] had to
go stay there for half a year and stay here for half a year.” (Teresa)

When speaking about their families, participants emphasised the importance of
having strong kinship bonds and a harmonious family, and avoiding conflict with
relatives was a common strategy used in “maintaining” family role. James
highlighted this and the responsibility that he carried in ensuring and preserving a
close family when talking about his role as head of the family:

“I do understand, I do know people who have families, they never
talk to each other, I think that’s sad. I’m the eldest in the family so I
try to get my brothers and sisters together.” (James)

There was no evidence of participants living in a traditional multi-generational
household, although many lived in close proximity to their children and only one
person had an adult child living with them; where parents and children did share
a home, the children were still in education. The conservation of a close family
whilst subsequently “maintaining” family role was balanced against the possible
consequence that being too close could result in intergenerational conflict. Anna spoke about how her children would not challenge her when they were younger, but now they are adults, this may happen:

“They [her children] called me “moan, moan, moan, moan” [when they were younger] but they can’t say anything...but since they got out of the door to go to university, uh oh!” (Anna)

There was also evidence that people maintained multiple family role identities, which arose at different times throughout their lives and were then incorporated into their core identity as permanent aspects of self. Many, like Vanessa, Graham, Anna and James, spoke about simultaneously being parents, grandparents and siblings, thus constructing links and continuity between their past and present:

“All my children have grown up ... he’s [participant’s grandson] almost the double of them [participant’s children] the way he does things, every time he sees me he just clings onto me. Ah that is really, I can’t be using words to describe it, it’s wonderful.” (James)

Participants also underlined the importance family role plays in the continuity of their core identity by looking forward to their children marrying and constructing future identities for themselves as grandparents:
“...he just wants all the kids to have married, have their own lives and have a good life themselves, and have some grandchildren.

That’s all he wishes.” (Peter via interpreter)

This concept of the permanence of family role offered continuity of identity throughout the participants’ life courses and in addition to being embodied in blood ties, it was maintained by family stories and ancestor worship. The concept of ancestor worship was spoken about by some participants who memorised their ancestors’ names and remembered them through ritual. This can be viewed as proffering an ultimate continuity of family role identity with the individual being remembered and respected across the generations.

4.4.2 Occupational role

The contribution of role in the core identity was also strongly manifest when participants spoke about their working lives and occupations. Occupation was a key link with their earlier lives; some, who were aged over the UK pension age, were still in paid employment and others undertook voluntary work. However, the importance to and influence of occupation on core identity differed between individuals; for some, it was just one factor adding to the whole picture of who they were, whilst for others, their occupation defined them as a person with threats to that role giving rise to maintenance strategies.
The importance of occupational role in core identity was stronger for participants who had a profession, for example, those who were nurses, teachers and business people. Alice was one such person with her occupation emerging as a crucial aspect of her identity. When Alice referred to herself, it was in terms of her profession and she used this to locate herself within society, reinforcing this throughout her narrative by talking about her skills and their value to society. The historical context of Alice’s life offers a possible explanation for this; when in China, she had been stripped of her occupational role and this disrupted her core identity:

“Why I am here? Because after our Cultural Revolution things changed...I’m good, I was a good (occupation removed) but I couldn’t do that in my country. Because no matter how strong I am, it was still something I wasn’t allowed to do.” (Alice)

When she moved to the UK, Alice was able to reclaim that aspect of her core identity by obtaining employment in her profession; she maintains this occupational identity by continuing to practise even though her poor health limits the work she can do:

“So I keep one person. But not regular, what he needs. When he needs to, he comes, I help him. Yeah.” (Alice)
Other participants, who could not respond to threats to occupational role by continuing to work, adopted other strategies to retain that aspect of identity. There was evidence of participants offsetting the loss of their paid occupation by applying skills and knowledge gained in their working lives to social, voluntary and leisure activities, for example, Sara and Lesley who had worked as tailors enjoyed handicrafts. James had worked in commerce for many years and during his interview, it was apparent that his previous role was important to him. Indeed, when asked about it, he began to refer to that aspect of himself in the present tense. James no longer worked in that field, but practised and retained some of his skills when keeping in touch with friends:

“... phoning up friends and see how they are going, go on the Internet, go onto Facebook or what else? Or email them. I do a lot of IT stuff.” (James)

“I’ll ask you about that then. What is it you like about the IT?” (JB)

“I worked in technology for so long. I’m a, I was a consultant when I was working for the company, so I am just keeping up with it, you know?” (James)
Whilst for some participants, their occupation emerged as an important aspect of their core identity and they employed strategies to maintain this, for others, working was less about identifying with their occupation per se and more about remaining consistent with their self-image. For example, Peter retained his identity as a hard worker by continuing to work very long hours, and Sheila maintained her personal values by doing voluntary work helping others.

4.5 Being an independent person

Autonomy was conceptualised as being able to make decisions and having the capability and the resources to enact them; this emerged as a crucial aspect of participants’ core identities, which was prized and manifest in different ways in their lives. Being an independent person proved to be an important continuity throughout the life course and during their interviews, people said that they were independent, that they had been for most of their lives and wanted to remain so. This again created links between their past, present and future. Wendy talked about being independent from a young age:

“…Independence is really, really important. I mean from the age of eight, I was already very, very independent.” (Wendy)
4.5.1 Independence and well-being

The importance of independence in participants’ quality of life was highlighted by Debbie who spoke about desiring to be financially independent. Although Debbie said she had a good standard of living, that she had her own car and was not short of money, she did not work and consequently relied on her husband financially. Not being self-sufficient had a detrimental effect on her life:

“So she thinks that if she can have a job, have money to spend, that would probably make life better. She said that if she could have a job and a salary and she can spend her own money then she’d feel better. She’d feel happier because right now she is depending on her husband.” (Debbie via interpreter)

Participants’ narratives discussed independence in a variety of contexts; as well as being able to support themselves financially, these included: being able to take on tasks and activities, not having to rely on other people for help, and not becoming a burden on others. Autonomy was associated with feeling personally competent and remaining a useful member of society, and was therefore linked to self-esteem:

“You know, at my age if I can be happy and not need people to help me, I’ll feel very proud and very happy. If I can maintain this I
will be very happy. If I can help people, I will try my best to do it.”

(Sheila via interpreter)

Participants’ accounts also contained many concrete examples of “maintaining” independence and what they were able to do, speaking about: daily activities, such as shopping and cleaning, leisure activities and travelling. Graham spoke at length about his ability at do-it-yourself and was proud of the work he was able to do on his home:

“…you don’t like to rely on somebody to help you, you do everything yourself. I don’t mind helping people, but I don’t like people helping me. Yeah, certain things you can’t do it yourself, that’s different, you know you need help? Like I’m not very good at electrical or plumbing, I’m not very good at that, you know, and that’s the kind of thing where I probably need help. But whenever I can do it myself, I do it myself.” (Graham)

4.5.2 Fear of dependence

Although their narratives showed that their families are very important, participants did not want to be dependent on them, or for their family to feel they had to care for them:
“…and I’m very independent. I need help, sometimes I need help. I ring up my children. They’re willing to help me, they know what I want but if it’s not necessary I won’t tell my children because they’ve got their own families. I don’t want to bother them.”

(Anna)

This also highlights the dynamic relationship between different aspects of identity, which can be so intertwined as to be symbiotic; here being autonomous interfaces with the need to maintain family role by avoiding conflict within the family. However, participants only held a negative view of needing help from others and being dependent in relation to themselves. It is an interesting paradox that many said that they were happy to care for or help other people, alongside fervently asserting that they did not want others to care for them or to become what they perceived as a burden. Wendy cared for her elderly mother and, whilst saying she was happy to do so, she emphasised that she had told her sons not to care for her. Belinda’s account also reflects this paradox:

“I don’t mind if somebody is really sick or whatever, I do not mind looking after them. But I don’t like people looking after me. I don’t want to be a burden!” (Belinda)
The concept of being a burden was not restricted to family and personal relationships and there were examples of a collective approach to autonomy at a macro level. This wider application of the concept of being a burden emerged in terms of not burdening society and participants spoke about how important it was not to drain collective resources. This was again related to different influences on independence and participants spoke about avoiding burdening the health service by caring for their health and ensuring they were financially self-supporting and did not claim welfare benefits unnecessarily. Peter spoke about how he became, and remains, independent since migrating to the UK:

“…after a few years he got a skill, he learned the language and he made a life for himself. He worked hard and he saved money to open the shop and he got independent without the government’s help... He says that is very important, he says he wanted to be independent and he didn’t want to depend on the government for support ...at first the government provided everything...but now they depend on themselves.” (Peter via interpreter)

Although being a burden cannot negate a permanent role such as being a mother, it may affect the individual’s status and position both within the family and in wider society, thus threatening aspects of core identity.
4.5.3 Constructing independence

Whilst being a burden was a common fear, it is important to understand that the individual’s perception of autonomy and what constitutes their understanding of the concept of being a burden is an important variable, and participants employed a number of strategies which helped them retain their perception of being an independent person. There was evidence that some participants constructed independence by offsetting capability in one area of their lives against being less capable in another. The area of capability did not have to be similar or related; but to enable them to demonstrate that they were not a burden and retained some independence no matter how limited, the individual did need to consider them to be worthy of comparison and of similar importance. Teresa’s health condition limits what she can do around the house; however, she maintained her sense of independence by offsetting her need for help with housework against achieving increased personal mobility by learning to drive and not having to rely on others for transport:

“…before [her health limited her physical capability] I can do all the housework, every week, but now when I take the vacuum it is very, very painful so I say ‘it’s OK don’t do it today, do it tomorrow’...I don’t want to bother anybody but this situation it makes me feel a bit useless because I can’t do this, I can’t do that… when I was in Hong Kong I didn’t need to drive because when you
go out you get a taxi or there is lots of transportation but when I
came here I needed to learn how to drive because it’s not possible
for my husband or friends or my sons to take me out.” (Teresa)

Participants’ narratives demonstrated that they viewed health as one of the
biggest influences on autonomy, and health and being healthy was a common
strand in their interviews. Being healthy per se was desired and participants
spoke about wanting to avoid pain and discomfort, but they also spoke about
good health facilitating autonomy and the possible consequences of ill health:

“…that’s the thing I’m thinking, that I hope not to happen, like
some people have got an illness and have to go to a home and
things like that. That’s dreadful isn’t it? You know, I don’t want to
end up like that.” (Graham)

Participants had, therefore, developed and used a number of strategies, such as
having a healthy lifestyle and following medical advice, which facilitated them in
being able to cope alone and avoid needing care. This maintained their identity as
an independent person and their core identity.
4.6 Being a healthy person

While participants’ accounts showed that health was a crucial influence on being autonomous, there was also evidence that health was also involved in constructing their identity in its own right. Indeed, evidence emerged of participants having a health identity, which they sought to retain. Whilst maintaining their identity as a healthy person was desired, there was also evidence of, and of participants accepting, changing health identities; these were associated with the effects of ageing.

4.6.1 Physical health

Being healthy was a source of pride and this was highlighted by participants speaking about what they remained physically able to do and that they were free from illness. Laura’s narrative encapsulated this:

“…And keeping the weight down to 46 kilograms, keeping it in that range steadily. The first thing she does, when she wakes up, she drinks 3 glasses of water. After 3 glasses of water she goes for a walk for about an hour. After the walk then she comes back to cook the breakfast, then after breakfast she comes out and then she does all the activities... she is 68 and she is not taking any medication at all. She has got no cholesterol, no hypertension, no diabetes, that’s really good.” (Laura via interpreter)
Being healthy was also a source of collective pride and contributed to participants’ communal identity; during the fieldwork, numerous people from the Chinese community highlighted that in a survey on health undertaken by the city council, their community emerged as the healthiest of all the ethnic groups surveyed. This was assigned to making healthy lifestyle choices and although Laura’s health story was more extreme than others, many participants spoke about strategies such as exercise, diet, monitoring their health, and attending health screening and check-ups:

“Good diet, I do lots of exercise. Apart from housework I like golf, I like swimming, I like hiking and I like shopping as well, obviously. So I always try to make myself more motivated.” (Wendy)

However, it was constructions of what being healthy is and their own health which emerged as playing an important role in participants’ health identity, rather than just their actual state of health. Some recognised that they had health problems, but perceived them as not affecting them. Graham spoke about having high blood pressure, but he maintained his health identity by offsetting this against praise from his doctor regarding his appearance and healthy lifestyle:

“Yeah the doctor has said to me ‘Oh, you’re very good at your age’.

Actually, you know, I have got high blood pressure, I take tablets...
then she [the practice nurse] asked about ‘What’s your hobby? What do you do?’ and I said ‘I love walking, I always go’ and she put it in the computer... then another time when I went to see the doctor, she looked at the computer: ‘Oh you like walking’, I said ‘How do you know?’ I didn’t know she’d got it in the computer! She said ‘Oh it’s good you know, no wonder you don’t look your age. So keep doing that, more exercise for your body is good’.”

(Graham)

Sara suffered from pain and had health problems which sometimes restricted her mobility to the extent that she required a wheelchair and sticks. However, she refused to use them or to go out of her home until she was able to walk unaided again:

“Why did you prefer to stay in [when she was unable to walk unaided]?” (JB)

“Because she feels that using a wheelchair means that she’s disabled and she feels it is not good to admit [that], if people see her. And she says that she is not disabled.” (Sara via interpreter)
Sara preserved her health identity by adopting a strategy of denial. She also prevented other people witnessing her mobility problems, so was able to sustain this act of denial by cleverly ensuring that there was no independent evidence of her ill health. However, other participants acknowledged that ill health was a reality and there was evidence of a cost-benefit analysis with participants balancing the importance of health against the cost of maintaining it. For example, some participants balanced the fact that they no longer ate food they used to enjoy against the benefits of following a healthy diet. Belinda spoke about having to eat porridge rather than having a cooked breakfast; for her, this had not affected the quality of her life because she had come to enjoy it. However, Pauline’s story about the impact changing her diet had on her quality of life was very different:

“Like when I went to (place name removed) my dad had a big party, I didn’t even eat a piece of prawn! King prawn has high cholesterol. I didn’t even eat one, not even a single one that night. I was good. Now, what is good quality of life if you can’t enjoy the food, that you normally do, but you don’t now because of health?”

(Pauline)

Nevertheless, the importance of maintaining her identity as a healthy person prevailed and Pauline still continued to follow a healthy diet.
The importance of health was not restricted to physical issues; having mind and body in balance was also important to participants who believed that good cognitive well-being preserves and enhances physical health:

“…if you are not clear in your mind, that will affect your health.”

(Helen via interpreter)

“Good health, it can bring less illness. Also if the mind is more positive you will also be in more good health. You can live longer.”

(Elizabeth via interpreter)

4.6.2 Cognitive health
As with physical health, participants had developed strategies to maintain their cognitive health and here there was evidence of an interface between their health and cultural identities. Whilst only one participant spoke about using traditional Chinese medicines for physical ailments and as a prophylactic against illness, the strategies participants used to maintain their cognitive well-being were mainly associated with Chinese culture. Participants spoke about practising Tai Chi, singing traditional Chinese songs and opera, and playing games of Mahjong:

“What do you enjoy about singing?” (JB)
“It is good for your health and your chi will grow stronger. Of course you need to remember the words and not forget them, so it is like doing exercise for your brain … you have got more chance to perform in front of people so you get more esteem and no depression.” (Ruth via interpreter)

When talking about cognitive health, participants also spoke about dementia, although no one talked openly about knowing somebody who actually suffered from dementia. Dementia presents perhaps the ultimate threat to identity, not only impacting on autonomy and daily living, but also severing the thread of continuity running throughout the life course and the sense of being the same person over time. A fear of developing dementia emerged from participants’ narratives and there were examples of what they did to prevent it. Activities intended to keep their mind active, such as learning new skills and playing Mahjong, emerged as the main strategy employed to avoid dementia:

“Why do you enjoy Mahjong?” (JB)

“So she won’t get dementia when she gets older. That’s what they say, it gets your brain working, functioning. You use the brain a lot when you play Mahjong.” (Clare via interpreter)
4.7 Modifying identity

Whilst there was evidence of continuity of identity, it also emerged from participants’ accounts that they recognised that, in some ways, they had also changed across their life course. Participants were able to identify precursors to that change; these included: ageing (particularly in the context of psychological maturation), migration to the UK, changes within UK society, and a need for personal growth. Time emerged as a key influence in change, and “modifying” was recognised as an ongoing process, with participants acknowledging that their future may bring more changes and speaking about anticipated events in their lives.

4.7.1 Ageing and health identity

Although people spoke about wisdom and maturation in association with ageing, there were also negative connotations of age, and these were mainly related to ill health and death. Participants acknowledged that physical ageing impacted on their lives and there was evidence that they attempted to address these issues. However, if the strategies employed are unsuccessful, or if health deteriorates further and they become ineffective, individuals may be forced to accept their ill health and the subsequent changes to their health identity. There were examples of ageing leading to change in participants’ health identity and how that impacted on their wider sense of self. For example, Rose spoke about how her deteriorating
health had affected her image of herself as a homemaker, and Louise talked about how she views the menopause:

“She says that when women reach the menopause everything is all down, down and they get more sickness and all that; it’s just like they get useless…” (Louise via interpreter)

The impact of physical changes was recognised by participants of both genders and they spoke about looking and feeling different. Ageing and death are inevitable and can neither be denied nor avoided; however, this does not mean that they are not difficult or sensitive issues and a strategy participants employed to address them was using metaphors:

“…and she says that the old people are just like machines. The machines always will break, the same as old people do… she understands that people will die finally.” (Sara via interpreter)

Other examples included referring to the body as a car that is slowing down with age and as equipment that is seizing up. The strategy of using machine metaphors enabled participants to accept ageing and death and incorporate it into their identity, whilst simultaneously distancing themselves from the loss of corporeal self and neutralising the associated emotions.
4.7.2 Time and identity

Ageing was a recurrent theme in participants’ narratives and was interwoven with and inseparable from time. When participants spoke about ageing, they often used their memories of their younger selves to contextualise and demonstrate how they had changed. Ageing was conceptualised by some participants as a series of stages taking place across their life course.

“Yes that’s why she thinks differently [now she is older]. She is saying that she is old, and when you are younger you think differently as well. You know, different ages have different stages?”

(Louise via interpreter)

When speaking about ageing, there was an assumption that it was natural to change and participants spoke about older people adopting different perspectives on life from those they held when they were younger. This was associated with a renegotiation of their identity in the context of previous life experiences, current life, and hopes for the future. Participants’ narratives contained examples of changed priorities and, whilst these were often related to changes to their values, changed priorities were also indicative of a changed and changing identity. For example, cutting down the hours he worked had enabled Graham to pursue other interests and resulted in him starting to develop a new facet of his identity, that of being a teacher:
“So I teach a few [people] whatever they want to learn... Yeah, I enjoy the company; and when they enjoy learning, I enjoy teaching. That’s the main thing, you know.” (Graham)

Psychological change emerged as a corollary of ageing and participants recognised and highlighted changes in their attitude towards life. Pauline felt she had mellowed and had become patient and more accepting of others, noting how this had improved her interpersonal relationships. Wendy also spoke about how her personality had changed with age:

“...when I was young I always argued with everybody, and I needed to be the number one. But now I think ‘It’s OK, even if you are number one what have you got? You might have no friends because you’re number one. Not everybody wants to speak to you because you always argue about everything’, but now I’ve changed...” (Wendy)

4.7.3 Developing

Respect for older people was a continuity woven throughout participants’ narratives; the proposal that wisdom is gained from life experiences and the concept of the wise elder was incorporated into their identity. Reframing was a strategy used to understand life experience and develop wisdom. Sara spoke
about learning that she did not need money to make her happy, and Penny talked about a difficult period in her life and how she had coped with it. Although during her interview it emerged that this had been a traumatic experience, she too reframed it, positively viewing it as learning, consequently appreciating how it had changed her outlook on life:

“It’s very valuable – it’s not about bad luck, it’s about life. Very valuable, you learn by that, and get wiser. You know, I can’t say I’ve got cleverer, but wiser – that’s the word.” (Penny)

Although they still affirmed and maintained their parental role identity, participants also acknowledged that they had fewer responsibilities towards their families than when they were younger. This facilitated an increased emphasis on themselves, proffering permission for them to explore what was important to them as people distinct from the family unit, and to focus on their personal identity. Joan illustrated this when speaking in terms ofrediscovering her own identity:

“He [her husband] says he’d really enjoy looking after the grandson or the granddaughter. I say ‘I worked’, for it is work, looking after two sons for 20 years, ‘I want to enjoy my life now. Now I am retired’. I lost my life before, I always stayed at home, I
worked hard you know? If I didn’t work hard my sons couldn’t go to university, yeah? I worked hard as well. Now I am retired I want to find out what I like, what I want to do.” (Joan)

The passage of time and the associated change to participants’ responsibilities also offered increased leisure time; this allowed them to spend more time on existing activities and to take up new opportunities available to them. Participants talked about being active in their community, for example, teaching children to speak Chinese, promoting healthy behaviour to their peers, taking up voluntary work, and of new hobbies. Age was not seen as a barrier to continuing personal development and growth:

“Learning things, makes you feel young one way, and also it makes you feel useful. And then, don’t let your age stop you, don’t always count. You asked me my age the first minute [when meeting before the interview]; you don’t always have to count your age. Age is cumulative every year you know? But learning things is every day.” (Penny)

The concept of ageing providing new opportunities and being able to continue to grow as an individual throughout life was linked closely to positive thinking, which also permeated participants’ narratives. Hope and optimism were common
and, as will be discussed in chapter seven, contentment was a key factor in participants’ evaluation of having a good life.

4.8 Cultural identity

Some aspects of identity were both retained and also subject to change; this was dependent on context and was evident for participants’ cultural identity and their public expression of this. Cultural identity is embodied and psychological; participants’ narratives included examples of how it is reinforced and strengthened, and also of how it changed and is changing. Unsurprisingly, when participants spoke about being Chinese, this was often placed in the context of migration and they talked about the impact this had on their cultural identity and how it is manifest in their lives. Participants spoke about integrating into UK society and recognised the resulting changes in themselves; nevertheless, there was also strong evidence of people retaining and maintaining their Chinese identity.

4.8.1 Maintaining cultural identity

Although there were differences in the pattern of how participants experienced and enacted being Chinese in the UK, all spoke about aspects of their Chinese identity and their accounts provided evidence of strategies they used to maintain it. One strategy was to affirm and reinforce cultural identity by taking part in activities associated with participants’ Chinese heritage, such as: practising Tai
Chi, singing Chinese songs and opera, doing Chinese handicrafts and art, making dim sum, and playing Mahjong. These activities enabled people to remain connected to both their heritage culture and their lives before migration, thus offering continuity of identity. Anna’s account of teaching Chinese writing to local school children illustrates this:

“You were telling me that you go to the school and show the children how to do the Chinese letters.” (JB)

“I do.” (Anna)

“Yeah, do you enjoy doing that?” (JB)

“Well, of course I enjoy it … I really enjoy it because when I was in Hong Kong, I liked doing Chinese characters and pen work.” (Anna)

Remaining connected to Chinese culture and identity was evident for those who felt that they had been able to integrate and those who felt they had not. For people such as Anna and Belinda, who felt they had integrated into UK society, this was an active choice, whilst for others, it was necessary for daily living. Some participants did not speak English and they were only able to function within the Chinese-speaking community. Many were people who used organisations
provided by and for the Chinese community; these organisations offered a collective focus for Chinese identity and provided culturally related activities, for example, Tai Chi classes, and services such as a Chinese hairdresser. Many of the culturally related activities people undertook were collective, such as making a model of a dragon boat and a Chinese wedding dress for art exhibitions, or attending the Chinese opera and exhibitions of Chinese art. As seen with Anna’s account, these activities enabled participants to reconnect with their early lives by practising skills obtained in their youth; they also enabled them to meet with their peers, share memories and experiences, thus reinforcing and affirming cultural identity:

“What was it you enjoyed about making the dress [a Chinese wedding dress]?” (JB)

“Because she used her memories. A long, long time ago when she was young she did those kinds of jobs in China.” (Lesley via interpreter)

“So do you enjoy making nice things?” (JB)

“Yes she does because during the whole process there is a group of people she could chat with.” (Lesley via interpreter)
Custom was another strategy involved in maintaining and reinforcing participants’ cultural identity. During the fieldwork, there were examples of collective expressions of Chinese identity, with participants celebrating a number of Chinese festivals, for example, Chinese New Year and the Mid-Autumn festival. Continuation of collective recognition of Chinese identity emerged as being important and one strategy employed to facilitate its continuity was the transmission of the heritage culture to the next generation. A number of local Chinese organisations and schools provided teaching in Chinese culture and language; some participants were actively involved in this. Penny spoke about teaching children how to speak Cantonese, and Belinda of language and Chinese cultural classes provided by a local church:

“...a lot of the parents want the children to know the Chinese language and also know the culture. Because when they are brought up here they don’t know anything about the culture, the Chinese culture. So we try our best to just tell them a bit of what the culture is.” (Belinda)

This affirms participants’ Chinese identity and maintains identity both in an individual and collective sense. Transmitting Chinese culture to the next generation not only facilitates participants’ cultural identity continuing from their past to their present, but also projects that identity into the future as a legacy.
4.8.2 Modifying cultural identity

Exposure to UK culture and the resulting acculturation emerged as a significant influence on participants’ identities and assimilation of UK culture; although this was subject to individual differences. Nonetheless, they also maintained and affirmed a core sense of being Chinese, and this heritage identity was not negated by acculturation. However, there was evidence of change and adaptation of the expression of cultural identity, which was related to participants’ experience and social world. The interface between the individual and the host culture resulted in change; people recognised this and related it to their experiences of living in the UK. They spoke about coming to the UK, of integrating and adapting, to various degrees, to the cultural mores of UK society; some felt they had incorporated more change than others. It emerged that some participants had constructed a hybrid identity or a bicultural identity, which comprised of aspects of both Chinese and UK cultures. Whilst, in common with others, Belinda affirmed her Chinese identity, she was also aware that aspects of her expressed identity had changed and she spoke about actively synthesising facets of both her heritage and the host cultures:

“...I’m a Chinese of course and I do a lot of things in the Chinese way but some of the ways and some of the things I do is not the Chinese way. You see? It is the English way.” (Belinda)
It emerged that assimilation of UK culture and the resulting impact on identity did not have to be the result of conscious action; simply being immersed in it had an impact. Pauline spoke about how she had changed over a period of time whilst living in the UK and had become accustomed to different behaviour and mores:

“When I first came to England, I think I came to England in the 70s, we came from a village. A culture where women were not so exposed to wear all this, you know, clothing? But when you are exposed to the West, you see women so open, they kiss and hug [in public]. In my town, when I first came to England, actually we can’t take it. We were like this in the street [looks away and hides eyes] but today it’s nothing because we, if you like, are integrated into your society. If you see women not wearing anything it’s nothing… But when we first came to England, we saw all this – we can’t take it, we’d have do this [hides eyes] – we saw people kissing we’d have to do this, but how can you do it? So now you’ve got numb. No feeling. Can you see? Culture, gradually you’re moulded into the culture. Gradually you learn.” (Pauline)

The issue of “being open” and how this is at odds with traditional Chinese culture, particularly in relation to women, was evident in other narratives. Anna is actively involved in the promotion of Chinese culture and socialises within the
Chinese community, but also recognises that she has changed since moving to the UK. Anna described herself as now being “too open” and related how this constructed her identity and affected how she is viewed by her peers in the Chinese community:

“Yeah, but loads of Chinese people say, ‘You are not Chinese, you are English because your mind is too white’. Maybe that is because I am staying here longer than in Hong Kong…Because I’m way too open, not Chinese and I socialise with people. I like dancing, dancing with a man or something, you know? So, all the Chinese people say, ‘You are a woman, you are so open. It’s not right’. They are very strict.” (Anna)

There was also evidence that acculturation enabled individuals to reject aspects of their heritage. For example, Anna described her peers as being strict and later as being old-fashioned in their views about acceptable behaviour for women, whilst Belinda spoke about rejecting the Chinese tradition of bowing to others. Core aspects of identity, in this case being Chinese, interacted with external contingencies and, whilst participants retain their core identity, their public or social expression of it changes. This complex relationship between continuity and change, of incorporating changes assimilated from UK culture whilst maintaining aspects of the core identity, was mediated by the context of what is acceptable to
and expected by the heritage and host societies. Some aspects of cultural identity were retained, whilst others, especially those involved in the social expression of identity, were more susceptible to change.

4.9 Summary

In this chapter I discussed the importance of identity to participants in the context of their core and social identities, exploring how identity can both endure and change over time. Identity was not viewed as being a single entity, but it was conceptualised as being multifaceted with some aspects being immutable and others being adaptable, depending on their nature and the context. The core essence of the individual was viewed as being located at a personal level and as enduring over the life course, whilst the aspects of identity which were located at the interface between the individual and the social levels were more amenable to change.

I identified the factors which impacted on participants’ identities and discussed how they dealt with these factors in terms of them “maintaining” or “modifying” identity. Some factors affecting identity, such as ageing, may be extrapolated to the general population; however, the processes of “maintaining” and “modifying” for this group of participants took place within the context of migration to the UK and living in a host culture. The assimilation of UK culture emerged as playing an
influential role in participants’ cultural identity and there was evidence of the development of a hybrid or bicultural identity.

That identity is never completely fixed and may be conceptualised as a lifelong project was highlighted by participants recognising that they had changed and had future opportunities to continue to change and develop across their life course. This was associated with changing priorities and responsibilities as well as an accumulation of life experience and learning.

In the next chapter I discuss the concept of “belonging”, exploring how participants experience and enhance their sense of belonging in both the personal and public dimensions.
Chapter 5

“Belonging”
The previous chapter explored “identity – maintaining and modifying” and I discussed how individuals manage to both maintain a continuing identity across their life course and incorporate change in response to their interaction with the social world. Context and individual differences were highlighted as important mediators of this process.

This chapter explores another of the concepts identified in data analysis as being important to participants – “belonging”. I define “Belonging”, and establish the factors that influence it. I also identify the strategies participants used to enhance and construct a sense of “belonging”, and explore how successful these were. I examine the issue of being treated as other, which can be conceptualised as not being a member of the dominant group in a social situation, and the impact this has on individuals, as well as discussing examples of the participants viewing people as other and the purpose this served. Implicit throughout the chapter is that the sense of belonging and identity have a dynamic relationship; indeed, this relationship is so close that changes in one impact upon the other. However, as closely interrelated as these concepts are, the category of “belonging” has its own distinct properties.

5.1 Definition of “belonging”

A sense of “belonging” is subjective and is experienced when an individual feels comfortable and secure in their personal and/or social worlds. Consequently,
“belonging” does not exist in isolation; instead, it is constructed in relation to people and places. Belonging involves: one-to-one relationships with others, being included as a member of a group and being recognised as part of a community, and is also manifest in people feeling attachment to places that hold meaning for them. The concept of “belonging” is constructed from factors such as: kinship, shared history, beliefs and customs, and common understanding. See diagram 5.1 for a pictorial representation of this category.

Similarity or sameness between individuals evokes a commitment to and connection with people or places, which is reciprocated and reinforced by others. “Belonging” may also be defined in terms of what it is not; not “belonging” is about feeling different and being treated as such: a sense of being other, of being excluded and not fitting in with one’s social world.

“Belonging” is not a fixed or permanent phenomenon and it is possible for changes in the dynamic relationship between the individual and the social world to construct or destroy their sense of belonging. Feeling that one does not belong in a situation – of being other – is stressful and uncomfortable; consequently, people adopt strategies to enhance and sustain their “belonging”, to construct new “belonging”, and to avoid being other.
Diagram 5.1 Belonging
5.2 Participants’ accounts of “belonging”

The concept of “belonging” emerged when participants spoke about various aspects of their lives, such as: relationships with their family and friends, their interactions with wider society, and the places they visited and felt comfortable in. However, this all took place against the backdrop of migration to the United Kingdom (UK) and their subsequent acculturation, which unsurprisingly emerged as a crucial influence on people’s sense of “belonging”. This is encapsulated by the following excerpt from Vanessa’s interview:

“I was young when I came here and I wasn’t that happy because, the thing is, I didn’t speak much English and the kids were small and you had to look after them all the time. I think at that time I was upset and not very happy at all. But then gradually I met more friends, and the kids grew up and you get used to the life here... I used to think ‘Why not go back to Hong Kong, we have good life there?’ Well right now, even if I say, ‘Right I have the chance to go back to Hong Kong to live’, I don’t think I would. I don’t think I would because I have got friends here, the family, not much of my family; my husband’s family is all here you see, because we have five generations here. For my kids it is five generations and the
grandchild is the sixth now…I wouldn’t go back there to live.” (Vanessa)

Evidence that “belonging” can range along dimensions from the micro, personal level to the macro, global level emerged during the interviews, with participants speaking about close relationships with friends and family as well as being part of a collective, and about private and public places. Participants also spoke about occasions when they had felt as if they did not belong, when they were treated as other, and how they had responded to this. In some instances, there was evidence of a simultaneous feeling of “belonging” and of being other, which resulted in tension for the individual. “Belonging” emerged as being important in having a good life and consequently as something participants both constructed and maintained over time, for example, by nurturing relationships with people and by creating attachment to places.

The remainder of this chapter is divided into three sections: the first explores “belonging” through people, the second discusses the importance of place and how it can be constructed to enhance “belonging” and the final section turns to the issue of transnational “belonging” and the strategies individuals use to maintain attachments to people and places across different countries.
5.3 “Belonging” through people

Participants spoke about “belonging” through people in the micro context of their private interpersonal relationships with family and close friends (including maintaining links with people living at a distance), their less personal and more publicly visible involvement in their community, and in the macro context of being a member of a wider UK society. Relationships with people, and thus the associated sense of “belonging”, varied in quality and type and participants valued and prioritised some relationships more than others.

The concept of sameness emerged as being key in the quality of relationships and enhancing similarity to other people was a strategy linked both to the concept of “modifying” identity, discussed in the previous chapter, and to increasing “belonging”. Increasing similarity to others was particularly influential at the macro level of “belonging” and participants constructed a sense of “belonging” in society via integration and assimilation of UK culture. However, increasing similarity to the host community had the subsidiary effect of decreasing similarity to the home community and needed to be carefully managed; one way of managing this was to nurture close personal relationships and maintain similarity with family and friends, whilst adapting at a macro level to fit in with the host society.
5.3.1 “Belonging” and family

As demonstrated in the previous chapter, having and maintaining a close and harmonious family was important in participants’ identity and this emerged as being a crucial factor in the concept of “belonging”. The perceived permanence of family originating in kinship bonds and blood ties grants membership of a group (the family) from birth to death, thereby providing an opportunity for continuity of “belonging”. Kinship ties were spoken of as binding, and casting somebody out of the family, making them other, was unthinkable; the dominant theme was that an individual would always belong with their family no matter what:

“… it doesn’t matter how wrong you are or how wrong one of the family is, you still stand by them. Family support always counts, it is always important. I have a big family, my husband has a big family – I don’t count how many, but if any one of them needs my support, I will be there.” (Penny)

The permanence of “belonging” with family was underscored and strengthened by the sameness between members and an understanding of each other derived from a shared history. Participants knew how their family functioned as a group, what to expect from the other members, and what was acceptable and not acceptable within the family. The innate permanence
of the relationship between family members and their shared understanding served to remove uncertainty from relationships, enabling participants to feel comfortable and secure. This facilitated them being open and participants felt able to share their feelings and opinions with their family:

“Can you tell me about why it [family] is important?” (JB)

“You can chat with each other, because if she wants to say something she doesn’t have to butter people up. Because you can’t communicate with other people like you can with close family.” (Verity via interpreter)

“Belonging” with family and family relationships emerged as being more valued than relationships with friends and other people; even participants who spoke about having very close, long-term friends demonstrated that friendship and kinship were viewed differently:

“…because a friend is different from the family, they are all important but differently important to her.” (Sheila via interpreter)
Membership of a family had practical as well as psychological benefits and participants spoke about the support and help they got from their families and how this differed from that of friends:

“...Maybe, say when you buy a house or you really have a difficult financial situation, then the first people you would think about would be your family – that they may help you to borrow some money, or something. But you won’t ask friends to lend you money. I think that something like that, to me, important business, you would talk to your family.” (Pauline)

Due to the concept of blood ties and sameness between family members, suggesting that one could be other within a family is oxymoronic. Nonetheless, whilst “belonging” with family was viewed as permanent and membership as a given, close family relationships were not taken for granted; participants spoke about nurturing them, of compromising, and of balancing one thing against another to avoid conflict within the family. Maintaining harmony within the family was sometimes achieved paradoxically by relinquishing some aspects of “belonging”. For example, there was evidence of people moving out of traditional multigenerational households or refusing to live with their children:
“She used to live with her children, you know her son and daughter, but when you are living together in the same house, something maybe they like she doesn’t like or maybe something she likes they don’t like it either. So in that situation some conflict might occur.” (Helen via interpreter)

There was also recognition that living with family may not necessarily always lead to “belonging”:

“She lives independently. Some friends and family ask ‘do you feel lonely or do you feel isolated?’ She thinks that if you are living together and you can’t cope with your son-in-law or daughter-in-law that is worse. Even though you are living in a big family you won’t be happy.” (Sheila via interpreter)

Although participants lived independently, they still spoke about having close families, good family relationships, and of feeling supported and cared for by them. Children, grandchildren and siblings visited participants, and vice versa, and technology proved useful for keeping in touch with family living at a distance. No evidence emerged that a lack of physical proximity between family members affected the participants’ sense of “belonging” in relation to their family:
“One of her sons is in Canada, last year he even came back to the UK just to fix the computer for her. He has been in Canada nearly 10 years and he will come over every year.” (Sheila via interpreter)

This issue of physical proximity was particularly relevant for this group as many, if not all, still have family living in their homelands and some have family spread across the globe, with whom they keep in touch:

“I’ve got lots of brothers and sisters. And all over the world as well but we still keep in touch. In a way that we talk over the phone for hours.” (Belinda)

This aspect of “belonging” was strongly associated with transnationalism and is further developed and explored more fully later in this chapter.

As much as family relationships were a common thread in participants’ narratives, this was to generally emphasise the positive nature of these relationships. There was only one instance where there was evidence of ongoing problems within a family; in this case, the participant stated they did not want to talk about it. A small number of people did speak about
conflict or disagreements with family members; however, these were in the past and spoken about in terms of how such issues had been resolved; nobody spoke about feeling outside their family or of being estranged from them:

“A few years ago I tell my brother, I said, ‘Look, I’m getting older – so are you, I really don’t want to come here every time to argue, there is no point’. Then we both keep quiet. Can you understand? I made a clear declaration ‘I have no intention to come and argue with you’…But me and my brother, whether we have a similarity in character that clashes, I don’t know. But we are blood! Blood relationship, you can never take away that relationship! No, how can you take away your flesh and blood? You can’t, yeah! That will link you together regardless, so you have to live with it. That is true!” (Pauline)

This extract from Pauline’s interview further illustrates the importance participants placed on kinship, so it is unsurprising that they were motivated to nurture family relationships. One strategy that was employed to enhance “belonging” within the family was to improve communication and understanding between different generations; this was most evident in the relationship between older people and their children and grandchildren,
many of whom were born in the UK. Belinda spoke about setting up English sessions for Chinese-speaking people and teaching Chinese to their children:

“…I taught them for many, many years. The reason why the church actually set up a Chinese school is because they found that the kids, you know in this country when they were born here and after they have gone to school, they don’t want to speak to the parents at all in Chinese. You see?”

“Oh right. Uh huh.” (JB)

“But unfortunately that generation, the parents do not speak English. Now, the kids themselves speak English and they can’t communicate. That’s why we taught them Chinese, so that they can communicate with the parents.” (Belinda)

5.3.2 “Belonging” and friends

Friendship emerged as also being important in the concept of “belonging”; participants spoke about how they felt comfortable in the company of friends and many had long-term friendships that had lasted 50 years or more and had endured across distance:
“I think friends are very important, very important. I don’t think a singleton (sic) person, they can survive, but I don’t think they enjoy life.” (Belinda)

These relationships, like those with family, were characterised by sameness and a shared history. However, unlike family relationships, there were no blood ties; therefore, factors such as shared interests, beliefs and activities also emerged as being important in constructing and strengthening friendship. Friends were a common source of support and participants spoke about seeking their advice when they had problems and of offering advice and support in return. This reciprocity was an important factor in demarcating family from friends; reciprocity was not a necessary feature of family relationships. Nevertheless, although family were valued more highly than friends, friendship still emerged as an important aspect of “belonging”, and whilst friendship could not replace kinship, there was evidence that it could be a substitute in some situations. Friends sometimes filled in for family who were either living at a distance or not readily available:

“At our age you know all the children have grown up and live in different places, so friends are very important. And if the
friends are good, you will feel happier; you won’t feel alone or isolated.” (Sheila via interpreter)

Although friendship was important in participants’ sense of “belonging”, not all friendships were viewed as equally valuable and the concept of a hierarchy of friendship emerged. Friendships ranged along a continuum from close to distant and participants categorised them differently; as Joan demonstrates where the relationship was located in the hierarchy depended on: who the person was, how long the friendship had lasted and how they were known to people:

“…close friends, there are only three or five very close friends, who if I have a problem I can talk with. Are you with me?...[indicates using fingers] the first is very close, second is a fellow worker, do you understand what I mean?” (Joan)

“Like an acquaintance?” (JB)

“Yes, an acquaintance, yes it’s that way round...If I have a problem, a family problem, the first one, I want to confide in her or talk. She helps me very much. I have a very, very good friend who I have known since my son’s birth. My son is
about 30 years old… I know her mother, her father, her whole family as well. I know all her family, so we help each other.”

(Joan)

Close, intimate friendships were generally long term, involving a shared personal history, and were characterised as being a relationship where participants felt safe to talk about things that were important to them, without fear of judgement. As well as “belonging”, close friendships also provided both emotional support:

“He meets with a lot of friends here [place name removed] and also he can talk with them about things on his mind and in his heart, about the more personal problems.” (Keith via interpreter)

And practical help:

“So for instance, like when my father recently had this illness, I had to talk to my friend. I mean, I have been talking to him quite a lot, but this time I have to ask for some advice from him because he had experienced, not to him directly but indirectly, he had already experienced that kind of thing. So
he can tell me what to look for and how to do it, which is really, really good.” (James)

Whilst close, supportive friendships were located at the micro level of “belonging”, the less close relationships participants spoke about were located further along the continuum towards “belonging” at a macro level. A common history and sameness was still important between participants and less close friends; however, this was at a generic rather than a personal level, and social activities and hobbies provided enough common ground for this type of friendship. A number of people were active in a church or temple and for those who held them, spiritual beliefs emerged as being important both in their personal value systems and in providing group membership and thus “belonging”. Here, “belonging” was based on shared values and understanding and, as with their families, participants knew what to expect from other members of their faith. These relationships were especially characterised by mutual support. Belinda spoke about sharing activities with members of her church, of hosting and attending regular Bible classes and raising money to help others. Pauline’s close family lived at a distance and she spoke about how members of her church helped her on a day-to-day basis:
“I’m not saying I don’t love my family, I do, but they are too far away. Yeah, when I have some problem mostly it’s my friends, people around me who help me.” (Pauline)

Whilst family relationships and close friendships were not dependent on proximity, less close friendships were, and activities were often instrumental in bringing people together and fostering and nurturing a sense of “belonging”. These less intimate friendships were centred more in the public domain and, although participants all lived in the same city, few lived close together or called unannounced on less close friends. Social activities provided a reason for participants and such friends to meet; Vanessa talked about getting a large group of people together to socialise:

“Well we play it [Mahjong] because when we get together we have a chance to talk to each other, to say ‘How are you?’ and things like that you know? … The thing is sometimes if you’ve got time, you don’t know whether they have got time or not. You can’t just pop in and say knock on the door and say, ‘I am coming to talk to you’, you can’t do that. So if we don’t see each other for a long time then we call them and say ‘let’s come out and have a meal’...and then we get together.” (Vanessa)
Further along the continuum of “belonging” and firmly located in the public dimension were relationships within the wider community. Participants demonstrated a strong identification with the Chinese community and spoke about socialising with and helping other Chinese people. The sense of “belonging” in this context was facilitated and enhanced by involvement with organisations set up by and that served the Chinese community. Participants socialised with other people using these organisations; whilst these relationships were less personal and sometimes no more than acquaintanceships, they played a role in people’s lives by providing company and helping them avoid loneliness:

“I like, I like groups. I don’t want to be by myself.” (Anna)

“Why is that?” (JB)

“By myself, I can’t do anything, I feel lonely.” (Anna)

Others also spoke about more formal involvement within the Chinese community and many, for example, Wendy, Belinda, Sheila and Penny did voluntary work:
“...that’s why I say to people to ‘do something’, you know to give to society? Yeah everybody can do that! Everybody can do it, it’s up to you.” (Penny)

5.4 “Belonging” and society

The concept of being other and the sense of simultaneously “belonging” and not “belonging” were issues which emerged at the macro level of belonging and related to the wider society outside participants’ circles of friends and acquaintances. For this group, there was an ambivalent sense of “belonging” manifested in relation to a wider UK society and citizenship. Participants employed various strategies to address this feeling of not “belonging” and commonly spoke about their strong belief that it was important to integrate into UK society, their desire to do so and the efforts they had made to integrate:

“Not only say that you Chinese should know Chinese, no because if you live in this society, if you live in this country you need to merge with others.” (Belinda)

“Do you think that’s important to be part of society?” (JB)

“Oh yes! I say yes! You ask me that – yes.” (Penny)
Nevertheless, evidence emerged that their success was varied and participants’ narratives included accounts of different degrees of integration. These ranged along a continuum, from participants like James, who felt he had been successful and had fully assimilated the host culture, to others, who felt they had not been able to integrate well. Participants who felt this way commonly assigned it to them being unsuccessful in their attempts to learn English. Due to the language barrier, they had limited day-to-day interaction with mainstream UK society and some said that they experienced difficulty living in the UK:

“I tried it [to integrate] but I can’t because, you know my English is so very poor. I can’t speak good English; there is a big barrier to communicating with the local people. Especially in (city name removed) there is a lot of slang dialect or something like that. I don’t understand what they are talking about.” (Robert)

In such cases, a common coping strategy was to remain within the Chinese-speaking community to work, shop and socialise, with little contact outside that community. The interaction these participants had with mainstream UK society was associated with formal or official contact, such as dealing with housing associations and government departments, and attending
appointments at the dentist, the doctor and the hospital. However, these were dependent on people being able to obtain assistance from an interpreter or an English-speaking family member:

“She can go shopping, then the difficult part is that she can’t speak English well. She needs an interpreter for everything… She needs to wait for her son to take a day off actually, before they can take her to the doctor because of the language barrier.” (Louise via interpreter)

However, this strategy was not available to all and Verity spoke about feeling isolated in the UK and of wanting to return to her homeland:

“She has no one to rely on, she can’t speak the language, she can’t communicate, it is difficult to communicate with her neighbours. She hasn’t got many relatives here because she is a single mum with a daughter.” (Verity via interpreter)

Verity had few connections in the UK and saw little chance of making new ones; thus, she had no sense of “belonging”. Although Verity’s situation stood out within this participant group, professionals working within the Chinese-speaking community indicated that many older Chinese people are
at an increased risk of isolation and had initiated an outreach service to address this.

Another strategy which enhanced “belonging” at a macro level was to attend activities held outside the Chinese-speaking community as a group; this was effective in two ways. A sense of “belonging” was gained from group membership, for example, there was always somebody present who participants knew, who they were comfortable with and could talk to. Also being part of a group meant that one person did not stand out as being different thus reducing the sense of being other.

5.4.1 Being other

There was evidence that other participants did experience “belonging” in UK society at a macro level and they spoke about paying tax and national insurance, voting in elections, higher education, receiving benefits and public services. Nonetheless, for some their experience was ambivalent at times and spoken of in the context of both experiencing “belonging” and of being other. Pauline spoke about how she had experienced this at work:

“I was in charge of the department and I was not graded the highest. I should be the highest, being in charge of the department holding the key and all that, but I wasn’t. No one
fought for me, no one!...I believe because I am Chinese.”

(Pauline)

Indeed, both participants and interpreters spoke about racism they and their families had experienced; Alice spoke at length about prejudice, relating an instance of racism she experienced and how it affected her:

“...once I met a gentleman, a little bit older maybe more than 50 years old or more. He was just very angry at some other people who live here. So he says ‘they should go back to their country’. In front of all of us at the bus stop, yes just at the bus stop! I was there, but I think he indicated some other race such as Muslims because he said ‘if you want to put that on your head, go back to your country. If you want to stay here you get along’. So such is this speech. Well all of a sudden he turned to me and he said ‘not you, it’s not you’ and apologised, you see? But I was still feeling uncomfortable because I am not English. I am an immigrant, but I am a citizen now. So it’s things like that I feel a little bit fearful of.”

(Alice)
Alice demonstrated how being treated as other created tension in her sense of “belonging”; she addressed this issue by asserting her UK citizenship. Gail dealt with an experience with the UK Borders Agency by also declaring her legal right to be in the UK:

“… When she was working in a kitchen, the immigration went in and tried to arrest her. Like she said, she doesn’t carry her passport with her when she goes to work. The manager said ‘oh, she is a tax payer you know?’ but the immigration don’t believe it so they arrested her and she was at the police station. She was kept in a cell for five hours and she was crying for five hours… She said I am entitled; I have got the right of abode in the UK.” (Gail via interpreter)

This strategy of highlighting UK citizenship created a legal “belonging” that was supported by the law and, as such, could not be challenged. However, this reliance on objective facts reduces the emotion associated with “belonging” and the effectiveness of this strategy is questionable because both Alice and Gail remained fearful that other similar incidents could occur again.
Participants also adopted another strategy which highlighted how well they felt they had integrated into the UK and enhanced their “belonging”; this was to view other people as other. Evidence emerged of participants judging their own integration and the changes they had made to assimilate UK culture by comparing their level of citizenship and conformity to expected behaviour with that of both British-born people and other migrants. Although, viewing people as other occurred in relation to other migrants to the UK; Alice compared the contribution to society that her family makes against her perception of some migrants to the UK:

“… I think racial prejudice is up, up, up, creeping up yeah, but I don’t only criticise Western countries because immigrants, some immigrants, are really bad! They forge documents, they lie, they cheat – so that’s another side. So our government should distinguish who is bad and who is good. Good people they do good things for our country. My daughter is working hard, she runs her own company. She hires a lot of people including English people, she employs them, she pays a high salary. My son he worked here, he was a worker in England. He worked in a company as senior staff so he paid quite high tax for a couple of years. So we do contribute, yes!” (Alice)
Individuals also contrasted their desire to integrate into UK society and “belong” to their perceptions of other minority groups’ intentions:

“They [a minority ethnic group] want freedom – won’t do that, won’t do that, won’t do that! But I don’t agree, personally I don’t agree! If you stay in a place you have got to understand people’s rules. You can’t say ‘No, I’m not, I can’t do it, I’m not’. Go home and do it...But here, you’ve got to follow the rules here.” (Anna)

The strategy of conceptualising people as other underlines that participants made active attempts at integration and that, whether successful or not, the intention was to “belong” in the UK and not to be separate from the rest of society. Consequently, it strengthens participants’ “belonging” by highlighting their similarity to the host culture and minimising any differences. However, whilst acculturation may enhance “belonging” in wider society, it may also result in a person being seen as other within their own community. Indeed, achieving “belonging” in both the host and heritage cultures may be a fine balancing act, where failure results in being marginalised by both communities.
5.5 “Belonging” and place

Place played a valuable role in “belonging”, both in terms of providing a space for people to meet for activities and to socialise and in simply being somewhere people could identify with and become attached to. “Belonging” through place was enhanced where participants met with familiar people, artefacts and behaviour and felt comfortable and welcome. As with “belonging” through people, “belonging” through place ranged along a continuum of dimensions, from “belonging” in the micro dimension of personal or private space to “belonging” in the macro level of public or shared place. Nevertheless, there was a difference between “belonging” through people and through place. In relation to people, there was strong evidence of participants actively changing themselves to integrate, as well as assimilating the host culture. However, in relation to place, there was evidence of participants creating bespoke places that reflected their heritage culture, and of adopting existing places as their own.

5.5.1 Created place

Creation of place aims to produce somewhere which feels recognisable and comfortable; created places contained artefacts participants were familiar with and that were associated with their culture. Creating place served to both reflect and reinforce participants’ cultural identities; the most obvious example of creation of place at the macro level of “belonging” relevant to this
research was that of Chinatown. Chinatown in Manchester is a bustling area replete with shops, restaurants and services focussed on and delivered to the local Chinese community. Signage is written in Cantonese and English, and Cantonese, Mandarin and Hakka are spoken by shopkeepers. Chinatown was not created by the participants of this research; however, they did identify with it and spoke about visiting, socialising and working there. This also served to sustain and maintain Chinatown as a place of “belonging” for people. For those who were unable to speak English, Chinatown was especially important in their day-to-day lives, enabling them to be self-sufficient with everyday tasks, such as shopping for food and clothing. Chinatown emerged as being important in “belonging” by being a Chinese-friendly place where participants could be themselves and could access services tailored to their needs, as well as providing a familiar and secure place for them to meet with groups of friends for meals and to socialise:

“...we sometimes play [Mahjong] outside the restaurant.”

(Vanessa)

Creation of familiar “Chinese” places also emerged at a more specific community level with the development of community centres. Due to the economic issues associated with the catering trade, many older Chinese people are, or are in danger of being, isolated and the community
consequently developed services to address this, including a centre specifically for older people. This centre reflects the members’ Chinese heritage and has artefacts, such as models of a dragon and dragon boat, Cantonese literature and newspapers, and Chinese television programmes are available. Indeed, the centre is well used and older people call in both to use the services and to meet and chat with friends:

“What is it you like about that [going to the community centre]?” (JB)

“She likes talking to people and singing and making jokes and having fun.” (Rose via interpreter)

Although Chinese culture is strongly manifest in the community centre, the concept of a bicultural/hybrid identity, formed via acculturation and the importance placed on integrating into UK society, is also present. The centre offers a mix of both traditional Chinese activities and activities which are more often associated with other cultures. For example, Tai Chi takes place alongside line dancing and, during the fieldwork, celebrations were held for: Chinese New Year, the Mid-Autumn Festival, Christmas and the wedding of Prince William and Kate Middleton. The creation of place in this instance provided somewhere which offered “belonging” to people who remained
mainly within the Chinese-speaking community and to those who felt fully assimilated into UK society.

Access to evidence of “belonging” and place at a micro level was limited in this research as only a few interviews were undertaken at participants’ homes. Homes are created as places where people “belong” and feel comfortable, and there was evidence that the homes visited reflected the identity of their owners. Verity, who felt that she had been unable to integrate into the UK and wanted to return to her homeland, had attempted to recreate aspects of her previous home and her earlier life. When younger, she had lived in a village and she spoke about growing fruit and vegetables there, and how she had created a kitchen garden in her current home. This recreation of place formed a link between Verity’s present and her past life in the village where she felt she belonged:

“Well she has liked gardening since she was little...sometimes she feels really proud ‘Oh I’ve grown this’. She comes from a village and when she was really small she used to grow them [vegetables], you see?” (Verity via interpreter)

The creation of familiar external space in the form of gardens was replicated in the public domain; the community centre had a thriving vegetable garden
that many members tended and Chinese tenants of a housing scheme grew both Chinese vegetables and plants.

5.5.2 Adopted place

At the housing scheme, part of the garden tenants created had been adopted by the Chinese tenants; this was distinct and separate from the rest of the garden (which was laid out in a traditional British style). The adoption of place located at the macro level of “belonging” was also seen in other public areas, for example, seating in a shopping mall and the local casino. Whilst it is true that these adopted places facilitated participants meeting their friends, they were also places where they felt comfortable, which enhanced “belonging”. Indeed, during the course of the fieldwork and the interviews, many people spoke about using the casino and, whilst some participants acknowledged the racial stereotype associating Chinese people with gambling, none said that their primary reason for visiting the casino was to gamble. Wendy’s reference to the casino was typical:

“You know when I was young I could like go to the casino, not, gambling, just to gossip.” (Wendy)

It emerged from the interviews that the casino was initially adopted by people due to the fact that it was open 24 hours a day, seven days a week; as
many Chinese people work late into the night, it was a convenient meeting place. Consequently, members of the Chinese community found that there would always be somebody there that they knew or could speak to. For example, Debbie’s husband worked long hours and only had two days off work each year; she spoke about how they used the casino as a place to meet friends and relax after work:

“She said she has got loads and loads of friends at the casino. Because she goes to the casino with her husband. They just go there to socialise and perhaps gamble a little bit.” (Debbie via interpreter)

Adopting space enabled participants to become familiar with a place and for other people using the same place to become familiar with them being there; this facilitated participants being comfortable and enhanced their sense of “belonging”. Adopting a place is also associated with socialising in groups and it is possible for an adopted place to become strongly associated with the people who frequent it, as was evident with the casino in this study. As a place becomes associated with a group, it also develops into somewhere members of that group know they will “belong”.
“Belonging” through place and people are closely linked concepts and, as noted earlier, it emerged from participants’ interviews that “belonging” can exist independently of distance. The importance of participants’ relationships with family, friends and others living outside the UK as well as the subsequent nurturing of those relationships is illustrative of the concept of transnational “belonging” and this concept emerged at both the micro and macro levels. Participants’ interviews included accounts of transnational “belonging” via both people and place, ranging along the continuum from intimate and personal to public and generic, simultaneously demonstrating strong ties and a sense of “belonging” both within and outside the UK. Many participants spoke of close relationships with family and friends living in different countries, how they nurtured these relationships and how often they were in touch with each other:

“How they [children] telephone or communicate via the web cam every week, once a week.” (Sheila via interpreter)

“…my husband calls me every morning, but it is just like ‘Are you OK?’ like that.” (Wendy)
Virtual communication was a common way of maintaining relationships and participants spoke about telephone calls, web chatting, using social networking sites and sharing photographs electronically. These forms of communication provided a tangible aspect to relationships over distance because they enabled participants to hear and see family and friends, often in real time. As a result, they were successful strategies for nurturing relationships, as well as enhancing and maintaining “belonging” over distance:

“Having a conversation is quite important with close family. So some people ask ‘what is important?’ If she can hear their voice on the telephone that is very important.” (Sheila via interpreter)

“You can see friends [on social networking sites], what they have been doing and they tell you what has been going on, you know? And the most important thing is that you can see the pictures. So you can see friends; you know living far away you don’t see them very often. Sometimes they have got their latest pictures on it and you can tell how well they are doing.” (James)
As well as getting together virtually, family members and friends living at distance stayed with each other and it was common for participants and their peers to return to Hong Kong and for their family to visit the UK. Visits to Hong Kong usually lasted for several months:

“Like last year I went back to Hong Kong for two months.”

(Vanessa)

Visits often coincided with cultural festivals and celebrations, for example, even though the local Chinatown hosts huge Chinese New Year celebrations, many people returned to Hong Kong at that time. This highlights the continuing meaning Hong Kong has for participants and their attachment to it as a place; indeed, a number of people were truly transnational and retained homes there, splitting their time between the two countries. Participants also spoke about family and friends in other parts of the world, with whom they remained in contact:

“…so whenever I go to Canada we have a big group there, America we have a big group there. Hong Kong we have a big group there, so wherever we go we have big meetings.”

(Belinda)
Whilst having attachments to people outside of the UK was beneficial in enhancing and widening participants’ sense of “belonging”, their narratives also demonstrated that transnational “belonging” can be difficult; some experienced being torn across distance, especially in relation to close family and sick or ageing relatives. For example, Teresa spoke of returning to Hong Kong to care for her mother, only coming back to the UK on her death, and Wendy talked about having elderly relatives in the UK and abroad; she cared for her mother in the UK and her husband remained in Hong Kong and cared for his parents.

“Yes family are important to me, that’s why I look after my mum, yeah and then I sometimes go back to Hong Kong to see my in-laws.” (Wendy)

However, not all participants demonstrated a sense of transnational “belonging”; Graham, who viewed himself as integrated into the UK, made no mention of friends or family abroad. Indeed, he spoke about himself as being uninvolved with the Chinese community for many years:

“Actually you know, I never made many Chinese friends before? You know with (wife’s name) being born over here
we’ve got more English friends than Chinese, but now I get to know more Chinese friends.” (Graham)

Alice, Debbie and Peter did not evoke any sense of transnational belonging either; for them the context of why they migrated to the UK may explain this, as all came to the UK as refugees. Although Alice spoke of her experiences during the Cultural Revolution and her subsequent migration, she only spoke about her life in China in the context of that historical period. In contrast, she strongly affirmed her current UK citizenship:

“We like this country. I’ve got freedom which I want. So, I love my country, this is my country, I will do everything for my country.” (Alice)

Furthermore, although these participants spoke about their earlier lives, they did not speak of keeping in touch with anybody still residing in their place of birth or of wishing to visit, even though this was now possible. The circumstances of their past lives and their subsequent migration appeared to have severed the ties with their places of birth, which none spoke of wishing or attempting to re-establish.
5.7 Summary

This chapter discussed the concept of “belonging” in relation to both people and place, and I drew attention to the interrelationship between the sense of belonging and identity. I explored in depth the factors that influenced participants’ sense of “belonging” and showed that the context of migration to the UK and living in a host culture have an important impact for this group. “Belonging” through relationships with people emerged as a finely balanced concept, which could morph into not “belonging” depending on the situation and context. “Belonging” also emerged as being multi-layered and participants experienced it at different levels – micro and macro; there was also evidence that participants could experience “belonging” at a micro level, but feel other within wider UK society. However, there was no evidence of participants experiencing “belonging” only at a societal level and not at a personal level; this further reinforces the innate permanence of family and the associated “belonging” kinship brings.

I demonstrated that place plays a key role in “belonging” and this emerged in participants’ accounts of creating and adopting places where they felt welcome, comfortable and secure, particularly at the macro level. I highlighted the evidence that “belonging” in relation to people who are important in participants’ lives was not dependent on proximity and identified that, for some, transnational “belonging” is both a positive and, at
times, a stressful concept, with them trying to juggle obligations across distance.

The next chapter moves onto defining and exploring the concept of “value systems”. I identify participants’ personal and public values and priorities and examine the issue of these changing across their life course in response to events and experience.
The previous chapter discussed the concept of “belonging” and explored how this is manifest in participants’ lives at both a micro and macro level as well as the strategies they used to enhance their sense of “belonging” in the context of both people and place. This chapter is concerned with the concept of “value systems” and I begin by defining it in the context of participants’ accounts before examining the importance it has in their lives. I also examine how participants have modified their values across their life course, in accordance with changes in their personal and family priorities, acculturation and modernisation.

6.1 Definition of “value systems”

Participants’ accounts contained multiple references to “value systems” both at a personal and a societal level; this reflected the micro and macro dimensions evident throughout the data analysis, which were also present in the categories “identity – maintaining and modifying” and “belonging”. However, with “value systems” the micro and macro levels are much more interdependent than seen with the other categories, with the micro level being viewed by participants as having a significant influence on the macro level.

The micro level of “value systems” involves factors such as: having and demonstrating high personal values and standards of behaviour, being
respectful and considerate of other people, helping others, being fair, and working hard. The macro level encompasses societal mores which participants associated with being law-abiding, contributing to society, being a good citizen, and the desire for an equitable relationship between individuals and society. The influence of the participants’ cultural heritage was strong, with evidence of aspects of the Chinese tradition of filial piety, as well as the concept of collectivism and the interrelatedness of the individual and society, emerging from participants’ accounts. Diagram 6.1 provides an overview of the category, value systems.

6.2 Participants’ accounts of “value systems”

Evidence from participants’ interviews demonstrated that it was important to them to have high standards in both moral principles and behaviour; there was also the expectation that other people should have similar high standards and there were examples of frustration when this did not happen. Participants highlighted the importance of having rights within society and that these came with associated responsibilities. The concept of a deal between the individual and the collective emerged, with participants expressing consternation and, in some instances, anger when they perceived that this had been broken by either side.
Diagram 6.1 Value systems
Myriad factors were involved in the development of participants’ values and they spoke about: their families, their faith, formal legislation, laws, and cultural traditions. There was also evidence that, in addition to enhancing their sense of belonging, aspects of UK culture that participants had adopted also affected their value systems at both micro and macro levels. However, this was complex as participants also spoke about the continuing influence of some aspects of their Chinese heritage. Indeed, as seen with “identity – maintaining and modifying” and “belonging”, “value systems” was constructed and reconstructed over time during the dynamic relationship between the individual and their social world.

6.3 Traditional values

The participants’ Chinese heritage emerged as having an important role in “value systems” and they spoke about traditional values, such as: respect for elders, the importance of family and hard work. “Value systems” was perceived as encompassing micro and macro levels, and a common assertion was that individuals needed to be aware that their behaviour affected wider society, as well as their personal interactions and relationships. Participants were cognisant of and accepted that there were differences between Chinese and British traditions, and there was evidence of changes to traditional values resulting from acculturation.
6.3.1 The role of the family

Analysis of participants’ interviews revealed that they believed that values, morals and standards of behaviour were primarily instilled by the family; viewing families as playing a crucial role in teaching children how to behave properly emerged as a common theme. Participants related examples of how they were brought up and about the lessons they learned in childhood, many of which had remained with them throughout their life course. Wendy spoke about her mother teaching her the importance of working to support oneself; James learnt the value of education and of encouraging his children to study. There was evidence that family values originating at the micro dimension were perceived as having an important influence at the macro level. Teaching acceptable behaviour and values within the family was conceptualised as creating a value system from the bottom up which impacted on the whole of society; this concept of the family being the foundation of society was encapsulated by Teresa:

“I think that society is built up by families. So if one family, they are very good and then the other ones do their good part, then everybody will be good. I think that the country is built up by lots of families...I think education is very important, family education especially, when the parents teach their children to be good people.” (Teresa)
Parents were held responsible for the behaviour of their children and failing to instil values and high standards of behaviour were viewed as a major precursor to problems in society. James’ response to the issue of antisocial behaviour typified this:

“...Discipline and proper behaviour but they all come from where? It is those people’s family, their parents. It is all linked together, all linked together. Why are parents letting their children do that [behave anti-socially]? Because they’ve not been educated properly, they are probably doing the same old things like the children, children learn from them! Yeah, so if they are not respecting people, their children are not going to respect other people. If the parents do that, children will do the same. Passing down. I would say the bad breeding the bad!” (James)

People spoke about teaching their children how to behave in accordance with their standards and not to bring trouble home, as well as monitoring their behaviour – knowing what their children did and where they were. Anna, for instance, spoke about her personal beliefs about appropriate behaviour, relating how she brought up her children:
“My children go to school, finish school at quarter to [four], I’d always bring them home. When they grew up I didn’t need to bring them home, I just stood there and looked for them...Four o’clock they’d have a meal, say about bedtime they’d have a snack and go to bed. And all my children finish their meal, clean up and do homework...My children all grow up very, you know, steady?... I never gave them their meal on their lap and watched TV or something. I don’t like that. All of us sat at the table talking about today’s school life, and you know something? That is why when my children were at school they all had good reports. They all behaved!” (Anna)

A number of participants spoke about how their children passed their own upbringing onto their grandchildren and about being closely involved with nieces, nephews and other more distant relatives, suggesting that the whole family has a role in instilling values and standards of behaviour. Anna and James spoke about being personally involved in teaching values to their grandchildren:

“The other thing is I am constantly, not worried but thinking, you know? I want to help my daughter and my son-in-law with how to bring up a child. Because I believe to bring up a
child in the proper way is important; to a family and to society as well.” (James)

Sheila highlighted the assumed influence of the wider family when, during her interview, she asked me about my family and I told her about my nieces:

“I’m probably biased, but they are both very good girls.” (JB)

“That is because they are educated from a good family. Family education is really important. If you lead them to a good and successful way, they will follow you.” (Sheila via interpreter)

There was no evidence that participants thought families no longer played a role in instilling values or that this should be a task for the state. Neither did anybody speak about their children or grandchildren misbehaving or getting into trouble. Enmeshed with family values was the tradition of respect, which was important both within and outside the family.

6.3.2 Respect

The concept of respect for parents and people older than oneself was very important and had endured over time and distance. Belinda highlighted this,
as well as the importance of actively demonstrating respect:

“Say for example, for the Chinese, we are very closely linked with the family. And with anything your family comes first and we respect our parents and the older generation, we do respect them. It’s funny because English people, if you get married, you will, perhaps you will call your in-law sometimes dad but sometimes you call them their names. But we never call our parents or the older generation their names. We will respect them and call them uncle whatever or dad or mum or whatever, because if we use their names they say that we don’t respect them.” (Belinda)

Respect emerged as being very important across many levels; it was manifest within the family, with people participants knew and extended to include wider society. Respect was interwoven throughout participants’ interactions with others and was a principle they felt should be preserved across the generations. During the fieldwork, there were numerous examples of respect, and an age-related hierarchy was evident, with people helping those older than themselves. Despite being an older person herself, Joan spoke about helping people older than her with their shopping and other tasks:
“I always look after the old people. Yeah, when (name) has been here I take her back to Chinatown.” (Joan)

Anna spoke about teaching her grandchildren to show respect towards people outside the family and to consider their opinions:

“…and respect the old ones… [If there is an empty chair] you see if there are any old ones behind you and let the old ones sit first...And you have got to be very, very careful, you know, mind yourself? Do not show off all the time. Never mind if you know or don’t know, you have got to be taught! Don’t say ‘I know, I know’, no!” (Anna)

Nevertheless, whilst respect was highly valued and endured, there was no evidence of participants expecting respect from others. Indeed, participants acknowledged that, in some circumstances, this tradition was changing and they highlighted that younger people were now more likely to assert their opinions and did not always acquiesce to their parents’ wishes. Although there were no examples of participants arguing with their own parents or of arguments between them and their children, they did acknowledge the possibility that this could occur by speaking about their friends’ experiences:
“...Some friends said that their children do not listen to older people and she just explained to them, ‘That is because we are a different generation now, so everything is different’.” (Sheila via interpreter)

People also spoke about strategies they used to avoid conflict or arguing with their children. One tactic was to propose that complete obedience from children towards their parents was old-fashioned and no longer realistic in today’s world.

“You say you’re old-fashioned. So are the traditional values important to you?” (JB)

“Well, it is very important but I don’t mind because you are living in a different society, you can’t follow the old-fashioned ways too much. If you want old-fashioned or to follow your way, that’s not right for the young ones.” (Anna)

Another strategy adopted to deal with changing intergenerational values was to give adult children space; participants spoke about not expecting, or indeed wanting, to live in multigenerational households. Again, participants rationalised this by viewing the tradition of children caring for their parents
as old-fashioned or outdated, although, as discussed when exploring the category “identity – maintaining and modifying”, some cared for their own parents:

“…I’ve already told my sons ‘If I get anything you can’t look after me, just send me to the elderly home’.” (Wendy)

“Now that’s quite different from the traditional Chinese view, isn’t it?” (JB)

“Yeah, yeah, because we are the middle generation now. We are not the old generation. The old generation, like my mum, even though she is very ill now, not very ill, she is OK but she is 90. The new generation would send her to the residential home but we don’t because she is the old generation.” (Wendy)

This change in the tradition of children caring for parents was also explained in terms of children being so busy with their own lives, jobs and families that they had little or no time left for their parents:
“...the kids these days they grow up, if they have a family they don’t have time for you so they can’t say, they won’t say, ‘Oh mum, let’s take you to such a place’, they won’t do that. They don’t have time for you, you see? They have their kids to look after; they have got their wives to look after. You know?”

(Vanessa)

Although some participants had cared for their parents or their spouse’s parents and had made remittances to them in the past, the majority spoke about being independent of their children and that this was their choice. However, it is important to note that two male participants expressed a wish to live with their children, one of whom expected his children to support him financially:

“His wish is – he has got 2 children – yeah? So when they graduate they will get good jobs, so they have something to give them [participant and spouse]. So they can depend on them, so they can relax.” (George via interpreter)

No female participants expressed similar wishes and, although this was a small sample, this may have been indicative of gender-related differences.
6.3.3 Hard work

Hard work emerged as another important aspect of “value systems” that had endured over time and distance. Being committed to doing a good job and supporting oneself and one’s family were very important to the participants; they spoke about their occupations and businesses, and how they worked long hours with little time off. For example, Peter spoke about coming to the UK and finding work:

“And he made a life and made a living for himself but he says they came to a strange country to live and they can still do that. And why do the English people who are living in the UK have benefit all their life and they don’t work? They are very lazy and he said that’s no good and that is not quality of life.”

(Peter via interpreter)

Joan extended this concept of working hard to include providing for her retirement:

“But I worked hard because me and my husband had the plan when I was young. That’s the important thing that I told my sons, I told my boys ‘you must have a good plan for your
retirement. The government is not here to look after you. You need look after yourself.” (Joan)

Hard work was also spoken about in the context of the home, and female participants spoke about housekeeping, keeping their home clean and providing home-cooked meals for their families. Several women worried that, as they aged, they would not be able to maintain their high standards within the home; Rose spoke about being unhappy that she could no longer clean her home as she wanted to:

“Does she enjoy cleaning?” (JB)

“Yes, she enjoys cleaning but now because of her health [shrugs]...She feels much better if everything is nice and clean. She’s not been able to clean the kitchen for about a year now”. (Rose via interpreter)

As seen with the concept of respect, the work ethic and working hard, were considered assets and as something important to pass on to the next generation. Consequently, participants’ narratives contained examples of them encouraging their children and ensuring that they worked hard at their
education. Education was viewed as the route to a good job and James encapsulated this:

“...they [his parents] were not forcing me into what I wanted to do, but they just left me to deal with my thing. They were not forcing you, but the only thing they were doing was saying ‘study, get a qualification. That’s your job’. That’s exactly how I taught my children as well. ‘I provide the environment, I’m supporting you but in your studying age that’s your job. Studying!’” (James)

“So is education very important?” (JB)

“Exactly! And I always say that if you haven’t got a qualification, you know if you don’t do your education properly, there are billions of people out there who haven’t got a job. If you don’t get a qualification, what chance do you get?” (James)

Participants also spoke about their adult children’s success in obtaining a profession from working hard at school, of them setting up businesses and of passing the work ethic on to their grandchildren.
6.4 Material wealth

Whilst working hard and being able to materially provide for one’s family and retirement were important to participants, having money simply for the sake of it was considered unnecessary and injurious. When participants spoke about money, it was in the context of only having enough to meet their needs and that if these were met, there was simply no need for more. A common belief was that having more money than was needed was almost immoral and that it brought numerous problems:

“That’s another thing, she has seen a lot of people who have got money and it seems to her it is a problem, you know, trouble? And also what she believes, if people have got vast lots of money it is a sin.” (Helen via interpreter)

Participants worried that having money could lead to conflict with family and friends; James feared arguments and jealousy, should he offer them financial help, and Wendy spoke about inheritance:

“Yeah, yeah, I always say enough [money] is OK … because I see quite a lot of the next generation, they just argue about their inheritance. So, I think if the money is enough for me to use during my life or when I have got like a health problem,
money enough to help myself, I think that should be enough.”

(Wendy)

The concept of enough money involved being able to have the very basic necessities for life; these were commonly defined as food, shelter and clothing:

“You know money, just enough, if I’ve got rice or food to eat or clothes to wear, why do you need more money?” (Sheila via interpreter)

This approach to life and to material things was commonly perceived as being admirable and virtuous; whereas wanting more than one needs was associated with negative emotions and behaviour:

“She said that she doesn’t have high expectations. Like some people want to get the nice car, the big house, whatever; she doesn’t think that way. You know? She wants somewhere to live, a stable home but most important is her health. She doesn’t have envy…she doesn’t expect too much.” (Clare via interpreter)
Coveting what other people had was viewed negatively; participants spoke of not caring about what others had. Penny, Joan, and Anna spoke about being satisfied with what they had and of refusing to compete with other people, and George showed his distaste for people highlighting their financial superiority:

“Some people they like to show their wealth which he doesn’t like. Some say ‘oh look what I have got and what you haven’t got’. They make a comparison you know?” (George via interpreter)

“I know what you mean – showing off?” (JB)

“Yes, which he doesn’t like, so he doesn’t bother with them.”

(George via interpreter)

Nevertheless, when people spoke about money and material wealth, there was clear evidence that the attitude they held was different from the one they had held in the past; money was very important to participants when they were younger:
“When I was younger I’d just say ‘money, money, money, money’.” (Wendy)

Money becoming less important to participants as they aged was a common theme. This may be due to money having less relevance as participants had fewer financial commitments than when they were younger. Nevertheless, the reduction in the importance of money was associated with an increased importance of health in participants’ accounts; there were numerous examples of this juxtaposition:

“…and when I was young, I thought that most important thing is money but now I think it’s not that. Nothing, nothing is more important than just good health.” (Vanessa)

The increased value placed on health and reduced value of money reflected changed priorities. Participants viewed health as declining with age and as something which had to be nurtured and preserved, thus increasing its importance. Conversely, good health in their youth was more common and taken for granted, but money was in short supply.
6.5 The importance of contentment

Contentment emerged as being desirable and prized, and alongside their discourse about the unimportance of wealth in life, participants spoke about what brought them contentment. Sara spoke about how having and losing wealth shaped her approach to life:

“...she used to have everything and she also experienced losing everything. So she has got experience and doesn’t expect having a lot of things to make her feel happier.” (Sara via interpreter)

Other participants highlighted that, in comparison to some people, they felt that they had much to be grateful for; Robert spoke about being free from war and the security of peace, and Belinda about having a home:

“You know a house, a simple house, is good for me. You know just a shelter? And then I’m satisfied because a lot of people they don’t have shelter, they don’t have room, not a room even to live in. So I am contented.” (Belinda)

Reflecting the value placed on having a simple life, people spoke about what brought them pleasure; some, like Vanessa and George, liked chatting with
friends; others, such as Teresa, James and Belinda, spoke about going on walks:

“...because even though you are worrying about something it doesn’t solve any problems...if you say ‘oh tomorrow, I’ll have no money’ and even though you worry, do you think that the money will come down from heaven? No, you don’t! Maybe tomorrow you will have another chance, you never know...If you worry so early you just make your hair grow
white. I don’t say anything because, you never know something may happen on another day; maybe (employer’s name) will give me another job. I don’t know, nobody knows.” (Teresa)

As well as being desirable in its own right, being content was also viewed as an important factor in people’s well-being; negative thinking was commonly believed to have a detrimental effect, with them proposing that it can lead to dementia and mental ill health:

“…you’ve just said that you’ve got to have positive thinking ‘otherwise’. What happens if you haven’t got positive thinking?” (JB)

“Well the most important thing is, that if you don’t think positively you may get some bad feelings about everything, maybe you will become depressed.” (Robert)

6.6 The role of faith

Despite not all participants having or having practised a religion or faith, for those who did, it was an important element in their personal “value systems”, offering guidance about thought, intention and behaviour. Faith
emerged as being influential at the micro and macro levels, and those who spoke about it, highlighted its importance in their everyday lives, believing that it showed them how to live a good life and provided an understanding of the consequences of their behaviour – both good and bad:

“Buddhism to her is very, very important. Because its philosophy is saying that you have to respect people, you have to respect your older generation and also it tells you, it helps you to think, what is right and what is wrong... What she believes, or what Buddhism teaches her, is that there is a reason. If you are doing something bad, you will get punished... You have got a reason. If you are doing something good, you expect something good in return. If you are doing something bad, similarly you will get some bad return.”

(Helen via interpreter)

An important correlate of this certainty about the outcome of behaviour and the guidance faith gives was that it removed the stress of making decisions; it also alleviated worry about the future by providing hope for an afterlife:

“...because I think that this is the purpose of my life. Yeah, that my existence is not just a coincidence? I think that there is
a plan. That God gave me life...It gives me a purpose as well because there is a hope that I am looking forward to, because my belief is that I will have eternal life. So that is the life that I am looking forward to.” (Belinda)

Participants’ faith also influenced their behaviour at the macro level, both in practical terms, for example, Gail felt that the teachings of her faith enabled her to take a stand against crime in her neighbourhood, and Belinda helped others:

“...what Jesus teaches us, is to do good to others, to love other people; not only yourself, not only your relatives but all the people around you. No matter what race or nationality or religion... and I enjoy actually helping people, looking after them and you know, because I enjoy that, I think this brings the quality of my life.” (Belinda)

And in spiritual terms, Verity read religious texts and took comfort from them, and Elizabeth spoke of her belief that prayer was influential on a personal and global level:
“What I normally pray every day for is: good health, don’t have any accidents, that the other old people can live well ... The rules make us keep doing good things and let the whole world get better.” (Elizabeth via interpreter)

For those participants who spoke about faith, being able to worship freely emerged as being important; Helen included this in the rights she valued as a citizen. Religious tolerance was a common theme both for those with a faith, who accepted that people followed different faiths:

“...if you find a religion which fits to you it is good... so when my mum, she was a Buddhist, and two or three years ago she told me that one of my aunties took her to the church, and she told me ‘I really like it, I feel very peaceful’. And then she said ‘Do you think I should be a Christian?’ I said, ‘If you think it is comfortable for you, why not?’ So last time when she came here she was a Christian.” (Teresa)

And for those who found value in more than one faith:
“I am Christian and at the same time I also believe in Buddhism. Because their aim is the same; their aim is just to teach you to be good.” (Alice)

As well as for those without a faith, who highlighted that they accepted that others wished to follow one and respected this:

“One of my best friends always asks me to go and to be a Christian. I’m very supportive of her religion but I don’t want to be baptised.” (Sheila via interpreter)

“I don’t have any religion but I don’t mind somebody having their religion... So sometimes I will volunteer with the Buddhists to help them and sometimes I will be doing volunteer work with the Christian as well, yeah.” (Wendy)

6.7 Rights and responsibilities as a citizen

Citizenship was viewed as a social contract constructed at the interface between the individual and the structures within society, such as: law, taxation and welfare benefits. Reciprocity in the relationship between the individual and society was expected. Participants valued the rights
citizenship bestowed, for example, Helen provided a list of what she valued as a UK citizen:

“Right to an education and skill, the right to the minimum wage, the right to say what you think, the right to have free medical treatment, the right to travel, the right to practise your religion…The right to vote. Absolutely brilliant!” (Helen via interpreter)

Structures in society such as the National Health Service (NHS), education and welfare benefits were not taken for granted and participants spoke about their appreciation of them and about ensuring their children were aware of the value of these services. For example, Anna, Pauline and James spoke about valuing their education and their children’s education:

“So I said [to her children] ‘a lot of people, Hong Kong Chinese people, pay loads of money, loads of money, coming here, studying for university. You are born here’. In our day when you go to university you don’t need to pay for your education; the government gave it to you free. They looked after you, you know? So I pushed my children, I can say, very hard.” (Anna)
Participants were aware of, and felt it was important to adhere to, the responsibilities that came with their rights and were proud of the contribution they and their families made to society, talking about: obeying the law, working hard, paying tax and national insurance.

6.7.1 Fairness and the social contract

Fairness emerged as being key in participants’ “value systems” and, although some spoke about fairness in relation to their families, for example, the issues of inheritance and favouritism, it was more strongly manifest at a macro level. The concept of a fair deal between citizens and society emerged; participants spoke about giving and receiving, proposing that it was important only to accept or take a fair share. Alice, who had spoken earlier in her interview about the contribution she felt she and her family had made to UK society, went on to talk about her expectations of a fair return. For Alice, tension existed between what she felt she needed and what was available; she emphasised her awareness that public resources were finite and balanced that against her individual need:

“...I know we have too many old people in our country. This is a heavy load, for young people and our government. So, I think if we can wait or we can bear something, we should wait or bear something. That’s another side, yeah? But if we
cannot wait, we still need the government’s help, NHS help. I feel it difficult to say that. If I say too much for myself, I think it is too selfish.” (Alice)

The concept of balance in the social contract emerged very strongly and there was dismay when participants felt that the deal had been broken, either by other individuals or the government. Pauline spoke about how she was initially frustrated by contributing to society, without what she felt was any tangible return. However, balance was achieved when she received free university tuition as she then felt that society had fulfilled its side of the contract:

“...so many years later I applied for full education and they gave me full education, free! I think that was very fair to me. I didn’t feel it was fair when I was working because I came to this country and I felt I couldn’t get any benefit from the government...in work a lot of tax is taken and you have to pay contributions, a lot of money there, you know?... I think it is fair. So I never complain any more because I realise that I got some free education.” (Pauline)
During the fieldwork, the UK government announced austerity measures aimed at reducing the national debt; these included: raising the state pension age, cuts to public services, and changes to welfare benefits. Participants spoke about how they felt the planned cuts to services and expenditure would affect people throughout society, and expressed anger and disbelief that this would happen. Indeed, the perception that the government was reneging on some aspects of the deal between society and the individual emerged. Vanessa spoke about the possibility of pensioners losing their free bus pass, Pauline about how she worried about meeting bills, and Penny voiced her concern about the raising of the statutory state pension age:

“…I would be really upset, you know? I definitely will. I’m human, yeah, but if the government can’t give you money what can you do? I don’t know.” (Penny)

James took a collectivist approach, voicing concerns about how the austerity measures would impact on society as a whole, both immediately and in the future. He focussed on the consequence of raising university tuition fees:

“…why did they have to introduce fees in universities? Some of them they can charge, you know, well name your price. I think it’s wrong! I think it’s wrong and would deter a lot of
people from going to university. Students, if they don’t get financial backing they end up with heavy debts when they are finished. And if they can’t make a good living they can’t contribute in society... That is wrong, to me anyway, but going back to when I was a student, education was free. Why can’t we do it? Why can’t we continue with that? Education is most important to the country; if the young people don’t have technology or they don’t follow the educational trend how on earth you can compete with other countries?” (James)

The concept of breaking the deal between society and the individual was also applied to the behaviour of individual citizens; participants spoke about people who they felt did not keep their side of the deal, for example, by not contributing financially to society via tax and national insurance or by claiming benefits fraudulently:

“...I think she was probably on benefit you see? And of course she wouldn’t let anybody know that she was working and still having this benefit. And she said to me, she was on benefit, because they allow her to work so many hours without paying tax or something, you know? ... And then after so many years she said ‘I’ll have a baby, then I can still carry on
with the benefit’, that’s how they say that, right? So, as you
know, a lot of people for their whole of their life don’t work at
all, you see? And they keep having these children and then
other people who pay high tax they [the UK Government] cut
their child benefit. I think it’s not fair.” (Vanessa)

6.7.2 Law and order

The deal between the individual and society was not viewed only in financial
terms; law and order and obeying the law also emerged as important issues.
The fear of crime emerged as affecting participants’ lives; some avoided parts
of the city and others stayed at home after dark:

“…say if I come back late, I don’t know who will follow me or
if somebody will do something to me very bad. And then you
worry.” (Teresa)

People also spoke about having been the victims of crime or anti-social
behaviour or knowing somebody else who had been. These included
accounts of physical violence, such as being spit at or slapped; Gail related
how she had been accosted in the street by a group of men and had been
pressured by local loan sharks. Others spoke about problems with antisocial
behaviour, particularly from children, for example, Laura and George had objects thrown at their houses:

“At Christmas some young kids from across the road they threw stones and eggs, the neighbour came out and told them to stop it...And he got help from the neighbours because he has trouble with his legs so obviously he can’t chase after them so they got help from the neighbours who came and told them to wash all these eggs off.” (George via interpreter)

Some, like Verity, had problematic neighbours:

“...the neighbours here, they stole her vegetables, and the people next door they kicked the football and they trod in it [participant’s vegetable patch] and killed the plants.” (Verity via interpreter)

Whilst crime and antisocial behaviour had an impact on both an individual and societal level, as discussed earlier, its causes were located at the micro level and participants viewed families as being responsible for children’s poor behaviour:
“Anti-social behaviour! That’s another thing. And where are their parents? So their parents are not educated, well the majority of them let their kids run wild. I see it with my own eyes! One o’clock, two o’clock, three o’clock in the morning, I see kids 10 years old, 11 years old, 12 years old running wild on the street! Where are their parents?” (James)

This supports the dynamic relationship that emerged between the macro and macro levels of value systems, with the family being perceived as affecting the whole society.

6.8 The influence of context on values

As highlighted, participants realised that their values had changed over their life course and they viewed it as a natural progression. One motif was that life is a series of stages and what is valued relates to the stage they are at:

“What you think is important to you in having a good quality of life?” (JB)

“Different age has the different stage.” (Helen via interpreter)
“OK, so at the stage you are at now, what is important to you?” (JB)

“Health is the most important thing.” (Helen via interpreter)

“Can you tell me why health is the most important thing?”

(JB)

“Health is important at this stage because when we are young we’ve got other targets but now at this stage health is our target.” (Helen via interpreter)

However, it emerged that some values were more amenable to change than others. Values that were highly important and central to the individual were also closely linked to their core identity and sense of self, so persisted throughout their lives. For example, during the interview with Pauline, there were several occasions when she spoke about equality and being faced with injustice over her life course. She recognised that the importance she placed on fairness had originated in her childhood experience and was reinforced by a series of life events; consequently, her belief in fairness continues to shape her and her approach to life:
“But my grandmother loved my brother, the one above me, loved him the most. So things are not fair, a lot of things are not fair in the way you are brought up and then you fight for your justice… I think that is partly now when I argue or I do things or I see unfairness, I feel very strongly, very strongly indeed. I think that’s just the way I have been brought up…I think now in terms of that, everything is psychological, you want to contest, to stand up for yourself.” (Pauline)

Relevance was also a key influence; values that continued to be relevant over time and distance, such as respecting others and obeying laws endured, and it remained important for these to be passed on from generation to generation. Whereas other values had become less relevant to participants, for example, the tradition of living in multi-generational households and of expecting children to care for their parents was declining in importance. In the main, apart from values that were central to an individual’s identity, those that endured generally had an impact on a macro level and were beneficial to society.

6.9 Summary
In this chapter I explored the concept of “value systems” and how it was manifest in participants’ lives and across their life course. Evidence was used
to illustrate that it was located on both a micro and macro level in participants’ lives and that these levels were highly interdependent, with personal and family values being viewed as underpinning society. I also discussed the influence of factors such as culture, faith and fairness in the concept of “value systems” and the impact of change to personal priorities. Evidence from participants’ narratives highlighted the importance of relevance and context in “value systems”; some values endured throughout their lives, whilst others were more amenable to change.

The next chapter draws together the categories of “identity – maintaining and modifying”, “belonging” and “value systems” into the overarching theory developed from the research – “synthesising self”. I present the theory and demonstrate how the three categories already discussed interact in participants’ lives and are involved in constructing their quality of life.
Chapter 7

“Synthesising Self”
The previous chapters presented the three categories “identity – maintaining and modifying”, “belonging” and “value systems”, providing evidence that these categories were developed from and are well supported by the data. This chapter draws this together when I present and explore the core category – the theory of “synthesising self”, demonstrating that the three categories already presented are linked conceptually to each other and the core category, as well as underpinning it. I aver that the dynamic relationship between categories constructs a consistent sense of self across time and place and this, in turn, is influential in participants’ quality of life.

Although this is the first actual presentation of “synthesising self”, it was implicit throughout the presentation of its underpinning categories when I discussed specific antecedents, important factors such as role, and the strategies participants employed to achieve their goals. The purpose of this chapter is to make “synthesising self” explicit so that it explicates this previous information and presents a clear model of this emerging theory.

7.1 The core category – “synthesising self”

The core category developed from the data analysis – “synthesising self” – earned its place because it: encapsulates the conceptual analysis of the data, has explanatory power regarding participants’ narratives and what they represent, and is common to all participants’ accounts (Strauss 1987; Strauss
In grounded theory terms, “synthesising self” is a substantive grounded theory, meaning that it applies only to the participants and context of this research and cannot be generalised to other people or situations without further testing and development. “Synthesising self” represents a process that involves an individual’s identity and the people, places, things and mores they hold dear, which are manifest in the categories presented in the preceding chapters. I conceptualise “synthesising self” as:

The dynamic and ongoing process of balancing change to aspects of self, precipitated by interaction in the social world and individual need, against maintaining aspects of the existing self, with the aim of constructing a harmonious self across the life course.

The fundamental characteristics of “synthesising self” are:

- The current self and the past and possible future selves are in a dynamic relationship and are not fixed; rather they are constructed and reconstructed over time. Change cannot directly affect the past and future selves; change is mediated by the current self, which may
result in reinterpretation of the past self or reformulation of possible future selves.

- “Synthesising self” is triggered by events that impact on the current self and result in tension that the individual is motivated to address. If the event is congruent with the existing self, it may be incorporated without any, or with minimal, change. However, if the event is incongruent this leads to tension that the individual addresses by adapting self to incorporate change while still preserving an integrated, recognisable sense of self.

- The categories of “identity – maintaining and modifying”, “belonging” and “value systems” underpin “synthesising self”. These categories are in a dynamic relationship with the self and encompass the factors that emerged from the data analysis as being important to participants’ quality of life.

- As synthesising self is grounded in the data, it is possible to identify how aspects of the self are enacted in the social world, what precipitates change to the self and why.

- Needs influence the underpinning categories and are fulfilled by the properties of these categories. For example, social needs influence belonging and having a close family or integrating into a host culture, satisfy social needs. Needs do not fall discretely within one particular category; rather they exert an influence on all three. Individuals are
motivated by different needs that can manifest in numerous ways; which need is prioritised is dependent on the individual’s circumstances and aims.

- Individuals select from a range of strategies to address tension; these depend on their experience and capability.

Diagram 7.1 presents “synthesising self” as a model showing the components of the theory and illustrating the interaction between them.

The above account of “synthesising self” highlights the role individual differences play when people construct their sense of self; therefore, it is not a straightforward process and is subject to the complexities inherent in people’s lives. For example, the same antecedent may have a different impact on different people; for one person, having a child may result in a changed sense of self due to incorporating a whole new identity as a parent; however, the sense of self for somebody who is already a parent may simply be reinforced and affirmed. People may also employ different strategies to achieve the same aim; belonging may be achieved via integration into United Kingdom (UK) society or by nurturing close family relationships.
Antecedent

Past Self

Current Self

Future Self

Identity – Maintaining and Modifying

Belonging

Value Systems

Needs

Diagram 7.1 “Synthesising self”
The concept of “synthesising self” is woven throughout participants’ accounts, which demonstrate multifaceted senses of self, influenced by internal and external contingencies. Participants talked about themselves over their life courses, relating how instances in childhood or earlier life had shaped them as people and still influenced them today. Alongside this, people also spoke about change, and there was evidence that change came about via both deliberate and unconscious behaviour.

7.2 The relationship between the categories of “synthesising self”

The categories of “identity – maintaining and modifying”, “belonging” and “value systems”, which emerged during data analysis and underpin the theory of “synthesising self”, have previously been explored in isolation; however, Strauss and Corbin (1998) and Corbin and Strauss (2008) note that for a grounded theory to be credible, the concepts involved must be systematically related. While these three underpinning categories represent different concepts and have their own properties, they also interact and, to some extent, overlap with each other. As the categories are involved in the same process, it would be suspect if they were conceived of as being completely independent of each other. In grounded theory terms, if they had been wholly independent, this may have been representative of the data being forced to fit categories and a theory.
Some of the factors important in people’s lives and their behaviour were identified as having multiple functions, as well as possible multiple antecedents, so it was sometimes difficult to unravel the close connections between the categories and identify the purpose of an individual factor. Indeed, some factors provide an identity, offer belonging and have their own values system; faith is one such example. As well as providing values, faith had clear links to identity, with individuals labelling themselves as Buddhist or Christian, and participants’ accounts demonstrated that they felt they belonged in their communities of faith.

Concepts were also seen to interact; one example is the evidence of a reciprocal relationship between “belonging” and “identity – maintaining and modifying”. Changes to identity may cause an individual to reassess their sense of belonging, whilst the drive to belong also influences identity, especially social identity, contributing to how it changes over time. The interrelationship between the categories is best illustrated with reference to specific events in the participants’ lives; as all participants share the experience of migration, this has been selected as an example.

The impact of migration on participants was evident in many aspects of their lives; it challenged their sense of self and was manifest differentially in their identity, sense of
belonging and values. Participants highlighted the fact that they felt it was important to integrate into the UK and, although some were unable to integrate for example due to the language barrier, none said that they actually wanted to be separate from UK society. There was evidence that their resulting efforts to integrate affected their values, identity, behaviour and beliefs. Acculturation involved a change to cultural identity and this impacted on people’s sense of belonging; for example, Verity who had not been able to learn English remained within the Chinese-speaking community and felt isolated from mainstream society, whereas Henry who felt fully integrated viewed himself as wholly British. Between these poles were people such as, Anna, Pauline and Belinda who felt part of the Chinese and mainstream UK communities and demonstrated both Chinese and British identities. Belinda’s narrative highlighted well how acculturation also affected people’s values and behaviour and she talked about rejecting some of her heritage values whilst retaining others, alongside adopting some Western values (see page 140).

The individual’s subjective experience was an important influence in “synthesising self”, for example, Robert spoke about how he felt unable to integrate into the UK, citing the language barrier as the cause (see page 166). From an outside view, he seemed no less integrated than most participants and more integrated than others. Indeed, Robert spoke English well enough to participate in an interview without the
help of an interpreter, was a member of a local church and worked full-time, but he was unhappy and wished to return to Hong Kong. However, not feeling able to integrate did not always result in a lack of belonging as there was evidence that, for a number of people, this was achieved via their relationships and lives within the Chinese-speaking community. Furthermore, there was evidence that change to cultural identity and integration may reduce belonging within the heritage community. Anna, who believed it was important to integrate, had adopted some British customs and spoke about how some of her peers viewed her as no longer being Chinese (see page 142).

I unpicked such issues by considering the context and by taking a consistent approach to classification of data, ensuring that it was not assigned arbitrarily to categories and categories were grounded firmly in the data. As discussed in chapter three, I found that grounded theory techniques, such as constant comparison and the conditional matrix, proved to be useful tools for clarifying the meaning of data.

7.3 Antecedents to “synthesising self”

There were numerous examples in participants’ accounts of antecedents to the process of “synthesising self”; these could be positive or negative events. Some events were out of participants’ control, but people were not merely passive and also
initiated events that impacted upon their sense of self, although that was not their conscious intention. Some antecedents were specific to individuals, for example, becoming a grandparent or experiencing ill health, while others such as ageing and migration were common to all. Migration experienced by all the participants was a key trigger of the process of “synthesising self”, as well as being a backdrop to the other events in participants’ lives.

Migration presented challenges such as the demands of living in a host culture, of being other, and leaving behind family and friends, and resulted in varying degrees of change and stability in the self. Addressing the impact of migration involved change, via purposeful behaviour with participants talking about what they had actively done to integrate into the UK, and by a process akin to osmosis where people changed gradually without realising it was happening until a new aspect of their self crystallised. As well as change, people dealt with migration by preserving aspects of their self, for example, they nurtured family relationships and took part in cultural activities.

Ageing was another common antecedent to “synthesising self” and participants spoke about the physical aspects of ageing, for example, how their bodies had changed. People talked about developing age-related health conditions, how these
affected them and also of how they dealt with them. Participants also spoke about avoiding ill health and especially dementia. Ageing was also associated with changes to participants’ personal priorities and many spoke about how their values had changed over time and the associated concept of wisdom.

Life transitions also emerged as important precursors to “synthesising self”, and how events such as being widowed, becoming a parent and/or grandparent, and retiring from work affected people was evident in their accounts. Life transitions had a particular influence on identity, although the scale of the impact was dependent on the transition and individual differences.

7.4 Strategies employed by participants when “synthesising self”

Participants utilised various strategies, both physical and cognitive, when engaged in “synthesising self”. The strategy people employed depended upon the nature of the challenge, its anticipated and actual impact on their self, as well as their past experiences, preferences, personal and social resources, desired outcome, and hoped for future self. Strategies could also be conscious or unconscious, for example, Pauline talked about how she integrated into UK society without being actively aware of changing, whereas Belinda actively selected values from both her heritage and the host cultures. Furthermore, although strategies manifest in participants’ lives
on a concrete level and they used them to address the challenges of daily life, they also impacted on a conceptual level, thereby influencing self.

Offsetting was a strategy that enabled participants to acknowledge and incorporate change while preserving their sense of self; this was achieved by balancing the impact an event had in one area of life against its lack of impact in another. This strategy was effective in addressing a range of issues, for example, health conditions that affected capability; in these circumstances, participants offset what they could no longer do against what they could.

Reframing was evident when participants dealt with events that could be painful or difficult; this involved adopting a different perspective about an issue to achieve a better or more preferable outcome. For example, Elizabeth talked about being widowed and that, in some ways, this had a positive effect on her life because she no longer needed to worry about her husband. Indeed, positive thinking emerged as a crucial tool in reframing and many people spoke about the importance of avoiding negative thinking, about being positive, and hope.

Denial was another coping strategy; this was employed when an event was threatening to the self and other strategies would not produce a desired outcome. For
example, there was evidence of participants denying chronic ill health or disability to preserve their health identity.

Participants’ accounts also evidenced how they had dealt with change and life events by accepting and integrating them into their existing sense of self. This was done in such a way to retain continuity whilst allowing growth and facilitating harmony, for example, James embraced his new identity as a grandparent alongside affirming his continuing role as a parent (see page 113).

Nurturing social relationships and avoiding disharmony were commonly used to enhance and preserve a sense of belonging and was especially evident in relation to family and friends. Interpersonal relationships with people outside the UK were also very important to participants and transnational belonging was strongly manifest in their accounts. The use of information and communication technology emerged as a valuable strategy in nurturing relationships and people spoke about using software such as Skype, and social media sites like Facebook.

Creating and adopting place, both in the personal and public domains, were strategies that had multiple outcomes impacting on: identity, values and belonging. Created places reflected, and were a safe place for people to express, their cultural
identity. Created and adopted places provided somewhere people felt comfortable and could meet as groups and socialise, as well as being a tangible statement of belonging.

Participants’ accounts demonstrated a wide repertoire of strategies employed during the process of “synthesising self”. Some strategies had a direct impact on their lives, such as healthy eating, socialising and using technology to keep in touch with people. These were often people’s first choice when addressing challenges to self and when they were ineffective, people fell back on other less direct tactics to address challenges to their sense of self. These tactics are well illustrated in relation to health, where healthy behaviour was not always sufficient or became ineffective in maintaining good health. In instances where direct strategies such as exercise and healthy eating were ineffective, people used indirect, cognitive strategies, such as highlighting areas where their health decrements did not impact on their lives. There was evidence that, eventually, due to increased age or further health-related decrements, such offsetting can become ineffective. However, this did not mean that the individual had to lose their health identity or change their self, as people moved to another strategy – denial. Here people denied either the seriousness of their health condition or simply denied that they were affected by it. In some ways, this may be maladaptive, for
example, an individual may not get the help they need or may be in unnecessary discomfort; however, in terms of preserving continuity of self, it is effective.

It is important to understand that due to the influence of individual differences, it is not possible to identify every antecedent to synthesising self nor every strategy people used to achieve it; however, it has been possible to explore the shared aspects of this that were evident in participants’ accounts.

7.5 Summary

This chapter has drawn together the data analysis and the categories developed and discussed in isolation in the previous three chapters to demonstrate that they are part of a dynamic system that constructs the self. The overarching, emerging theory of “synthesising self” is a process that offers an explanation of behaviour by identifying: the strategies people use to construct, preserve and/or recreate a harmonious self and how these strategies are applied. I also discussed the strategies and antecedents to the process and used examples to illustrate how these are manifest in participants’ lives.

In the next chapter I review the literature that is relevant to the process of “synthesising self”, discussing the content and process, identifying how this impacts on participants’ self, and the link this has to quality of life.
Chapter 8

Literature Review
The previous chapters reported the results of the research and I presented the emerging theory of “synthesising self”, identifying the factors that are important in the participants’ lives and why. In this chapter I review the literature that is relevant to the findings resulting from the data analysis, specifically the dynamic process of synthesising the personal and social aspects of the self-concept to construct a harmonious and continuous whole. The review explores how migration may affect people’s sense of self and the processes involved in managing change alongside preserving continuity. My aim is to locate the research findings within the existing body of knowledge, identifying where they support and are supported by it, and where they differ and offer new insight and understanding during the forthcoming discussion chapters.

In compliance with the tenets of grounded theory, to avoid the data analysis and resulting grounded theory being influenced by extant theory and literature I delayed this subject-specific literature review. Although this sequence of work differs from the traditional research structure, it is consistent with the grounded theory aim of developing new theory and insights. Additionally, until the parallel process of data collection and analysis typical of grounded theory research is underway, the specific details of the topic under investigation will not have emerged. Nevertheless, to ascertain whether there was a gap in knowledge regarding the broad aim of the
research and thus facilitate a piece of original work, I undertook a limited literature review at the beginning of the research (this appears in the introduction chapter). To inform and refine the research process with the aim of ensuring that it was as robust and valid as possible, at the outset of this study I also carried out a literature review related to the methodological issues, focussing particularly on cross-language and cross-culture research, (this is included in chapter two).

8.1 The review process

As advised by Oliver (2004), the main thrust of the following review of the literature is to place the study within the context of academic knowledge current at the time of writing; therefore, my search focused initially on work from recently published, peer-reviewed, academic journals and books. However, older relevant literature, specifically continuity theory (Atchley 1989, 1999), research into adaptation across life involving individual capacity and resources (Heckhausen, Dixon and Baltes 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner, Freund and Baltes 2006), and Maslow’s needs hierarchy (1943, 1968, 1970), is also reviewed. The review begins with details of the search protocol and then moves on to critiquing the selected work.
8.1.1 Search protocol

I undertook a search of the following EBSCO electronic service databases on 16.1.2012: Medline, psycINFO, Ageline, CINAHL plus, and Academic Search Complete. (See table 8.1.)

Table 8.1: Details of search terms and hits for search of EBSCO databases.

<table>
<thead>
<tr>
<th>Search term</th>
<th>No. of hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self AND/OR identity AND ageing OR aging</td>
<td>1,824,112</td>
</tr>
<tr>
<td><strong>Refined by</strong></td>
<td></td>
</tr>
<tr>
<td>Date: 2000-2012</td>
<td></td>
</tr>
<tr>
<td>Themes and major headings: Aging, self perception, self concept, identity, social identity, group identity, older people, well being, life changes, gerontology and the psychological aspects of aging.</td>
<td>3,717</td>
</tr>
</tbody>
</table>

I completed an additional electronic search of journals that were identified as being relevant to the area of study on 20.1.12 (see table 8.2). My aim was to identify any relevant papers that may have been missed in the search detailed in table 8.1 as a result of refining it to reduce the hits to a manageable number.

Table 8.2: Journals searched, search terms and hits.

<table>
<thead>
<tr>
<th>Journal</th>
<th>Search term</th>
<th>No. of hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ageing and Society</td>
<td>Identity OR self</td>
<td>777</td>
</tr>
<tr>
<td></td>
<td>Belonging</td>
<td>295</td>
</tr>
<tr>
<td></td>
<td>Migration</td>
<td>335</td>
</tr>
<tr>
<td>Journal of Cross Cultural Gerontology</td>
<td>Identity OR self</td>
<td>36</td>
</tr>
<tr>
<td>Journal of Adult Development</td>
<td>Identity OR self</td>
<td>51</td>
</tr>
<tr>
<td>Journal of Aging and Identity</td>
<td>Ethnicity</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td>Migration</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Culture</td>
<td>71</td>
</tr>
</tbody>
</table>
Furthermore, from ongoing discussion during the research process with my supervisors and the grounded theory coach, relevant theories were identified that I included in the literature search. These were: continuity theory (Atchley 1989, 1999) and Maslow’s hierarchy of needs (1943, 1968, 1970). I undertook an electronic search for these authors and theories on 21.1.2012 using the EBSCO databases listed above (see tables 8.3 and 8.4).

Table 8.3: Search by author.

<table>
<thead>
<tr>
<th>Author</th>
<th>No. of hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atchley RC</td>
<td>32</td>
</tr>
<tr>
<td>Maslow AH</td>
<td>83</td>
</tr>
<tr>
<td>Refined by NOT primates + NOT monkeys</td>
<td></td>
</tr>
</tbody>
</table>

Table 8.4: Specific theory search.

<table>
<thead>
<tr>
<th>Search term</th>
<th>No. of hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maslow’s hierarchy of needs</td>
<td>2,127</td>
</tr>
<tr>
<td>Refined by major subject headings: needs, human needs, motivation, needs assessment, self actualisation</td>
<td>262</td>
</tr>
<tr>
<td>Continuity theory</td>
<td>214</td>
</tr>
</tbody>
</table>

I reviewed the hits obtained for relevance by reading the abstracts. I also scrutinised the references of relevant papers and books obtained from the electronic searches for additional material and also made serendipitous finds when searching library shelves.
for books already identified. In total, 104 papers/books were included in the literature review.

8.2 Review

The perspective regarding self adopted in this research is that it is fluid and negotiated in the social world; therefore, its construction is influenced by the cultural and temporal context in which the individual is operating. Due to the influence of context, self is conceived as being conditional; for example, in individualistic cultures, the self is often spoken of in terms of an individual’s personal attributes, whilst in collectivist cultures, the self is often defined in terms of relationships with other people and social roles (Bond and Cheung 1983; Herzog and Markus 1999; Hong et al. 2001). The self is also viewed as being embodied and physical aspects of ageing and how these are interpreted by the individual are considered to play a dynamic role both in the construction and expression of self.

However, whilst there are myriad aspects of and to self, it is important to recognise that individuals generally do not perceive themselves as fractured, or as an organisation or sum of numerous selves, but rather as a cohesive whole, and experience themselves as being the same person across time and space. Troll and Skaff (1997) found that although people reported that some aspects of self, such as
values, attitude and health status, changed over time, the majority said they felt they were basically the same and none reported feeling they were a different person. This suggests that, although there is evidence of people changing across their lives, there is also a sense of a core or permanent essence of self. There are ethical concerns associated with the concept of a core self (Hall 1996; Gilroy 1997; Woodward 2002); however, even while accepting that essentialism is a thorny issue, there is substantial evidence to support the concept of continuity of at least some aspects of self across the life course. Herzog and Markus (1999) provide a useful definition of the concept of self: “a multi-faceted dynamic system of interpretive structures that regulates and mediates behaviours” (p. 228); they thus propose that it is “as much about doing as being, as much about process as content” (p. 242).

The research findings demonstrate that continuity and change were woven throughout the participants’ lives and there was evidence that they employed numerous strategies to either achieve continuity or adapt to external contingencies such as: migration, ageing, ill health and life transitions. There was also evidence that people had common needs and goals that they wished to fulfil; these were related to their overall priorities. The existing theories and knowledge explored in this review are included as a result of their relevance to these research findings.
8.2.1 Continuity theory

Continuity theory (Atchley 1989, 1999) was specifically developed as a gerontological theory and aims to explain normative ageing. The focus on specifically explaining ageing in older people, rather than adapting or applying existing theories to an older age cohort, is a major strength that, instead of ignoring older people and their experience of ageing, recognises them in their own right. Atchley (1999) reports on the development of continuity theory over a 20-year period; this took a mixed methods approach and involved 335 participants. Atchley (1989, 1999) suggests that continuity offers people the security of predictability and stability; however, whilst the individual is seen as attempting to preserve continuity, change is not rejected. Indeed, continuity theory is an evolutionary theory that proposes the individual is motivated towards development, which is informed by, their previous life experience. Thus continuity is not seen as re-establishing a status of equilibrium, but as preserving previously utilised general patterns of cognition, behaviour and environment, with which the individual is comfortable.

Kaufman (1986) conducted qualitative research with older people, also finding that continuity was important in their lives, and hypothesised that people seek to create meaning and continuity of self during ageing. A major strategy employed by Kaufman’s participants when constructing a meaningful life was to draw on and
reinterpret the past. This was consistent with Atchley (1999) whose participants utilised their past experience to manage change and preserve a sense of continuity across their lives. Evidence suggests that loss of aspects of self that an individual considers important is feared (Dark-Freudeman, West and Viverito 2006) and that failure to have the certainty of continuity of self can affect well-being (Laing 1960; Becker 1993). It is logical therefore that people seek continuity of self.

Research shows that people seek continuity of many aspects of their lives, for example Coleman et al. (1998) found a number of themes emerged as being important across people’s life courses; these included: family, other interpersonal relationships, work, faith, interest activities, and home and society. Nuttman-Shwartz (2008) found that men dealing with the transition into retirement sought ways to preserve their sense of self as a worker, a breadwinner and a father. Context and individual differences are important influences on what individuals actually seek to preserve (Kaufmann 1986; Barnes and Parry 2004; Yuen et al. 2007; Nimrod 2008); the issue of family ties provides an example of this. Family ties are one factor that commonly emerge as being important in people’s lives and as something they seek to preserve across time (Kaufman 1986; Coleman et al 1998; Atchley 1999; Boneham and Sixsmith 2006); however, these are differently manifest in people’s lives. Kaufman (1986) and Boneham and Sixsmith (2006) both found that family was important to their
participants, but Boneham and Sixsmith found that the women in their research retained their identity as a mother throughout their lives, whereas Kaufman found no evidence that parenthood was a role people retained across time. Indeed, research suggests that what people seek to preserve are aspects of self that are crucial to their understanding of whom they are and which they employ to construct a meaningful life (Kaufman 1986; Becker 1993; Ray 2000; Vignoles et al. 2006).

Becker (1993) investigated how individuals dealt with the discontinuity resulting from a stroke, finding that they experienced a loss of self and actively attempted to re-establish aspects of self which were central to them before their stroke. This was achieved by creating bridges to their lives pre-stroke in both the cognitive and physical domains. Initial attempts focussed on regaining function as before, and if this was not possible, people achieved continuity by offsetting losses through adapting their goals, for example, one individual whose work was important to their sense of self began to work from home. Becker (1993) also found a strong desire for continuity, reporting that participants sought to link their present and previous lives and that those who failed to do this had worse outcomes. By demonstrating that continuity can be actively regained by older people after a sudden discontinuity in their lives, Becker’s (1993) work adds important insight and highlights that a process
Evidence also suggests that not only do individuals seek to achieve continuity of their current self, but they also hold concepts of their future selves, and will act to avoid a feared self and to enhance the chance of achieving a hoped-for self (Markus and Nurius 1986; Herzog and Markus 1999; Ross and Buehler 2004; Dark-Freudman et al. 2006; Yuen et al. 2007). In some instances, continuity can be conceptualised as reaching after death in the form of a legacy, by the passing on of material belongings or traditions (Kaufmann 1986; Nuttman-Shwartz 2008).

Although there is evidence of individuals seeking continuity, the theory itself is not without problems and Victor (1994) suggests that due to the emphasis continuity theory places on individual differences, it is difficult to test. Indeed, some aspects of continuity theory seem contradictory, although there is evidence that explains this apparent ambiguity. For example, Atchley (1999) proposes that there is an optimum level of continuity with too little or too much being detrimental, while Koren (2011) found that older people can simultaneously tolerate continuity and discontinuity in their lives without difficulty. Regarding traumatic experiences, Atchley (1999) suggests these can offer resilience or result in an avoidance of continuity. Evidence
supports the suggestion that people do not always reject past traumatic life events; on the contrary, they may have a positive impact with people referring back to such events and using them to provide strength and optimism to cope with other events (Becker 1993; Troll and Skaff 1997; Coleman et al. 1998; Nuttman-Shwartz 2008), and Moore, Metcalfe and Schow (2006) suggest that the experience of and surviving difficult life events may add meaning to people’s lives. These apparent contradictions make it difficult, therefore, to apply continuity theory to predict behaviour. Furthermore, Atchley (1989, 1999) states that continuity theory only explains normative ageing; therefore, when an individual fails to demonstrate continuity, this can be explained by identifying a non-normative life event that could result in rejection of the past. However, as it is a gerontological theory, it is possible that many people continuity theory is applied to will have had some previous life experience that could be used to explain any lack of orientation towards continuity.

How continuity is conceptualised can also be ambiguous. Nimrod (2008) studying post-retirement leisure found evidence of people taking up new activities and proposed an innovation theory of ageing, which suggests that well-being in later life is associated with taking up new activities and behaviour. However, the activities participants began post-retirement were related to the individual and their lives pre-retirement or were fulfilling long-held goals. If the focus is moved back from the
manifest content of an activity to the function it serves, these new activities can be viewed as instrumental in achieving continuity of established patterns of behaviour and consistent with continuity rather than innovation.

Kaufman’s (1986) research highlights that the aspects of self people wish to preserve are influenced by cultural, social and individual context, finding that older people constructed a continuous sense of self over time by drawing on factors such as social role, but that cultural norms and structures regarding the ideal life course were important influences. Indeed, her participants’ construction of the self as ageless may have been a consequence of the dominant negative paradigms of ageing at that time. Kaufman’s (1986) identification of the importance of culture and context also highlights a problem with continuity theory, that is, the issue of its cross-cultural validity. Although Atchley’s (1989, 1999) work was comprehensive in design, involving multiple measures over a long period, all the participants were white, middle-class Americans, as were Kaufman’s (1986) participants. Later research has involved other groups, for example, Nuttman-Shwartz (2008) and Koren (2011) worked with Jewish Israeli people. However, minority ethnic people were not represented in the research and development of continuity theory or Kaufman’s work; the researchers acknowledged this as a limitation with their work, recognising that cross-cultural research should be undertaken to address this gap in the
knowledge. Cross-cultural validity needs to be borne in mind therefore when using continuity theory, and cultural and societal norms should be considered when identifying what is accepted as normative and non-normative ageing.

Continuity theory makes a positive contribution to the understanding of ageing as it recognises that alongside the maintenance and preservation of patterns of cognition and behaviour, growth and that the individual is actively involved in their ageing and continues to be throughout life. The literature which follows explores the motivation for continuity and growth, the processes which may be involved, and what people seek to preserve and why.

8.2.2 Adaptation

There is evidence that adjusting and adapting goals in line with reduced capability and resources to increase the likelihood of attaining them is a commonly occurring strategy during ageing (Brandtstädter and Rothermund 1994; Chang-ming H 2005; Grewal et al. 2006). Adaptation in response to life events was explored by Baltes and colleagues, who developed the Selection, Optimization and Compensation model (SOC) (Heckhausen, Dixon and Baltes 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner et al. 2006). SOC explores how people actively construct their lives to achieve positive psychological outcomes by: selecting
personal goals, planning how to achieve them and, where this cannot be done, acting to avoid negative outcomes and compensating for loss of resources. Important features of SOC are that it considers both losses and gains across time and, recognising the influence of individual differences, does not prescribe the norm at any stage of life, hence employing subjective measures of successful ageing (Baltes and Carstensen 1996).

Whilst SOC is intended to be applied across the whole life course, there are parallels to continuity theory. Ebner et al. (2006) found that for self-generated goals, older participants were more oriented towards maintenance and avoiding loss than younger participants, who, in turn, were more oriented towards growth. There was also evidence of older people having some growth orientation towards cognition and physical ability, particularly in the cognitive domain. This study also explored the influence of resources needed to achieve goals and what triggered goal adaptation, finding that age per se was not the driver of goal adaptation. Goal adaptation was related to the resources needed to achieve the goal; the greater the demand on resources the more likely it would be changed.

Whilst resources and capability are important variables, it should also be considered that the orientation towards maintenance and loss avoidance evident in older people
and towards growth in younger may have other explanations. Older people may simply have achieved many of their life goals and therefore wish to preserve that achievement, whereas younger people may have achieved far fewer goals and thus be more oriented towards growth. Nonetheless, by demonstrating that older people are motivated towards continuity and growth, dependent on the circumstances, SOC offers support for continuity theory and may also offer an explanation of the processes involved in continuity and change. Indeed, a major strength of SOC is that it provides a heuristic model of how people age, which can be tested and used to predict successful aging (Ebner et al. 2006). Logically, if older people are taught the necessary techniques, it should also be possible to improve their experience of ageing.

Although SOC may be useful in exploring the processes involved during ageing, some aspects of the model are contentious. Whilst it is true that Baltes and colleagues propose that subjective measures of well-being are important and emphasise the importance of individual differences in motivation and capacity, a lack of objective criteria makes comparisons across groups difficult. Indeed, Villar (2011) criticises SOC for focusing on the process of successful ageing to the detriment of its content, noting that the ageing paradox may result in older people rating their lives well, regardless of circumstances. The validity of only using subjective measures is problematic as they are vulnerable to socially desirable responding, for example,
where there is a negative paradigm of ageing, it should be considered whether older people would be likely to admit having any age-related problems. This highlights a dilemma when considering how to measure successful ageing. Objective measures of successful ageing impose a set of norms which are dictated by the dominant societal paradigm of ageing and may result in stigmatisation of people who are judged as failing to meet their requirements. On the other hand, without some objective method of assessment, it is difficult to identify and address problems people may experience.

Villar (2011) suggests that the concept of generativity originating from Erikson’s (1983) theory of psychosocial development could be a useful indicator of successful ageing. Erikson (1983) proposed that psychological development occurs across a number of age-related life stages and that individuals must effectively resolve conflict at each stage to achieve psychosocial adaptation. Generativity is a concept proposed to occur in midlife, which encompasses care for and guiding of the next generation. Villar (2011) addresses criticism that Erikson’s concept of generativity is Western-centric by adopting Kotre’s (1995) conceptualisation of it as relating to personal and communal generativity, thus widening its cross-cultural applicability. Using generativity as a measure of successful ageing emphasises the contribution older people make to society rather than conceptualising them as burdens, an identity they may dread (Skucha and Bernard 2000) and internalise, resulting in a negative
paradigm of ageing. Indeed, Villar (2011) suggests that it is possible to develop a structure of goals based on the concept of generativity, which would promote a positive view of ageing.

Steverink, Lindenberg and Ormel (1998) also criticise SOC for a lack of content and suggest that a successful model of ageing needs to include: what guides behaviour, details of the goals people are motivated to attain and the criteria for success. The theory of social production functions (SPF) addresses these points (Ormel et al. 1997; Steverink et al. 1998; Ormel et al. 1999; Gerritson et al. 2004). Although originally developed as a theory of ageing, SPF has also been applied to health-related quality of life. SPF aims to synthesise other theories into a more comprehensive explanation of ageing and takes the assumption that people desire maximising their overall well-being. SPF includes a hierarchy of goals, at the summit of this are two universal needs: physical and social well-being. Beneath these are the first-order instrumental goals: comfort, stimulation, affection, behavioural confirmation and status. The hierarchy is underpinned by factors needed to achieve the goals. The researchers propose that if an individual cannot attain a first-order instrumental goal, they will substitute it for another which is more easily attainable.
Whilst SPF (Ormel et al. 1997; Steverink et al. 1998; Ormel et al. 1999; Gerritson et al. 2004) introduces the concept of goals as a measure of successful ageing, this is not without problems. The developers state that SPF is relevant cross-culturally; however, status is defined as a first-order goal and evidence suggests that status is not a universal need (Nevis 1983). Additionally, if individuals are able to substitute a first-order goal, they cannot achieve with another first-order goal without a loss in well-being; this begs the question of whether the distinction the researchers make between goals is redundant. Indeed, although support was found for the importance of the first-order goals, it was only when all the goals, except for comfort and affection, had been substituted did an individual experience a crisis (Steverink 1996, cited in Steverink et al. 1998). Furthermore, whilst criticising previous models for not including measures of successful ageing is valid, it seems somewhat obvious to propose that successful ageing results from maximisation of social and physical well-being, which, it can be argued, is implicit in other models.

Nevertheless, some aspects of SPF (Ormel et al. 1997; Steverink et al. 1998; Ormel et al. 1999; Gerritson et al. 2004), such as the proposition of goal substitution and the classification of some goals as being instrumental in achieving other goals, highlight an important issue regarding the development of models designed to explain and predict behaviour – people have many needs, desires and motives; indeed there may
be multiple precursors for the same behaviour and one behaviour may function to
meet several needs. Ormel et al. (1999) recognise this, stating:

“Many activities are multifunctional; they achieve several
instrumental goals, or they combine immediate production with
investment.” (p. 71)

This pragmatic approach, whilst incorporating ambiguity into SPF regarding how
accurate it may be in predicting behaviour, does resonate with the fact that people do
have “messy” lives and that it is not realistic to propose that their motives and
behaviour are clear-cut.

8.2.3 Maslow’s hierarchy of needs
Steverink et al. (1998) acknowledge an overlap between the goals they propose are
involved in the process of adaptation and that people wish to attain with Maslow’s
hierarchy of needs (1943, 1968, 1970). Maslow’s theory proposes that humans are
motivated to achieve a universal set of innate goals, which emerge in order from
physiological needs to self-transcendence as they are gratified (see diagram 8.1).
Self-transcendence (service of others/ causes outside the self)

Self-actualisation (reaching personal potential)

Esteem needs (recognition, mastery, respect)

Social needs (love, belongingness, affiliation)

Safety needs (security, law, order)

Physiological needs (food, water, shelter)

Diagram 8.1: Maslow’s hierarchy of needs (Koltko-Rivera 2006).

Maslow (1943, 1968, 1970) proposed that human beings have a set of innate needs, which emerge in a hierarchical manner from basic physiological needs through to higher developmental needs. Whilst the physiological needs can be linked to basic biological requirements of the body to maintain homeostasis and are met by food and water, the claim for universalism of all the needs and the order of the hierarchy are problematic. Although Maslow (1943, 1968, 1970) accepted the relevance of context and culture, this was related to how needs were satisfied; therefore, there are significant concerns regarding ethno- and andro-centricity. The concept of self-actualisation is especially problematic because it focuses on personal potential and disregards: relatedness and concern about others (Nevis 1983; Cullen and Gottell 2002; Gambrel and Cianci 2003) and collectivist cultures (Nevis 1983; Gambrel and Cianci 2003).
However, Rowan (1998) and Koltko-Rivera (2006) highlight issues regarding interpretation and application of the model, noting that often what is applied does not represent the full theory (this emerged later in Maslow’s career). Furthermore, Rowan (1998) notes that Maslow never presented his work as a closed-ended pyramid and that this representation restricts the process of self-actualisation, which may continue to develop through life. Koltko-Rivera (2006) also raises the important point that Maslow’s later work included another need after self-actualisation – self-transcendence – which is concerned with the individual putting their needs aside and focusing on others or on forces outside themselves. This addition moves the model towards a more culturally neutral form, for example, the concept of self-transcendence resonates with Nevis’ (1983) work on developing a hierarchy of needs for use in the People’s Republic of China, where self-actualisation was replaced with serving society and others. Koltko-Rivera (2006) proposes that this addition not only enriches the theory and creates connections with other theories, but that it also accommodates the concept of collectivism.

Whilst this addition does provide opportunities for linking theories, Koltko-Rivera’s (2006) argument fails because, as self-actualisation remains a separate step in the hierarchy, the simple addition of self-transcendence does not address the issues of relatedness and collectiveness. A better method of addressing the need for a more
A culturally neutral model would have been to merge the concepts of self-actualisation and self-transcendence into one. Furthermore, although Maslow’s needs hierarchy (1943, 1968, 1970) has been widely applied, Peterson and Park (2010) highlight that it was not developed via empirical research, and its form and underpinning assumptions make it difficult to test (Wahaba and Bridwell 1976; Rauschenberger, Schmitt and Hunter 1980).

Notwithstanding the problems associated with Maslow’s (1943, 1968, 1970) work, evidence from a range of research supports the proposition of shared needs. From identity research: Vignoles et al. (2006), whilst recognising that individual differences are influential, found that self-esteem, continuity, distinctiveness, belonging, efficacy and meaning were factors shared by participants; Coleman et al. (1998) found the following common themes that persisted across the life course: family and other interpersonal relationships, activities, health and independence, beliefs and values, and environment. Researchers exploring quality of life also found that common themes such as social relationships, home and neighbourhood, psychological outlook and well-being, activities, health, social role, independence and finances were important to participants (Bowling et al. 2002; Bowling and Gabriel 2003; Gabriel and Bowling 2004; Grewal et al. 2004; Bowling and Dieppe 2005; Bowling and Gabriel 2007).
Tay and Diener (2011) offer some cross-cultural evidence of shared needs and goals from research across 123 countries with a sample of 60,865 people. This work tested the association of subjective well-being, overall life satisfaction, and positive and negative thoughts with needs gratification. The results demonstrated that across all countries, basic needs were the strongest predictor of life satisfaction, gratification of social needs and respect was associated with positive thoughts, and deficiency in basic needs, respect and autonomy was associated with negative thoughts. Furthermore, 82% of people who reported low need satisfaction had a low overall life evaluation; however, having all needs fulfilled did not guarantee life satisfaction. This suggests that other variables are important in people’s lives. An interesting finding from Tay and Diener’s (2011) study may offer a partial explanation; the level of need satisfaction occurring in a society as a whole was related to individual life satisfaction. That is, if other people’s needs were met, individuals rated their life satisfaction higher; whilst this may be expected in collective cultures, it also occurred in individualistic cultures. Tay and Diener (2011) suggest that this may show that Maslow’s needs (1943, 1968, 1970) apply at a macro level as well as to the individual. However, an alternative explanation is that this provides support for the stage of self-transcendence, which involves concern for others and society.
Tay and Diener (2011) also found some support for Maslow’s (1943, 1968, 1970) ordering of needs in that the basic and safety needs were usually met first; however, this was related to the society in which the participants lived. Where it was difficult to fulfil basic needs, there was evidence of social needs being fulfilled first; additionally, the order in which needs were met did not influence subjective well-being. Other research also highlights the impact of culture on the order of needs; Oishi et al. (1999) found that this was related to how the need was valued within a culture. Indeed, in some cultures, there is evidence that particular needs may not be relevant; Nevis (1983) found that self-esteem was not relevant to participants from the People’s Republic of China, and Grewal et al. (2006) found that whilst the factors people living in the UK said were important to them resonated with Maslow’s needs hierarchy, they did not mention the physiological needs.

The issue of universal goals or needs is problematic; however, the above discussion suggests that whilst there are concerns regarding Maslow’s needs hierarchy (1943, 1968, 1970), there is evidence to support it, although how it is manifest is influenced by individual and cultural difference, so it may not follow the classic design in practice.
8.2.4 Acculturation

A prominent paradigm associated with culture is that, of individualist and collectivist societies, Western cultures are predominantly classified as individualistic and Eastern as collectivist (Oyserman, Coon and Kemmelmeier 2002). Individualism is conceived as being concerned about one’s rights rather than duty, personal freedom and achievement, and independence, whilst collectivism is seen as being group-oriented, where members have mutual obligations and common goals, and are interdependent. Markus and Kitayama (1991) extend this paradigm to the concept of the self, proposing that people from individualistic cultures have an independent self-construct that is separate from others; whilst those from collectivist cultures have an interdependent self-construct that is connected to others. As harmony and compromise are considered important in collectivist culture, the interdependent self is also perceived as moulding to the social context.

Acculturation involves change to the individual’s sense of self in terms of attitudes, behaviour, values and identity (Ryder, Alden and Paulus 2000) and is initiated when an individual comes into contact with a culture different from their own. Phinney et al. (2001) report that acculturation results in the minority adopting the majority culture; however, this is not always the case, for example, colonisation results in the minority culture being dominant. There is also evidence that people living in
monocultures may be affected by acculturation; Lu and Yang (2006) found evidence in Taiwan that participants held a traditional Chinese self and a modern, more Western self, suggesting this bicultural identity resulted from contact with American culture.

Berry (2001, 2008, 2009) and Ryder et al. (2000) discuss and evaluate two different paradigms of acculturation: the unidimensional and the bidimensional models. The unidimensional approach views the heritage and host cultural identities as being located at either end of a continuum; as an individual adopts aspects of the host culture, they drop aspects of the heritage culture. Consequently, at the extreme, the heritage culture is conceived as being subsumed by the host culture or the individual remains completely separate from the host society. However, Ryder et al. (2000) highlight a major problem with this model: people who identify with both cultures and people who identify with neither will both be located in the middle of the continuum. Furthermore, there is very strong evidence that different cultural identities can co-exist at the same time and an individual may switch between identities (Benet-Martinez et al. 2002; Lu and Yang 2006; Ng, Yam and Lai 2007; Miramontez, Benet-Martinez and Nguyen 2008; Ng and Lai 2011).
Berry and colleagues (Berry et al. 1989; Berry 1997; Berry 2001; Berry 2005; Berry 2008) developed and tested a bidimensional model of acculturation that conceptualises host and heritage cultural identities as being separate and able to vary independently. This approach is flexible and accounts for individual and group behaviour, and explains why individuals within the same group have different experiences and levels of acculturation. Indeed, Berry (2001) suggests that how important cultural identity is to the individual influences acculturation and they may either:

- **Assimilate** – take on the host culture and drop their heritage culture.
- **Integrate** – maintain aspects of their heritage culture and adopt aspects of the host culture.
- **Separate** – retain their heritage culture without adopting any aspects of the host culture.
- **Marginalise** – neither retain heritage culture nor adopt host culture.

It is also important to recognise that the outcomes experienced by migrants are a result of a dynamic interaction between heritage and host cultures, resulting in continuity and change of varying degrees, influenced by individual differences. In reality, migrants may have little choice regarding acculturation, for example, where
the host culture is hostile, this may prevent integration and result in separation or assimilation (Berry 2008; Berry 2009).

A bicultural identity, where an individual remains part of their heritage group and also feels part of the dominant society, is viewed as being the most adaptive (Phinney et al. 2001; Berry et al. 2006), with a secure heritage cultural identity being conducive to well-being. When acculturation is problematic for individuals, this results in stress and affects their well-being (Berry 2006; Berry 2008). A study of the relationship between ethnic identity, acculturation, and quality of life in Chinese migrants in the USA found that marginalised individuals exhibited stress and reported lower quality of life, whereas bicultural, integrated individuals had the best outcomes (Leiber et al. 2001). Again, a strong heritage ethnic identity was believed to buffer the bicultural group against the stress of acculturation. Schwartz et al. (2006) caution, however, that a bicultural individual may find themselves marginalised by members of both the heritage and the host cultures and, where host and heritage cultures are very different, the individual may experience a culture clash.

However, there is a wealth of research suggesting that bicultural individuals are able to move easily between cultures, feeling themselves to be members of both. Ng, Lam and Lai (2007), in a study with Chinese people in Hong Kong, found that Chinese and
Western selves coexisted without conflict. Indeed, these participants demonstrated evidence of three cultural identities coexisting harmoniously: Chinese, Western and Hong Konger. However, these findings need to be considered in the specific context of Hong Kong, where people experienced high exposure to Western culture during its time as a British administered territory (Ng and Lai 2011). Research suggests that bicultural individuals move between their cultural identities in response to context and cues, a process termed Frame Switching (Hong et al. 2001; Benet-Martinez et al. 2002; Benet-Martinez and Haritatos 2005; Miramontez et al. 2008). Miramontez et al. (2008) identified that for some individuals, there may also be an overlap between cultural identities, which they term bicultural identity integration. This occurs when people perceived an overlap between the stereotypes of different cultures, and also between their sense of self and each culture, resulting in hybrid cultural identity which the researchers suggest facilitates a sense of belonging.

Nevertheless, there are methodological issues regarding much of this research; one possible confounding variable was that the participants were drawn from several different generations, from first-generation migrants through to people from the fourth generation. It is plausible to propose that a person who is four generations removed from their heritage culture, and who may also have never visited the country of their ancestors, will have a more integrated cultural identity than first-
generation migrants. Indeed, the heritage cultural identity of people living in a host culture may be radically different from that of the current culture in their land of birth or ancestry (Chun 2001). Furthermore, the majority of the participants in the research of biculturalism and frame switching are young, for example, adolescents or university students; therefore, it should be considered that the findings may not be representative of the experience of older people.

8.2.5 Belonging

Closely linked to acculturation and identity is the concept of belonging; indeed, the need to belong may be viewed as a motivator of acculturation. From a meta-analysis of literature exploring the concept of belonging, Baumeisster and Leary (1995) propose that it is a fundamental human need, defining it as involving “lasting, positive and significant interpersonal relationships” (p. 497) and highlighting that social exclusion and isolation results in negative affect, whilst social relatedness leads to positive well-being. They also suggest that needing to belong has an evolutionary basis by offering a survival advantage. The assertion that human beings have innate social needs is consistent with Maslow’s theory of needs hierarchy (1943, 1968, 1970), and with Tay and Diener’s (2011) research, demonstrating that individuals have a desire for social support and affection.
Baumeister and Leary (1995) also propose that social contact alone is not sufficient to fulfil the need to belong; it is important for individuals to interact with “those to whom one feels connected” (p. 497). Deau et al. (1995) identified 64 possible social identities, suggesting they formed five clusters: personal relationships, vocation, political affiliation, stigmatised groups, and ethnic and religious groups. These social identities were also found to differ in how they develop and are maintained, for example, relationship identities were ascribed, whereas occupational identities had to be achieved and enacted to endure. Mussweiler, Gabriel and Bodenhausen (2000) also found that occupational role, gender, and family role are important in the sense of belonging and, as with cultural identity, there was evidence of people switching between identities. However, here the researchers found that, in addition to whom the individual is with and their personal motivation, another important influence on which identity was activated was the avoidance of threatening social comparison. Although, people may hold myriad identities, Bettencourt and Sheldon (2001) found that it is crucial for the individual to be expressing a role which is authentic or consistent with their self-concept. Research with bicultural individuals also found that the heritage and host identities were associated with their sense of self; working with bicultural Chinese participants, Ryder et al. (2000) found that their heritage identity was associated with an interdependent self, and their Western identity with an independent self.
However, interpersonal relationships alone do not fully encompass the concept of belonging and there is also considerable evidence that people form significant attachments to place (see Rubinstein 1989; Perkins Taylor 2001; Despres and Lord 2005; Peace, Holland and Kellaher 2006; Phillipson 2007; Wiles et al. 2009; Bernard et al. 2012). Research with older people shows that place, their various identities and their sense of belonging have a dynamic interrelationship. Holland and Katz (2010) highlight the impact of cultural identity, citing the preference of older Jewish people living in extra care housing for public space reflecting their cultural identity, and Bernard et al. (2012) found that occupational identity was influential in the relationship between place and belonging for people living in a retirement village. Indeed, Cuba and Hammond (1993) propose that places and the meaning they hold for people play a role in constructing their identity.

The construction of belonging associated with place also involves customs and artefacts; objects within the home are often representations of self and can be instrumental in creating continuity and belonging (Rubinstein 1989; Perkins Taylor 2001; Rubinstein and de Medeiros 2005; Peace et al. 2006). The concept of culturally relevant customs and artefacts is particularly relevant for migrants, for example, Peace et al. (2006) cite the example of an older Indian migrant whose home contained objects which reflected his cultural heritage and his faith, and Li, Hodgetts and Ho
(2010) found that older Chinese migrants created belonging through place and re-established their cultural identity by creating Chinese gardens at their new homes. The relationship between place and belonging is not restricted to personal places, and migrants are also able to shape public aspects of their new environment (King 1995; Levitt 2001; Ehrkamp 2005; Buffel and Phillipson 2011). Levitt (2001) discusses how Miraflorenos living in Boston recreate aspects of their lives before migration; Buffel and Phillipson (2011) found that, as well as recreating places, people adopt space and invest it with meaning, transforming it into a place where they belong.

It is important to recognise that, for migrants, belonging may be manifest across two or more countries; Phillipson (2007) highlights the importance of increasing globalisation on the lives of older people and how transnational belonging impacts on their identity. Indeed, a growing body of research shows that distance may not negate, or be a barrier to, the sense of belonging; work with older migrants showed that they retain ties across international borders, and nurture relationships with friends and family still living in their lands of birth (Gustafson 2001; Levitt 2001; Phillipson and Ahmed 2006; Buffel and Phillipson 2011). Whilst traditional methods of sustaining transnational relationships, such as visits and letter writing, continue, the increasing availability of new technologies has resulted in more flexible and instant communication. Affordable telephone calls, the use of email and web chatting
have influenced how transnational relationships are maintained and enable people to feel more connected to family and friends in other countries (Phillipson and Ahmed 2006; Wilding 2006).

8.3 Summary

The format of this literature review was progressive and layered with the intention of forging links between different theories, which, when synthesised, may provide insight into and an explanation of the process involved in ageing and what is important to people. I reviewed the literature relevant to the findings of this research, particularly continuity theory (Atchley 1989, 1999), SOC (Heckhausen et al. 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner et al. 2006) and Maslow’s hierarchy of needs (1943, 1968, 1970). I explored the concept that people strive to preserve aspects of self over time to achieve a coherent whole, and Atchley’s (1989, 1999) continuity theory was critiqued and supported by evidence from other researchers, including Kaufman’s (1986) assertion of the importance of culture and context. The chapter moved on to investigate the processes that individuals may employ to achieve continuity of self and maximise successful ageing in the face of possible age-related changes. I examined Maslow’s hierarchy of needs (1943, 1968, 1970) balancing concerns regarding the concept of universal needs against research from different areas that found common needs and themes that were
important in people’s lives. This suggests that whilst individual differences are important, it is not possible to completely reject Maslow’s work. The review also considered the impact of migration on the self and how this may be addressed, and closed with consideration of the importance of place and how older people use places in the construction of their self.
Chapter 9

Discussion – Part One: The Research Findings
The grounded theory approach I adopted during this research aims to develop new information and theory; it does not test a hypothesis based on existing knowledge. Consequently, it was not possible to undertake a review of the literature relevant to the research findings until after data analysis was complete; that review is reported in chapter eight. This chapter draws together the information from that literature review and the information developed during the research to consider where the findings converge with and diverge from existing relevant theory and knowledge. Additionally, I highlight how they add to and broaden this literature by providing new insight into what the participants stated was important in their quality of life.

9.1 “Synthesising self” revisited

The emergence that self is influential in the quality of life of the participants is supported by other research; indeed Laing (1960) and Becker (1993) suggest that loss of the self has a detrimental effect on an individual’s well-being. Consistent with previous research, I found that participants’ self emerged as being multifaceted, including concepts such as: identity, beliefs, attitudes, and values (Herzog and Markus 1999). The identification of these concepts, their role in participants’ construction of their self, and that this was influential in their perception of their quality of life, resulted in the development of “synthesising self” and its three underpinning categories: “identity – maintaining and modifying”, “belonging” and
“value systems”. The properties of these categories include the things participants identified as being influential in their lives and it is conceptualised that change initially takes place at the level of these properties. Some aspects of self emerged as representing the essence of the individual; however, unlike the concept of essentialism, individual differences are viewed as being influential in the construction of these central characteristics.

There was evidence that ageing and life transitions were influential in the participants’ construction of self, and this was often related to capability and role. For example, people spoke about physical changes and retirement and there was evidence that this affected how some felt about themselves. This aspect of “synthesising self” was relevant to Kaufman (1986), continuity theory (Atchley 1989; 1999) and the Selection, Optimization and Compensation theory (SOC) (Heckhausen et al. 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner et al. 2006), and is thus considered in relation to them later in this chapter.

For the participants of this research, ageing occurred in the context of migration and adapting to life in the UK involved acculturation, which impacted on aspects of self, such as: beliefs, values, attitudes and identity (Ryder et al. 2000). Research also shows that acculturation is an influential factor in mental health (Meyler, Stimpson and Peek...
2006), with Berry (2006, 2008) noting that problems with acculturation can have a detrimental effect on well-being. In contrast, people who are able to integrate into a new culture show lower levels of stress compared with those who cannot (Berry 2001, 2005, 2009). Although I did not actually measure quality of life, there was some evidence that problems with acculturation and adapting to life in the UK had affected the well-being of some participants. For example, the language barrier resulted in reduced autonomy and a lack of belonging, with two people expressing their desire to return to Hong Kong, and a third being distressed about their lack of independence. Alternatively, the accounts of participants who said they felt fully integrated into the UK showed no evidence of such issues. There was mixed evidence for those who expressed a bicultural/hybrid identity, but as suggested by Leiber et al. (2001), for the majority this manifested as a positive adaptation. However, while there was no support for Schwartz et al.’s (2006) proposal that individuals with a bicultural/hybrid identity may experience marginalisation by their heritage community, there was limited evidence that it can be problematic.

The accounts of three female participants contained examples of tensions between the traditional cultural expectations of women and their personal desires. For two, this had resulted in tensions within their family, and a third had experienced censure from some members of the Chinese-speaking community for being outgoing. None
actually talked about being distressed by this and as they all regularly attended social events with, and were in contact with their peers, they were not truly marginalised. However, that they did actually raise this issue suggests that it was important to them and affected their relationships. This apparent contradiction may be a result of my sampling strategy as I recruited all but three participants via organisations working with and offering services to the Chinese community, or using the snowballing technique. This suggests that the impact of acculturation and the resulting tension between the traditional cultural expectations of women and their changed behaviour bear further investigation.

There was evidence of other tensions between aspects of the heritage and host cultures; these were associated with the concept of filial piety, which retained relevance to participants’ lives. However, whereas Laidlaw et al. (2010) found that filial piety was important to people in their research, the participants of this research showed ambivalence towards it; this was especially evident to caring responsibilities. Several had or continued to care for their parents, but they and others did not wish their children to care for them, and only two said they would like to live in traditional multi-generational households; this can be understood from several possible perspectives. One explanation is that participants’ children were Western or had become Westernised, and were consequently less likely to obey and defer to them
than participants did to their parents; therefore living in shared households or giving and receiving care could result in conflict. Alternatively, migration and their subsequent acculturation offered participants an attractive opportunity, that of retaining independence and preserving continuity of the autonomous self. Indeed, many participants said that they desired remaining independent and living alone or with their spouse. Additionally, for some, their children growing up and leaving home had resulted in them being free of duty and work for the first time in their lives since their childhood.

It is important to consider alternative explanations for participants talking about their change in attitude towards their heritage traditions. It was interesting that when participants spoke about repudiating aspects of their heritage culture, they often did so in the context of time and modernisation, proposing some traditions were the old way or old-fashioned. There is research suggesting that cultural change can be a result of modernisation, for example, Lu and Yang (2006) found evidence of people living in Taiwan having both a traditional and a modern cultural identity. However, as cautioned by Blakemore and Boneham (1994), cultural change cannot be simply assigned to modernisation and addressing these cultural tensions involved a dynamic process of negotiation that was played out in the participants’ social world. Similar to Torres’ (2001, 2006) work with Iranian elders living in Sweden, one solution was to
retain aspects of their heritage culture that were acceptable in the UK, such as: respect for others, having a close family and working hard, and rejecting those that were not.

The issues discussed above highlight that it is important to recognise that, for the participants in this research, migration and their ensuing acculturation to UK culture, were not straightforward. Divergence from heritage culture is not something that can be assigned one isolated reason, and evidence suggests that it may have multiple antecedents and that individual differences are also influential. Nevertheless, that self, acculturation, and their impact on participants’ well-being emerged as being of paramount importance in this research strongly suggests that when investigating the quality of life of migrants, it is important to consider these issues.

9.2 “Synthesising self” and quality of life research

I highlighted in the literature review in chapter one that quality of life instruments are often developed with a white, Western population and then applied to people living in other cultures (Shek et al. 2005). One of my motivations was to understand whether a number of instruments employed in the UK to assess quality of life are relevant to the participants of this research. The next section returns to this and explores the relevance of three quality of life instruments discussed in chapter one: Older People’s Quality of Life questionnaire (OPQOL) (Bowling et al. 2002; Bowling
2009; Bowling et al. 2009), ICEpop CAPability measure for Older People (ICECAP-O) (Grewal et al. 2006; Coast et al. 2008a; Coast et al. 2008b) and the C(ontrol)A(utonomy)S(elf-realisation)P(leasure) CASP-19 (Higgs et al. 2003; Hyde et al. 2003; Wiggins et al. 2008).

During the interviews, I directly asked participants what they felt was important in them having a good quality of life; their responses included: health, socialising, finances, interpersonal relationships, family, friends, faith, work, and crime. This is consistent with the findings of other UK researchers, for example, Bowling and colleagues (see Bowling 1995; Bowling et al. 2002; Bowling et al. 2003; Gabriel and Bowling 2004; Bowling 2005; Bowling et al. 2009) and the paradigm of quality of life as a multi-dimensional concept that is used by the above instruments; however, the cross-cultural relevance of some of their domains and underpinning concepts is problematic.

The content of the OPQOL (Bowling et al. 2002; Bowling et al. 2009) domains were relevant to the participants of this research, offering some cross-cultural support. However, Bowling (2009) reports that its validity and reliability, although good for white participants, were less so for those from black and minority ethnic (BME) groups. This suggests that culture may influence the weight people place on items
and further research is needed to understand and clarify this. As discussed in chapter one, culture is an important variable in conception and perception of quality of life; this is particularly relevant to the validity of ICECAP-O (Grewal et al. 2006; Coast et al. 2008a; Coast et al. 2008b) and CASP-19 (Higgs et al. 2003; Hyde et al. 2003; Wiggins et al. 2008) because no people from BME groups were involved in their development. However, although Grewal et al. (2004) offer some cross-cultural support for CASP-19, finding that its domains were applicable across four different ethnic groups, no people of Chinese heritage were involved in that research.

Comparison of the findings of this research and ICECAP-O and CASP-19 showed both similarities and differences. Aspects of Maslow’s needs hierarchy (1943, 1968, 1970) that underpin CASP-19 – the esteem needs and self-actualisation – did not emerge as relevant to the participants of this research. Whereas Maslow’s physiological needs, which were relevant to participants, are not included in either CASP19 or ICECAP-O; the developers of both instruments suggest that these were not relevant to their sample. Furthermore, belonging and place emerged as crucial to the older Chinese people in this research, but this is not represented in ICECAP-O. Role emerged as important to participants in both this research and is also assessed in ICECAP-O; however, the concepts of role are different: in this research, role influenced identity, whereas ICECAP-O associates role with an individual feeling
valued. Some of the factors identified in this research as being important to quality of life do concur with domains of ICECAP-O, that is: attachment which measures capability for love and friendship, and autonomy and control, these are also included in CASP-19 and OPQOL. An important similarity between ICECAP-O and this research is that both consider health to be more than an absence of illness and as a facilitator for achieving desired aims.

It is important to consider that none of the three quality of life instruments were without problems in relation to cross-cultural applicability. However, as all the domains underpinning CASP19 and ICECAP-O are not relevant to the participants of this research, and factors that are relevant to them are not included, this suggests that these instruments are not appropriate for use with this group. The domains underpinning the OPQOL, however, are relevant; although a number of specific issues that were important to the participants in this research are not measured. The findings of this research suggest that the following inclusions would enhance the relevance of the OPQOL for this group.

Identity and cultural identity emerged as being important to participants’ quality of life; it would be useful therefore to include items about acculturation, cultural identity and whether people feel that they are able to express this as they wish both in
the host and heritage communities. This links with belonging, which was also very important for the participants in my research; this could be further explored by questions assessing belonging at meso and macro levels via both people and place. Questions should focus on whether people feel part of and included in their local community and wider UK society, and if they have a place where they feel they belong, are able safely to express their cultural identity, and meet with their peers.

The OPQOL does ask respondents whether cultural/religious events/festivals are important to them, however they are asked to simply rate how important such events are. As rating whether cultural events are important is irrelevant if the individual has no access to them, I consider that this question has limited value in assessing quality of life. Participating in culturally relevant activities did emerge as being important to the participants in my research; such activities facilitated continuity of self via cultural identity, belonging and adherence to traditional values. The relevance of the OPQOL for older Chinese people could be strengthened therefore by asking a follow up question about whether people are able, or unable, to attend cultural events that are important to them.

Culture was shown to have a continuing influence on the participants in this research, and some traditional Chinese values and societal collectivity emerged as being important in their approach to life. Some of the issues participants said were
influential in their quality of life concurred with those found in research exploring the quality of life of older Chinese people living outside the UK: Chan et al. (2004) in Hong Kong, Tsang et al. (2004) in Melbourne, and Ku et al. (2008) in Taiwan. However, there were also some differences between those studies and this research: Tsang et al. (2004) did not find that the language barrier had a detrimental effect on the people interviewed. They speculate that this may be due to the availability of publicly funded interpreters, as well as support from within the participants’ families and community. This is plausible, as the data collected during this research highlights that an unmet need for interpreters affected participants’ ability to access some public services and that this impacted on their quality of life. Chan et al. (2004) found that their participants valued being respected by others and being given recognition for their achievements; this did not emerge in the current study. This suggests that, due to the impact of acculturation, quality of life measures developed with Chinese people living in China may have limited relevance for those living elsewhere. Indeed, the challenges experienced by the participants in this research may only be manifest for migrants. The difficulty is that, as evidenced, people show varying levels of acculturation; therefore, developing a universally applicable measurement tool is problematic.
9.3 Convergence with and divergence from other theories

“Synthesising self” has commonalities with, parallels to, and differences from: continuity theory (Atchley 1989, 1999), Maslow’s needs hierarchy (1943, 1968, 1970), the Selection, Optimization and Compensation theory (SOC) (Heckhausen et al. 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner et al. 2006) and the theory of Social Production Functions (SPF) (Ormel et al. 1997; Steverink et al. 1998; Ormel et al. 1999; Gerritson et al. 2004). Although it is important to highlight that, none of these theories alone provides a complete understanding and explanation of what is important to the quality of life of this group of participants. For example, Maslow’s needs hierarchy (1943, 1968, 1970) offers an explanation of why particular factors, such as relationships with family and friends, and the sense of belonging, emerged as being influential in participants’ lives, and continuity theory (Atchley 1989, 1999) provides insight as to why participants behaved in certain ways, for example, continuing to work post-state retirement age and taking part in cultural activities.

9.3.1 “Synthesising self” and Maslow’s needs hierarchy

Evidence from participants’ narratives suggests that some of the needs described by Maslow (1943, 1968, 1970), play an important role in “synthesising self”. While he does not acknowledge Maslow, Atchley (1999) notes that people seek to preserve
some patterns of behaviour because they “address basic needs for food, shelter and companionship” (p53); however, he suggests this is simply to free the individual to focus on other aspects of their lives. In contrast, “synthesising self” concurs with Maslow’s proposal that people’s needs may influence and motivate their thought and behaviour. Many of the responses participants gave regarding what they rated as being important in having a good quality of life corresponded to stages on Maslow’s needs hierarchy (1943, 1968, 1970); diagram 9.1 illustrates this.

<table>
<thead>
<tr>
<th>Factors from participants’ interviews</th>
<th>Corresponding need from Maslow’s needs hierarchy (1943, 1968, 1970)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helping others</td>
<td>Self-transcendence</td>
</tr>
<tr>
<td>Following faith</td>
<td></td>
</tr>
<tr>
<td>Doing voluntary work</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Having a close family</td>
<td></td>
</tr>
<tr>
<td>Having good friends</td>
<td></td>
</tr>
<tr>
<td>Integrating into UK society</td>
<td>Social needs</td>
</tr>
<tr>
<td>Socialising</td>
<td></td>
</tr>
<tr>
<td>Having a place to socialise</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Social order</td>
<td></td>
</tr>
<tr>
<td>Fear of crime</td>
<td>Safety needs</td>
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<tr>
<td>Being a good citizen</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Having enough to eat</td>
<td></td>
</tr>
<tr>
<td>Somewhere to live</td>
<td>Physiological needs</td>
</tr>
<tr>
<td>Having clothing</td>
<td></td>
</tr>
</tbody>
</table>

It is possible to understand this correspondence between Maslow’s work (1943, 1968, 1970) and the theory of “synthesising self”, through a cultural lens and facets of traditional Chinese culture dovetail well with aspects of the needs hierarchy.

Physiological needs emerged as being significant to participants; they did not take them for granted, and many spoke about food, shelter and clothing; this was in terms of merely having what is necessary for survival. This is consistent with a number of participants highlighting that in their culture having more resources than one requires is considered to be greedy. Safety needs emerged as being important to participants in the context of a need for order and the rule of law. Participants spoke about: being a good citizen, following rules and obeying the law. This reflects the hierarchical nature of traditional Chinese society, the respect for elders, and the importance of hard work and morality. Social needs were evident in all participants’ narratives and manifest at both micro and macro levels. Interpersonal relationship offered belonging, love and security, with kinship bonds being viewed as immutable. The importance of family is a crucial aspect of traditional Chinese culture; therefore, this finding was not unexpected. For some participants whose family were either living abroad or at a distance within the UK, friends were crucial sources of support and affiliation. There was very strong evidence of the desire to belong, especially at
the macro level; this was related to migration and the participants’ experience of acculturation and integration into UK society.

Although there was evidence from this research that supported aspects of Maslow’s theory (1943, 1968, 1970), there were also areas of divergence. The issue of the continuing importance of physiological needs to this group of participants, challenges the proposition that needs once satisfied become less salient to individuals. There was no evidence to suggest that any of the participants had unsatisfied physiological needs; on the contrary, their narratives show that these were satisfied. Nevertheless, the physiological needs remained very important to them. The reason for the remaining importance of the physiological needs is unclear, although it is possible to speculate that this could be a result of cultural or generational differences, or both. As Maslow (1943, 1968, 1970) did not test his theory cross-culturally and this research involved only older Chinese migrants, further research is needed to identify the reason for this divergence.

The fact that needs located further up the hierarchy than physiological needs, such as safety and social needs, were salient to participants at the same time as the physiological needs also challenges Maslow’s (1943, 1968, 1970) concept of a prepotent hierarchy (where needs emerge in order once those preceding are at least
partially satisfied). Indeed, there was no evidence of a hierarchy from physiological needs to self-transcendence or of a need only emerging when the one before it was at least partially satisfied.

There was also divergence from the full content of Maslow’s theory (1943, 1968, 1970); although participants’ responses were consistent with some of the needs, not all were manifest in their narratives. This was especially evident for esteem needs and the concept of self-actualisation; this may be due to the influence of culture. There was little evidence of participants having a need for individual self-esteem; while they spoke about successes and positive events in their lives, apart from the pride some expressed in their good health, they did not delight in their own achievements. The exception to this was where that involved their contribution to a wider group, for example, being involved in group art activities, or not being a burden to others. Participants did express pride in their children’s and grandchildren’s achievements, although this was often qualified by highlighting that their success was due to hard work, and that they ensured their children and grandchildren were not boastful and remained respectful of others. This mirrors research suggesting that people from collectivist culture take more pride in the achievements of others and of the group than in their own (Neumann, Steinhauser and Roeder 2009), and reflects a cultural tradition of modesty.
There was also limited support for the need for self-actualisation; a small number of participants did talk about continuing development later in life, which was generally related to lifelong learning and education. Although, this was not purely to meet their own need and was associated with helping others in the community, for example, via health promotion. There was support, however, for the concept of self-transcendence; participants talked about helping others, doing voluntary work, and following their faith. There were examples of generativity (Erikson 1983; Kotre 1995), where people transmitted culture and tradition to, and nurtured, the following generations. Participants also spoke about planning to ensure that others were in place, who could also convey culture and traditions when they were no longer able to do so. Indeed, concern for others and for future generations was strongly manifest in the data collected. This again reflects a tradition of societal collectivism and supports Nevis’ (1983) work highlighting the relevance of self-transcendence as opposed to self-actualisation in collectivist cultures.

Evidence from this research, therefore, offers partial support for Maslow’s needs hierarchy (1943, 1968, 1970) and culture emerged as an important variable in this. Consistent with other research (Nevis 1983; Oishi et al. 1999; Tay and Diener 2011), this study offers only limited cross-cultural support for the needs hierarchy and challenges whether the complete hierarchy and the proposal that needs arise in a
specific order are valid across cultures. This suggests that caution should be taken when applying Maslow’s needs hierarchy (1943, 1968, 1970) to people from non-Western cultures and that amendments may be necessary to ensure that it is culturally relevant.

9.3.2 Selection, Optimization and Compensation (SOC)

This research concurs with the SOC model (Heckhausen et al. 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner et al. 2006), proposal that one way people address life events is by making adaptations in line with their capability. Participants in this research spoke about changing their personal goals as they aged; a common example was substituting the importance of finances with that of maintaining good health. There was also evidence that participants reframed how they evaluated the achievement of goals, for example, highlighting their continuing capability in one area whilst minimising loss of capability in another. This is consistent with Ebner et al.’s (2006) proposal that it is beneficial for older people to focus on maintaining their functional capability and redirecting their resources to do so.

Ebner et al. (2006) also found that personal growth remains relevant for older people, and there were examples of participants in this research being motivated towards
growth in the context of lifelong learning. The SOC model highlights that successful ageing involves balancing losses and gains and that strategies include continuity and change. Although this is common to both theories, SOC focuses on the achievement of goals, whereas “synthesising self” is concerned with constructing the sense of self.

Baltes and colleagues emphasised the importance of subjectivity in rating successful ageing; therefore, they did not incorporate specific measures into their model. SOC therefore offers a process without content, which has been criticised (Steverink et al. 1998; Villar 2011). Whilst “synthesising self” recognises the importance of individual differences, the participants in this research shared concepts of what is important to them as they aged and highlighted specific factors, such as: role, socialising, health and faith. As discussed, this converged with the findings from other research into quality of life, supporting the suggestion that a set of common goals and strategies could be incorporated into SOC (Steverink et al. 1998; Villar 2011). In common with this research, Steverink et al. (1998) recognise the influence of aspects of Maslow’s needs hierarchy (1943, 1968, 1970) on quality of life. Further research on developing a culturally neutral set of needs may provide useful data that could strengthen the SOC model. The incorporation of outcome measures alongside process identification would facilitate comparison across groups and the identification of where people may be experiencing deficits or problems, enabling targeted interventions to be made.
9.3.3 “Synthesising self” and continuity research

Although Kaufman (1986), Atchley (1999) and this research employed different methods – Kaufman conducted repeated qualitative interviews and observations, Atchley utilised mixed methods over a 20 year period, and data was collected in this research via one off in depth interviews – the findings of the three studies have numerous commonalities. In essence they all share the concept of people managing change alongside preserving aspects of self across their lives, supporting this with strong evidence of continuity.

Some aspects of “synthesising self”, however, diverge from, and build upon, Kaufman (1986) and Atchley (1999). One explanation for the divergence from continuity theory (Atchley (1999) may be that the research aims of the studies were different. Atchley’s initial focus was on testing existing theories about the impact of retirement on individuals, later switching to investigating the impact of disability; whereas this research aimed to investigate quality of life without reference to any existing theory. Consequently, Atchley (1999) utilised pre-existing measurement tools, collected information about issues such as income and education, later including a measure of continuity, as well as interviews. This focus on specific issues enabled him to track and measure continuity across time and identify evidence of the
desire to maintain patterns of behaviour. Atchley’s (1999) definition of continuity theory is:

“Continuity theory assumes that the primary goal of adult development is adaptive change, not homeostatic equilibrium…Continuity theory is about adaptation.” (p. 6)

However, employing specific measures may have biased Atchley’s findings towards what he was seeking, and he may have failed to collect other relevant information. “Synthesising self” emerged wholly from the analysis of participants’ open-ended interviews and this approach, as well as identifying continuity, enabled me to identify the motivation behind it. Nevertheless, it is interesting that although I employed open methods and had no a priori hypothesis, the final theory developed – “synthesising self” has a narrower focus than continuity theory and is concerned wholly with continuity of self. This outcome can be understood as a result of raising data analysis to a conceptual level; indeed at a surface level I did identify numerous factors that participants wanted to preserve.

Developing a conceptual understanding of what these factors represented resulted in the identification that continuity of self was crucial to participants, and that their past
is important in their construction of their present self; this is consistent with Kaufman (1986). However, there were some differences between what the participants of this research and Kaufman’s sought to preserve, for example family role, personal achievement and social status were valued differently by the two groups. This outcome may be due to the different cultural heritages and life trajectories of each group. Indeed the impact of migration and how acculturation affected the cultural identities and the values of the participants in this research was very evident, and there was strong evidence of the development of a host cultural identity alongside continuity of the heritage cultural identity.

The self is considered in continuity theory but this is restricted to focusing on emotional resilience, self-confidence and personal goals, which Atchley (1999) termed internal continuity. Atchley also explored the influence of lifestyle, including relationships, leisure activities and income; he conceptualised these as aspects of external continuity, which he suggests provides:

“...a basis for social security; a stable platform for venturing forth into new inner territory.” (p. 53)
“Synthesising self”, on the other hand, conceptualises the self as multifaceted and encompassing myriad issues, making no distinction between internal and external factors – all are viewed as relating to the self-concept. “Synthesising self”, therefore, views the factors Atchley (1999) assigned to external continuity as reflecting and enacting aspects of self, for example, relationships are associated with belonging, identity and values. Atchley (1999) stated that people pursue continuity to preserve patterns of behaviour and thought that they have invested in over time. “Synthesising self” moves beyond this and offers a different motivation for continuity; agreeing with Kaufman (1986), “synthesising self” proposes that continuity is driven by the need for a “coherent sense of self” (Kaufman 1986, p. 14).

Consequently, people preserve things which are valued aspects of who they are. By exploring the meaning factors such as work, social relationships and leisure activities have for the individual, and how they are involved in constructing their self, “synthesising self” demonstrates why such things are important to them. The issue of autonomy illustrates this; Atchley (1999) proposes that throughout their lives, through experience and behaviour, people create a sense of agency. “Synthesising self” takes this further, explaining what autonomy represents: being an independent person emerged as an important aspect of participants’ sense of self, and was associated with continuing to have a useful role, being able to make a contribution to
society and not having to rely on other people. The desire for, and realisation of, continued independence, in addition to maintaining the current self, facilitated the construction of a desired future self as an autonomous person. This also helped participants avoid a dreaded future self, that of being a burden on others. It is important to understand that the individual’s subjective perception is crucial; in this example, it is their belief in their continuing independence, despite evidence to the contrary for some, which constructs their identity as an autonomous person and feeds into their sense of self. “Synthesising self” demonstrates that the factors participants said were important in their lives, as well as having manifest content, also underpinned their continuing sense of self and had an important influence on their reinterpretation of the past as well as their construction of the future. In this respect “synthesising self” builds on Kaufman’s (1986) work; although Kaufman notes that people reinterpreted their past and that they expressed concerns about the future, she does not report evidence that they actively constructed or avoided future selves.

As with continuity theory (Atchley 1989, 1999), participants’ narratives provided evidence of patterns that had endured throughout their lives. Similar to Kaufman (1986), some continuities involved character traits that participants were able to trace back to their childhood. These were central, immutable aspects of participants’ self-concept, for example, a strong belief in fairness and the importance of independence.
Consistent with Vignoles et al. (2004), preserving such central aspects of self was important for individuals and, as suggested by Dark-Freudeman et al. (2006) they feared the loss of these valued aspects of self, thus they employed various strategies to preserve them. There was evidence from participants’ accounts of a hierarchy of strategies, from those that directly affected aspects of self, such as healthy behaviour, through offsetting, to a strategy of last resort – denial. Laing (1960) and Becker (1993) suggest that loss of self has a detrimental impact on well-being; therefore, it is unsurprising that individuals did all they could to preserve it. This evidence of a desire for continuity of self may also explain the common fear of developing dementia; many participants spoke both of fearing dementia and about the strategies they used to avoid it. The impact of dementia affects both an individual’s autonomy and destroys the links between people’s past and present, and ultimately their future, thus eliminating continuity of self.

One important area where “synthesising self” and continuity theory diverge is regarding the impact of traumatic events. Atchley (1999) has an ambivalent approach to this, providing examples of people drawing on past experience to provide strength, as well as suggesting that traumatic experiences may result in people being “less inclined to produce continuity” (p. 138). The findings of this research show no evidence of such ambiguity; some participants talked about traumatic experiences,
for example: the death of family and friends during the cultural revolution and experiencing mental ill health due to bullying; however, consistent with Becker (1993), Troll and Skaff (1997), Coleman et al. (1998) and Nuttman-Shwartz (2008), they highlighted that these traumatic life events provided strength and optimism that they continue to draw upon years later. There was also evidence of how coping with traumatic experiences may be used to support and validate identity, for example, that of being a strong and independent person, thus enhancing continuity.

There were also examples of specific factors being common aspects of continuity; Kaufman (1986), Atchley (1989, 1999) Nuttman-Shwartz (2008) and I all found that preserving their occupational identity was important to people. People preserved their occupational identity by continuing to work past their official retirement age and, where this was not possible, practised their occupational skills in voluntary work and/or in different areas of their personal lives. However, as found by Kaufman (1986), the specific importance of occupational role was only evident for the participants in this research who had worked in professions, and where their occupation was central to their concept of themselves as a person. Other participants still viewed work as important, but were less concerned with continuity of their actual occupational role identity. Alternatively for some, being able to continue to perceive oneself as a hard worker maintained a valued aspect of their self (Kaufman
1986; Nuttman-Schwartz 2008). Furthermore, for the participants in this research this facilitated them avoiding the feared identity of being lazy.

The importance of family was another shared issue; Atchley (1999) found that family was important with 95% of his participants stating they wanted to maintain close family ties, and all the participants in this research and Kaufman’s (1986), spoke about the importance of maintaining a close family. The importance of family is a crucial aspect of Chinese culture, and interpersonal relationships with family living in and outside the UK were very important to participants, with transnational belonging being strongly manifest in their accounts. People spoke about nurturing relationships with family and friends in many different countries, as well as their homeland; although, while family relationships were unconditional, similar to Boneham and Sixsmith (2006), reciprocity was important in friendship. In contrast to Kaufman (1986), family role identity emerged as an important aspect of self for the participants in this research, especially that of being a parent. As found by Boneham and Sixsmith (2006), women in this research spoke about the ongoing identity of being a mother. Indeed, both genders, viewed the role of parents as permanent and continuous throughout life, and this emerged as an important anchor by which to secure self, offering one explanation of why the continuity of kinship bonds is important.
Patterns of leisure activities identified in “synthesising self” were also consistent with other research (Atchley 1989, 1999; Nimrod 2008) and there was evidence of participants taking advantage of the additional time available to them as they got older by increasing the time spent on leisure activities. In the main, these were either activities people had done throughout their lives, such as playing Mahjong, arts and crafts and practising Tai Chi, or were activities they had done when younger, for example, dancing. There was also some evidence of people fulfilling long-held desires. However, although people talked about learning new skills, there was little evidence of them actually doing so or taking up entirely new activities. Fulfilling long-held desires and recommencing activities they did when younger, on the other hand, forged links between participants’ past and present.

Although they discuss living arrangements, place was not a specific focus of Atchley’s or Kaufman’s work; however, continuity of place emerged as being influential in the lives of the participants of this research. Place has been identified as playing an important role in belonging, identity and self (see Rubinstein 1989; Levitt 2001; Perkins Taylor 2001; Wiles et al. 2009; Holland and Katz 2010; Li, Hodgetts and Ho 2010; Bernard et al. 2012), and there was strong evidence that it was involved in addressing the discontinuity of migration experienced by these participants, especially by enhancing their cultural identity.
Consistent with Levitt (2001), people created places that had cultural meaning and were safe for them to reclaim, affirm and express their continuing cultural identity; this was evident for a number of locations, both personal and public. As found by Li et al. (2010), gardening had a role in forging links with people’s lives before migration and constructing continuity; this was especially evident for those who had lived in rural areas or had been farmers and who now lived in urban areas. Created public places, such as Chinatown and community centres, also facilitated a collective expression of cultural identity, as did adopted space (Buffel and Phillipson 2011). In this instance, the local casino became recognised as a Chinese place by both members of the Chinese community and members of other communities. These findings therefore demonstrate the importance of continuity of place and the influence this has on people’s lives and sense of self.

An issue common to Kaufman’s (1986), Atchley’s (1989, 1999), and my work, is that all involved one specific group of participants: Kaufman’s were all white Americans, Atchley’s were also all white Americans who lived in the same small town in Ohio, and the participants of this research were all older Chinese migrants living in the same urban area of the UK. Although this is a limitation of all three studies, when the results are compared, “synthesising self” offers support for the importance of continuity in people’s lives, as well as for specific aspects both of Kaufman’s (1986)
findings and continuity theory (Atchley 1989, 1999). Furthermore, “synthesising self” addresses an important gap Kaufman’s and Atchley’s research by offering evidence that continuity may be applicable cross-culturally.

Atchley’s (1999) participants were all residents of the same town and he notes that, although many had experience of discontinuity, continuity was the dominant pattern. In contrast, for all the participants of this research, the common discontinuity of migration provided a backdrop to their lives; indeed, many had experienced multiple discontinuities, for example, having also been widowed or experiencing disability and ill health. As seen with Becker’s (1993) participants, they demonstrated that they were able to re-establish continuity, and did so in the face of multiple changes. This finding that major life events can be overcome to construct continuity also provides additional evidence to support Atchley’s (1989, 1999) proposition that people have a general orientation towards continuity.

Nevertheless, it is necessary to highlight that, consistent with Kaufman’s (1986) findings, for the participants of this research continuity emerged as one way of achieving and preserving a coherent self; change was also important, and this was facilitated by maintaining aspects of self to provide a foundation for change. While Atchley (1999) views continuity as facilitating exploration of the inner self, like
Kaufman (1986), “synthesising self” proposes that continuity of a core self enables the individual to address external challenges and incorporate change.

9.4 Summary

In this chapter I discussed the findings of this research in relation to existing knowledge and theory, highlighting the similarities and differences between them and where new knowledge had been developed. The finding that self is important to quality of life and how migration can affect self were discussed with reference to existing theory. The establishing of a link between self and quality of life supported the findings of the research and strengthened the validity of the emerging theory “synthesising self”. I also considered the findings and other theories through a cultural lens, demonstrating that culture is a key influence in people’s lives and is involved in their constructions of self and quality of life.

Introducing a cross-cultural perspective on the findings was an important step in showing how this research challenges and extends existing theory. This was especially relevant to Kaufman’s (1986) research and to continuity theory (Atchley 1989, 1999), which has not been tested cross-culturally, and to Maslow’s needs hierarchy (1943, 1968, 1970), which has been criticised for being Western-centric. I demonstrated that aspects of those theories were relevant to the participants of this
research, highlighting areas where the influence of migration and culture was particularly important.

The next chapter discusses the research methodology, specifically exploring its appropriateness to the research aims and where it may have affected the findings.
Chapter 10

Discussion – Part Two: The Research Method
The previous chapter discussed the research findings in comparison with other literature and theory, focussing on the impact of culture; this chapter evaluates the research methodology. Although the research process was rigorous and I developed a credible grounded theory it is important to acknowledge and discuss the methodological issues that emerged during the process of the research. Some of the issues I encountered were related to the use of grounded theory and others to the fact that the research was cross-cultural and cross-language; how these may have affected the research and its findings is considered. I begin by focussing on the appropriateness and application of grounded theory, before moving on to explore the challenges specifically related to the cross-cultural and cross-language nature of this research.

10.1 Application of grounded theory

Glaser and Strauss (1967) state that researchers should not enter the field with preconceptions, therefore should defer literature reviews until after completion of the fieldwork and not use an interview schedule; in practice, it proved difficult to strictly adhere to this guidance. As discussed in chapter two, both the content and ethics of the proposed research had to be approved by the university prior to its commencement. This required the completion of a literature review and the provision of an interview schedule. I addressed content approval by undertaking a
limited literature review; however, there was no acceptable alternative to producing an interview schedule and a list of possible prompt questions. There is little doubt that these requirements resulted in me carrying some preconceptions into the fieldwork and data analysis, particularly ideas regarding the nature of quality of life and the things that were important to people. It is important to acknowledge that I already had preconceptions about quality of life, but these were strengthened by undertaking the literature review. These preconceptions had a particular influence on the data analysis and, even though the identification of health as being influential in participants’ quality of life was valid, initially I placed more emphasis on health per se than was warranted. Other preconceptions were independent of the literature review and entirely mine, especially my resistance to theories proposing to be universally applicable.

Attempts to avoid the data analysis and emerging theory being influenced by existing theories met with varying success. For example, Maslow’s needs hierarchy (1943, 1968, 1970), which I was aware of, emerged as being relevant to the research during the cycle of interviewing and data analysis. I attempted to put this to one side until my work was reaching its conclusion. In contrast, I was not cognisant of continuity theory (Atchley 1989, 1999) before data analysis; the relevance of this theory emerged during a coaching session focusing on data analysis. In this instance,
I simply delayed reading Atchley’s work until data analysis was complete, and it was not until I read this work that I became aware of the relevance of Kaufman (1986).

The issues of preconception and contamination were also addressed by a determination to explore all possible conceptualisations of the data. I also found that the use of the conditional matrix (Strauss and Corbin 1998; Corbin and Strauss 2008) enabled me to identify different dimensions of the data and the links between them, and facilitated new thinking about the data. This is interesting because, paradoxically, Glaser (1992) condemns the conditional matrix as forcing data; this highlights issues with the Glaserian grounded theory dogma regarding preconceptions. The more flexible approach taken by Charmaz (2006), who argues that researchers do have preconceptions, but that these do not have to determine research findings, is more realistic. I adopted Charmaz’s (2006) advice to challenge my assumptions throughout the research and data analysis. One technique I used to do this was to list all my possible preconceptions and refer to them during data analysis to ensure that pre-existing theory warranted inclusion in the analysis. In reality, no person is a blank slate, and viewed from a relativist perspective, it is not possible for a researcher to eliminate or ignore their preconceptions; however, being aware of them should reduce their impact on the process and findings of the research.
As highlighted in chapter three – application of the planned methodology – due to the availability of participants and interpreters, it was not always possible to analyse interviews before undertaking the next interview, and on occasion, coding and analysis had to be done in blocks of two or three interviews. Although this diverted from grounded theory principles, it was the only way I could complete the fieldwork. Being dependent on other people to recruit participants also affected another aspect of grounded theory methodology – theoretical sampling – as I was unable to proactively select specific participants whose experience may have added depth to the emerging theory. One possible source of valuable information would have been people who were less involved with the Chinese community. It may be that people who are isolated from both the heritage and host communities, or who are only involved in mainstream UK culture, have different experiences of belonging and of challenges to their identity and values than the participants of this research. It was possible to undertake some theoretical sampling during data analysis; as the grounded theory emerged and developed, I returned to previously analysed interviews to check for data that would strengthen or refute the emerging theory.

Other aspects of grounded theory were more straightforward to apply, and I made full use of the techniques of: coding, constant comparison, memo writing and sorting, and the conditional matrix, as already mentioned. However, while I aimed to remain true to grounded theory methodology, it is important to highlight that a balance
between using techniques and proper analysis was initially absent; Silverman (2005) notes that this can lead to developing meaningless categories. In this case, I was beguiled by a route map approach to grounded theory; this initially resulted in me focussing on the details of the data and producing a descriptive analysis, rather than a conceptual analysis. By recognising these issues and refocusing the analysis, I developed appropriate conceptual categories and a credible grounded theory.

10.2 Cross-language and cross-cultural challenges

Other researchers have discussed the difficulties in cross-cultural research, noting that these often result in such work not taking place (Marshall and While 1994; Frayne et al. 1996; Hunt and Bhopal 2003). Indeed, early in the fieldwork, it seemed that this research would not reach fruition and it is important to explore the challenges I encountered and how I addressed them.

10.2.1 The process of recruiting participants

In practice, recruitment of participants proved much more difficult than anticipated. A recruitment strategy had been developed with a contact within the target community; however, shortly after the research began, they left their employment and recruitment ceased after three interviews. The language barrier between the prospective participants and I then became a major impediment to recruitment. As I
could not speak Cantonese I was unable to recruit verbally and, although I produced information leaflets and letters of invitation in Cantonese, many of the potential participants were unable to read, thus making this written material a poor recruitment tool.

I made a breakthrough by taking part in social activities held at a Chinese community centre, which required little or no conversation. Subsequently, I found that many more people spoke English than I had been led to believe, so was able to directly recruit English-speaking participants and adopt snowballing techniques to recruit other participants.

Even though I had built in slippage to my research timetable, the problems with the recruitment strategy resulted in delays to the fieldwork, If I were to undertake cross-language research again, I would attempt to make multiple contacts and involve myself with the target community well before beginning the fieldwork.

10.2.2 Working with an interpreter

As advised by Baker (1981), Freed (1988) and Twinn (1997), to increase cultural sensitivity and to put participants at ease, interpreters who were members of the target population were employed. Initially, my intention was to work with only one
or two interpreters, with the aim of enhancing consistency of the interview process and building a rapport with the interpreter. In practice, due to the differing availability of participants and interpreters, this proved very difficult; in all, five interpreters were employed. I briefed each interpreter about the aims of the research and the process before beginning the interviews. Three of the interpreters were members of the target population and agreed to be interviewed. This was done before they translated any interviews and proved to be an effective method of ensuring that they understood what the research interviews would cover and how they would proceed.

Accuracy of translation was paramount and the research design was comprehensive and incorporated quality assurance checks regarding translation, including a second translation of interviews. There was evidence of attempts to manipulate data in two early interviews where the interpreter added information praising an organisation. Although having all the interviews translated a second time would have been valuable, the cost proved to be prohibitively high; therefore, other steps were taken to check the veracity of the data. The grounded theory technique of constant comparison requires the analyst to compare data against data; therefore, triangulation was inbuilt in the research. Interviews undertaken in Cantonese and with the aid of different interpreters were compared with each other and with the interviews done in
English; the content of interviews undertaken with the aid of interpreters and in English was remarkably similar. Only one instance of novel information, which was not evident in any other interview, was identified. As far as possible, data translated from Cantonese was thus judged to be an accurate representation of the participants’ interviews.

The interpreter had to be sure that the participants and I understood what each other was saying; this was not always straightforward and on occasion I felt that I was not in control of the interview. For example, the interpreter and participant sometimes had discussions in which I was not involved and could not understand. When asked, the interpreters said that some were personal conversations or they were clarifying my questions and the participant’s answers. There was no reason to doubt this but I requested that whenever possible, personal conversations were delayed until after the interview and that interpreters included me in all conversations aimed at clarifying questions and answers.

Undertaking cross-language interviews with the aid of an interpreter was much more difficult and tiring than interviewing in one language. I found that initially because I was focussed on the process of the interview and my research agenda, I failed to pick
up on pertinent issues mentioned by participants. Fortunately, I recognised this and addressed it for future interviews.

Undertaking a pilot study was an invaluable way of evaluating the appropriateness of the planned research procedure, and testing out interviewing with an interpreter helped me identify possible issues regarding the process and quality of translation. However, even when a rigorous research design is developed and tested with a pilot study, the issues I faced in practice highlight that it can still be further refined and improved during the fieldwork.

10.2.3 Being an outsider researcher

I entered the fieldwork aware of being an outsider and had identified a number of possible differences between the participants and myself, including: culture, faith, language, ethnicity, education, values, and family structure. However, no participants form a homogenous group and, even with the most strictly controlled research, there will always be within-group differences; here for example, some people felt highly integrated into UK culture while others felt unable to integrate. It is not possible to identify all instances where my being an outsider impacted upon the research, and working with an interpreter from the Chinese community may have ameliorated some difficulties.
Sixsmith et al. (2003) highlight that gatekeeping is one issue outsider researchers may have to address and I met with instances of vigorous gatekeeping, which particularly hampered recruitment. Examples include: organisations ignoring letters and emails, failing to put telephone calls through to the appropriate person or cutting the call off. The main reason cited was that people would not be interested in taking part in the research. Having the visible support from a respected member of the Chinese community proved an excellent way of negotiating such issues. There were two specific examples of this: one formal and one informal. One individual was a well-respected professional who had set up numerous services for the Chinese community and worked hard to promote the needs of the community with local and national government. The second was not an active community leader, but they were well respected by their peers and younger people in the community. This person chose not to participate in the research and, due to the language barrier, I was not able to speak with them on a one-to-one basis. However, they demonstrated their support for me by actively engaging me in community activities, initiating conversations via an interpreter and acknowledging me each time we met.

The reliance on organisations working with the Chinese community to assist recruitment raises another gatekeeping issue: participants may have been screened and specific people selected (Sixsmith et al. 2003), for example, those who may
represent the Chinese community in a particular way. It was also possible for participants to be primed with specific information, such as promoting services the organisations that assisted with recruitment offer, which could bias the research findings. One possible example in this research was that many people recruited via organisations that offer translation services talked about needing interpreters to help them with letters, documents, appointments, and dealing with official bodies. However, the need for interpreters was also highlighted by participants who I recruited directly and I also witnessed it during the fieldwork. In this instance, therefore, I was satisfied that if participants had been primed it had not biased the findings but remained alert to the possibility of priming taking place.

Participants themselves may also have been gatekeeping, for example, they may have wanted to portray their community in a positive way, which may have manifested as socially desirable responding. A possible example of this is when participants spoke about visiting the local casino; many said they went there, but none said they went primarily to gamble. Whether the participants visited the casino to gamble or not, it is important to consider why they felt it was necessary to emphasise to me that they did not gamble, or only gambled very small amounts of money. This may be indicative of several things: firstly, participants were simply being truthful; secondly, they were being truthful but were aware of the stereotype regarding Chinese people
and gambling, and wanted to refute it; or thirdly, they visited the casino primarily to
gamble and were concerned that I and others may judge them. Other aspects of
participants’ narratives may have also been influenced by socially desirable
responding. Only a small number of people said that they felt they did not belong in
the UK or had experienced racism or discrimination; it may be that a greater number
felt that way, but they did not feel able to say so because I am a member of the
mainstream UK population.

The issue of demand characteristics also needs consideration and early in the
interview cycle, it was identified that participants may have been trying to please me
by telling me what they thought I wanted to hear, especially praising the UK
government. This was addressed at the time, but it is not possible to be sure there
were no other instances of participants saying what they thought I was looking for
and/or censoring their answers to avoid providing information that they felt did not
meet my research agenda.

Priming, socially desirable responding and demand characteristics may not always be
identified, although I found that the grounded theory technique of constant
comparison of data offered a way of identifying possible examples; it is important,
therefore, that researchers consider whether these issues are influencing the data.
Although there may be difficulties associated with being an outsider researcher, there are also advantages. Fay (1996) highlights that one advantage an outsider researcher may have is being able to identify issues which an insider, who is embedded within the culture, would not. This research offers a possible example, many people played Mahjong and I was interested why. One reason that emerged was that people used it as a strategy to prevent dementia, which I recognised was associated with continuity of the self. In contrast, an insider researcher who was used to the popularity of playing Mahjong may have taken it for granted and not uncovered this association.

People may also be more willing to share information with somebody from outside their culture or social circle (Sixsmith et al. 2003). There were several occasions where participants shared information with me during an interview and/or after the interview had ended, but asked for it not to be included in their interview transcript or indicated that they did not want anybody else to know what they had said. It is not possible to be sure this sharing of information was due to my being from outside their community, but as these interviews were all undertaken in English, on a one-to-one basis, and I was asked not to use this data, it seems plausible. Although I was not able to use this data, this experience does suggest that people may have shared other less sensitive information with me, which they would not have given to an insider researcher.
Brodsky and Faryal (2006) highlight that researchers can assume differences when they do not exist in reality, and there will also be similarities between them and the participants. This seems especially pertinent when the participants are migrants living in a host culture. Due to the impact of acculturation, people may share as much with the host culture as they do with their home culture. Furthermore, an issue relevant to this research is that virtually all the participants were migrants from Hong Kong, therefore, they had already had a great deal of contact with UK culture before their migration (Ng and Lai 2011). Although I was aware I could not gain insider status, numerous similarities between the participants and I emerged during the interviews, for example, social interests, values, beliefs and education. These similarities offered common points of reference and were important in me building a rapport with the participants.

10.3 Research design

Qualitative interviews were selected for this research as I judged them an effective means of collecting in-depth data. This proved to be the case and it was possible to develop a detailed explanation of what brings quality to participants’ lives and why these things are important. However, due to the nature of grounded theory research, the importance of self across the life course emerged from the data collected; unlike other methods, this was not an a priori hypothesis being tested. In hindsight,
biographical interviews may have elicited more information from participants about how and why their current self had been constructed, and why specific factors and issues remained important throughout their lives.

Acculturation emerged as being a crucial influence on the sense of self; there was clear evidence that acculturation affected multiple aspects of participants’ lives and that their construction of their cultural identity enabled them to preserve continuity of self alongside accommodating the change necessary to integrate into a host culture. This suggests that a unidimensional model of acculturation is insufficient to explain the process and outcome of their acculturation; indeed, there was little support for this model. Instead, the majority of participants spoke about aspects of both heritage and host cultures, as well as how these were enacted in their lives. These participants appeared to move easily between using Cantonese and English, and interacting with both the heritage and host communities. This provides anecdotal evidence of people transferring between different cultural identities and/or of behaving in relation to context and cues, supporting the proposal that acculturation influenced their identities. However, the research design did not facilitate identification of whether participants had constructed a bicultural identity with separate Chinese and British identities, or a new hybrid identity. While this did not hinder the original aims of the research, it did result in limitations regarding understanding some findings. Further
research employing objective measures of acculturation, using priming experiments and observing the participants in a variety of locations, would further clarify the impact of acculturation on their identity and self concept.

Evidence from participants’ narratives demonstrated that continuity was important to them and that they attempted to preserve aspects of self over time, but there was no objective measurement of this. The evidence of continuity was in the form of retrospective self-report, for example, although people said that they had held similar values, such as a belief in fairness across their lives, this may have been subject to recall bias. The research design did not facilitate assessing continuity over time as the participants in this research were only interviewed once. However, although I could have used a measure assessing orientation towards continuity, it would not have been possible to fully assess continuity of self without interviewing the participants and administering a measurement tool before, as well as after, migration.

These issues relate to the emerging grounded theory, with its focus on self, so I could not have anticipated them prior to beginning the research; this raises an important question about the use of grounded theory as an effective research method. The aims of this research were to discover new information and not test existing theory; therefore, I consider that grounded theory was an effective and rigorous way of doing
this, especially as I was not seeking to develop a theory that could be generalised to the whole population. Rather than negating or detracting from the findings, the issues highlighted above offer guidance on how to build on this research and broaden understanding of the impact of migration on older people.

10.4 Implications for cross-language research

During the course of my research I dealt with challenges of both a practical and personal nature. A particular strength of my work is that I have shown it is possible to work effectively across languages and quality assure translation without using costly techniques. I found that some of the current recommended procedures for working across languages and with interpreters, for example, having interview questions and interviews forward and back translated and engaging interpreters to undertake all interviews in participants’ first language, were not practical for a lone student researcher. The cost alone is prohibitive. Instead, I had a very small number of interviews second translated and used constant comparison and triangulation of data to assess the accuracy of translation; this proved to be effective. Adopting these techniques, therefore, greatly reduces the cost of cross-language and cross-cultural research without compromising its quality, making it more accessible to both lone researchers and research teams.
My research also shows that whilst researchers need to be culturally aware and sensitive, it is possible for an outsider researcher to undertake effective research; indeed in some instances they may have an advantage over an insider.

As discussed earlier in the thesis, due to language and cultural barriers people from BME groups and non-English speakers are often excluded from research. My work demonstrates that, with careful planning, it is possible for a lone researcher to successfully undertake cross-cultural and cross-language research.

10.5 Social policy implications

The findings of my research highlight issues with existing services, regarding both gaps in services and how provision may be improved. There was strong evidence of a need for additional translation services as those that were available were very overstretched. In some instances participants said that they could not access healthcare and benefit advice due to a lack of interpreters. There was also evidence that mainstream service providers failed to provide interpreters they had promised. The local authority does provide a translation service, however this is expensive and thus unaffordable for people who need it most. However, the local universities have many Chinese students who may be able to translate for people. One solution to the need for additional affordable interpreters would be for a third sector organisation,
perhaps one of those already working with the Chinese community, to develop a register of volunteer interpreters. A further issue with translation is the reduction in the use of Cantonese and Hakka; therefore, consideration should be given to providing more classes teaching those languages.

Furthermore, for some older Chinese people the language barrier has serious implications regarding their personal safety and independence. One finding of my research was that, although some participants had access to emergency alarms, all the service providers did not offer multilingual services which meant they could not use them, for example Age UK and Careline UK’s services are only available in English. Some telecare organisations do offer multilingual services; therefore, service providers such as housing associations and social services should ensure that any alarms and telecare they provide, or organisations they engage to deliver services on their behalf, are inclusive and provide services for non-English speakers, in this case Cantonese and Hakka speakers. Indeed, failure to do so may leave them in breach of the Equality Act (2010) and potentially open to prosecution.

There was very strong evidence of the importance of place to the participants and although there was a Chinese community centre in the area and this was very well used, it is unlikely to be economically possible to provide such dedicated services in
every locality. It may however be more economically viable to develop existing provision towards being multi-cultural. For example, sheltered housing schemes generally have a communal room that is used for activities and these could offer culturally appropriate activities such as Mahjong and handicrafts. Unlike Tai Chi, these do not require an instructor or much space so could be run by the older people themselves. Some participants in this research already visited local schools to demonstrate cultural activities such as Chinese writing and art, this could be extended to other schools and other activities such as, Tai Chi could be offered to pupils and local residents. This could increase attendance making such activities more attractive to providers and also spread the cost making them more affordable for individuals.

Outside space also proved important to participants and it would be possible to develop areas in public space to be culturally relevant. For example, charities such as Groundwork UK (2012) and the Prince’s Trust (2012) work with local communities to develop and improve their locality. I also worked with sheltered housing schemes whilst engaged on the CALL-ME (2008) project and tenants designed and maintained their own gardens; this included Chinese tenants developing a Chinese garden. Housing associations, therefore, could also work in partnership with local residents, charities and schools to develop culturally relevant outdoor space.
The findings of my research suggest that the provision of inclusive services would enhance this group of older people’s quality of life. With this in mind, I have agreed to provide a report for the organisations with which I worked for them to use as evidence supporting the need for culturally appropriate services, and to work alongside their staff on bids for funding. I also intend to approach contacts working for housing associations with the aim of consulting with black and minority ethnic tenants and working with them and the housing providers to develop culturally relevant communal places (if the tenants want them) within their properties.

10.6 Summary

This chapter considered issues with the research design and how this may have affected the research process and outcome; strengths and limitations were identified and I suggested how these could be addressed in future research. These were especially pertinent to issues regarding measuring acculturation and assessing identity that emerged from the data analysis. Nonetheless, I have demonstrated that grounded theory was an appropriate method for this study and my aim of investigating this under-researched topic. This chapter also explored the implications of my work for other researchers and highlighted how the findings could be used to influence service design and delivery, especially in meeting the cultural and language needs of older Chinese people.
The next chapter closes the thesis by drawing conclusions and making recommendations based on the process and findings of this research. I also offer my reflections, highlighting what I learned during my time as a student.
Chapter 11

Conclusion
This research set out to explore the concept of quality of life of older Chinese migrants living in North West England, and in this final chapter of the thesis I assess whether the research aims were met and identify the limitations of the findings. I make recommendations regarding how the outcomes of the research may be applied; these include: how the findings can be used to understand the issues regarding the quality of life of the participant group and develop interventions aimed at enhancing it, suggestions for future research, as well as offering guidance on undertaking research with older black and minority ethnic (BME) people. The chapter also includes my personal reflections on my work, highlighting what I learned during my time as a research student, both about undertaking research and myself.

11.1 Were the aims of the research achieved?

The broad aim of this research was to investigate the concept of quality of life held by a group of older Chinese people. I did not set out to merely identify factors that were important in participants’ lives, rather my aim was to investigate and understand their quality of life at a conceptual level. This resulted in the development of an emerging theory that identifies what is important in the participants’ quality of life, why it is important, and the process they use to construct and maintain a good quality of life. The methods and results chapters provide the full evidence to support
the achievement of the three research aims; this section distils that information. The original research aims were to:

1. Identify the factors that older Chinese migrants living in the United Kingdom (UK) feel are important in having a good quality of life.
2. Understand why these factors are important and what they represent.
3. Identify and explore the process participants use to construct a good quality of life, developing a new theory if appropriate.

My use of open-ended interviews and a thorough analysis of the data, using grounded theory techniques (Glaser and Strauss 1967; Strauss and Corbin 1998; Corbin and Strauss 2008), resulted in the first aim being achieved, and myriad factors that participants felt were important in their lives were identified. Participants experienced no difficulty in identifying what was important in their lives and many of the factors they spoke about concurred with the findings of other research into quality of life.

The second research aim necessitates understanding the factors identified in terms of more than their surface content. I achieved this by exploring the function of the factors identified and their meaning, facilitating a deeper understanding of why they
were important to the participants. Interestingly, during the interviews, some people experienced initial difficulty articulating why something was important in their lives, indicating that it just was. I addressed this by using probe questions to draw out more in-depth data regarding the importance of a factor, although in a very few instances, participants still said they were unable to articulate why something was important. Understanding the function of factors and what they represented in participants’ lives was facilitated by raising data analysis to a conceptual level, for example, attempts to integrate into UK society emerged as being indicative of a desire to belong. From this analysis of the data, conceptual categories were synthesised, which encompassed: identity, belonging, attitudes, beliefs and values. As linkages between the categories were identified, it became evident that having a harmonious sense of self over time was crucial to participants’ quality of life.

Self was recognised as the anchor of participants’ existence, enabling them to know: who they are, have been and want to be, what they value, what they believe in, where they belong, and who they belong with. Without a consistent sense of self, they would be adrift within their world, with no reference points to guide them, thus being unable to function. The identification of: the importance of self, the strategies participants used to construct and maintain aspects of their self-concept, and the
antecedents to that process, resulted in the development of the emerging theory of “synthesising self” and achievement of the third research aim.

11.2 The contribution of this research

At this stage, it is crucial to examine the contribution this research has made to the existing body of knowledge, particularly to the understanding of the issues that may be important in the quality of life of older migrants.

This research was the first known cross-cultural research to explore the concept of quality of life held by older Chinese migrants living in the UK and the findings add valuable information to the understanding of quality of life, and what influences it and why. The research also makes a contribution to the methodological knowledge regarding designing and conducting effective research with older BME people.

My original concerns about the appropriateness of quality of life measures for use with this participant group have been addressed; however, the research findings show both support for and highlight issues with such instruments. The factors identified as influencing the participants’ quality of life mirrored those commonly included in quality of life instruments, for example the older people’s quality of life questionnaire (OPQOL) (Bowling et al. 2002; Bowling et al. 2009), and some of their
domains were also relevant to participants. However, although something may be identified widely as being important to quality of life, it may actually represent different things to different people and more than one thing to the same person.

Consistent with the research discussed in chapter one (Herdman et al. 1998; Hunt 1999; Grewal et al. 2004; Molzahn et al. 2011), I found that culture played an influential role in the meaning and impact of such factors. This suggests that assigning instruments items to a measurement domain and/or weighting them is problematic, an issue also highlighted by Bowling’s (2009) statistical testing of the OPQOL. This research adds to the debate by identifying that the impact of living in a different culture and the affect this has on the self was a crucial variable in participants’ quality of life, and therefore needs to be considered when developing strategies to assess and enhance it.

The findings of this study also have parallels to, and offer conditional support for, existing theories and knowledge, specifically in the area of their cross-cultural validity. Some aspects of Maslow’s needs hierarchy (1943, 1968, 1970), such as the importance of the physiological and social needs, were supported by the findings of this research, but other aspects of the theory were not representative of the participants’ experience; this concurs with other cross-cultural research (Nevis 1983; Oishi et al. 1999; Tay and Diener 2011). There was also support for the proposal that
people adapt their personal goals over their life course (Heckhausen, Dixon and Baltes 1989; Baltes and Baltes 1990; Baltes and Carstensen 1996; Freund and Baltes 1998; Ebner et al. 2006).

However, while “synthesising self” can stand alone as an explanation of the experience of the people who participated in this research, crucial aspects of the research findings intersect with Kaufman’s (1986) work and continuity theory (Atchley 1989, 1999), therefore, it is incorrect to suggest that it is entirely novel. The importance of continuity as a foundation for change when participants dealt with challenges to their self was a shared finding; but by offering cross-cultural support for the importance of continuity to older people, my research addresses a gap in both Kaufman’s and Atchley’s work, which was developed with a white American population.

Atchley (1989, 1999) proposes that main motivators towards continuity include: preserving the investment in the patterns individuals have constructed over their lives, and the achievement of or progression towards their personal goals such as, family relationships, autonomy, and having a comfortable place to live. These were issues that emerged as being important to the participants of this research, but Atchley’s proposal does not fully encompass their experience, neither does it fully
explain why such goals are important to people. “Synthesising self” looks beyond the manifest content of such issues and explores and identifies people’s deeper motivations for continuity, showing that continuity may serve more than just preserving comfortable and familiar patterns of behaviour and lifestyle. By raising the understanding of the motivation driving participants’ behaviour, “synthesising self” recognises - as did Kaufman (1986) - the overarching importance of their sense of self and offers additional insight and builds upon Atchley’s (1989, 1999) work.

The participants in this research all experienced the discontinuity of migration alongside other discontinuities and transitions common to other older people, for example: retirement, widowhood and ill health. My research findings, therefore, also provide insight into how older migrants address multiple life events and how these are ultimately related to their ongoing construction of their sense of self, and subsequently their quality of life.

The proposal that self is important in quality of life may also be employed to understand what seem to be paradoxes regarding people’s subjective evaluation of their quality of life. For example, why some people, who may be viewed clinically as having poor health – which is generally acknowledged as being important in quality of life – maintain that their quality of life is good (Cohen et al. 1996; Albrecht and
Devlieger 1999). In this research, health emerged not simply as an absence of illness, but also as being associated with identity through its influence on autonomy, as an identity in its own right, and as facilitating desired goals; maintaining good health therefore also helps to preserve the sense of self. It follows that if ill health is addressed in a way that avoids disruption to the self, quality of life may be maintained; this offers new directions for interventions aimed at improving quality of life.

This research also provides valuable guidance on implementing research methods, particularly by demonstrating the value of undertaking a pilot study prior to the main fieldwork, and establishes that a lone outsider researcher can effectively undertake cross-language and cross-cultural research. I have also demonstrated that whilst back and second translation of interviews are valuable techniques, there are also other methods of assessing the accuracy of interviews that are far less costly and therefore more accessible to researchers, especially research students. Constant comparison and triangulation of data proved effective ways of quality assuring translated interviews; however, this is only possible when a number of interviews are done in the researcher’s tongue as well as in the second language.
11.3 Evaluation of the research process and findings

The issue of evaluation of research findings is important for any researcher and grounded theory research is no different. Lincoln and Guba (1985) propose that it is not possible for qualitative researchers to demonstrate more than the credibility of their research findings. Nonetheless, there are techniques which can be used to evaluate qualitative research in general (Silverman 2006; Denscombe 2007), and specifically grounded theory (Strauss and Corbin 1998; Corbin and Strauss 2008).

Due to the dynamic relationship between the participants and me, and my input into data analysis and theory development, it is debatable whether it is possible to entirely replicate my research. Strauss and Corbin (1998) and Corbin and Strauss (2008) substitute reproducibility as an alternative to replication when assessing qualitative research; the clarity and the thoroughness in reporting the research process in this study facilitates reproducibility. This thesis includes details of the research design and procedure, and a full account of data analysis. Chapters two and three highlight that a systematic and rigorous approach was taken throughout, discussing in depth: the selection, design, testing and application of the research methodology. These chapters also demonstrate that I considered the issues and challenges associated with cross-language and cross-cultural research, and tested and refined the research design by using a pilot study. Chapter three also provides an account of the data
analysis, highlighting that the grounded theory techniques of coding, constant comparison, memo writing and sorting, and the conditional matrix were used to develop the conceptual categories and the theory of “synthesising self”. Consistency and differences between participants’ accounts were explored, and the dimensions of categories were identified to ensure that they were sufficiently dense to justify their place within the theory, and were conceptually related to each other and the core category. Consequently, although other researchers may not arrive at the same outcome as I, they should be able to reproduce the research and analysis process, and follow the logic used when developing the theory of “synthesising self”.

Strauss and Corbin (1998) and Corbin and Strauss (2008) stress the importance of researchers being trained; I undertook training with the Grounded Theory Institute, worked with a grounded theory coach, and read widely on both the principles of grounded theory and publications of research undertaken using grounded theory. Additionally, as advised by Corbin and Strauss (2008), rather than diluting my approach by incorporating aspects of other research methods, I endeavoured to adhere to the grounded theory method and techniques. While an eclectic approach does not mean research is lacking in quality, Denscombe (2005) highlights that research should not be described as grounded theory if it has not followed the method’s rigorous procedure. Adhering to grounded theory techniques and
procedure meant that this research meets the requirement for findings to be generated from the data (Corbin and Strauss 1998; Strauss and Corbin 2008). I demonstrate that the participants’ interaction with their social world, at both micro and macro levels, affects their sense of self. I also identify the strategies participants employ in addressing challenges to self and evaluate how effective these were. The emerging theory of “synthesising self” therefore explains and contextualises the participants’ experience, as well as identifying the processes involved in constructing a coherent sense of self across time and its antecedents.

Corbin and Strauss (2008) propose that the fit of a theory is crucial; this is assessed by investigating whether the participants and professionals feel that the research findings authentically represent their experience. Due to time constraints and the availability of participants and interpreters, I was only able to undertake limited checking with participants. However, the findings were discussed with professionals working with the Chinese community (some of whom were also participants), who felt that the findings were authentic.

The input of other people was considered to be a valuable means of evaluating the research and this occurred throughout the process. My supervisors provided feedback on all aspects of the project, had sight of all relevant documents, and regular
supervision meetings were held where the research process, data analysis and written work were discussed. I also had the support of a grounded theory coach who offered guidance on the use of techniques, and insight into the data analysis and developing theory. I also actively sought feedback, discussing my work with peers at Keele and other universities, and presented my work at conferences. The involvement of other people offered reassurance that the developing theory was credible and evident in the data; it also resulted in challenges to me and my work. Challenges proved valuable as they helped me take a step back and assess my work through another lens – this strengthened both the research process and the outcome.

11.4 Limitations to this research and recommendations for further research.

While the research design was thorough and refined via a pilot study, there are limitations to the research. The emerging theory of “synthesising self” was developed from, and is grounded in, the data collected during this research project; therefore, it is only applicable to the participants of this research and cannot be generalised to a wider population. This is not problematic of itself, as there was no intention to develop a formal grounded theory that could be generalised to the wider population; however, there are several approaches that could be taken to produce a generalisable theory.
Firstly, I could expand my work by interviewing other older Chinese people, for example, those living in another UK city, or those who are less involved with the Chinese community, and use the data to assess and further develop the current findings. Secondly, as there is evidence that some aspects of “synthesising self” show parallels to research undertaken with older Chinese people living in other countries (Chan et al. 2004; Tsang et al. 2004; Ku et al. 2008) and with older people from other BME groups living in the UK (Grewal et al. 2004), secondary analysis of the data collected in that research could be used to assess whether “synthesising self” represents the experience of these groups and again extend the findings of this research. Additionally, it is also important to understand whether “synthesising self” is only relevant and applicable to first-generation migrants; further research is necessary to determine if it also explains the experience of later generations.

Although “synthesising self” was developed in the context of migration and ageing, it should be considered that it may also apply in other circumstances where aspects of self may be affected, for example: starting a new job, moving to live in sheltered housing or residential care. Similarly “synthesising self” represents the experience of one minority group and further research may find that it is applicable to people who may be members of other minority groups and who are ageing in place, for example: people with disabilities, and lesbian, gay, bisexual and transgender people.
In addition to explaining the experience of older Chinese migrants, “synthesising self” may be useful in designing interventions to improve their quality of life. For example, “belonging” emerged from the data as being a key issue, so enhancing this should influence quality of life. Interventions could include: providing opportunities to socialise with peers, addressing the language barrier by providing language classes or appropriate technology, such as Microsoft’s Monolingual TTS or smartphone applications, as they become more accessible.

Phillipson (2007) highlights that transnational communities and belonging are important issues in older migrants’ lives and information and communication technology helped the participants of this research maintain relationships with people living at a distance. Being able to see and speak in real time with friends and relatives, as well as hear them, proved to be important; it can be hypothesised that by enhancing the intimacy and immediacy of communication this may have strengthened and improved the quality of long-distance relationships. It was outside the scope of this research to explore how the participants conceptualised their meetings with others via cyberspace. However, research exploring the meaning they assigned to this may facilitate a better understanding of how using such modes of communication could play a role in the well-being of older migrants.
Evidence from participants’ narratives demonstrated that language skills were a crucial variable in adapting to life in the UK. Those who had been unable to learn English remained within the Chinese-speaking community and, in some instances, expressed a wish to return to their homeland. Whilst this finding in itself is not novel, it does have a particular relevance for older people who speak Cantonese or Hakka. Due to the adoption of Mandarin as the official language of the People’s Republic of China, these languages are less frequently used both in mainland China and Hong Kong. Participants also highlighted that children of Chinese heritage born in the UK may not learn Cantonese or Hakka or prefer to use English at home. It can be proposed, therefore, that as this cohort reduces over time, fewer people will be fluent in Cantonese and Hakka, resulting in some older Chinese people living in the UK being at higher risk of becoming isolated. My own inability to source Cantonese language classes prior to beginning the fieldwork further highlights this issue. Provision of Cantonese and Hakka language classes and encouraging relevant people to learn those languages would be valuable in addressing this possible increase in isolation.

11.5 Guidance on research with older BME people

It was important both ethically and in terms of the research aims that recruitment was as inclusive as possible; therefore, I did not restrict participation to people who spoke
English. However, my inability to speak Cantonese reduced the control I had over the fieldwork, especially in recruiting and interviewing Cantonese-speaking participants. Due to the challenges faced during the fieldwork, I was able to identify such issues and offer the following guidance for undertaking research with older BME people:

- To facilitate recruitment before beginning the fieldwork, make contact with at least two, but preferably more, respected people within the target community who are supportive of the research. These people do not have to be recognised community leaders.

- Adopt a flexible recruitment strategy with a number of approaches built into the research design (Sixsmith et al. 2003).

- Where possible, recruit people directly as this avoids the issues of screening and priming, which may occur when recruiting via organisations.

- Be aware that using written information may be problematic and assess whether having documents translated is cost-effective.

- Prior to having documents translated, take advice on what language/dialect participants use. For example, in this research, I was aware that potential participants may speak Mandarin, Cantonese or Hakka, but by consulting
professionals working within the community found that all but a very few spoke Cantonese.

- Ask interpreters if they are willing to participate in an interview prior to translating any – I found that this was more effective in ensuring interpreters understood the aim of the research and the content of the interviews than simply briefing them.

- Be aware of the interpreters’ position within their community and their loyalties towards it. Ensure that they are made aware that a second translation of interviews may take place for quality assurance.

- Where possible, have interviews translated a second time; the translations may not be exactly the same, but meaning should remain constant.

- If second translation is not possible, use other strategies to quality check the accuracy of interviews – for example, check interviews done with different interpreters and in English against each other.

- Compare data across interviews and across languages to also identify possible instances of: socially desirable responding, priming, and demand characteristics.

- Expect interviews and transcribing to take far longer and build this into the timetable.
• Expect to feel out of control and worried about missing something important – ask interpreters not to be selective about what they translate.
• Get to know potential participants before the fieldwork (Sixsmith et al. 2003).

11.6 My personal reflections

I found undertaking my research to be a very rewarding and life-changing experience, although I quickly realised early in the process why there is a lack of cross-language and cross-cultural research. It is difficult in many ways and I had to tackle: language barriers, recruitment problems, finding, working with and funding suitable interpreters, avoiding stereotyping, and negotiating cultural differences. I had decided at the outset of my research to take the approach suggested by Hunt and Bhopal (2003), so I viewed these issues as “...a challenge and not an obstacle, a stimulus to innovative thought...” (p. 353). Consequently, I found the experience enjoyable and believe that I have produced a credible theory, grounded in the data collected, which adds to the existing knowledge about quality of life. I also feel that I have taken an intellectual and personal journey during the course of my PhD studentship, which has resulted in me learning a great deal about research, academic writing and about myself.
11.6.1 Ontological perspective

Prior to and during the early stages of this research, I had adopted an interpretive approach and also agreed with the social constructionist perspective that knowledge is created via the interaction between the researcher and the participants. As discussed in chapter two, aware of the problems with this, I decided to adopt Fay’s (1996) advice regarding fallibilistic objectivity, but this was more difficult in practice than I had anticipated, and my personal perspective initially had a detrimental effect on my work. This was highlighted during the research process when parallels to Maslow’s needs hierarchy (1943, 1968, 1970) began to emerge. Initially, I resisted accepting this as it was a move away from my interpretive background and I justified this resistance by viewing my findings as being contaminated by my previous knowledge. While this was reasonable to some extent, as more data was collected and analysed, more evidence paralleling Maslow’s work emerged and I was confronted with the possibility of universal motives and needs. Failing to acknowledge this promptly was problematic and had I continued to deny what was evident in the data, my work would have been inauthentic, not representative of the participants’ experience, and the final thesis would have been inaccurate. Berry’s (2009) response to criticisms of his acculturation theory offers a useful metaphor to address this – that it improves the view if both eyes are used. I reflected on why I had problems with a concept of universal motivation and needs, identifying that I
saw this as positivism and, most importantly, as denying the agency of the individual. Despite the fact that the paradigm of positivism remained a difficult issue for me, I also realised that I had almost thrown the theoretical baby out with the bathwater. Therefore, during the course of my research, I learned to be more critical of my ontological perspective and adopt a more open-minded, flexible approach.

11.6.2 The research process

As a novice grounded theory researcher, I used the techniques developed by: Glaser and Strauss (1967), Strauss and Corbin (1998) and Corbin and Strauss (2008). Although these were essential tools for the research, as I became more experienced, I realised that strict adherence to these techniques was having a detrimental impact on my work. I was so focussed on coding the detail of the data, for example, the fact that every participant stated that health was important to them, that I was not exploring the meaning and purpose of what participants were telling me. Consequently, my initial analysis was descriptively rich but conceptually weak, which I found very discouraging. This situation was resolved by working with an experienced grounded theorist, who provided both expertise in the method and experience in its application, and helped me move to a conceptual approach. This initial false start in my development of a grounded theory resulted in much additional work, but was invaluable in understanding the need to look beneath and beyond the manifest
content of data. My recommendation to any novice grounded theorist would be to find an experienced practitioner who is able and willing to offer guidance, insight and empathy when you are struggling to find your way.

As well as working with a grounded theory coach and my supervisors, another strategy I used to monitor the quality and originality of my work was to list as many preconceptions as I could think of that were associated with the developing grounded theory, and periodically check them against my data analysis and write-up. This did not remove the preconceptions and some were relevant to the findings of the data analysis; however, I was able to be more aware of when they were contaminating my work rather than helping to refine it.

11.6.3 Cultural sensitivity

I was aware that my interpretation of participants’ accounts was from a Western cultural perspective and was very concerned that this would result in inauthentic findings and a Western-centric piece of work. I bore this in mind throughout the research process and questioned whether there were alternative interpretations of participants’ interviews and what they meant. However, whilst I was aware that academic conceptualisations of the Western self and the Eastern self are different, with the first being viewed as intradependent and the second as interdependent
(Markus and Kitayama 1991), I had always felt uncomfortable with this, and as I got to know some of the participants, it became clear that we shared more similarities than we had differences. For example, I found myself empathising with many, especially with the experiences of some of the women. That said, there were also differences and I experienced some difficulties during the fieldwork, particularly regarding my lack of Cantonese. In addition to the methodological issues highlighted previously, I found that not being able to always understand what was being discussed at meals and social events resulted in me feeling that I did not belong. Additionally, when going on group visits, for example, to a Chinese arts centre, I felt very conscious of standing out as being different from everybody else. It would be crass of me to assume that my experience was like that of the participants, especially as it was restricted to the fieldwork, where I was welcomed, encouraged to take part in activities, and people made efforts to include me in conversations. Nevertheless, I felt that I gained a limited understanding of feeling as other and that this strengthened my sensitivity as a person and a researcher.

During the course of my research, I met with people who took a different approach to cross-cultural research than I. Some felt that I was guilty of colonialism, and I also faced assertions that as I was not Chinese and had not lived in China, the results of my research would not be valid. To be frank, some of these assertions bordered on
racism, although, interestingly, none came from any person of Chinese heritage or from anybody actively involved in my research. Indeed, in contrast to this, I was made to feel very welcome by the organisations I worked with and by the participants, finding that people were happy to talk to me. I also learnt that, other than asking people to complete questionnaires, nobody from outside the Chinese community had ever asked the participants about what was important in their lives and they were pleased to have an opportunity to make their voices heard. Although I accept that people have different perceptions of cross-cultural research, I was, and am, perturbed by some reactions to my work and wonder if this leads to some researchers being reluctant to undertake cross-cultural studies.

11.6.4 Power in the research relationship

Although I did not view the participants as passive subjects, I was aware of the issue of power within the research relationship and built strategies into the research design to address this. These included: giving participants a choice about the location of their interview and the interpreter, ensuring that they were cognisant that they could refuse to answer any question and could withdraw from the research at any time, could have any data removed, and could receive a copy of the transcript of their interview for editing. Some participants asked me to turn off the recorder during the interview and not to include some utterances in the transcript, but none wanted to
have a copy of the transcript of the recording or asked to edit anything after the interview was complete. On reflection, this may have been due to the transcripts being in English, although provision was made for an interpreter to read the transcript to the participants in Cantonese. Nevertheless, I remain uneasy about this issue and would have preferred to have been able to offer transcripts written in Cantonese; due to the very high cost of having them translated, this was not possible.

11.6.5 Finally

One of the motivations for my research was my father’s experience of cancer and how it affected his quality of life. During his illness, I was perplexed and frustrated at his focus on continuing with his sport, which, at times was to the detriment of everything else. Returning to this, I now understand that it was not the disease per se that reduced his quality of life; rather that it was a consequence of the loss of central aspects of his sense of self which he struggled in vain to preserve. I wish I had known that then.

11.7 Summary

This research investigated the concept of quality of life of older Chinese migrants living in the UK. The findings demonstrate that their sense of self is crucial to their quality of life and is constructed and reconstructed as a result of life events that
challenge it; for these participants, acculturation was identified as a major influence. As belonging, value systems and identity were shown to play a key role in how older migrants actively construct their quality of life, “synthesising self” may also be applied to the development of better focused interventions designed to enhance it.

Cross-cultural and cross-language research presents particular challenges and this research demonstrates that, even with limited resources, it is possible to successfully conduct such studies. The research tested a rigorous design and I offer practical guidance regarding how to address issues related to cross-language and cross-cultural research, making a methodological contribution to this area of study.

Blakemore and Boneham (1994) highlight that, as people who migrated to the UK age, it is important to understand the experience of growing older in a host culture and a place other than ones country of birth. Continuing globalisation raises the priority of achieving this (Phillipson and Ahmed 2006). By providing new insight into what is important in the quality of life of older migrants this research moves the understanding of this issue forward. It also offers a theory – “synthesising self” – that may be relevant to people from other minority groups as they age, and makes recommendations for further research to test and strengthen this theory.
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Appendices
Appendix 1

Demographic questionnaire – Cantonese version
閣下收到這份問卷是因為你將參加本人的博士研究，主題是探索年齡50歲及以上的華人之生 命質素概念。

調查問卷收集有關你的真實資料。你的答案將嚴格保密，但將被用來幫助我們形容參加研究 的人士。如果你不想回答任何問題，請轉到下一題。

1. 你是甚麼年紀

2. 你是:
   女 [ ]  男 [ ]

3. 你是:
   未婚 [ ]  已婚 [ ]  離婚 [ ]  分居 [ ]  喪偶 [ ]

4. 你是與誰住在一起:
   獨居 [ ]  配偶/伴侶 [ ]  孩子 [ ]  家屬 [ ]

5. 你在英國住了多久？ [ ]

6. 在英國，你有住在曼徹斯特以外的其他地方嗎？如果有的話，你在哪裏住了多久？

多謝你的幫忙。
聯絡資料：
英國基爾大學博士研究生欣貝利
Jan Bailey, PhD Student
生命歷程學研究所
Institute for Life Course Studies
Moser Building
Keele University
Staffordshire
ST5 5BG 電話. 01782 584596 流動電話. 07759 869789 (工作)
Appendix 2

Demographic questionnaire – English version
You have been given this questionnaire because you are taking part in my PhD research which is exploring the concept of quality of life held by Chinese people aged 50 and over.

The questionnaire collects factual information about you. Your answers will remain anonymous but will be used to help describe the people who take part in my research. If you would prefer not to answer any questions please move onto the next one.

1. What is your age

2. Are you:
   Female □  Male □

3. Are you:
   Single □  Married □  Divorced □  Separated □  Widowed □

4. Do you live:
   Alone □  With spouse/partner □  With Children □  With extended family □

5. How long have you lived in the UK?

6. Have you lived anywhere in the UK other than in Manchester? If so where did you live and how long did you live there?
Thank you for your help.

**Contact details:**
Jan Bailey,  
PhD Student Institute for Life Course Studies  
Moser Building  
Keele University  
Staffordshire  
ST5 5BG

Tel. 01782 584596  Mobile. 07759 869789 (work)
Appendix 3

Interpreter confidentiality agreement
Interpreter confidentiality and acknowledgment agreement

I have read and retained the information sheet concerning the PhD research being conducted by Jan Bailey. In my role as interpreter for the researcher, I understand the nature of the study and the requirement for information given by the participants to remain confidential.

Please tick in the box as appropriate.

1. Maintaining Confidentiality

☐ I agree not to reveal in any way to any person other than the researcher any data gathered for the study by means of my services as interpreter.

2. Acknowledgement of my services as interpreter

I understand that the researcher will acknowledge the use of my services in any report on the research. I have indicated below whether I wish any acknowledgement be anonymous or by name.

☐ I wish to remain anonymous

OR

☐ I agree that the researcher may use my name when acknowledging use of an interpreter in data gathering.

Name of interpreter: ____________________________

Signature: ___________________________ Date _____________
I have explained the above research and confidentiality agreement to the interpreter and answered all questions.

Researcher Name___________________

Researcher Signature_______________________  Date _______________

**Contact details:**
Jan Bailey, PhD Student Institute for Life Course Studies
Moser Building
Keele University
Staffordshire
ST5 5BG
Tel. 01782 584596  Mobile. 07759 869789 (work)

If you have any queries that I cannot answer or any complaints about the how the research is conducted please contact either my supervisor:

Professor Sian Maslin-Prothero
Professor of Nursing & Dean of the Graduate School
Dorothy Hodgkin Building
Room DH 1.11
Keele University
Staffordshire
ST5 5BG

Telephone 01782 733145
Appendix 4

Ethical approval
8 March 2010

Ms Janet Bailey
RI LCS
CM2.14
Claus Moser Building

Dear Janet,

Re: 'A qualitative exploration of the concept of quality of life held by Chinese elders living in Manchester'

Thank you for submitting your revised project for review.

I am pleased to inform you that your project has been approved by the Ethics Review Panel. One very minor technical point is that on page 2 of the form entitled 'PHD Research Project Consent Sheet' under the sub-header 'Focus group discussion', bullet point 2 and 3 are the same.

Amendments to your project after a favourable ethical opinion has been given must be notified to the Ethical Review Panel. If there are any amendments to your project please contact Nicola Leighton Research Governance Officer
n.leighton@us.keele.ac.uk.

If you have any queries, please do not hesitate to contact Michele Dawson in writing to m.dawson@us.keele.ac.uk

Yours sincerely

M. Dawson

Mrs Sue Brelade
Vice-Chair – Ethics Review Panel.

cc RI Manager
Appendix 5

Agreed interview prompts
Verbal Introduction
Hello my name is Jan Bailey and I am a PhD student at Keele University, Staffordshire. Thank you for agreeing to take part in this interview. The interview should last between one hour and one hour 30 minutes and (name) will translate both my questions and your replies as we go along. If you do not understand any of my questions please say and I will explain further.

You do not have to answer any questions you do not wish to, we can stop the interview at any time you wish and you do not have to give a reason.

The interview will be tape recorded so that I can produce written transcript of what we discussed for use in my analysis.

My research aims to identify and understand what factors Chinese people living in Manchester, who are aged 50 years and over, consider are important in having a good quality of life and what factors they consider detract from having a good quality of life. I am trying to find out what people think is important in having a good quality life so there are no right or wrong answers to my questions. What I would like to hear are you views and opinions about what is important in life.

Before we start the interview, would you like to ask any questions or would you like me to explain anything to you?

Prompts

To begin I would like to discuss some details about you and your life.

Please would you let me know how old you are and how long have you lived in the UK.

Have you lived anywhere in the UK other than in Manchester? If so where did you live?

Do you have any family living in the UK and if so who?

How often do you see them?
How often do you come to the (place name removed) and what do you like about coming here?

*I would like to move onto some questions about what you think is important in life.*

Please describe to me what you think is a good life/a good quality of life.

You have just told me what you think is a good life – what things do you think make that a good life?

What things do you think are important in life?

What do you think would make a good life worse?

Please describe to me what you think is a poor life/a poor quality of life.

You have just told me what you think is a poor life – what things do you think make that a poor life?

What do you think could improve a poor life?

As the research takes a grounded theory approach the interview and thus the interview schedule/questions will develop organically and the answers given by the respondent will be used to frame further questions. For example, should a respondent say that they feel that faith is important in having a good life they will be asked why this is and what it is about having faith/what aspects of faith add(s) to their quality of life; should a respondent say that good health is important what function good health serves will be explored as it may sustain independence, facilitate socialising etc. as it may be these factors rather than good health per se which are important in the respondent’s quality of life.

After each interview the transcript will be analysed to identify emerging concepts which may be common or specific to participants; the interview prompts will be adapted to investigate these concepts and test out the validity of the analysis and the emergent categories. Later interviews will be undertaken to confirm or refute the concepts developed in analysis and will, therefore, be based on those concepts. The final interviews will test out the substantive theory developed.
Appendix 6

Participant information sheet – Cantonese version
我的名字是欣貝利(Jan Bailey)，我是斯塔福德郡基爾大學的一名博士研究生，得到大學贊助和資助本人的研究。這研究項目已經通過基爾大學研究倫理委員會標準批核。

這研究項目
本人正在從事一項研究項目，目的是要確定和瞭解年齡50歲及以上的華人，認為甚麼是優質生活的重要因素和考慮甚麼因素削弱了他們的優質生活。

為什麼你被挑選參與這個研究項目
你被邀參加這個研究是因為本人相信，你將能夠對這研究作出寶貴的貢獻，提供你的個人想法及對生活品質的認識發表意見。

目前為華人進行這種性質研究的數目並不多。雖然我不能保證這研究將直接讓你得到受益，但是我從事這工作是有兩個目標：

1. 讓華人長者有機會發表他們的意見和現有的生活品質資料加以補充。
2. 向為長者提供服務機構提出意見，建議他們可以如何修整來達到曼徹斯特華人社區的需求。
在你決定是否參加之前，最重要的是讓你瞭解這項研究會涉及哪方面。請花一點時間仔細閱讀以下資料或收聽錄音帶中的詳細資料，當中解釋這項研究將會怎樣進行。如有任何不明確的地方，或者如果你想瞭解更多資料，請向本人查詢。由於你需要決定是否想參加，所以請盡量花時間考慮。

研究將如何進行
你將獲得參加這項研究的同意書。如果你選擇參加這項研究，你將被邀出席一個訪問，過程應該為時一至一個半小時。通常都會在一次訪問中完成整個調查。你可能也會被邀請參加一個專題小組討論會，會議應該為時一至兩個小時。訪問和焦點小組討論會中均有一名翻譯員陪同在場，即場會以錄音處理，還由第二名翻譯員收聽這些錄音帶。隨後由錄音帶再抄錄下來。你的身份和其他可以識別你身份的資料將會予以保密。你在訪問及小組討論會中提供的所有回應及引用句均以匿名處理，你也可以選擇一個化名或本人給你挑選一個代號。

你同意通過參加這項研究，提供在最後報告書、出版物、推介、訪問和焦點小組討論會的抄錄與及最後報告書附錄中收集得來的數據和引用句。但你的身份將保持匿名處理。

儲存和保留資料
如果你願意，你將有機會看到你在出席過的訪問和參加過的任何評論焦點小組討論中所提出的評語。你亦可以作出任何更正、補充和修改。
這些訪問和焦點小組討論會的錄音和筆錄均會保留在電腦中及以加密處理。任何記錄副本都會被儲存在一個上鎖的櫃中。

翻譯員
如果你希望有翻譯員在訪問中協助你，我可以為你安排。你可以選擇一位你認識及你希望他為你翻譯的人到場，或者我會為你提供一名翻譯員。請提前讓我你知道你希望得到這安排。

參與
參與這研究項目是完全自願性質，你不一定要參加。如果你決定參加，然後改變主意的話，在出版報告書之前，你可以在任何時間自由退出該項目，已收集了的有關資料將會被銷毀。
如果你決定退出這研究，你是無須提供任何理由，你是不必回答任何你不想回答的問題及可在任何時候要求終止訪問或離開焦點小組討論會。

參加這研究並沒有明顯的風險，但你可能會覺得談論你的生活質素會給你帶來一些困難和/或具有挑戰性的問題。對於這方面，本人並沒有資格給你提供任何意見，但你可能會覺得以下組織會給你提供很好的支持服務：

慧賢社華人婦女會, Wai Yin Chinese Women Society, 1st & 2nd Floor, Mosley Street, Manchester, M2 3HZ
電話號碼 0161 237 5908
如果你對這研究的運作方面有任何本人無法回答的疑問或有任何投訴，請聯絡本人的上司。
西安馬斯林-普羅西羅教授
Professor Sian Maslin-Prothero
基爾大學護理教授及研究院院長
Professor of Nursing & Dean of the Graduate School
Dorothy Hodgkin Building
Room DH 1.11
Keele University
Staffordshire
ST5 5BG
電話 01782 733145
或者

基爾大學研究治理主任尼古拉頓小姐
Miss Nicola Leighton
Research Governance Officer
Dorothy Hodgkin Building
Keele University
Staffordshire
ST5 5BG
電話 01782 733306

多謝你抽空閱讀這些資料。如果你有意索取進一步資料或有任何疑問，我的聯絡資料是

英國基爾大學博士研究生欣貝利
Jan Bailey
PhD Student
生命歷程學研究所
Institute for Life Course Studies
Moser Building
Keele University
Staffordshire
ST5 5BG電話. 01782 584596 流動電話. 07759 869789 (工作)
Appendix 7

Participant consent form – Cantonese version
生命歷程學研究所
Research Institute for Life Course Studies

博士研究項目同意書
PhD Research Project Consent Sheet

研究員: 英國基爾大學博士研究生欣貝利 (Jan Bailey)

研究項目的目的
研究的目的是要確定和瞭解生活在曼徹斯特年齡50歲及以上的華人，他們認為甚麼是優質生活的重要因素，考慮甚麼因素削弱了他們的優質生活。將通過訪問和焦點小組來收集資料和錄音。你的身份和任何可以識別你身份的資料均會予以保密。

為你提供的資料和/或給你收聽的錄音帶均具備這研究的所有細節。

參與者同意書
簽署此表格，本人確認:

1. 本人已經收到有關這項目及其目的的足夠資料，亦有機會考慮當中的資料、提出問題和得到滿意的答案。

2. 本人確認已經閱讀及明白上述研究的資料(附上的版本3.1副本)或已經收聽及明白錄音版本。

3. 據本人所知，我是自願參與，可以在任何時候及無須說明理由退出該項目。
4.
本人知道我的姓名及其他個人資料會得到絕對保密，除非本人同意允許將資料用於出版物中。

請√上適當的答案:

訪問

● 本人很樂意參加個別訪問。 □

● 本人明白這訪問將會被錄音。 □

● 本人同意由第二位翻譯員收聽該錄音帶。 □

● 本人同意將我在訪問中所提供的資料用於研究博士論文、推介、報告和出版物中(除去姓名和個人資料)。 □

● 本人同意將訪問中的引用句用於研究博士論文、推介、報告和出版物中(除去姓名和個人資料)。 □

焦點小組討論會

● 本人很樂意參加焦點小組討論會。 □

● 本人明白焦點小組討論會將會被錄音。 □

● 本人同意由第二位翻譯員收聽該錄音帶。 □

● 本人同意將我在焦點小組討論會所提供的資料用於研究博士論文、推介、報告和出版物中。 □
版物中(除去姓名和個人資料)。

- 本人同意將小組討論會中的引用句用於研究博士論文、推介、報告和出版物中(除去姓名和個人資料)。

參加者姓名__________________________

參與者簽名__________________________日期______________

本人曾向參與者解釋上述研究及同意書，還回答了所有問題。

研究員姓名__________________________

研究員簽名__________________________日期______________

聯絡資料：

英國基爾大學博士研究生 欣貝利
Jan Bailey, PhD Student
生命歷程學研究所
Institute for Life Course Studies
Moser building
Keele University
Staffordshire
ST5 5BG 電話. 01782 584596 流動電話. 07759 869789 (工作)

如果你對這研究的運作方面有任何本人無法回答的疑問或有任何投訴，請聯絡本人的上司:

西安馬斯林 -普羅西羅教授
Professor Sian Maslin-Prothero
基爾大學護理教授及研究院院長
Professor of Nursing & Dean of the Graduate School
Dorothy Hodgkin Building
Room DH 1.11
Keele University
Staffordshire
ST5 5BG
電話 01782 733145
Appendix 8

Participant information sheet – English version
PhD Research Project Information Sheet

Researcher
My name is Jan Bailey and I am a PhD student based at Keele University in Staffordshire, which is sponsoring and funding my research. This research project has been given ethical approval by the Keele University Research Ethics Committee.

The Research Project
I am undertaking a research project, which aims to identify and understand what factors Chinese people living in Manchester, who are aged 50 years and over, consider are important to having a good quality of life and what factors they consider detract from a good quality of life.

Why you have been chosen to take part in this research project
You are being invited to take part in this research because I believe that you will be able to make a valuable contribution to this study by giving your personal ideas and understanding about quality of life.

There has been very little research of this nature undertaken with Chinese people and, although I cannot promise that this research will directly benefit you, I have two aims in undertaking this work:

1. To give older Chinese people the opportunity to have their opinions heard and add to the existing information about quality of life.
2. To make recommendations to organisations, which provide services to older people, regarding how they may tailor these to meet the needs of the Chinese community in the Manchester area.

Before you decide whether you would like to take part it is important for you to understand what it will involve. Please take time to read the following information or listen to the audio tape which detail how the study will be done. Please ask if there
is anything that is not clear, or if you would like more information. You may take as much time as you need to decide whether or not you wish to take part.

**How the research will be done**

Your written consent to participate in the study will be obtained. If you choose to participate in the study you will be asked to take part in an interview which should last between one hour and one and half hours and will usually be completed in one session. You may also be asked to take part in a focus group discussion, which should last between one and two hours. The interviews and focus groups will be tape recorded and carried out with the aide of an interpreter, a second interpreter will also listen to some of the tape recordings. The tape recordings will be transcribed afterwards. Your identity and any other information, which may identify you, will be kept anonymous. All your responses and any quotes used from your interview and the focus group discussions will be anonymous and you can either choose an assumed name or I will assign you one.

By participating in this research you are giving consent for the data gathered and quotes to be included in the final report, publications and presentations and for the full transcripts of interviews and focus groups to be included in the appendices of the final report. However, your identity will remain anonymous.

**Storing and retention of information**

If you wish, you will be given the opportunity to read the transcript of your interview and your comments in any focus group discussion you take part in and you can make any amendments, additions and alterations you wish.

The recordings and transcripts of the interviews and focus group discussions will be kept on a computer and will be password protected. Any hard copies of the transcripts will be stored in a locked cabinet.

**Interpreter**

If you would like an interpreter to assist with the interview this can be arranged. You can either choose a person you know who you would like to interpret for you or I will provide an interpreter. Please let me know in advance which you would prefer.

**Participation**

Taking part in this research project is entirely voluntary and you do not have to take part. If you decide to take part and then change your mind later, you are free to
withdraw from the project at any time up to the production of the report and any information which has been collected from you or about you will be destroyed. You do not have to give any reason if you decide to withdraw from the research. You do not have to answer any questions you do not want to and you can ask to stop the interview or leave the focus group discussion at any time.

There are no obvious risks from taking part in this study, however, you may find that talking about your quality of life raises some difficult and/or challenging issues for you. I am not qualified to advise you about this but you may find the following organisation a good source of support:

Wai Yin Chinese Women Society, 1st & 2nd Floor, Mosley Street, Manchester, M2 3HZ
Telephone number 0161 237 5908

If you have any queries that I cannot answer or any complaints about the how the research is conducted please contact either my supervisor:

Professor Sian Maslin-Prothero
Professor of Nursing & Dean of the Graduate School
Dorothy Hodgkin Building
Room DH 1.11
Keele University
Staffordshire
ST5 5BG

Telephone 01782 733145

Or

Miss Nicola Leighton
Research Governance Officer
Dorothy Hodgkin Building
Keele University
Staffordshire
ST5 5BG

Telephone 01782 733306

Thank you for taking the time to read this information sheet. If you would like any further information or have any queries my contact details are:
Jan Bailey
PhD Student
Institute for Life Course Studies
Moser Building
Keele University
Staffordshire
ST5 5BG
Tel. 01782 584596   Mobile. 07759 869789 (work)
Appendix 9

Participant consent form – English version
PhD Research Project Consent Sheet

**Researcher:** Jan Bailey, PhD student at Keele University, Staffordshire.

**The Aim of the Research Project**

The research aims to identify and understand what factors Chinese people living in Manchester, who are aged 50 years and over, consider are important to having a good quality of life and what factors they consider detract from a good quality of life. Information will be collected via interviews and focus groups, which will be audio taped. Your identity and any other information which may identify you will be kept anonymous.

Full details of the research are given on the information sheet you were given and/or on the audio tape you listened to.

**Participant Consent**

1. In signing this form I confirm that: I have received sufficient information about the project and its aims and I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.

2. I confirm that I have read and understand the information sheet (version 3.1 copy attached) for the above study or listened to and understood the audio taped version.

3. I understand that my participation is voluntary that I can withdraw from the project at any time without giving a reason.

4. I understand that my name and other personal details will be treated anonymously unless I give permission for them to be used in publications.
Please tick as appropriate:

**Interview**
- I am happy to take part an individual interview. □
- I understand that the interview will be audio taped. □
- I give my consent for a second interpreter to hear the audio tape. □
- I give my consent for the information that I give in the interview to be used in the researcher’s PhD thesis, presentations, reports and publications (except for names and personal details). □
- I give my consent for quotes from the interview to be used in the researcher’s PhD thesis, presentations, reports and publications (except for names and personal details). □

**Focus group discussion**
- I am happy to take part in the focus group discussions. □
- I understand that the focus group discussions will be audio taped. □
- I give my consent for a second interpreter to hear the audio tape. □
- I give my consent for the information from the focus group discussions to be used in the researcher’s PhD thesis, presentations, reports and publications (except for names and personal details). □
- I give my consent for quotes from the focus group discussions to be used in the researcher’s PhD thesis, presentations, reports and publications (except for names and personal details). □
Participant Name ______________________

Participant Signature________________________  Date ______________

I have explained the above research and consent form to the participant and answered all questions.

Researcher Name__________________________

Researcher Signature________________________  Date ______________

Contact details:
Jan Bailey, PhD Student
Institute for Life Course Studies
Moser building
Keele University
Staffordshire
ST5 5BG
Tel. 01782 584596  Mobile. 07759 869789 (work)

If you have any queries that I cannot answer or any complaints about the how the research is conducted please contact my supervisor:

Professor Sian Maslin-Prothero
Professor of Nursing & Dean of the Graduate School
Dorothy Hodgkin Building
Room DH 1.11
Keele University
Staffordshire
ST5 5BG
Telephone 01782 733145
Appendix 10

Invitation letter – Cantonese version
敬啟者：

我的名字是欣貝利(Jan Bailey)，我是斯塔福德郡基爾大學的一名博士研究生。本人聯絡你是因為我正在從事一項研究，目的是要確定和瞭解年齡50歲及以上華人認為甚麼是優質生活的重要因素，我希望得知你對這方面的意見。雖然我不能保證我的工作將直接讓你得到受益，但我希望能夠提出一些如何改善服務的建議，來達到華人長者的所需。

附上的資料和/或給你收聽的錄音帶均具備這項研究的所有細節。如果你希望獲取進一步資料或對我的工作有任何疑問，我的聯絡資料如下，本人亦會定期前往常樂日中心。

此致，

欣貝利(Jan Bailey)

聯絡資料：

英國基爾大學博士研究生欣貝利
Jan Bailey, PhD Student
生命歷程學研究所
Institute for Life Course Studies
Moser Building
Keele University
Staffordshire
ST5 5BG
電話: 01782 584596
流動電話: 07759 869789 (工作)

如果你對這研究的運作方面有任何本人無法回答的疑問或有任何投訴，請聯絡本人的上司：

西安馬斯林 - 普羅西羅教授
Professor Sian Maslin-Prothero
基爾大學護理教授及研究院院長
Professor of Nursing & Dean of the Graduate School
Dorothy Hodgkin Building
Room DH 1.11
Keele University
Staffordshire
ST5 5BG
電話 01782 733145
Appendix 11

Invitation letter – English version
Invitation to take part in a PhD research project.

Dear,

My name is Jan Bailey and I am a PhD student at Keele University in Staffordshire. I am contacting you because I am undertaking research which aims to identify and understand what things Chinese people aged 50 and over consider are important to having a good quality of life and I would like to know your views about this. While I cannot promise that my work will directly benefit you, I hope to be able to make some recommendations regarding how services may be better shaped to meet the needs of Chinese elders.

The full details of the research are given on the information sheet attached and on an audio tape you can listen to. If you would like any further information or have any questions about my work my contact details are below and I will also be visiting the Sheung Lok Day Centre on a regular basis.

Yours sincerely,

Jan Bailey

Contact details:

Jan Bailey, PhD Student.
Institute for Life Course Studies
Moser Building
Keele University
Staffordshire
ST5 5BG
Tel. 01782 584596
Mobile. 07759 869789 (work)
If you have any queries that I cannot answer or any complaints about the how the research is conducted please contact my supervisor:

Professor Sian Maslin-Prothero  
Professor of Nursing & Dean of the Graduate School  
Dorothy Hodgkin Building  
Room DH 1.11  
Keele University  
Staffordshire  
ST5 5BG

Telephone 01782 733145
Appendix 12

Excerpt from coded transcript
JB You also mentioned about money and material things
like a house and a car. How important do you think....

INT That is not very important to me at all! *Personal Values

JB OK

INT To be honest to you but there is an old Chinese saying
that says, well not old but the common Chinese saying
is “money is nothing but without money you can’t do
anything”

(Left) => (Cultural Value)

(Laughter)

JB Yeah.

INT Yes in a way that, but saying that I am a very, I get *Personal
contented very easily.

JB Right OK

INT If I’ve got sufficient, I don’t ask for more. *Personal

JB Uh huh I understand

INT So if I have enough for me to eat, to keep me warm and
I’m satisfied. I don’t need to chase for a beautiful house
or a luxurious car or whatever, I don’t I don’t.

JB Uh huh, so that’s not important to you?

INT Not important to me at all. No, no. If I have a car, a
basic car is sufficient for me That’s, if it serves the
purpose that’s it.

JB Yeah

INT You know a house, a simple house is good for me. You
know just a shelter.

JB Yeah

The importance of contentment are being happy with
having enough. What you have has emerged from
client services, having more now you need concerns
being greedy, sinful, wrong. Being content and grateful is
viewed positively. This information suggests that race
is not merely a personal value and is influenced
by various factors. But culture seems to be the dominant
factor.
And then I'm satisfied because a lot of people they don't have shelter, they don't have room, a single not a room even to live in. So I am contented.

Uh huh so for...

For me it is not that important.

Is having enough...

Having enough is good for me. I am thankful if I have that.

Yeah, OK. You tell me that your religion gives you a purpose in life.

Yes

And I know that you also help out with activities at (place)

Yes I do.

Do you enjoy doing that?

Oh yes! Because it is voluntary work if I don't enjoy it I won't go again and help them.

Uh huh

For doing that is because a lot of the Chinese people in this country, especially the elderly ones, well not only the elderly to be honest some women as well, language is their problem. And they can't actually because of the language problem they can't actually have even join the other groups for activities.

Ah right, yeah.

So that's why (place) set up for these minority people and I find that if I contribute some of my time to you known do something to, for their benefit and so why not. So that's why I do enjoy doing that.

Uh huh so is that the helping other people?
INT Yes

JB OK

INT Yes yes. In church as well too, I actually taught on the Chinese school of a long, for many, many years.

JB Uh huh.

INT Yeah. For the children, little children. I taught them Chinese and eventually A levels, GCSE and that sort of level. I taught them for many, many years it is because the reason why the church actually set up a Chinese school is because they found that the kids, you know in this country when they were born here and after they have gone to school they don’t want to speak to the parents at all in Chinese. You see?

INT But unfortunately that generation the parents do not speak English. Now, the kids themselves speak English and they can’t communicate. So that’s why we taught them Chinese so that they can communicate with the parents.

JB Oh right, uh huh

INT For the parents we, we have in the church we have English corners so that we can teach them English but unfortunately the parents, most of the parents need to work and they can’t study in a way, they can’t join the class. So we tell the children here how to, actually they get along, they get along with the English people quite well but they don’t, sometimes they find themselves and also sometime some kids find themselves, when I say they get along well with the English people, some of them some don’t

INT So do you think it is important to be active in the community and the church?
INT  Yes
JB  Uh huh
INT  Yes yes in a way that, because when you say active
that would be helping each other wouldn’t it?
JB  Uh huh
INT  I think that one needs friends, needs people around
you, needs help.
JB  Uh huh
INT  So yes I find that, err.
JB  So do you socialise a lot?
INT  (laughs) I do!
JB  Do you?
INT  I do. (laughter)
JB  What do you enjoy doing?
INT  I meet my ex-colleagues and then we will arrange
meetings. And then catch up with each other about
what we do and all that.
JB  Mmm mm
INT  Yes I am quite an active person. Yes, I love keeping
friendships. So we still have good friends. A lot of
good friends, from school time when we were young.
JB  Oh right yeah, yeah. So you’ve kept friends for a long
time
INT  Yeah long time yes. We have got lots of ex-colleagues
and whatever, so whenever I go to Canada we have a
big group there, America we have a big group there.
Proximity is no barrier—neither is time.
Hong Kong we have a big group there so wherever we go we have big meetings and I really enjoy.

Uh huh that's great. So you have friends all over the world?

Friends all over the world, yes.

Uh huh OK so you obviously do your best to keep in touch with them?

Yes I try to (laughs) not very often sometimes though we have just got too many but at least once a year you keep in touch.

Uh huh what is it that about having good friends that you think is important to your life?

(laughs) Friends are, friends are people that you can talk to and that you can listen to and we can be encouraging each other. Comforting each other when we are in need. I think friends are very important, very important I don't think a singleton person, they can survive, but they, I don't think they enjoy life.

Ah right. Yes I understand what you are saying that there is a difference between survival and having a good quality of life!

Which is kind of what I'm investigating really because as you say there is a difference there isn't there?

Yeah

And for each person it is going to be individual for what that is.

Yes.

That's really interesting. What about family, do you think family is important?

Family is important yes.
Family is important um and there again family is really somebody you can talk to and listen to. But we, I've got a very big family still around.

Right yeah

I've got lots of brothers and sisters.

Have you?

And all over the world as well but we still keep in touch. In a way that, we talk over the phone for hours and like that so.

uh huh and you were talking about making sure that the younger and the older people at the church are able to communicate.

Yes

Do you think that relationships between the generations is important?

Yes, of course because if the parents cannot talk to the children so they will be very frustrated so a lot of the parents want the children to know the Chinese language and also know the culture.

Right

Because when they are brought up here they don't know anything about the culture the Chinese culture. So we try our best to just tell them a bit of what the culture is.

Uh huh

But we try to relate that to the English culture as well. Not only say that you Chinese should know Chinese, no because if you live in this society, if you live in this country you need to merge with others. So and I think
Integration

they should relate themselves with the English people. Especially sometimes when we would teach the and we say “look, some ways are the Chinese way and some ways are the English way and then you tell which one is better” some of things of course we have it are better one way or the other but you should pick up the good things but if you see something which is not good enough well just pick up the good ones. Tell what is better for you.

JB I’m with you. So do you think that it is important to integrate into the society where you are living?

INT Yeah. Definitely yes

JB Why is that?

INT If you don’t integrate into the society you are living in you are causing problems as well?

JB Right OK uh huh

INT I think one should. We should all do that. Although we, we I’m a Chinese of course and I do a lot of things in the Chinese way but some of the ways and some of the things I do is not the Chinese way. You see? It is the English way.

JB Right, OK

INT Say for example for the Chinese we are very closely linked with the family. And anything your family comes first and we, we respect our parents and the older generation we do respect them. It’s funny because English people if you get married you will perhaps you will call your in law sometimes dad but sometimes you call them their names. But we never call our parents or the older generation their names. We will respect them and call them uncle whatever or, dad or mum or whatever because if we call their names they say that we don’t respect.

JB Ah right.
INT So but within the same generation of course we call ourselves by name.

JB I understand, so some ways, you talk about there’s some Chinese ways you follow and some English ways that you follow. Do you think that are traditional Chinese values important to you?

INT Tradit... it depends some of the things are some are not. The mix of things and ideas.

JB Right OK

INT Do you know that like Chinese they before they like kneel down and bow, kow tow I don’t know whether you have heard that name or not, bow to, that means you kneel down and bow.

JB Uh huh yeah

INT Now I don’t do that!

JB Right uh huh

INT I refuse to do that and I think that if I bow I will only bow to my god. You see if I kneel down, I kneel down for my god so because um, that bow that means worship you know for the Chinese.

JB I know yeah

INT It is a worshipping. That’s why I am not saying that the bowing bit is, is not right it’s the worship bit.

JB I’m with you it goes along with the worship bit.

INT Yeah it goes along with the worship, that’s why if I bow in the Chinese way it means worship and I won’t do that. Because if I worship I only worship god.

JB Uh huh yeah.

INT Do you know like English people they also bow, they give a bow but that is not worship you see? It is a courtesy.

Tension between heritage values + traditions and faith related values. Evidence of rejecting cultural values and culturalization regarding some aspects of culture. Why are some cultures preserved and others rejected? Migration modernization? Would
Appendix 13

Memo about health
Health

Why is health so important to everyone interviewed?

- Participants view having poor health as very limiting – there is no talk about having a good quality of life despite having poor health.
- There is a fear of dementia and participants do many things to ward it off.
- Participants use many strategies to try and keep physically healthy – diet, exercise, health checks, getting enough sleep.
- Participants’ accounts show they construct themselves as being healthy even when they are not. If they are not healthy/have a disability they obfuscate or use denial.
- What purpose/s does health have for the participants apart from feeling well?
  - Being healthy is very important to participants and is often linked with activities, carrying on doing things and not needing help from others.
  - Does being healthy help retain participant’s self identity as an autonomous independent person and avoid being a burden?

This is about sense of self and identity as a healthy and/or independent person rather than just the actual issue of health or illness.
Appendix 14

Memo about Maslow’s needs hierarchy
<table>
<thead>
<tr>
<th>Maslow’s Hierarchy of Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>There is evidence within participants’ accounts which can be associated with Maslow’s Hierarchy of Needs:</strong></td>
</tr>
<tr>
<td><strong>Basic needs</strong> are very evident and participants talk about having the “basics” i.e. food, clothing and shelter which correspond to the physiological needs. This remains important though even when satisfied.</td>
</tr>
<tr>
<td><strong>Safety needs</strong> – adhering to UK mores, law and order, fear of crime and concern about antisocial behaviour.</td>
</tr>
<tr>
<td><strong>Social needs</strong> - Love and belonging participants talk about family and friends, integrating into the UK. Family harmony is paramount and participants will sacrifice things to avoid conflict with their family. They nurture relationships by keeping in touch with, and visiting friends and family in the UK and abroad. The social needs are therefore satisfied by relationships within and outside of the UK – transnational relationships with family and friends are important.</td>
</tr>
<tr>
<td><strong>Esteem</strong> – there are many references to respect for others but not much about expecting respect or pride in personal achievement.</td>
</tr>
<tr>
<td><strong>Self actualisation</strong> - developing throughout life is important and people talk about learning new skills etc but this is in the context of their voluntary work and helping others in their community as well as avoiding burdening others. The pure sense of self actualisation is weak.</td>
</tr>
<tr>
<td><strong>Self transcendence</strong> - doing things for others is most important participants talk about voluntary work, helping family and friends, teaching and nurturing the next generation.</td>
</tr>
<tr>
<td><strong>Is there evidence of a pre-potent hierarchy?</strong></td>
</tr>
</tbody>
</table>
Appendix 15

Memo about a methodological issue
My impact as a researcher

Participants have praised the UK government, e.g. saying that the government treats them well. Do they think this or is there something else happening? This may be an example of socially desirable responding or demand characteristics. Are participants telling me what they think I want to hear?

I discussed this with G (interpreter) who thinks that participants may believe that I work for the UK government. Not illogical given that I am white British, provided paperwork with the Keele logo etc which uses formal language and says that I am funded by the university. This is an illustration of how data is constructed by the researcher and participants.

We agreed that G will ensure that participants are informed that I am not employed by the government and re-inforces that they will not be identified by name.

**Be alert for socially desirable responding.**
Appendix 16

Conceptual memo about citizenship
Citizenship memo

How valid is the category “citizenship”? It has a lot of properties but they don’t seem to fall discretely into the concept of citizenship and also seem represent other aspects of people’s experience.

People do refer to themselves in the context of being a citizen but this is in different contexts:

About being a British national, having the right to abode, the right to work, experiencing racism, believing it is important to integrate into society, changing to fit in with UK society.

This is more representative of Belonging.

Having rights - access to public services such as the NHS and education, being entitled to benefits e.g. retirement pension, bus passes, having the vote, freedom to worship.

Having responsibilities - obeying laws, paying tax and NI, contributing to society.

Teaching children the importance of following rules and the law.

Only taking what they feel they are entitled to and being aware of limited resources which they say should be fairly distributed.

Being annoyed with people who don’t work and who they perceive as not contributing to society but taking in the form of benefits. Being annoyed at government cuts.

This is representative of people’s values, and a belief in fairness and about the importance of a social contract that is adhered to by all parties.
Appendix 17

Storyline memo
People were asked about what was important in having a good QOL and their answers, whilst referring to specifics such as health and family, were around how they dealt with these issues (or not) and integrated (or not) the resolutions into their sense of self. There was the issue of reconciling changes with their existing sense of self and how these were: incorporated, rejected, offset.

This is about people dealing with changes in their lives and the strategies they use to handle that change. Time and place (as contingencies and context) are important. Participants are dealing with issues such as: ageing and the impact that has on self, and transitions for example: becoming a grandparent, retiring and migration.

Competing aspects of self are being played out and dealt with. There were issues affecting self such as – who am I now, am I still Chinese, am I British, am I neither, or am I both? This impacts on where the individual feels they belong or are allowed to belong. The private and the social self are both involved.

Values change with time and place – there was a lot of talk about traditional values e.g. some participants called them “old fashioned”. Some values were rejected but others were retained e.g. respect. These issues affect sense of self. They threaten existing self but also offer hope of new beginnings, of growth and second chances.

Participants are trying to deal with the issues and resolve them in the best way possible for them. This means that they have to integrate changes into their existing sense of self in such a way that they do not lose continuity, so that they still know who they are, where they belong and what is important to them. Or they can reject the changes and retain an enduring unchanged sense of self. However, at some point issues have to be faced and cannot be rejected. I think here of a decline in health and facing mortality.

What is coming through is that people are juggling and balancing aspects of their sense of self in relation to what is going on in their lives with the aim of constructing an integrated sense of self. This is important as our sense of self enables us to know who we were, who we are and envisage who we may become. It provides a link with the past present and future. We know where we belong, who we belong with, what is important to us and what is not.

I am back to my very first gut feeling about what was happening i.e. a process of balancing old and new BUT I am now able to understand what is being balanced, why and how.
Appendix 18

Pen portraits of participants
Sara
Sara has lived in the UK for 29 years, she lives in a flat in the inner city and is unmarried. Sara was a successful businesswoman in her homeland; however, events resulted in her losing her business and moving to the UK. She has health problems, which intermittently affect her mobility and lead to pain, although she does not allow these to influence her positive self-image as a strong and independent woman. A devout Buddhist Sara believes strongly in the power of prayer and prays daily for other old people to be healthy and for a harmonious world. She enjoys meeting friends at a local community centre and the casino, and playing Mahjong.

Lesley
Lesley has lived in the UK for over 10 years, she is married and lives with her husband and has grandchildren who she sees regularly. The couple live on their state pension and Lesley is unable to speak English; this severely limits her independence, as she is reliant on interpreters to attend appointments and to translate documents. She does a range of activities at a local community centre and enjoys meeting and chatting with her peers, art and handicrafts.

Keith
Keith came to the UK 32 years ago; he is married with two adult children and is hoping to be a grandfather in the near future. Keith used to run his own catering business but has retired and is looking forward to having more time to himself. He attends events at a local community centre and enjoys dancing which he and his wife also do in the evening. Keith asked for an interpreter for his interview but as he became more confident during the interview, he began to use English.

Elizabeth
Elizabeth is a widow who lives alone in social housing in the inner city; she relies on welfare benefits and struggles to pay her bills. Her husband worked in the catering industry and when he died Elizabeth was left alone in the UK and unable to speak English. Outreach staff from a local Chinese organisation visited her and she now attends a luncheon club and is involved in numerous activities including: tai chi, art, crafts, swimming and going on day trips. Elizabeth is a Buddhist and believes in the power of prayer and that positive thinking is essential for physical and mental well-being.

Anna
Anna came to the UK from Hong Kong 45 years ago with her husband and children; she speaks Cantonese, Mandarin and English. Anna is a widow and has adult children and many grandchildren. All her children have successful careers and some
live at a distance, although they are in frequent contact and Anna visits them and they her. Anna is fiercely independent, drives herself wherever she needs to go and lives alone. She regularly takes part in activities at a local community centre, teaches children at a school near her home to write Chinese characters and is a skilled needle worker. Anna does have some health problems but as much as possible she refuses to let them affect her life.

**Helen**
Came to the UK 32 years ago is divorced and has children and siblings living nearby who she sees often. She used to live with her children but moved out to her own flat to live independently. She speaks little English and is taking language classes as well as employment focussed training courses, as she wants to integrate more. She is a devout Buddhist and she follows its teachings to guide her life and explain why things take place. She practices Tai Chi daily.

**James**
James has been in the UK for 40 years; he lives with his wife and has grown up children and young grandchildren. His siblings also live in the UK and as the head of his family James ensures that they all get together regularly. James speaks excellent English and is a semi-retired professional person. He is well educated, a strong advocate for the value of education, and ensured that his children had the opportunity to succeed at school and university. James has an interest in politics and he believes that the family is crucial in building a good society. He enjoys keeping in touch with friends and family and exercising, especially enjoying walking.

**Belinda**
Belinda moved to the UK 35 years ago, has never married and lives alone in her own home. She has family in the UK and across the world with whom she keeps in touch, telephoning and visiting them. She is very active and takes care of her health, eating healthily and exercising. Belinda has a strong Christian faith; she raises funds for her church and runs Bible classes. Well educated she is able to move between English and Cantonese with ease and for many years taught the children of Chinese families to speak Cantonese and about Chinese culture. Belinda realises and acknowledges that she has changed in respect to some Chinese traditions since moving to the UK; some she retains but others she has rejected.

**Joan**
Joan came to the UK 30 years ago and has just retired; she speaks both Cantonese and English. Joan is married and has two children who have left home and have their own businesses. She has family and friends in the UK and elsewhere in the world.
with whom she keeps in touch. Joan enjoys the company of others and attends events at a local community centre; she takes a positive approach to life, is full of fun and avoids being with people who are negative. She believes in independence and self-reliance and has planned carefully for retirement seeing it as an opportunity for more freedom.

**Graham**
Graham has lived in the UK for 50 years, coming to the UK as an economic migrant. He speaks both Cantonese and English and lives with his wife in a middle class suburb. The couple has adult children and grandchildren who live nearby and Graham and his wife see frequently. An outgoing and friendly person Graham looks very much younger than his age and is very active. He still works part time three mornings a week and enjoys do-it-yourself, painting and decorating the family home and woodwork. He also runs activities at a local community centre.

**Alice**
Alice left her homeland as a refugee and has been living in the UK for 15 years. She is widowed and has adult children, who are both in successful careers, and grandchildren, she lives alone in a middle class suburb. Alice is very well educated and speaks Mandarin and English; she is retired, although she does some part time work occasionally. Alice is in poor health but remains active and takes part in numerous social activities; she would also like to do some voluntary work but is restricted by her health. She is both Buddhist and Christian and is a deep thinker with a desire for harmony and fairness and a fear of social discord and prejudice.

**Vanessa**
Vanessa came to the UK 33 years ago with her husband and sons for her sons’ education. Her sons have grown up and are successful professionals and she has several grandchildren. Vanessa speaks Cantonese and English and lives in a middle class suburb; she used to run her own business but is now retired. Vanessa looks after her health by exercising and eating healthily and looks much younger than her years. None of her wider family live in the UK and she visits them in Hong Kong and elsewhere in the world. Vanessa has many friends and enjoys a range of activities and travelling.

**Peter**
Peter came to the UK with his wife 30 years ago; he has adult children and is looking forwards to becoming a grandparent. He runs his own catering business that he built from scratch and works very long hours believing it is important to be self-reliant. In his limited leisure time, Peter enjoys jogging, playing computer games and visits the
local casino to meet his friends. Peter asked for an interpreter for his interview but also answered some questions in English.

**Debbie**
Debbie has lived in the UK for 29 years with her husband and has one child who has now left home. She mainly speaks Cantonese and has learned some English, has her own home and car and is in excellent health. Debbie is very active, attends activities at the local community centre, and has many friends at the community centre and the casino with whom she likes to socialise. Debbie would like to find a job to be more independent.

**Penny**
Penny is a slightly built woman who displays a great deal of inner strength that she has gained due to traumatic events in her life. She came to the UK 15 years ago, has two children who have left home and she lives with her husband in an affluent suburb of the city. Penny works in the catering industry and does voluntary work, teaching children to speak Cantonese, which she enjoys very much. She also helps several members of her family with their businesses. Penny believes that age should be no barrier to personal development and would like to enter further education.

**Wendy**
Wendy came to the UK 19 years ago and lives with and cares for her elderly mother. She has two adult children who live in the UK. Wendy is a well educated professional who also does voluntary work with several organisations. She speaks Cantonese and English and enjoys a number of hobbies including golf and walking which she does to maintain her health; she is also a strong proponent of positive thinking. She is fiercely independent and recognises that she has let go some of her cultural heritage but accepts this as a result of time and acculturation.

**Pauline**
Pauline has lived in the UK for over 30 years, she is married and came to the UK with her family who were economic migrants and worked in the catering industry. She has parents, siblings and other relatives in the UK, although they do not live near to her. Pauline is a well educated professional who speaks Cantonese and English. In the past, she has suffered from illness and now eats well and exercises to keep as healthy as possible. Pauline has a desire for fairness and has a strong Christian faith that has sustained her throughout her life and she regularly attends church where she has many friends.
**Teresa**
Teresa is quietly spoken and looks much younger than her chronological age. She is married with grown up sons and lives with extended family and is in regular contact with family and friends both within and outside the UK. Teresa has chronic pain that limits the things she can do but she remains independent. She is a well educated professional who believes in positive thinking and has a strong Christian faith that has helped her deal with bereavement. She also enjoys hobbies including walking and art, and relishes change enjoying the challenge of learning new things.

**Robert**
Robert has lived in the UK for seven years, is married, and has children living with him. He is well educated with a good job, although this is not in the same profession he followed before he migrated, and speaks English well, although he does not feel confident about this. Robert keeps in touch with friends and family outside the UK via web chatting and social media sites; he feels unsettled in the UK and wishes to return to Hong Kong. Robert enjoys keeping fit and eats healthily, he also has a strong Christian faith and these values guide his daily life.

**Gail**
Gail is divorced and lives alone in a disadvantaged neighbourhood, which has crime and antisocial behaviour. She has lived in the UK for 19 years and speaks Cantonese but no English. She used to work in the catering industry and has now retired. Gail has had a difficult life in the UK and has experienced both racism and discrimination as well as physical and verbal abuse. She is a devout Buddhist and follows its teachings in her daily life; this has enabled her to take a stand against local criminals.

**Carol**
Carol has lived in the UK for over 30 years, is a widow with adult children. She used to live with family but prefers to live alone so moved out and now lives alone. Carol speaks Cantonese and very little English. She has good friends and enjoys meeting and chatting with them. She also enjoys being in the countryside and finds being there relaxing. She is in good physical health and exercises and eats healthily, however in the past she has suffered from stress and now counters that with positive thinking.

**Sheila**
Sheila has lived in the UK for almost 40 years; she is a widow and lives alone. She has adult children and grandchildren but they do not live near to her, however she keeps in touch with them via Skype and the telephone and they visit her at least annually. Although she does speak English, Sheila requested to be interviewed in
Cantonese. She is very healthy and looks much younger than her age; she is also very fit and runs for one hour every day, practises Tai Chi and believes in positive thinking. Sheila has many friends and enjoys socialising, chatting and playing Mahjong, and does voluntary work in the Chinese community.

Louise
Louise is widowed and lives alone in a disadvantaged neighbourhood, she has adult children but only one lives nearby, although she has many close friends. She relies on state benefits and has to be careful with her money. Louise speaks Cantonese but no English and this limits her independence as she relies on people to interpret for her in many situations, although she is able to do her own shopping. She also has a number of health problems but remains active and enjoys Tai Chi and socialising with her friends. Louise believes that positive thinking is important in maintaining physical and psychological well being.

Verity
Verity is widowed and has one teenage daughter who is in full time education. She has lived in the UK for 30 years and has no other family members in the country. Verity has not been able to learn English; this makes her day-to-day life difficult as she has to rely on others to interpret for her. Verity is in poor health and suffers from chronic pain and has had particular difficulty with hospital appointments; often the hospital interpreters failed to arrive meaning she had to return home without seeing a doctor. Verity lives in a very disadvantaged neighbourhood where crime and antisocial behaviour is common and she has bad neighbours; she would like to move home but is not able to. Verity was born in a village and misses that way of life. A devout Buddhist Verity likes to spend time reading Buddhist texts and teachings.

Clare
Clare came to the UK 36 years ago and lives with her husband, the couple have adult children who have left home. She believes positive thinking is beneficial to health and that it is important to be content. Clare is very active both physically, exercising daily, practising Tai Chi at least once a week, and mentally, socialising with her friends and playing Mahjong. She also likes to travel and enjoys meeting new people and making new friends. Clare speaks Cantonese and some English but requested to be interviewed in Cantonese.

George
George lives in a very disadvantaged neighbourhood with his wife and daughters where they have experienced problems with anti-social behaviour. However, he feels supported by some good neighbours. George speaks Cantonese and no English. He
has health problems that restrict his mobility and make it difficult for him to go out, although he likes to meet with friends at a shopping mall in the city. George hopes that when his children leave college and find work that they will be able to offer financial support for him and his wife.

**Rose**
Rose is widowed and lives alone, although she has adult children and grandchildren, who live nearby. She sees her family regularly and frequently speaks with them on the phone. Rose's health is deteriorating which prevents her from doing everything she would like to be able to do. However, she meets her friends at a local community centre and enjoys many activities including: Tai Chi, cooking, Chinese opera, singing, socialising with friends and having fun. Rose believes that people can learn many things by listening to their peers and that positive thinking as well as keeping active is important in enhancing well being. She is a Buddhist who helps others by action and by prayer, and believes it is important to follow the teachings of Buddha in her daily life.

**Laura**
Laura lives with her husband and has been in the UK for 15 years, the couple has adult children and grandchildren who live about 30 minutes away by car. Laura has taken computer classes and she keeps in regular contact with friends and her family via web chatting. She is very active and extremely healthy, eating healthily and exercising daily. Laura enjoys many activities including: Tai Chi, walking, singing, learning English and socialising with friends. She believes it is important to get out and about and not stay at home all the time. Laura is a devout Buddhist and adheres to the custom of ancestor worship.

**Ruth**
Ruth lives with her husband and they came to the UK eight years ago when they retired to be with her children and grandchildren, she speaks Cantonese and a little English. The couple do not live with their children but they see them and their grandchildren regularly and her children interpret for her whenever she needs. Ruth suffered with poor health in the past but now follows a healthy lifestyle and her health has improved. She enjoys socialising and lives in Manchester to be part of the Chinese community there. Ruth believes it is important to be active and she takes part in activities at a local community centre, including singing, dancing and Tai Chi. Ruth was born in a rural area and is a keen gardener planting Chinese herbs, vegetables and flowers.