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Intergenerational relations in an aging world

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Introduction

The papers in this special issue address the increasingly important contemporary issue of the care of elderly people in an ever changing society. In particular, the diverse contributions speak to the tenuous balance that exists between formal and informal care mechanisms and the implication of such for the design of social policy, as well as for the very understanding of the aging experience in the modern era. This short essay reviews the respective papers giving special attention to the impact of the evolving formal–informal interface, as reflected in the analysis of intergenerational relations.

The opening paper by Attias-Donfut and colleagues represents a significant expansion of the previous groundbreaking analyses by that investigator into the realm of intergenerational exchange (Attias-Donfut 1995; Attias-Donfut and Wolff 2000). This construct refers, most frequently, to the exchange of financial resources, the provision of support (time transfers), and cohabitation (housing transfers) (McGarry and Schoeni 1995; Kohli 2004). The current paper examines the nature and determinants of financial and time transfers among persons age 50 and over in ten European countries. The analysis is one of the first published works to make use of the newly available cross-national and interdisciplinary data set from SHARE, the Survey of Health, Aging and Retirement in Europe.

Examination of the profiles of intergenerational transfers among the respondents from the ten different countries confirmed some major trends that have been observed in previous single country studies. Chief among them is that the majority of persons are indeed involved in the exchange of resources, whether as givers or receivers, and that the dominant direction of financial

transfers is downward, that is, from older people to their adult children. Consideration of the determinants of different kinds of exchange, through multivariate analysis, also confirmed additional basic insights. Among them are the role of very old age and poor health in predicting the receipt of support (time transfers), and the function of high income and position in the life course as predictors of the giving of monetary resources.

Perhaps, the most interesting finding to emerge from this analysis is not what was found, but rather what was not found, and that is consistent country differences in patterns and predictors of intergenerational exchange. Country comparisons should provide insights into the interface between formal and informal support mechanisms, insofar as countries ostensibly represent differing sociocultural institutional frameworks and varying welfare regimes. The findings in the current paper seem to suggest, however, that the trends observed here do not fit into neatly classifiable divisions and do not reflect the explanations proffered in the literature thus far. This state of events raises two considerations that should be taken into account in future research on intergenerational relations in Europe.

First, the significance of country level comparisons may be decreasing in light of globalization, in general, and the unification processes sweeping Europe, in particular. Efforts will need to be made to identify other key factors that shape the nature of intergenerational exchange and thus govern the balance between formal and informal care. Second, the study of intergenerational transfers involves a complex collection of components and an even more complicated pattern of dynamics. Future research will need to find more efficient ways to disentangle the concomitants and the effects of the transfer of resources of varying kinds across generations.

Daatland and Lowenstein address the same area of interest considered in the first paper, but frame their analysis in terms of intergenerational solidarity. Based upon data from the OASIS study that was carried out in five countries, they examine the interrelationship of family regimes and welfare state provisions (Lowenstein

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and Ogg 2003). They ask, in particular, whether family solidarity is discernibly different in differing national settings and whether formal care services enhance or restrain the provision of informal help to older people. The strength of this paper is in its careful classification of each participating country on parameters of both family solidarity and welfare state type, allowing empirical examination of contrasting models.

As in the previous article, the findings in this study seem to indicate fewer differences across countries than was, perhaps, anticipated. Assumed North–South differences in the distribution of familial solidarity did not emerge from the data, leading the authors to conclude that there may be some differences in the character of filial obligations toward older parents, but not in their overall strength. The crux of the analysis thus turned to consideration of the resiliency of such informal support in light of formal care alternatives. That is, do public services crowd out the private transfer of support?

Focusing upon persons age 75 and over in the sample who reported low functional ability, the analysis compared sources of help among the respondents in each country, controlling for selected relevant variables. The findings indicate that formal services neither enhance nor restrain the provision of informal assistance. The authors tentatively suggest, however, that generous public benefits may allow the family to refocus its efforts on the kinds of tasks it is more prepared or inclined to provide.

Interestingly, another team of investigators has reached somewhat different conclusions in analysis of this same data set (Motel-Klingebiel et al. 2005). They found that formal services seem to encourage family support as well. This finding provides empirical backing for the alternative notion of crowding-in. The presence of such varying interpretations seem to suggest that “the jury is still out” regarding the interface of formal and informal care of dependent elderly adults. Thus, the important question of the effect of formal services and transfers on the provision of familial help will necessarily require continued consideration.

Using Swiss data, Perrig-Chiello and Höpfinger turn our attention to the precarious state of current informal support provision in the face of growing elder care needs. Focusing upon intergenerational burden as the critical feature of intergenerational relations in this equation, they document an expected increase in dependency ratios and discuss the implications of this increase for informal care. They concentrate specifically upon women in the middle, those having responsibility for under-age children at home and for dependent parents as well (the group Attias-Donfut has termed the pivot generation). Due to the combination of rising support ratios, “sandwiched” care responsibilities and the increased participation of women in the work force, a growing sense of intergenerational burden may well jeopardize existing norms of helping older parents.

The unique contribution of this particular paper is in its attempt to predict continued filial obligation in spite

of the countervailing social and demographic forces that challenge it. The authors’ conclusion is that filial maturity among women in the middle, defined as their willingness to help, is dependent upon psychological resources, and specifically upon their sense of attachment with their own offspring. As such, they underscore that the formal–informal balance is influenced not only by macro-framing forces such as welfare state structures, but by the personal coping resources of the actors in the arena of informal care as well.

Schwarz and Trommsdorff expand upon the analysis of attachment between older people and their offspring that is touched upon in the previous paper, by examining the relationship between attachment style and help actually received among 100 mother–daughter dyads in Germany. The analysis advances our understanding of the dynamics of intergenerational exchange in that both the attachment style variable and the support variable are further differentiated in this paper, in order to reflect finer distinctions within each phenomenon. The findings revealed that attachment style was indeed a predictor of received support, but only among the daughters, and in relation to emotional support but not to instrumental support.

It could be that these particular findings were influenced to some degree by the exclusion from the sample of mothers who did not live in relatively close proximity to their daughters, by the failure of the analysis to consider support received by mothers and by other methodological shortcomings. Nevertheless, the analysis did underscore, at least partly, the relationship between attachment traits and exchange outcomes. This is interesting from two points of view. First, attachment styles are conceived here as lasting traits rather than as temporary states. This would suggest that intergenerational relations with elderly parents go beyond immediate and strategic exchange concerns and may stem from more long-lasting developmental dynamics that occurred earlier in the life course.

The second point of interest concerns the lack of association between attachment and receipt of instrumental support. As mentioned, the current study addressed this question only in relation to support received by daughters. However, examination of this relationship among older mothers is essential. If the lack of association persists in their case as well, it could mean that a leveling affect underlies intergenerational exchange. That is, despite initial differences in the quality of intergenerational communication and attachment, concrete assistance may nevertheless be provided at needed levels as the degree of need on the part of the older parent increases. More structured inquiry into this aspect of the exchange relationship is clearly warranted.

The final paper covered in this review is the article by Quadrello and colleagues. It brings the discussion of intergenerational relations into the future by considering the effect of new communication technologies on the frequency and nature of intergenerational contacts, in this case, communication between grandparents and

grandchildren. The study reported in their article queried about 400 grandparents from four European countries. The analysis found two main modes of communication-mediated contact: face-to-face exchange and telephone calls, on the one hand, and more advanced media such as e-mail and SMS messages, on the other.

The various findings of the analysis point to greater use of the advanced modes of communication among younger and better educated grandparents, and among those living at greater geographical distances from their grandchildren. Nevertheless, computer-mediated communication was employed by but a small minority of respondents. It seems, therefore, that future generations of grandparents have the potential to maintain meaningful intergenerational relations over greater geographic distances, and indeed, on a global basis. The current cohort of grandparents, on the other hand, is at risk of falling between the cracks, or in other words, having increasingly dispersed family networks but little means to maintain significant exchange with them.

This is indeed a paradox. Older persons should be able to derive great benefit from computer-based communication. They can maintain virtual social networks from their homes without concern for time constraints or other limitations (Blit-Cohen and Litwin 2004). Moreover, cyberspace is the realm of modern society in which social capital is increasingly exchanged. However, several studies confirm that the current generation of older people may have missed the cybernetic revolution. Only a minority of the current elderly cohort participates in such computer-mediated communication (Blit-Cohen and Litwin 2005).

The collection of studies presented in this special issue demonstrates the diversity and the complexity of the realm of intergenerational relations. Whether one focuses on intergenerational exchange or on intergenerational solidarity, the field of inquiry is shaped by a combination of macro and micro factors. Multidisciplinary inquiry is required, therefore, in order to better understand the parameters of this unique aspect of human social behavior and its dynamics.

The articles in this collection also point out the tenuous balance that exists between formal and informal assistance; between public and private exchange. Clearly, each sphere influences the other. Whether such influence eventually results in the complementary interweaving of the respective systems or in the substitution

of one for the other may well be a function of unique dynamics that are not yet fully evident. More targeted inquiry is warranted in this regard in order to sort out the component parts of the exchange equation, and to identify the trajectories of their respective influences.

Another challenge to the understanding of intergenerational relations is the fact that such behaviors take place in a constantly changing social environment. Radically changing fertility rates, dramatically increasing longevity, and widespread global mobility are but three of the many contemporary phenomena that are impacting the nature of exchanges across generations. Borrowing a phrase from another area of expression, one might say that the future of intergenerational relations is "not what it used to be." Researchers and policymakers alike will need to better understand the expected developments in this regard and to anticipate, as best they can, the unexpected ones. The future care of the oldest segment of society, and indeed, the very well-being of aging cohorts across societies will depend upon the work that is being done in this area today.

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