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The dynamics of elderly support

The transmission of solidarity patterns between generations

Received: 23 November 2000
Accepted: 11 December 2000

Contribution to Session
*“Ageing in (Central) Europe – Euro-
pean Ageing: Health and Care Systems
and Intergenerational Solidarity
in an European Perspective”*

5. Kongress der Deutschen Gesellschaft
für Gerontologie und Geriatrie (DGGG)
Nürnberg, 18.–20. September 2000

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Die Dynamik der Unterstützung Älterer – Die Vermittlung von Solidaritätsvorbildern zwischen den Generationen

■ **Summary** This paper analyses the support given to the handicapped elderly by their children on the basis of a large survey done in France where both the elderly and their middle-aged children were interviewed. These data allow us to address such questions as: “Who helps?”, “Who receives help?” and “According to what principles?”. Besides the principle of need which is at work, the results show that there is also the principle of equity, which functions through reciprocity. This study highlights two main processes in the dynamics of support for the elderly, its redistributive effects (family support mainly benefits the poorest elderly), and its complementarity with the state health care systems (family support is mainly

directed towards those who also receive public help). Can we make the deduction that the more generous the welfare state, the more developed family solidarity is? Nevertheless, some difficulties arise: support is mostly given by women. Furthermore there are a small number of people on whose shoulders it falls to take care of everybody else in the family. One sign of these difficulties is that the carers are more often in less good health than the non-carers of the same age. Comparisons from one generation to the other, including the youngest (the children of the middle generation who were also interviewed) shows that the younger generation will not want to be so completely involved in parental care at the expense of their own private time and life. Most probably family involvement will be maintained in the future, but to a lesser extent.

Introduction

Retirement pensions have changed the status of the elderly in society and primarily within the family by giving them free time and sufficient resources. Older people no longer receive economic assistance from their adult children or grandchildren as they used to in rural economies. On the contrary, they are able to give such help to the descending generations. Retirement pensions have significantly contributed toward reversing the directional flow of economic transfers and stimulating all kinds of intergenerational solidarity within the family, whether it benefits the young or the old (2).

I will deal with the reciprocal help between the elderly and their adult children, and with the determinants of such help. The theoretical frameworks of these analyses are both macro- and microsocial. On the macrosocial level, I refer to the theory of social regulation in order to study the interaction between public and family support to the elderly. In addition, it is important to look at the consequences of the generational flows of solidarity on social stratification. I will show that this flow also has a redistributive effect, both shortening the gap between the resources of the two generations (the elderly and their middle age children), that is intergenerational inequalities, and also diminishing the inequalities that exist within the older generation itself.

On a microsocial level, I will refer to the theory of gift, as initiated by Marcel Mauss (11), to study the circulation of family help within the framework of a wide system of reciprocity. But it is not enough to state that there are debts binding generations to each other, it is also necessary to integrate the gift theory into the approach to generational relationships. According to Bengtson, there are several types of family solidarity, which he places in opposition to family conflicts (3). Other approaches place at the core of the relations between generations the necessary existence of tensions, whether they are called contradictions (5), conflicts (12) or ambivalence (10). I will adopt this approach and show the more that solidarity exists, the more risk there is of conflict.

This analysis is based on the data drawn from a trigenerational survey in France. The general purpose of that survey was to study relationships between generations and various kinds of exchanges between them (material exchanges, social, domestic or cultural).

The cross-sectional survey was undertaken in 1992 and involved 2000 families living in France where there were at least three adult members of different generations: the middle generation, which we call the pivot; their parents, the elderly; and their children, the young.

The anchor for the data set was the pivotal generation, aged 49 to 53. The underlying methodology therefore allowed the same comprehensive questions to be put to one pivot generation member, to one grandparent and to one adult child, all of whom belonged to the same lineage. Five thousand people were interviewed face to face, through questionnaires lasting about 1.5 h. In addition a qualitative survey was done in 1996 on a subsample of 30 lineages (that included 90 people).

These three generations represent at the same time clearly differentiated family generations. They are also three different welfare generations, in the meaning given by Kohli: All of the elderly were retired, all of the middle generation were actively working, and the young generation was in transition between their education and their employment. In addition, these generations represent three different socio-historical generations because of the consistent age difference between them and the relative homogeneity of age within each generation.

This empirical construction allows us both to study private and public exchanges between generations, and to also study the social changes at work in the differences of behaviour and attitudes across these three generations.

Macrosocial dynamics

The global results have shown two main directions of transfers. First financial transfers are mainly descending from the grandparents to both their children and grandchildren, and from pivots to the young. There is only a small percentage of the middle generation giving money to their parents (but they provide economic support in kind through co-residence or in the assistance in their daily activities). Second, assistance of any kind is reciprocal among the three generations, each one giving to the other two. But it is the pivot generation which gives the most. The importance of financial transfers circulating down the generational ladder has become well established, not only in France, but also in other countries like Germany (8) or Norway (7).

Regarding reciprocal support between the middle generation and their parents, Table 1 shows the probabilities of such aid, according to the level of income of the elderly. Three types of support are given by middle age children to their parents: cohabitation, financial help and daily care.

These supports are received more frequently by the elderly belonging to the first and the second quartile of revenue. Conversely, the elderly belonging to the last quartile give money more often to their children.

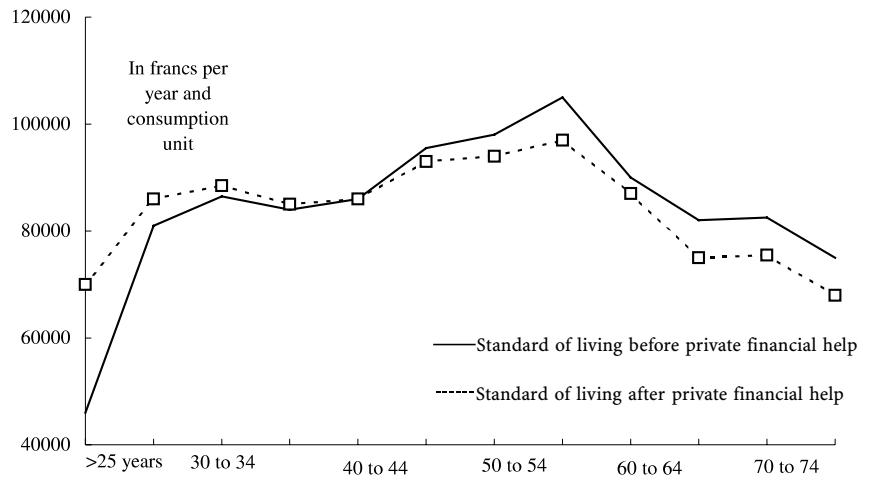
Table 1 Private transfers according to the income of the elderly

Income of the elderly	Quartile 1	Quartile 2	Quartile 3	Quartile 4	Total
<i>Type of support (frequency)</i>					
Cohabitation with children	29.3	17.1	10.2	8.2	16.2
Financial help from children	3.9	4.9	3.6	1.0	3.4
Daily domestic help from children	50.3	42.8	33.2	21.6	37.0
Financial help to children	12.5	24.0	24.0	41.6	25.6

Source: CNAV Tri Generations Survey 1992

Note: For each of the different types of support, the figures reported concern the proportions of help given

Fig. 1 Familial support and standard living by age



Family support tends to be targeted toward the poorest elderly. The result is the improvement in their standard of living. Furthermore, financial gifts from the richest older people to their descendants reduce the availability of their own resources. These two contradictory flows, upwards from the pivot generation to the advantage of the poorest older generation and downwards from the richest older generation to the pivot and younger generations, reduce the gap in standards of living within the older generation itself and also between this generation and the descending generations.

These results have been confirmed by another large survey on family budgets in France, done by Insee in 1996, as highlighted in Fig. 1.

Financial transfers within families significantly increase the incomes of household members under 40 years old, and above all, they increase the income of young households. For those aged over 40, the transfers they make reduce their disposable income. The net effect of these transfers is to reduce inequalities that are age related. Figure 1 shows that the differences in standards of living, before and after transfers, are considerably reduced.

When older people become handicapped they receive support both from family members and from professionals financed for the most part by the public sector. General data from different surveys, in the U.S. and in Europe, have shown the complementarity between these two kinds of support (6, 9). Our data from the three generational research demonstrate the same trend.

Among those who receive regular help from their children on a daily basis, one out of three receives the services of a professional to supplement family support, while among the elderly without family help, only one out of five receives public support.

In addition, the presence of professional care givers does not affect the amount of time given by mid-life children. Older people who receive professional support do not receive a lesser amount of time from their descendants. On the contrary, the amount of family help received is comparatively more significant when it complements public forms of support.

As expected, the quantity of family and professional support given to older people is determined by their degree of disability, but the increase in one

form of support does not give rise to any decrease in the other form. Far from acting as a disincentive for family support, the presence of a professional caregiver acts to enhance family support.

Family transmission of solidarity patterns

Such help is mostly given by women, whether it benefits an elderly man or woman. And among the elderly, those who are cared for by a woman receive less complementary support from public services than those who are cared for by a man (24% of the parents cared for by a woman – 37% of those cared for by a man). Women take on many aspects of the daily tasks necessary for the care of the elderly, such as personal hygiene and house cleaning, shopping, cooking and laundry, while men give less time and focus on shopping and companionship. Women experience more difficulties than men in caregiving: with the feeling of the burden of time (35% of the daughters, and 25% of the sons express this complaint), or with psychological difficulties (38% of the daughters and 16% of the sons). In addition, caregiving by women has a detrimental effect on both their psychological and physical health.

The dynamics of such help should be analysed through three main questions: Who gives? Who receives? And according to what principles? Since the trigenerational survey gathered the characteristics of each generation, it is possible to include both the characteristics of the givers and those of the receivers in the same regression analysis. The results presented in Table 2 refer to the probability of support to the elderly parent from the only child who was interviewed.

Women receive more help than men, especially when they are widowed. They are more often alone

because of their greater life expectancy, and because they are more often younger than their husbands. Women are also poorer than men. They have fewer assets and receive lower retirement pensions because of their past professional careers which were less stable and lower earning than jobs held by men (4). Older women have more social needs and they suffer from greater levels of disability than men, everything else being equal. Consequently, caring appears to be mainly a ‘female business’, from both the caregiver and the care-receiver’s perspective.

When elderly people have several children, each of them gives less help; this means that children share more or less equitably the care given to the parents.

Table 2 shows very clearly the complementarity with professional help, which appears to be highly correlated with the probability of being cared for by the children. The strong influence of poor health is an expected result. Another factor less known but of interest is the help that was given by the elderly to their dependent parents in the past. It is a sign of indirect reciprocity: I give to my parents and, when I become old, I will receive back from my children. In other words, there is a transmission of solidarity patterns. It is similar to: I received from my parents and I give back to my children.

Other forms of reciprocity have been statistically demonstrated through the survey. For example, when the elderly helped their children in the past by caring for the grandchildren, their relations with their children stayed very close, even after the grandchildren became adults and parents themselves. There is in these families a greater number of contacts and visits (10 more contacts a year, on average) than in families where there was no help from the grandparents to the grandchildren. This debt is nevertheless sometimes a burden, as was expressed in the qualitative study by a woman who spent every Sunday

Fig. 2

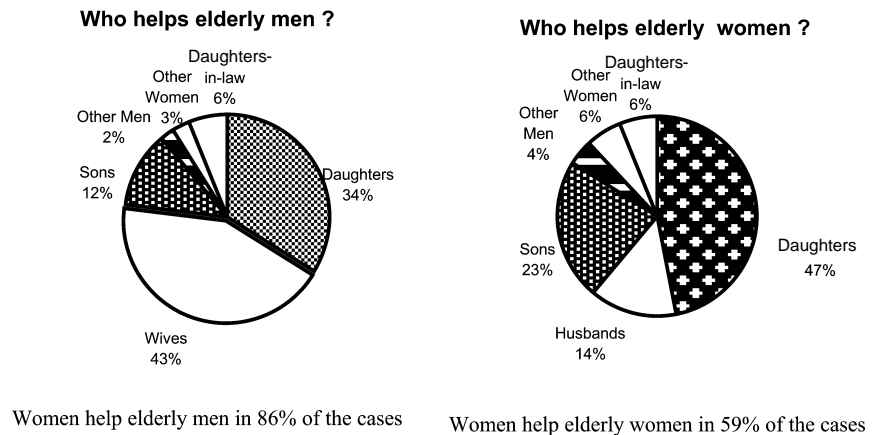


Table 2 Probability of in-kind assistance received by dependent elderly from pivot generation

Variables	Help from pivots		Effect
	Coefficient	t-value	
Constant	-3.909	-2.45	
Elder's characteristics			
Female	0.349	3.01	+
Age	0.056	6.32	+
Widowed	0.211	2.00	+
Number of children	-0.082	-4.15	+
Education (end of school age)	0.008	0.55	
Living within the family	0.172	1.35	
Existence of professional help	0.304	3.06	+
Poor state of health	0.319	3.11	+
Help to dependent parents in the past	0.176	2.03	+
Income (10E-4)	0.460	1.61	
Income squared (10E-8)	-0.100	-0.97	
Wealth (10E-6)	0.019	0.08	
Wealth squared (10E-12)	-0.229	-1.66	
Pivot's characteristics			
Female	0.490	5.53	+
Age	-0.040	-1.34	
Living alone	0.276	1.96	+
Number of nonco-resident children	-0.027	-0.73	
Number of co-resident children	-0.033	-0.68	
Education (end of school age)	0.004	0.23	
Income (10E-4)	-0.105	-1.10	
Income squared (10E-8)	0.018	1.62	
Wealth (10E-6)	0.203	1.58	
Wealth squared (10E-12)	-0.044	-1.54	
Distance from parents (10E-2)	-0.028	-5.58	+
Subjective social mobility			
Same as parents	0	-	
Better than parents	0.118	1.17	
Less than parents	0.123	0.63	
Unknown response	0.091	0.44	
Number of observations		1,217	
Number of elder recipients		309	
Log likelihood		-577.55	

Source: (1)

Note: Probit analysis of time assistance decision received from elders

with her mother who had looked after the grandchildren in the past:

“It is true that I had benefitted from a privileged condition, when I went on working and mother cared for the three children. But this created constraints afterwards, when the children grew up because mother was used to living through them and for us ... Now she has the habit of coming here every Sunday, and since she is aging and old...and here today, my son called me and asked me to come on Sunday. ‘Well, no, I can not come, grandma is coming here’. And that I feel it difficult, it is like something imposed on me, I would like to breathe sometimes... One doesn’t have the choice...”.

This example illustrates the very heavy debt that children sometimes feel towards their parents. Family solidarity does not necessarily mean a happy world nor the absence of relational problems.

Family help is subject to strong social norms, especially for women. And in each family there is a specific interpretation of these social norms which is expressed in its solidarity patterns and constitutes a subculture shared by its members. This subculture which we call a “*family microculture of solidarity*” is transmitted through the history of the family.

The comparison between families shows large disparities in the importance of support available to their members. Some are very supportive and in

many ways, others have more limited solidarity patterns, partially excluding the elderly; others again have only rare contacts and exchanges between households. The level of resources, both financial and social (in terms of education and status) is correlated to the extent of help exchanged within families. There is also the influence of family cohesion: divorces and separations result sometimes in a reduction of contacts and solidarity between generations. But these factors, however important they may be, are not sufficient to explain the inequalities between families. The microculture of solidarity within families plays an important role through the functioning of gift, debt and reciprocity. It shapes its solidarity pattern and differentiates families from each other.

Conclusion

The dynamics of elderly support has been viewed through both a macro and micro perspective. Taken from a societal view, help given by middle-aged children to their parents, as well as help received from those parents, brings closer their respective standards of living, due to the fact that the main principle of giving is the need of the recipient. Public and family support are complementary and stimulate each other. This complementarity reinforces their redistributive effects.

Within the family, the microperspective reflects the interplay between family history and social/economic conditions in the functioning of intergenerational solidarity. The data particularly showed the force of reciprocity as a governing agent in family life.

It is doubtful that the family will be able to continue to play the same role of support towards the elderly as it does today because of the changes in the structure and values in our societies. Demographic trends will result in an increasing population of the very old and a decreasing in the number of children.

Future middle-aged women will have more elderly people to care for but at the same time they will have more professional responsibilities. And fewer children to care for them.

We can expect changes in values and norms of obligations between genders and between generations, principally because of the evolution of the role of women over the past 50 years, resulting in two bread-winner families. The task of caring for others, both children and the elderly, will have to be more equitably shared between the genders and will require more help from the State. We observed in our survey that in cases where men are involved as care givers to the elderly, the elderly receive additional public help more often than when women are the care givers. Men seem more demanding of social services than women. And they seem to receive social assistance more easily, perhaps as a result of societal images of a man alone caring for the elderly. As long as care giving has remained the domain of women, social policy has not developed enough to meet the needs corresponding to demographic and social changes. As time passes and men, perforce, become more involved, there will be more pressure to develop social policies in this direction.

Among the young there has been a shift of values regarding the preservation of their own private lives and the desire to limit family obligations so as to preserve that privacy. They do express a sense of responsibility and feel a debt towards their parents or grandparents, but their feelings are first directed towards the development of their own lives and their own personalities, as a result, in fact, of the education they received from their parents which accentuated the underlying theme of self-realisation and imposed the norm, "Be yourself". This trend towards affirmation of the individualisation of the young is borne out in our qualitative survey. One can only conclude that there will be more claims made on the State for public help regarding the care of the elderly.

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