

Part One

**REPORT ON THE TECHNICAL MEETING ON POPULATION AGEING
AND LIVING ARRANGEMENTS OF OLDER PERSONS:
CRITICAL ISSUES AND POLICY RESPONSES**

The Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, with financial support from the United States National Institute on Aging, organized a meeting of experts from 8 to 10 February 2000, to discuss the most pressing issues related to population ageing, living arrangements of older persons and possible government responses. Population ageing is expected to have a major impact on life in the twenty-first century. Concerned by the looming pension crisis, many Governments are promoting more self-reliance in income security for older persons and greater family responsibility for providing care. Consequently, patterns of caregiving and co-residence are emerging as pre-eminent issues related to the well-being of older persons.

The Meeting was opened by Joseph Chamie, Director of the Population Division. He emphasized that the two most important objectives of the Meeting were, namely, to address key issues related to the ageing process and how Governments were responding to them, and to improve our knowledge of patterns, determinants and consequences of living arrangements among older persons. Mr. Chamie observed that persons aged 60 years or older comprised 10 per cent of the world's 6 billion inhabitants. These older persons will increase to about 2 billion or 22 per cent of the population by 2050, a percentage already attained in the five "oldest" countries: Germany, Greece, Italy, Japan and Sweden.

The present report includes brief summaries of the papers presented in each of the meeting's sessions, along with comments by the discussant, a consolidated summary of the main points arising in the general discussions, and conclusions. The agenda, list of participants and list of documents are included in the annexes.

I. FORUM SESSION

For the opening session, members of United Nations missions, representatives of non-governmental organizations and members of the press were invited to attend. The forum was designed to create a background against which to cast the main theme of the meeting, namely, the living arrangements of older persons. Each of four experts was asked to consider what were the critical issues and policy responses to population ageing.

Barbara Crossette, moderator of the forum, acknowledged the important function played by the Population Division of the United Nations as a channel to disseminate information and as a useful source of interpretation of a number of statistics. She thanked the staff of the Population Division for also performing that role with regard to ageing and older persons' living arrangements.

Peter Peterson began by stating that ageing is not far away into the future, but is occurring now. It is also not just a local phenomenon but one that will take place in many societies around the world. Ageing will have a global impact, which he described as the “Floridization of the world”. He called attention to the burden that ageing places on working age people, particularly in countries with pay-as-you go pension systems. Furthermore, the growth of the older population implies an increased demand for health services, as the per capita consumption of health services is several times higher among older persons than for the rest of the population. The impact of falling birth rates and increased longevity, two phenomena that are occurring in developing countries as well, is likely to impose severe constraints. The fiscal and economic impact of ageing will have to be absorbed in a number of ways, affecting both the younger adult population and older persons. For example, we will face decisions about spending and tax increases, increased borrowing, longer duration of working life, importing labour, pronatalist measures, and cost reductions in pension and health plans, as well as their privatization.

The second forum member, Nana Araba Apt, deplored the absence of comprehensive planning to meet the challenges of an ageing world. In particular, she observed, we know little about the role of families, particularly where the family is under stress owing to severe economic crisis. In developing countries, with their extended family culture, households comprising four or even five generations could become common. It is not clear that we understand what the effects of those changes are on family relations. By the same token, we know little about how those processes affect the community. Ms. Apt called for more and better information on the social processes accompanying ageing and on the factors affecting the well-being of older persons.

The third forum member, Antonio Golini, pointed out that ageing resulted from two of humanity’s greatest victories: increased longevity, or a victory over death and disease, and reduced birth rates, or a victory over unwanted childbearing. Yet, despite common sources, ageing processes are very diverse in different settings, particularly with respect to timing. Ageing has complex effects, involving many agents, activities and institutions. It is a silent process that evolves over the long term, producing consequences that are difficult to anticipate. It is also a new process in human societies, one for which there is no previous historical experience. Because ageing is global, it is necessary to create institutional mechanisms to deal with it. Mr. Golini proposed that countries establish supra-ministerial organizations to coordinate activities and planning that are relevant for ageing and that involve a number of traditional ministries that, as a rule, lack coordination. It is also important to take advantage of existing non-governmental organizations and redirect some of their

attention to ageing. Finally, there should be national research agencies focusing on ageing, such as those in the United States of America and Japan.

In preparing for an ageing society, he said that perhaps the most important need was for ideological change, in order to curb excessive individualism. There is a need for providing effective support to families, and this must include attention to the needs of the younger as well as of the oldest age groups. Secondly, more research is needed on morbidity, such as dementia and arthritis, to improve the quality of life of those surviving to older ages. Improvements such as these translate into actual slowdowns of the ageing process, and could conceivably reduce the burden on family budgets as well as on other persons. But ageing also creates problems for the young-adult generation, and attention should be directed to them as well. As social relations become more vertical than horizontal (most young adults will have fewer siblings than grandparents), there will be an increased family burden. Finally, as ageing occurs at different times in different places, it will create unique imbalances between countries. For example, as European countries move through a phase of high dependency ratios and labour shortages, developing countries will move through a phase of low dependency ratios and a surplus of young workers. How can these tensions be reduced? Increasing migration from labour surplus to labour deficient countries may be accompanied by political and ethnic tensions.

The fourth panellist, Elizabeth Mullen, reminded the audience that the image of ageing as a “problem” is misleading since it is usually based on a number of myths and stereotypes, rather than on empirical knowledge. The first myth is that older persons are homogeneous, which they are not. A second myth is that older persons are uniformly frail, dependent and vulnerable. As recent evidence in the United States indicates, older persons are less likely to be disabled or infirm than in the past. The older persons of today are not the older persons of yesterday, and will be different from the older persons of tomorrow. Differences are not just confined to health status but also include the kinds of activities older persons are able to perform, and the types of support they receive from families. Today, “intimacy at a distance” seems to be the preferred living arrangement with close family members—living apart but maintaining contact with close kin. A third myth is that older persons are only on the receiving end of exchanges. This is also inaccurate: research on intergenerational transfers shows that the flows are often from older persons to the young and not vice versa. An important programmatic issue that should have priority, whether it is related to co-residence or to other aspects of ageing, is the need to keep in place dynamic policies, flexible enough to adapt to the changing reality posed by older persons. The older population was very diverse, and aspects such as health, the financial situation and family and other social resources tended to differ according to age and between men and women. Sound data were required to monitor people’s needs and the effects of policies, and it was important that data regarding the older population be tabulated by both age and gender.

Ms. Crossette began the discussion by asking Ms. Apt whether we in the West have excessively romanticized our view of extended families in Africa by attributing to the extended family a large and central role in the care of older persons when in fact it has less importance. Ms. Apt responded that the main problem faced by African societies was not the dissolution of the extended family—a phenomenon that was indeed occurring—and the growing trend towards family nuclearization, but the persistence and aggravation of poverty levels across the board, regardless of prevailing family types.

The discussion also raised the point that, although there were indeed too many negative stereotypes of older persons, paradoxically there were also a number of equally misleading and unfounded positive stereotypes that should be debunked. That is, just as it was untrue that the older population was uniformly dependent, it was also wrong to paint an overly bright picture that would lead to neglect of genuine needs for support.

Mr. Peterson pointed out that there were a number of feasible ways to induce adjustments to meet the special demands of an ageing world. For example, older people could work for longer periods of time. There was a prevailing myth that older people did not want, did not need or were not able to work. That was disproved by a number of concrete counter-examples, and should be taken into account in the design of programmes aimed at solving problems of labour shortages mentioned during the forum.

Mr. Golini emphasized the problem that would be created by the demand for labour in countries where ageing was most advanced, while a labour surplus existed in countries at an earlier stage of the demographic transition. He wondered what the political consequences and ideological fallout of such a confrontation of needs would be. On closing the forum, Mr. Chamie referred to the labour supply problem raised during the forum and informed the meeting that the question was being examined by the Population Division.

II. DEMOGRAPHIC AND POLICY DIMENSIONS OF POPULATION AGEING AND LIVING ARRANGEMENTS OF OLDER PERSONS

A statement contributed by the United States National Institute on Aging noted that a key issue that the world must grapple with was how countries with relatively few resources would cope with individual and population ageing. Comparative or cross-national research was an essential tool for understanding population ageing at a global level, and multilateral organizations and the international research community had a key role to play in advancing such research and in improving access to reliable statistical data on older populations.

Since families provide most of the care when older people become disabled, living arrangements represent a key component in the link between individual and societal ageing.

The Chairman of the session, George C. Myers, introduced the main theme by reminding participants that almost 10 years ago a similar meeting, also organized by the Population Division, took place in Kitakyushu, Japan. That meeting also looked at the residential arrangements of older persons. The differences in the approaches used then and those used now are, however, vast. Today, we have all but abandoned the aggregate approach, and focus more on individuals and individual behaviour. We also pay more attention to longitudinal rather than cross-sectional data, and attempt to identify better the social, political and cultural contexts within which ageing is occurring (contraction of the welfare state, reforms to pension systems, political mobilization of older persons and so on). These changes in approaches and perspectives have produced some tangible gains in knowledge, but have also raised additional questions. Some of these were posed in the two papers presented during the session.

Barry Mirkin of the Population Division presented the first background paper, on the demography of population ageing. The paper described global trends in population ageing. By 2050, it is expected that there will be nearly 2 billion people over the age of 60 years, or 22 per cent of the world population. This will mark the first time in history that the older population is larger than the child population. The growth of the older population often receives attention in connection with the developed countries. However, the older population is increasing at a substantially faster rate in the less developed regions than in the more developed regions. Because of the gender differential in mortality, there are currently 1.2 women for each man aged 60 years or older. Population ageing is caused not only by the decline in fertility, but also by the sharp reductions in mortality at adult and older ages. The impact of demographic ageing is clearly visible in the old-age demographic dependency ratio (the number aged 65 years or older per 100 persons of labour force age, 15-64 years), which is increasing both in more and less developed regions during the period from 1970 to 2050. Between 2000 and 2050, the old-age dependency ratio is expected to double in more developed regions and almost triple in less developed regions. Finally, the older population is unequally distributed between rural and urban areas. Whereas the majority of older persons in developed countries are urban dwellers, a significant proportion of older persons in developing countries—sometimes as high as 70 per cent—reside in rural areas.

Alberto Palloni presented the second background paper, which reviewed the state of knowledge about living arrangements and their implications for policy. He discussed the background conditions for ageing processes in developing countries, which are relevant for understanding the living arrangements of older persons. Ageing is occurring more rapidly in Latin America and Asia than in developed countries, and it is

taking place within social and political contexts that are fragile and precarious. Some of the institutions providing social transfers to older persons either do not exist, are incipient or are being dismantled. Some examples are pension reforms in Latin America and the virtual absence of pension schemes in Asia. He argued that, contrary to many projections, the health status of older persons in Latin America, and possibly Asia as well, is likely to be worse than in developed countries. This implies higher levels of demands and needs, and heightens the importance of understanding living arrangements as it is through them that some of these demands are met.

The trend among older persons in Northern America and Europe has been towards increasing levels of living alone. Countries in Latin America and Asia continue to maintain very high levels of co-residence of older parents with children and, with the exception of Japan and the Republic of Korea, most societies have not yet shown clear indications of drastic changes in traditional patterns of co-residence. It is unclear when changes will occur, but there is a widespread belief that it will not take long before patterns found in the United States and Europe are adopted elsewhere as well.

A review of the literature revealed that remarkably little is known about the relationship between living arrangements and older persons' well-being. Most studies focus on the effects of poverty, income or wealth levels on the probabilities of older persons and children or other kin co-residing, while providing no information about other complementary, but perhaps more important, issues, namely, the degree to which co-residence with children or other kin enhances or depresses the well-being of older persons. In fact, the limited evidence available suggests that older persons living alone, particularly older widows, experience higher levels of poverty than those who co-reside. However, this finding is not universal and does not enable us to draw clear inferences about the direction of causality.

Despite new data, models and methods of inference, the determinants of living arrangements of older persons and the forces precipitating the sweeping changes in traditional co-residential arrangements in developed countries—and potentially in developing countries in the near future—are not well understood. It is believed that changes in income of both parents and children are very influential. It is also possible that some changes are due to changes in the prevailing characteristics of children available to co-reside (life cycle stages and income) and also to changes in preferences, which, in an era dominated by individualism, have turned towards living apart. Furthermore, we normally fail to consider simultaneously family and social transfers and co-residence, or to focus simultaneously on co-residence and on other older persons' social networks. In either case, the ability to understand underlying relations is severely impaired.

Comments by the discussant. Nikolai Botev noted that ageing is associated with distortions in the relative sizes of the cohorts. Indicators of kin availability are important and deserve to be monitored more widely, since they are strongly associated with living arrangements. The speed with which kin availability is decreasing has accelerated for countries with late demographic transitions. These countries will experience more sudden and rapid ageing processes than other countries. Other phenomena, such as war, massive migration and epidemics, can also distort kin availability.

Mr. Botev also underlined the point that, although co-residence is conventionally seen as a transfer of support and services from the young to the older generation, this is not always the case. As research has shown, co-residence can also be accompanied by a significant supply of services by older persons that benefit the younger population. The net flow within a household may go in either direction. Thus, it is important to examine co-residence in detail before making pronouncements about who receives net benefits. He also noted that a narrow focus on older persons' co-residence may be self-defeating as two important facts may be overlooked. On the one hand, the living arrangements of older persons are only one among many other social contexts within which older persons may develop social relations and connections. Not only does proximity without co-residence matter, but also living alone may be accompanied by social contacts outside the household, which may be instrumental in satisfying the basic needs of older persons. Thus, the linkages between co-residence, social networks and other family transfers should be studied together.

Mr. Botev also observed that demographers have not adequately explained population ageing and its implications to policy makers. Ageing occurs over a time horizon that is much longer than policy makers are accustomed to dealing with. Yet, despite its current speed in many parts of the world, the process of ageing will not continue indefinitely, and the proportion of older people in the population will eventually level off.

III. LIVING ARRANGEMENTS AND THE WELL-BEING OF OLDER PERSONS IN THE PAST

The Chairman of the session, Peter Lloyd-Sherlock, opened the session by emphasizing the importance of placing changes in the living arrangements of older persons in a historical perspective so as to shed light on future trends.

Steven Ruggles summarized his paper, which focused on the determinants of living arrangements of older persons in the United States from 1880 to 1990. Despite claims to the contrary, nearly all older persons in the United States prior to the period of full industrialization lived with children, provided that they had a living child. This does not conflict with the observation that only a small percentage of households contained

multiple generations, since early death, late marriage and high fertility meant that few multigenerational households were possible. The prevailing household arrangement for older persons was of the extended type. This was the outcome of a stem-family system, whereby older children left the parental household upon marrying, while the youngest child remained at home with the parents. This pattern began to decline early in the twentieth century and further declined after 1940, a period during which there was a sharp increase in the prevalence of living alone among all older persons. The forces behind these momentous changes were most likely associated with the erosion of self-employment tied to the family farm. As new economic opportunities became plentiful and the main focus of production shifted from the farm to industry, wage labour overwhelmed the importance of family farm work. This weakened the links between the economic prospects of the young-adult generation and co-residence in the parental home. In the traditional arrangement, the co-resident adult child was subordinate to the parents but could expect eventually to take over the family farm or small business; the rise of wage and salary employment offered an alternative that was relatively attractive in financial terms and did not depend on the older generation. The decline of the family farm also meant that parents, themselves no longer farmers, had less need of children's labour. The rising income of older persons was not a factor in explaining the shifts that took place before 1950.

Different factors, however, were behind the shifts that took place after 1950. First, the rising income of older persons played a role by making possible greater independence, but this by itself could account for at most 30 per cent of the decline in co-residence since 1950. The rising income and education of the younger generation also had important effects. Indeed, the changing characteristics of the younger generation may be more important than the changes in the older generation for understanding the recent declines in co-residence.

Some analysts have suggested that the creation of the Social Security system fuelled the increase in living alone, by raising income and fostering financial independence; this view assumes that there was a pre-existing desire on the part of many older people to live on their own, and Social Security then provided the financial support for maintaining an independent household. Ruggles' analysis of the data did not support this contention. On the contrary, the creation of the Social Security system may better be understood as a response to changes in the family that had already taken place as a consequence of the decline of farming and the rise of urban wage labour.

Comments by the discussant. Jacques Légaré noted that the paper had broken new ground in several respects. He agreed that it was important to analyse both parents and children, given that living arrangements are likely determined by the characteristics of both these groups. Citing data from Canada, he noted that current co-residential arrangements are related to fertility—those living in multigenerational arrangements are

more likely to have higher fertility—and that women who live alone are more likely to have higher socioeconomic status, while the reverse is true for men. He also agreed that it was important to determine whether declining co-residence was due to rising parental income or the rising income of the younger generation and to compare actual to potential numbers of two- and three-generation households in order to show that co-residence was almost universal early on. He further concurred with the idea that the widening disparity in education between parents and children contributed to the erosion of co-residence, but questioned whether co-residence would increase once the education gap began to narrow. He suggested that more attention be paid to urban-rural differentials and gender issues.

Mr. Ruggles agreed that the paper gave little attention to gender; the topic was important and perhaps deserved attention in a separate paper. He believed that urban-rural differentials were not important in explaining declining co-residence, once farming employment was taken into account. He also noted that, while the positive relationship between number of children and co-residence has been observed in a variety of settings, in the United States this pattern emerged only after co-residence ceased to be near-universal and became a matter of choice.

Responding to a question concerning possible policy lessons that might be gleaned from the United States experience, Mr. Ruggles indicated that an incorrect understanding of the causes of historical trends could lead to unsound policy choices. As an example, he referred to a view that had gained prominence recently, that the rise of the Social Security system had provided an important impetus to the erosion of the multigenerational household; if this were so, a policy that weakened the Social Security system might be expected to produce a reversion to familial arrangements of the past. In fact, the causality was mainly in the opposite direction; that is, broad social and economic changes caused the decline in multigenerational living, and the Social Security system grew up in response to needs arising from those changes.

IV. LIVING ARRANGEMENTS AND FAMILY SUPPORT

The Chairperson, Elizabeth Mullen, observed that the theme of the session's two papers revolved around a key issue, namely, the relationship between the material and ideological basis of support for older persons. It is important to remember that there are a number of ideological constructs (such as prescriptions from religious teachings, Asian filial piety, and media emphasis on the need for support of older persons) that emphasize the support flowing from children to parents and that in some cases these ideologies remain, while the material basis for support has eroded. Under what conditions does this occur and how long can one expect an ideology that stresses support of older persons to persist while the material conditions that sustain it disappear?

Jay Sokolovsky summarized his paper on the living arrangements of older persons and family support in less developed countries. Developing countries will confront dramatic structural, economic and social changes over the coming decades as a result of population ageing. Powerful "discourses of neglect" regarding older persons are heard in many of these countries, including some, such as India, where living arrangements of older persons have been quite stable and seem to conform to traditional patterns of household formation despite demographic, social and economic changes. In some cases, these discourses act as narratives of caution, which can have deep cultural roots. The focus is on how families in developing countries are trying to adapt traditional patterns of living arrangements to powerful changes, and on how culture may be sufficiently flexible to respond to "modernization", in such a way that traditional systems survive within more modern contexts, when the necessary resources exist. In examining these issues, he reviewed some of the basic data on living arrangements and support for older persons in developing countries. Data from the author's longitudinal research in a village in central Mexico demonstrated the need to go below the surface of observed living arrangements in order to understand the changing circumstances in which developing countries find themselves.

Jenny de Jong Gierveld, in her paper on the living arrangements of older persons and family support in more developed countries, explored the major characteristics of older persons' living arrangements and family support in developed countries. Marital status is an important determinant of living arrangements. Country differences in the distribution of older persons by marital status reflect differences in the timing of the "second demographic transition" affecting these countries. The latter term has been used to call attention to important shifts in patterns of norms and values, as well as in demographic behaviour, that have been observed in Europe during the past several decades. Among the most important demographic aspects are rising probabilities of never marrying and increasing frequency of divorce and of unmarried cohabitation. These changes have been viewed as linked to increased individualism and supported by underlying economic and social changes. In

addition, some of the differences in older persons' living arrangements are associated with differentials in mortality at older ages. In general, living together as a couple is the most common living arrangement of older married persons in each of the four countries studied. While most older men live with a spouse, a large proportion of older women are widows, who have a higher propensity to live alone. There are marked contrasts among countries, with Finland and the United Kingdom of Great Britain and Northern Ireland exhibiting the highest proportions living alone and Italy and Hungary the lowest. Older divorced women show a marked tendency to live alone in all countries, although in Finland, at least, they do so to a lesser extent than widows. However, older divorced women experience higher rates of living in unmarried cohabitation or with lifelong acquaintances than do widows.

The second demographic transition is already leaving its mark and this is evident in the data, which clearly demonstrate the preferences of older people and young alike for living alone, though perhaps near to kin and with possibilities for other kinds of social and material support. However, there are—and always will be—situations that trigger co-residence. One of these is the health status of the older population. Identifying the transition to different living arrangements is important but requires longitudinal data.

An important finding in all countries, but particularly in Eastern Europe, is that co-residence is a social arrangement that favours both older persons and the young-adult generation. This is especially true in situations of severe housing shortages and poor housing quality. To the extent that the quantity and quality of housing improves, social security benefits increase and coverage expands to cover a larger portion of the older population, continued increases in the proportions living alone can be expected. It was noted, however, that there is clear evidence that some older persons, particularly widows and divorced older persons, are opting for flexible living arrangements, such as unmarried cohabitation and living “apart but together”, that guarantee company and support without the need for remarriage. These types of arrangements provide important social and emotional benefits. Once again this points to the importance of studying social support networks rather than co-residence alone.

Comments by the discussant. Mohammed O. Rahman noted the possibility of an imminent second demographic transition in Hungary and Italy, which would imply an increase in the prevalence of living alone. He questioned whether this should be a matter of concern. Although the spread of such changes throughout Southern Europe is likely, it is also possible that this would not occur. The relationship between ageing of the population and decline in co-residence with children is not clear-cut: for instance, in Italy, the country with the highest proportion of older persons in the world, co-residence is much more common than in countries where the ageing process is not as advanced.

Mr. Rahman highlighted the phenomenon of living “apart but together” among widows and widowers. This type of arrangement merits attention, for it implies the emergence of household-based relationships that might escape notice if only conventional co-residential patterns are examined. This calls for new methods of data collection on emerging trends in living arrangements in Western Europe that are replacing co-residence with children or kin or living alone.

Mr. Rahman noted that the Sokolovsky paper raised an interesting issue regarding the validity of narratives of neglect, when co-residence and respect for older persons prevail. What do these narratives reflect? Anticipatory behaviour? Do they announce the demise of the traditional system? The evidence presented by the author suggests relative stability of co-residence arrangements in a highly changed community. This should alert us to the need for caution in using terms such as “ageing crisis”, as there may not be a crisis, particularly when communities are able to adjust without dismantling traditional living arrangements.

V. ADAPTING TO RAPID SOCIETAL TRANSFORMATION

The Chairperson, Linda Martin, noted that the theme of the session involved immediate concerns, which have very relevant policy implications. The papers dealt with trends affecting older persons in a range of societies undergoing rapid change in socio-economic conditions. Perhaps it is here that the contrast between the ageing issues facing developed and developing countries is most stark.

In presenting his paper, Paulo Murad Saad discussed the possible impact of pension reforms on the living arrangements of older persons in Latin America. As these reforms have only recently been implemented, it is difficult to provide a quantitative assessment of their impact since most effects will be felt only in the long run. The degree to which pension reforms impact on the household structure of older persons will depend on the extent to which they affect the financial independence of older persons. It is expected that improvements in the value and/or coverage of pensions will lead to increases in the prevalence of independent living arrangements. Preliminary evaluations of the Chilean reform—the oldest in the region—do not point to any increases in older persons’ financial autonomy. Most workers—especially those in the informal sector and those with lower incomes—do not contribute regularly to the system and will not receive benefits when they are older. On the other hand, the value of benefits paid by the Government, which still manages the old system, to the majority of current pensioners and retirees has dropped dramatically because of the huge outflow of income experienced by the public sector immediately following privatization. A basic lesson from

the Chilean reform is that a private system tends to work well for high-income workers, but poorly for low-income workers. Thus, merely substituting a private system for one that was public is not likely to resolve problems associated with pension schemes in Latin America. Rather, pension reform should be part of a broader set of socio-economic reforms, capable of providing the necessary conditions for workers to fully participate in the system. Since pensions comprise an important component of older persons' income, even small changes in the value of benefits can potentially have a large impact on the living arrangements of older persons. At present, though, we do not know how living arrangements will respond to pension reforms.

The second paper in the session, presented by Vladislav V. Bezrukov, describes changes in the living arrangements of older persons in Ukraine during the country's political, social and economic crises. As a result of these crises, the situation of the older population has worsened. Within the past decade, population ageing in Ukraine has increased, mainly owing to the continuing decrease in fertility rates. The number of persons aged 60 years or older continued to grow, and they made up 19.5 per cent of the total population in 1998. Increases in the cost of living, inflation and low pensions have led to a larger gap between the economic provision of pensioners and the changing living standards of the working population. The lack of employment opportunities for older workers has aggravated the situation. The absolute number of workers aged 60 and over declined from 1.0 million people in 1989 to 0.6 million in 1995. Housing conditions were poor: fewer than half the older population lived in dwellings with connections to piped water and only about 40 per cent had access to hygienic sewage disposal. This gloomy social and economic context is worsened by two additional factors. First, the role of the family as providers of care for older persons has weakened during the past decade. This holds true particularly in rural areas, where older persons are most likely to live alone. Secondly, there is clear evidence of deteriorating health conditions among older persons, which is reflected in the sharp reduction of life expectancy at age 60. Unfortunately, the present economic situation does not allow the delivery of appropriate health and social welfare services to the older persons who need them. In the final section, the paper explores alternative public interventions to improve the economic, social and health status of the older population.

Zeng Yi presented a paper on extremely rapid ageing and living arrangements in China. Both the official Chinese and the United Nations most recent projections confirm a rapid increase in the proportion of older persons, the large absolute numbers of older persons, an extraordinarily rapid increase of the oldest old after 2020, and sharper increases of the older population in rural than in urban areas. More than 70 per cent of Chinese older persons live with children. Among those who live with offspring, about three fourths live in family households comprising three or more generations. The proportion of older persons living alone is relatively small, and very few old people live in institutions. In general, older women are disadvantaged, for

they are economically more dependent than men yet are also much more likely to be widowed and thus to live alone. Considerable differences exist between rural and urban areas. The pattern of living arrangements of older persons changed little, if at all, between 1982 and 1990. Drawing upon empirical findings discussed in the paper, the authors review selected policy recommendations for strengthening the family support system, establishing an old-age insurance programme in rural areas, and designing programmes to increase the level of benefits for disadvantaged older persons (particularly widows), and to smooth the transition to a “two-child plus spacing” policy to replace the current one-child policy.

The paper presented by Nana Araba Apt focused on rapid urbanization and living arrangements of older persons in Africa. A number of drastic changes have occurred in the recent past, some of which would have been unthinkable until recently. First, systems of authority and dominance favouring elders have weakened as they play less important roles within the extended family. This is mainly the result of the erosion of rural production and of the household as the unit of production. Massive migration flows towards urban areas undermine the traditional system in which older persons commanded respect and authority. As older persons become more dependent within an altered social and economic context, and widespread poverty persists, families find it more difficult to support their older members. Thus, care of older and dependent parents, a task that in Africa only children can perform, will burden young adults well into the twenty-first century.

The troublesome fact is that, in Africa, ageing and the situation of older persons is not really felt or acknowledged as a problem by political leaders or other interested parties. Africa is still demographically very young, and issues related to the care of older persons have less priority amid a number of more urgent problems. African countries not only lack resources that can be diverted to increase older persons’ well-being but national Governments themselves are unlikely to act efficiently either to generate new resources or to allocate efficiently those that exist. Thus, at least in the near future, the well-being of older persons will be entirely dependent on the ability of children to provide for parents. A key issue is how to mobilize support in an environment where co-residence is threatened by large migration flows, where diseases and epidemics (including HIV/AIDS) are eroding the demography of households and families, and where there is massive unemployment of the young. Older people may have to continue working well past what in the West are considered ages of retirement. Given that, in the foreseeable future, Africa is unlikely to be able to build a comprehensive welfare system, limited measures are worth considering, such as tax breaks for those taking care of older relatives, and construction of community centres that can be used as meeting places or clubs for older people. The paper concludes with a number of policy recommendations for Ghana, including promotion of rural development, strengthening older persons’ income-earning opportunities, promoting village-based

small industry and business development, encouraging and facilitating older persons' participation in the labour force and securing additional education and vocational training.

Comments by the discussant. John E. Dowd, the discussant for the session, noted that all four papers made clear the need to utilize all the demographic information available, including information on health and disability, on risk factors and on chronic illnesses, before one could make an assessment of the situation of older persons according to co-residence status. Although in most cases those data do not exist, sometimes minimal data sets are available for making appropriate inferences. In the absence of well-integrated and coherent data sets, we need to work on a piecemeal basis, trying to assemble various segments of information from different sources.

Mr. Dowd found commonalities in the policy recommendations proposed by the authors of all four papers, but also questioned whether some of the measures were feasible. For example, all four authors agreed on the need to ensure better pensions for workers in all sectors of the economy as a way to ensure less dependency on children or relatives. He questioned whether this was realistic for many poor countries, where social security systems either do not exist or have very limited coverage. A second common thread in the papers was the recommendation that older persons be given a chance to participate more fully in the labour market under a variety of schemes to secure economic support as well as social integration.

VI. POVERTY, HEALTH AND LIVING ARRANGEMENTS OF OLDER PERSONS

Jenny de Jong Gierveld opened the session by noting that the papers to be discussed focused on the relation between well-being and residential arrangements but from a somewhat different perspective. The question now was whether there is any evidence that different co-residential arrangements lead to different health or poverty status among older persons.

Emily Grundy described evidence of the relations between living arrangements and characteristics of older persons, focusing on studies in the United Kingdom. Although there are theoretical reasons to suggest that living alone might have adverse effects on the health of at least some older people, the empirical evidence shows that those living alone are generally in the best health. However, in interpreting this fact it is essential to take into account the importance of selective moves to institutions and to relatives' households. In particular, among the very old, living alone may only be an attractive or possible option for those in reasonably good health or with good support systems. Given that surviving spouses, attentive daughters and personality cannot be randomly allocated, it is unlikely that the "true" effects of living arrangements on the health of older

adults can ever be quantified. Moreover, these are certain to vary between populations and individuals. The psychological effects of living alone, for example, may be damaging for older people who regard this situation as undesirable or stigmatizing but beneficial for those who regard it as an indication of independence and autonomy. Empirical studies have shown that having a close relationship with someone seen only two or three times a week was just as protective as having a confidant in the same household. It was those who had no close relationship at all who were at more serious risk of clinical depression. One might hypothesize that possibilities of economies of scale associated with co-residence may lead to adverse consequences for older persons who live alone and are poor, but may have no measurable effects among those who are well off. Another important point is that the health statuses of members of households where older persons reside are correlated. And, obviously, the health characteristics of those who share a household are important for the health of older individuals. Thus, it is important to consider the household's characteristics rather than just those of individuals when deciding on allocation of services.

Mohammed O. Rahman discussed the results of his research in Bangladesh. There is very little information about the impact of living arrangements on patterns of morbidity for older adults in developing countries. The paper employs newly collected comprehensive data to examine the impact of living arrangements—particularly the presence of various family members—on self-reported general health and limitations in activities of daily living for adults aged 59 years and over in rural Bangladesh. The results suggest that the gender difference in the impact of spouses on self-reported general health is consistent with the notion of spouses being more important for older women than for their male peers in a social setting where women have limited access to resources. These cross-sectional results need to be viewed with some caution because having a co-resident spouse appears not to affect limitations in activities of daily living for either older men or women, while earlier longitudinal mortality studies in the same population found that the impact of spouses was greatest for older men and was mixed for older women in terms of mortality. These discrepant findings reflect either differences owing to variations in study design or outcomes that vary according to the specific dimensions of health status examined. The results help underscore the complex dynamics of the relationship between living arrangements and the health status of older persons in developing countries.

Peter Lloyd-Sherlock summarized the results of his ethnographic work on poverty, old age and living arrangements in slums in Argentina and Brazil. Although the numbers of older persons were found to be lower in slum neighbourhoods than in other urban districts, there is fragmentary evidence that this gap is being reduced. Older people in the study districts were more likely to be living in large household units than were older persons in general, but co-residence did not necessarily mean support from other household members. In many cases older persons were significant net contributors to household welfare. In some cases support from

relatives living outside the home was more important than support from inside. Many older people are homeowners. This often represented a significant contribution to family welfare, but was rarely recognized by those concerned. The results of the microstudies are highly context-specific and may not apply to poor older people living in other urban communities. However, they draw attention to the complexity of older people's living arrangements and to the dangers of making assumptions about socio-economic relations from raw demographic data.

Finally, Mapule F. Ramashala described conditions of older persons in South Africa, using the 1996 South African population census. The projected growth in the number of persons aged 75 and over is of particular concern, because this group has the greatest number of needs that must be met: economic security; access to essential health and human services; adequate housing and personal safety. Of particular importance in South Africa is the problem of housing, which, combined with large rural to urban migration outflows of the young, leads to drastic alterations in patterns of living arrangements of older people. We know little about the existence and feasibility of alternative living arrangements, especially for older persons who are frail, the slightly impaired, and those who need sheltered housing but not nursing care.

Inadequate housing conditions are particularly problematic for older people who are disabled. In South Africa, one policy response to the severe reduction in public expenditures supporting nursing homes has been the concept of "ageing in place", whereby older people remain in their homes, with their kin or children. Providing support services to permit people to remain in their homes is considered the best option by many in the field of gerontology and appears to be a feasible solution for South Africa. To the extent that such policy is complemented by public assistance to meet the basic needs of older persons and the members of their households, programmes for "ageing in place" may take advantage of kin and young adults who can remain with older people, thus providing an array of services while in turn receiving shelter and sharing household goods in compensation for their services. These mixed strategies that combine familial support and state-based support to sustain familial care are likely to be, on the whole, less costly and probably more effective than strategies exclusively based on one or the other.

Comments by the discussant. The discussant, Martha Pelaez, noted that the four papers were tied together by a common attempt to understand either the extent to which certain characteristics of older persons (health, disability and poverty) affect co-residence or the degree to which living arrangements and marital status influenced older persons' characteristics such as health status and disability. Furthermore, the existence of two-way relations—for example, health affecting living arrangements and vice versa—has been repeatedly mentioned, warning us to be cautious in making causal inferences. With the exception of the paper by Ms.

Ramashala, which is based on census data, all the papers highlight the importance of social networks beyond those created through co-residence. The papers also stress the influence of housing availability and housing characteristics. Throughout the meeting participants emphasized the need to examine the complete set—or as complete a set as possible—of older persons’ social relations rather than confining attention to those in the household. Less attention was paid to issues of housing location and housing quality. Location and quality of housing may directly affect the health and well-being of older persons, and it might also determine the locus of control and therefore the likelihood that older persons can live with the younger generations. Clearly, special communities developed to house older persons by definition exclude multigenerational living arrangements.

An important issue highlighted by the papers is the need to study the dynamics of living arrangements. The papers give examples in which a cross-sectional picture could not possibly inform us about the changes that occur as a result of health conditions, including physical and mental health. The dynamics of transitions may differ by social class and by location of residence, as shown by Mr. Lloyd-Sherlock.

Linked to this is the theme of institutionalization and the creation of specialized hospitals and health-care facilities. The living arrangements of older persons will follow a different dynamic when Governments—as they are beginning to do in many countries—and private businesses—as they emerge in some places—begin to develop alternative arrangements that are not stigmatized. These linkages are important with regard to mental health. It is known, for example, that mental health impairments are especially likely to lead to institutionalization. Similarly, living alone may be a precursor to institutionalization, once serious physical or mental health problems develop.

VII. FUTURE RESEARCH DIRECTIONS

Douglas A. Wolf, the Chairman of the session, observed that over the past decade there has been a substantial amount of research on living arrangements but important questions remained unanswered.

Victoria Velkoff summarized her paper discussing priorities for future research. She noted several observations emerging from a cross-national comparison of living arrangements: women in developed countries are much more likely than men to live alone as they age, mainly because women are more likely to be widowed; there has been an increase in the proportion of the older population living alone in developed countries; in developing countries, both older men and women usually live with adult children; and the use of institutional care for the frail elderly varies widely among countries but is relatively low everywhere. She focused on three main areas where research was needed: (a) changing family structure; (b) familial resource

transfers; and (c) older people's preferences in terms of living arrangements and care. First, research on changing family structure should take into account alternative and changing family forms—including “blended families” that result from divorce and remarriage—and their possible consequences for living arrangements later in life. Changes in kin availability also needed attention. Grandparent-and-child families are increasingly common in some countries, particularly where HIV/AIDS has orphaned many children. With regard to the second point, little is known at present about the complex decision-making process behind transfers of physical, emotional and economic support among family members. Co-residence often offers benefits to both the adult parents and the adult children, but flows of support from kin outside the household are also important. Even though in most societies support is likely to flow in both directions—from parents to children as well as the reverse—the balance is likely to differ from place to place. For instance, by comparison to those in developed countries, older people in developing countries appear less likely to provide financial help to children—probably they lack the means to do so—although older parents clearly make substantial contributions in other ways ranging from socialization to housekeeping and child care. With respect to the third point, there is a need for more research on the preferences and attitudes of older people regarding living arrangements. Assumptions are often made about older people's preferences for living arrangements that are based on past or traditional norms. Recent research in the Philippines found that many older people, although co-residing with children, would prefer to live alone or with a spouse. This is similar to results reported from Brazil and Ecuador. More frequently than not older persons live with children either because of their needs, the needs of their children or a combination of both.

Several participants provided information about ongoing activities related to population ageing. Richard Leete presented a note on the United Nations Population Fund's research focus in the area of population and ageing, including examples of projects supported by the Fund. It was noted that while the bulk of the Fund's programmable resources are earmarked for reproductive health services in developing countries, including family planning and sexual health, about 30 per cent of the Fund's resources are devoted to programmes and projects in the area of population and development strategies. This includes the linkages between population and development, of which population ageing is one of the areas of focus.

Alexandre Sidorenko described the activities of the Programme of Ageing of the Department of Economic and Social Affairs of the United Nations Secretariat during the period from 1999 to 2002. The three major activities were (a) revising and updating the International Plan of Action on Ageing; (b) developing a long-term strategy on ageing and (c) convening of the World Assembly on Ageing in 2002. He stressed the important role of the World Assembly, not only as a follow-up to the goals and recommendations agreed to in the International Plan of Action on Ageing elaborated in 1982 at the first World Assembly on Ageing, but also

as a forum for launching the research agenda on ageing for the twenty-first century. He also spoke of the European regional conference on ageing, which is also expected to be convened in 2002.

Nikolai Botev described the work programme of the Population Activities Unit of the Economic Commission for Europe (ECE). There were four areas of work: (a) international migration and migrants; (b) population ageing and older persons; (c) fertility, family and reproductive health and (d) follow-up to population conferences. A major project deals with the status of older persons in ECE countries, especially economic conditions, living arrangements and gender. The main objectives are to assemble a set of cross-nationally comparable microdata samples based on the 1990 round of national population and housing censuses conducted in the member States of ECE and to use these samples to study the economic and social conditions of older persons.

Comments by the discussant. The discussant for the session, Antonio Golini, observed that the marked contrast in living arrangements for older men and women pointed to the need to study living arrangements by marital status, as others had also noted. Similarly, we need to understand why levels of institutionalization differ as much as they do among the developed countries. Is it because institutional living is still stigmatized in many societies and demand is low, or is it because there are not enough incentives for private capital to satisfy the existing demand? And, if this is so, how can the supply shortage be addressed? As more options for co-residence become available, patterns of co-residential arrangements will affect aggregate characteristics and have important ecological and spatial consequences. Finally, living arrangements are indeed a form of transfer and, as such, should be studied together with the occurrence of other transfers.

A second dimension of interest is healthy ageing. What are the factors that affect it and what are the most useful interventions? An important point has to do with the intensity and speed of ageing. To the extent that intensity and speed are high, the lead time for society and Governments to act will be shorter, with corresponding consequences for the health of older persons. A complicating issue is that speed and intensity will vary across countries and within regions in the same country. Focusing on the factors affecting healthy ageing is also complicated since the determinants of interest are not just proximate but also distant. For example, it is one thing to know that current co-residential arrangements may affect depression a few years from now, and another to know that health conditions during older ages are determined by social and health conditions early in life. Whereas in one case we could act, in the other the policy options may be more limited. Mr. Golini suggested additional studies and research on determinants of physical health and disability as well as mental health. In particular, we need to know with some certainty whether the future will be characterized by expansion or compression of morbidity.

A third dimension of ageing has to do with availability of kin. Mr. Golini suggested that the ratio of persons aged 75 or over to the population aged 50 to 64 was a useful approximate indicator of the number of oldest old, those most likely to need support, in relation to the number of children available to provide that support. The value of this indicator is projected to rise rapidly in all countries, and in some countries, including Italy, by 2050 there will be more than one person aged 75 for each person aged 50 to 64.

Fourth and finally, he observed that the ideological superstructure that rationalizes relations between older persons and younger generations had drifted too far in the direction of individualism. To the extent that individualistic values become dominant, the care of older persons will become disconnected from familial concerns.

VIII. SYNOPSIS OF THE DISCUSSIONS

Research issues and policy concerns

The living arrangements of older persons are of interest for both policy and scientific reasons. First, living arrangements may influence the material and psychological well-being and health status of the older generation. Co-residence with older parents may also affect the well-being of the other family members, typically adult children and grandchildren. A second major reason for policy concern is the potential trade-off between public (e.g., social security) and private, family-based support for older persons. Traditionally, most, though certainly not all, family support has been delivered within a co-resident family unit, and a decline in such arrangements is likely to coincide with a rising demand for public provision of some of the services formerly provided by family members. More generally, individuals' "micro" decisions about co-residence have, in the aggregate, "macro" effects in such areas as demand for social services and energy, water and other resource consumption; that is, a trend towards the establishment of more numerous but smaller households can be expected to increase consumption and associated privately and publicly borne costs. Finally, there is a broader scientific interest in understanding major shifts in family and household composition over time and place, and in trying to understand how family relationships are affected by economic and other social changes in the course of development. There is a particular interest in understanding the current situation and in forecasting trends in developing countries, where mechanisms and resources for non-familial support for the older population are few.

Data on living arrangements need to be supplemented by other information in order to understand the implications of changing residential patterns for older (and younger) persons' welfare. First, we need to know about preferences of older persons and of their kin. Secondly, for a comprehensive picture of support provided within the family, it is important to investigate the role of kin living elsewhere, since relatives, and even non-relatives, living nearby may be an important source of emotional support and assistance, and even distant kin may provide significant financial assistance. Thirdly, for sound policy decisions, we need a better understanding of the nature of intra-family transfers and their relationship to the system of pensions and social welfare. Fourthly, there is also a demographic context that is relevant. The younger old are more likely to be in good health, can still be economically active and may provide substantial assistance—both financial and personal (e.g., child care)—to their children and grandchildren. In such cases, support may flow mainly from the older generation to the younger. With advancing age and with the onset of chronic disease or disability, the older generation becomes more likely to depend on others for both financial support and personal care. It is also important to note that the family caregivers for a population aged 80 or over are typically individuals aged 55 to 60 or older. That is, those providing care and, especially, emotional support for the oldest old are themselves part of the older population.

Participants agreed that, based on present knowledge, it is difficult to argue convincingly what is best for older persons in terms of residential arrangements and, therefore, to choose cogently between alternative policy options. At present, even on apparently self-evident matters such as the relation between co-residence and feelings of loneliness and isolation, we have no decisive data. It is difficult to determine the effects of living arrangements on health, since ill health almost certainly affects living arrangements; only those who remain in moderately good health are likely to be able to live independently. There is really no sure way to tell what the causal relation between well-being and living arrangements is since we cannot perform randomized experiments. Longitudinal data can help answer some of the questions, but some difficult issues of interpretation of cause and effect cannot be settled even if the sequence of events is clearly known. More particularly, current and future behaviour depend to an unknown degree on people's expectations about the future and cannot be fully understood by studying events that have taken place up to the time of observation.

It is important to recognize that the relationship between co-residence and levels of well-being depends on the social context and macroeconomic conditions, not just on individual characteristics and preferences. Thus, co-residential arrangements are constrained by housing markets and quality of housing stocks, so that the choice of co-residence is not always freely made. In this connection, it was reported that, in Ukraine, older persons who were assigned to places that they considered undesirable experienced higher mortality, morbidity

and disability. Similarly, the ability of older persons to be satisfied and live without stress is likely to be a function of characteristics such as gender and education.

Because of their low rates of participation in the formal labour market, women are most vulnerable economically and their well-being may be more dependent on co-residence than is that of men. Also, since roles within families differ according to characteristics such as gender, age and marital status, co-residence will have different effects according to the status of the older persons regarding those characteristics.

The characteristics of the adult children are also important in determining living arrangements. It was reported that, in Brazil, older persons' own expectations are that their daughters, not sons, will take care of them in old age. A similar division of labour between sons and daughters has been observed in some countries of Asia, although in others a daughter-in-law traditionally provides most day-to-day assistance. Trends affecting the younger generation, such as increases in divorce, cohabitation and women's labour force participation, could limit the willingness or the capacity of children to provide support to parents through co-residence. The strength of bonds established earlier in life may also have an important effect. For example, the prevalence of living alone among divorced men in several European countries was higher than among divorced women. This could be due to the stronger childhood bonds formed between mothers and children than between divorced fathers and children.

Several participants remarked that the option of institutionalization is often ignored in discussions of living arrangements of older persons and seemed not to be regarded as a realistic or satisfactory option. Is this because there is a stigma attached to it? Or is it really a matter of lack of demand? Is it possible that the supply of acceptable institutional options is limited and insufficient but that the latent demand is substantial? Meeting participants confirmed that institutionalization was indeed stigmatized in many developing countries, including China. Yet, the issue is of relevance to older persons everywhere, not just in developed countries. It was noted that, especially for the younger old, institutionalization was often linked to health problems, while for the oldest old it was more often related to social situations, including a lack of potential family caregivers. Because the needs of older persons who are infirm and debilitated may outstrip the resources of members in a joint family, long-term care and institutionalization will become the only alternative for some people, and this too is a matter for design of adequate policies. Institutions provide a different array of care than co-resident families can or are willing to provide. If the development of robust pension systems is desirable, so is the development of policies to support affordable and good-quality institutional living arrangements.

In some areas of the world, there are creative alternatives to both home-based care and institutionalization. Thus, for example, in a few countries older persons are beginning to reside in communities specially designed for them. Older persons should have a say in determining the location and functioning of these communities; for instance, a location near downtown areas may be preferred because it provides easier access to cultural activities and a range of shops and services. These communities help resolve some of the social integration problems referred to earlier. However, whether they become widespread or not will depend on social, economic and, ultimately, cultural conditions.

This also raises the question of costs: Governments will become interested in the issue only to the extent we are able to show the costs associated with each set of options. In many settings families are currently providing care that would be costly to replace. For instance, a study in Ukraine made approximate estimates of the cost of providing paid caregivers for older persons to meet all the needs of the elderly for outside care, which is currently partly covered by family members and the formal sector. In this case, to care for the needs of older persons, using only outside providers, it was estimated that the Government would need an amount close to the total health budget of Ukraine.

Whereas in developed countries, pensions and social security expenditures are an important source of income for the older population, in most developing countries, the majority of older persons do not have coverage of any type, as their labour experience revolves around the informal economy. In these cases, providing broad coverage would require the establishment of social security systems that cover the informal economy. Another approach is South Africa's programme of assistance that subsidizes the family or close kin for care provided to older persons.

At present, living with children and other kin may be the only option available to the majority of older persons in developing countries, and those who lack this option may face destitution. Even in those countries, though, co-residence is not a panacea. To the extent that older persons contribute to the household, joint living arrangements may be tolerated and considered advantageous to all members of the household. But as older persons' contribution begins to decrease and as they become more a source of demand for services, there is reason for concern that co-residence arrangements may begin to weaken. When co-residence becomes increasingly difficult or is simply not an option, some older people will necessarily have to enter institutions.

Data and research needs

Meeting participants also discussed data needs and methodological approaches for answering many of the unresolved questions noted above. Assessment of data needs and design of data-collection instruments must take into account policy concerns and should be informed by theories of social functioning and social and economic change. In this regard, some participants regretted that the meeting had devoted relatively little time to theoretical issues.

In many developing countries, even basic descriptive information from a cross-sectional survey or case study is difficult to come by, especially given the inevitable competition for scarce research funds. One way to deal with this is demonstrated by John E. Dowd and colleagues at the World Health Organization, who are working on the design of data-collection systems (minimal data sets) sufficient to monitor and gauge the situation by tracking key indicators, without necessarily generating information to unravel complicated causal processes. To go further, to reveal the dynamic characteristics of household arrangements over time usually requires longitudinal studies and a focus on transitions over the life course of individuals, with attention to both older persons and their close kin.

There is value to be gained by combining survey-based data with information collected through focus groups and ethnographic research. Ethnographic approaches were employed in obtaining the results reported at the meeting by Peter Lloyd-Sherlock and Jay Sokolovsky. One important strength of ethnographic approaches is their ability to obtain information in depth about the process and reasons that underlie changes in living arrangements. For example, did the parent(s) move in with, or away from, adult children, or vice versa, and was the move impelled more by the needs of the older or of the younger generation? Was a move motivated by health problems, by financial considerations, or by needs for companionship, or for help in managing the household? Have living arrangements in fact changed, or did the parents and children remain together continuously after the children married?

It was noted that even in structured single-round surveys it was possible to pose questions that would ascertain basic information about the situation surrounding changes in living arrangements (and other major life events) and the reasons for those transitions. Such information could be of great value for interpretation and would be relevant to policy concerns, yet this type of data has rarely been gathered in surveys so far.

There is a tendency for surveys to focus on the older population only, or on the younger population only, and to ask such different questions of each group that it is not possible to compare the older and younger generations' desires and needs or their contributions to one another's well-being. Researchers and groups providing support for research on intergenerational family relations and intergenerational support should

ensure that a core of questions is posed to both older and younger adults. Results also need to be tabulated in a way that facilitates comparison between the groups.

A number of research initiatives were discussed, including longitudinal studies conducted in developed countries.

Census microsamples have increasingly been used to study living arrangements, their social and economic correlates, and trends over time. There is still much potential for further work of this sort. Steven Ruggles described a new project at the University of Minnesota to preserve and make more widely available census microsample data from the 1960s and later for a range of countries. The Economic Commission for Europe has also been engaged in work in this area, involving census microsample data for a range of countries in Europe and Northern America. However, not all countries have made such data available for research use. Participants voiced a plea to the scientific community to encourage those who are in charge of gathering and managing data from national or regional censuses to make them available for sampling and analysis. Census microsamples can, and should, be structured in a way that preserves confidentiality.

Demographers have contributed to an understanding of the demographic constraints on the formation of extended households through the use of simulations. There have been two major approaches: microsimulation, which involves using a computer to answer specific questions about the individual life course, through sampling and model-based assumptions; and macrosimulation, which applies a set of deterministic assumptions in order to project aspects of the life course for a group of people. Zeng Yi presented illustrative results from a new macrosimulation model, ProFamy, to project transitions in household types, and also mentioned other macrosimulation models. Douglas Wolf gave an overview of microsimulation approaches.

The meeting discussed relative strengths and weaknesses of the macro- and microsimulation approaches. Within each general approach, a number of core models and computer programs have been developed. In general, microsimulation offers more flexibility, including the potential to investigate questions that were intractable by other methods. However, some participants criticized most of the analytic efforts in this area for failing to make the assumptions of the model clear and/or convincing to the reader. The sheer complexity of many such simulations makes them difficult to present in a way that is understandable and convincing to an audience of researchers or policy makers. A fundamental problem is that empirical information about some of the key relationships included in microsimulation models—such as correlated risks among family members—is generally not available, and in this case assumptions of unknown validity have had to be made; this has

inevitably led to questions about the validity of the outcome of the simulations. Other participants stressed that the approach was indeed useful in certain situations. For instance, it could show the implications of making alternative assumptions, including assumptions about unmeasured heterogeneity in the population with respect to key risk factors such as frailty. It had also been useful in giving insights about kinship networks under different regimes of mortality and fertility. There was a further suggestion that different types of simulation might be employed in a complementary way to address specific aspects of issues such as kin availability.

IX. GENERAL CONCLUSIONS OF THE MEETING

Papers presented at the meeting and accompanying discussions facilitated the identification of a number of research and policy-relevant themes regarding the living arrangements of older persons. Many of these are due to insights produced by recent research and findings uncovered in the past 10 years. Although the living arrangements of older persons have always been an important dimension of the study of ageing, it is only in the past few years that researchers in the area have reached what may be termed a strategic point in the accumulation of knowledge, one that enables us to make certain statements with confidence and that sheds light on key areas for future research.

Pervasiveness of trends

Despite great intercountry variability in pace and timing, all developed countries have experienced increases in the prevalence of living alone among older persons. These trends are expected to continue. The contour of trends may not be exactly the same from place to place but they are quite close, and in the short run at least it is more likely that we will see a convergence towards even higher levels of living alone than any drastic reversals of recent trends.

With a few exceptions (such as the Republic of Korea), the same cannot be said of developing countries. There, the prevalence of older persons' co-residence with children and kin continues to be high—usually over 80 per cent—and these levels have changed very little in the past few decades. Yet, however small they may have been, changes during the decade 1980-1990 towards higher levels of living alone may point to the beginning of a major shift in the developing world as well. For a number of reasons discussed out below, most researchers working in this area believe that many developing countries have reached a turning point beyond which the traditional living arrangements of older persons are being eroded.

Forces behind changes

Demographic determinants can be expected in the future to contribute to increases in the prevalence of living alone among older persons in the more developed countries, though they are not a major reason for the trends observed to date. Sharp fertility reductions will produce lower levels of demographic availability of children and other kin. In order for joint living arrangements between children and older persons to be possible, only one surviving child per couple is needed. But having only one child is probably not sufficient to provide the full array of choices for older persons as would a larger number of children; indeed, in a number of countries, parents with more children have been found to have a higher probability of co-residence. Thus, even though among the more developed countries Italy has one of the highest levels of joint living arrangements among those aged 60 or older, the current levels may not be sustainable with a demographic regime such as that in northern Italy, where about 25 per cent of women above age 30 are childless and fully 50 per cent have only one child.

Mr. Ruggles argued persuasively that the turning point marking the beginning of the end of traditional living arrangements in the United States occurred as a result of transformations in the economy, and the same forces are believed to have operated in Europe. These changes simultaneously weakened the household economy and tightened the relation between human capital and social and economic returns and achievement. Social constructions such as the emergence of the welfare state reinforced changes that had begun to occur earlier but were not themselves the trigger that precipitated change. Finally, these changes have been reinforced by shifts in the ideological superstructure—reflected in stated preferences and values—with stronger emphasis on individual development, less reliance on family and kin networks, and an increase in the value placed on independent living.

Such trends are not the only factors influencing the dissolution of traditional living arrangements. Economic prosperity makes it more feasible for older people to live alone, while external constraints such as availability of housing and labour market rigidities for the younger generations can modify the extent to which living arrangements move in tandem with the set of economic, social and ideological conditions identified earlier.

Apart from a few Asian societies favoured by rapid industrialization, most other countries in the developing world face conditions that may retard the transition to higher levels of living alone. First, intergenerational solidarity and a sense of obligation towards older persons continue to be strong everywhere, or at least so it appears from survey information on preferences. Secondly, incipient, poorly developed, or

non-existent systems of social transfers continue to place older persons at a disadvantage, even in cases where they may prefer to live independently, rather than with their children or other kin. Thirdly, apart from areas where migratory outflows are massive, conditions for the younger generations are not always conducive to situations where the pooling of resources and the economies of scale reaped from joint living arrangements can easily be foregone. Finally, only in a few of these societies have demographic and economic transformation led to rigidities in the life cycle of younger individuals—owing to career demands, dual-earning couples and marital disruption—to constrain the field of choice for living arrangements of older persons.

At the same time, if the above explanation of trends in the more developed countries is correct, this has major implications for developing countries as well. Their economies will, necessarily, in the course of development, undergo similar structural changes away from family farms and family enterprise. Nana Araba Apt reported that such changes were already tending to undermine the traditional authority of older persons in Africa. These changes are occurring more rapidly in developing countries than they have in the West, and the generational gap in education and earnings—two other factors thought to be important—is even wider in many developing countries than it has ever been in the West.

Co-residence and well-being

There are a number of reasons to be concerned about patterns of older persons' living arrangements. First, older persons' living arrangements have spillover effects. That is, individual decisions about joint or separate living affect social and contextual characteristics. Thus, they have an impact on aggregate demand for housing and housing services as well as on the size and type of demand for social services and caregiving for older persons. Secondly, it is widely believed that living arrangements are one factor, among many others, that influence older persons' well-being.

In the meeting a number of interventions identified the first reason as one of some importance but also made it clear that it was a neglected area of research. The second reason for examining older persons' living arrangements attracted much more attention. Yet, even though more research has focused on it, the kinds of inferences we can normally make are remarkably weak and tentative. The simple question "Are older persons who live alone better or worse off than those who live with children or relatives?" cannot be answered in a straightforward way. First, there are issues pertaining to identification of causal relations that are simply insurmountable with the data normally available. Thus, unless one has longitudinal observations, it is difficult, if not impossible, to decide whether conditions defining older persons' well-being lead to a particular type of

residential arrangement or vice versa. Some may go so far as to say that without the ability to perform a randomized experiment, we will never be able to make unequivocal statements about this question.

Secondly, if living arrangements influence older persons' health conditions, socio-economic standing, emotional well-being or other dimensions of individual welfare, the effects could be highly contingent—that is, dependent on the presence or absence of other conditions. Thus, it is known, but rarely investigated, that the existence of social connections to individuals other than those in the immediate family has an important effect on emotional conditions such as loneliness. Familial transfers such as cash, periodic caregiving and so on could satisfy many of the needs that would normally be taken care of in situations of joint living.

In summary, in addition to the many problems presented to us by actually measuring the levels of older persons' well-being (how many dimensions? which ones?), there are serious difficulties associated with causal inferences. Some of these can be resolved by widening the scope of our inquiries, including an assessment of social relations other than those with family members, and measuring family transfers other than those that are part of co-residence.

Alternative living arrangements

The living arrangements of older persons need not involve a choice between living alone and living with family members only. For example, living alone but with a companion appears to be increasingly common among widows and widowers in Europe. We do not know whether this type of living arrangement will become widespread, nor do we understand the conditions (availability of housing; pension systems) that make it feasible.

The emergence of communities designed for older persons within or close to central cities is another form of living arrangement that emerges as a feasible alternative in the more developed and in some developing countries. But we do not yet completely understand either their financial implications or the type of older persons who are attracted to them. The idea that joint living arrangements of older persons and children could be reinforced by granting government subsidies to families, as is occurring in South Africa, is an innovative approach that may support continued co-residence as a solution in societies where there are no other feasible alternatives.

Finally, even in countries where the institutionalization of older persons is still highly stigmatized, it will not be possible to avoid altogether the development of institutionalization as an alternative. The current low

levels of use of such an arrangement to provide care to older persons who are disabled and infirm could reflect social avoidance as much as a lack of adequate supply. It is likely that as soon as adequate financial incentives are introduced in the market, private initiative will develop and exploit this niche, first catering to pre-existing demand among the more affluent and then creating through diffusion and imitation a much larger demand. Older persons living in poverty and, more generally, all those who cannot afford good-quality institutional services will require different facilities and, in all likelihood, these will have to be financed through public transfers.

ANNEX I

Agenda

1. Opening of the Meeting

Forum on Critical Issues and Policy Responses to Population Ageing.

2. Demographic and policy dimensions of population ageing and living arrangements of older persons.
3. Living arrangements and well-being of older persons in the past.
4. Living arrangements and family support.
5. Adapting to rapid societal transformations.
6. Poverty, health and living arrangements of older persons.
7. Future research directions.
8. Conclusions and closing of the formal sessions.

ANNEX II

List of participants

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ANNEX III

List of documents

<i>Symbol</i>	<i>Agenda item</i>	<i>Title/author</i>
UN/POP/AGE/2000/1	2	The demography of population ageing Barry Mirkin and Mary Beth Weinberger Population Division
UN/POP/AGE/2000/2	2	Programmatic and policy aspects of population ageing and living arrangements Alberto Palloni
UN/POP/AGE/2000/3	3	Living arrangements and well-being of older persons in the past Steven Ruggles
UN/POP/AGE/2000/4	4	Living arrangements of older persons and family support in less developed countries Jay Sokolovsky
UN/POP/AGE/2000/5	4	Living arrangements of older persons and family support in more developed countries Jenny de Jong Gierveld, Helga de Valk and Marieke Blommesteijn
UN/POP/AGE/2000/6	5	Impact of pension reform on living arrangements of older persons in Latin America Paulo M. Saad, Population Division
UN/POP/AGE/2000/7	5	Political, social and economic crises and living arrangements of older persons: the case of Ukraine Vladislav V. Bezrukov and Natalia A. Foight
UN/POP/AGE/2000/8	5	Extremely rapid ageing and the living arrangements of older persons: the case of China Zeng Yi and Linda George
UN/POP/AGE/2000/9	5	Rapid urbanization and living arrangements of older persons in Africa Nana Araba Apt
UN/POP/AGE/2000/10	6	Living arrangements and the health of older persons in more developed countries

<i>Symbol</i>	<i>Agenda item</i>	<i>Title/author</i>
UN/POP/AGE/2000/11	6	Living arrangements and the health of older persons in less developed countries: evidence from rural Bangladesh Mohammed O. Rahman
UN/POP/AGE/2000/12	6	Living arrangements of older persons and poverty Peter Lloyd-Sherlock
UN/POP/AGE/2000/13	6	Living arrangements, poverty and the health of older persons in Africa Mapule F. Ramashala
UN/POP/AGE/2000/14	7	Future research directions Victoria Velkoff
UN/POP/AGE/2000/15	-	Note on statistical analysis and microsimulation for studying living arrangements and intergenerational transfers Douglas A. Wolf

Information papers

UN/POP/AGE/2000/INF.1	Provisional organization of work
UN/POP/AGE/2000/INF.2	Provisional list of participants
UN/POP/AGE/2000/INF.3	Provisional list of documents

Part Two

BACKGROUND PAPERS