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Intergenerational linkages in families

Pearl A. Dykstra[1], Thijs van den Broek[1], Cornelia Muresan[2], Mihaela Haragus[2], Paul-Teodor Haragus[2], Anita Abramowska-Kmon[3], Irena E. Kotowska[3]

Abstract:
We present a state-of-the-art of the literature on linkages between generations within families. We focus specifically on intergenerational coresidence, upward and downward intergenerational transfers in families and the relationship between norms of family obligation and intergenerational transfers. An overview of the academic literature on these topics is provided, as well as suggestions for future research.

Keywords: Intergenerational linkages, intergenerational solidarity, family solidarity, living arrangements, intergenerational transfers, family norms

Affiliation:
1. Erasmus University Rotterdam, The Netherlands
2. Babeş-Bolyai University, Romania
3. Warsaw School of Economics, Poland

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Contents

In what follows, we present a state-of-the-art of the literature on linkages between generations within families. We focus specifically on intergenerational coresidence, upward and downward intergenerational transfers in families and the relationship between norms of family obligation and intergenerational transfers.

1. Intergenerational coresidence

The first section of this state-of-the-art report on intergenerational linkages in families is dedicated to intergenerational coresidence. We speak of intergenerational coresidence when adult children share a household with their parents. It is a type of living arrangements that has many aspects of interest to family scholars. First, we briefly discuss variation in the prevalence of intergenerational coresidence across countries and over time. Second, we will frame intergenerational coresidence as a facilitator for functional intergenerational solidarity as well as a form of functional family solidarity in its own right. Third, we will elaborate briefly on the emotional and psychological aspects. We will then provide an overview of parent and child level determinants of intergenerational coresidence. In this subsection we will emphasize the value of a life course approach, as intergenerational coresidence can be the result of very different life course trajectories, that each have their own, and sometimes contradictory, predictors. Intergenerational coresidence can have different meanings over the life course. Subsequently, we will discuss the way contextual factors shape the prevalence of intergenerational coresidence. We will briefly discuss factors such as housing availability, economic circumstances, welfare state and long-term care arrangements may shape choices of living arrangements. Cultural preferences with regard to intergenerational coresidence are also discussed. We therefore dedicate a final subsection to the state-of-the-art of the literature on intergenerational coresidence in Eastern Europe. We do so, because intergenerational coresidence in Eastern Europe has thus far received relatively little scholarly attention, compared to intergenerational coresidence in the United States, North-Western Europe, the Nordic countries and Southern Europe. This is unfortunate, given Eastern Europe's unique context.

1.1 Variation over time and across countries

The prevalence of intergenerational coresidence varies markedly across countries (Hank, 2007; Isengard & Szydlik, 2012; Iacovou & Skew, 2010; Iacovou & Skew, 2011; Jappens &

Van Bavel, 2012). It is lowest in the Scandinavian countries and the Netherlands, highest in the Mediterranean and South-East European countries, while intermediate levels are reported for Central Europe.

The prevalence of intergenerational coresidence has also shown substantial variation over time. Over the last decades, the proportion of older adults in developed countries living with adult children has drastically declined (Karagiannaki, 2011; McGarry & Schoeni, 2000; Palloni, 2001; Ruggles, 2007; Sundström, 2009; cf. Tomassini et al., 2004), although in the United States stagnation has been noted since the mid-1970s (Crimmins & Ingegneri, 1990). Given the difference in anchoring within the family lineage (Herlofson & Hagestad, 2011), developments in the prevalence of intergenerational coresidence from the older generation's perspective cannot simply be assumed to also apply for the prevalence of intergenerational coresidence from the younger generation's perspective (cf. Freedman, Wolf, Soldo, & Stephen, 1991). However, in her study on intergenerational coresidence from the adult child's perspective in England and Wales, Grundy (2000) also noted a large decline between 1981 and 1991 in the proportion of mid-life adults living with an older parent. Messineo and Wojtkiewicz (2004) focused on younger adults living with middle-aged parents rather than on middle-aged children living with older parents and found radically different results, namely an increase between 1960 and 1990 in the propensity for young adults in the United States to live with their parents.

1.2 Intergenerational coresidence and support

Intergenerational coresidence is among the strategies that can be adopted to organize support, economic or otherwise. In their classic model on intergenerational family solidarity, Bengtson and Roberts (1991), emphasize the importance of the opportunity structure for transfers between parents and children, referring to it as "structural intergenerational solidarity". A key element of structural intergenerational solidarity is the geographic proximity of parents and children. In line with Bengtson and Roberts' model, many scholars have shown that functional intergenerational solidarity, i.e. the extent that parents and adult children provide help to each other and exchange resources, is negatively associated with the physical distance between parents and adult children (see for instance Heylen, Mortelmans, Hermans, & Boudiny, 2012; Knijn & Liefbroer, 2005; Mulder & Van der Meer, 2009; Stuifbergen, Van Delden, & Dykstra, 2008).

Intergenerational coresidence, i.e. parents and adult children living together in the same household, can be seen as structural intergenerational solidarity in its ultimate form. Exchange of social support is greater among parents and adult children living together than among parents and adult children who do not share a household (Campbell & Martin-Matthews, 2000; Hank & Buber, 2009; Hoyert, 1991; Rossi & Rossi, 1990; White & Rogers, 1997). Besides facilitating functional intergenerational solidarity, intergenerational coresidence is also a form of functional intergenerational solidarity in its own right, with living space being the resource exchanged between parents and children. Leopold (2012) finds that extended coresidence, i.e. adult children living with their parents until relatively late ages, is positively associated with intergenerational provision of support, from the older generation to the younger generation as well as vice-versa.

1.3 Emotional and psychological aspects

Parents' and adult children's choice of living arrangements shape family wellbeing (cf. Moreno Minguez, 2013), in the sense that options for autonomy and dependence are structured by residential conditions. In the previous section we framed intergenerational coresidence as a facilitator as well as a form of structural intergenerational solidarity. Another dimension of family solidarity that is impacted by intergenerational coresidence is affectual solidarity, i.e. the sentiments that adult children and their parents hold towards each other (Bengtson & Roberts, 1991). Intergenerational coresidence can have a negative impact on these sentiments. Intergenerational coresidence can be associated with conflict and lower quality parent-child relationships (White & Rogers, 1997), although levels of conflict tend to be low (Suitor & Pillemer, 1988). Frustration of parents and young adult children when the latter fail to gain autonomy can for instance be a source of conflict and tension (Aquilino, 1991; Aquilino & Supple, 1991; Mitchell, 1998). For adult children, living with a parent with care needs may be a source of tension that can even result in violence. Elder abuse is typically committed by a relative living in the same household as the victim (Quinn & Tomita, 1986).

These negative psychological and emotional aspects of intergenerational coresidence may suggest that family wellbeing is lower when adult children and their parent share a household than in situations of residential independence. However, beneficial psychological and emotional aspects of intergenerational coresidence have been reported as well. For instance, sharing a household with an adult child seems to protect older adults against loneliness, though not to the same extent as the presence of a partner (De Jong Gierveld, Dykstra, & Schenk, 2012). Widows who live with adult children also report lower levels of depressive symptoms than widows living alone (Do & Malhotra, 2012). Combining a quantitative approach with an ethnographic, qualitative approach, Mitchell (2004) noted that young Canadian adult children living with their parents typically mentioned non-economic beneficial aspects of the coresidential living arrangement in in depth interviews, such as companionship and emotional support.

1.4 Parent level and child level determinants

Older parents with fewer adult children also have fewer children with whom a household can potentially be shared (Kobrin, 1976). Not surprisingly, research has shown that having fewer children is negatively associated with intergenerational coresidence from the parent's perspective (Aquilino, 1990; Crimmins & Ingegneri, 1990; Palloni, 2001). The argument of Freedman, Wolf, Soldo and Stephen (1991) that it is important to consider the generational perspective in research on intergenerational coresidence and intergenerational transfers in general should be kept in mind here, though. From the child's perspective, intergenerational coresidence is *more* likely when parents have fewer children (Boaz, Hu, & Ye, 1991; Smits, Van Gaalen, & Mulder, 2010; Ward, Logan, & Spitze, 1992).

Studies have determined several child level characteristic that are associated with intergenerational coresidence. Intergenerational coresidence is more likely for never married and formerly married adult children than for married adult children (Aquilino, 1990; Crimmins & Ingegneri, 1990; Messineo & Wojtkiewicz, 2004; Smits, Van Gaalen, & Mulder, 2010; Ward, Logan, & Spitze, 1992). However, Messineo and Wojtkiewicz (2004) show that the propensity of never married and formerly married adult children in the United States to live with their parents declined between 1960 and 1990 (cf. Karagiannaki, 2011). Sons live with their parents more often than daughters (Hank, 2007; Smits, Van Gaalen, & Mulder, 2010) and younger adult children more often live with their parents than older adult children (Hank,2007; Smits, Van Gaalen, & Mulder, 2010; Ward, Logan, & Spitze, 1992). When adult children are single parents they are more likely to share a household with their parents than when they are married parents (Cohen & Casper, 2002). Intergenerational coresidence is less likely for higher educated adult children than for lower educated adult children (Hank, 2007; Smits, Van Gaalen, & Mulder, 2010). Adult children of ethnic minority status or migrant status share a household with their parents relatively often (Angel & Tienda, 1982; Smits, Van Gaalen, & Mulder, 2010). Intergenerational coresidence is associated with lower adult children's income and adult children being self-employed (Smits, Van Gaalen, & Mulder, 2010). A recent study has shown that in the United States, economic considerations of adult children have become an increasingly important driver for intergenerational coresidence over the last half century (Kahn, Goldscheider, & García-Manglano, 2013). Furthermore, disabled adult children live with their parents relatively often (Smits, Van Gaalen, & Mulder, 2010).

Besides these child level characteristics, several parent level characteristics are known determinants of intergenerational coresidence. Mothers more often share a household with children than fathers (Crimmins & Ingegneri, 1990; Hank, 2007). Parental divorce is associated with a lower likelihood of intergenerational coresidence (Aquilino, 1990; Smits, Van Gaalen, & Mulder, 2010; White & Rogers, 1997). Children more often live with their parents when their parents are home-owners (Hank, 2007). Living in a shared household has further been found to be associated with lower parental income, lower parental education and parents being self-employed (Aquilino, 1990; Crimmins & Ingegneri, 1990; Smits, Van Gaalen, & Mulder, 2010).

Characteristics of the adult child have been found to be stronger determinants for coresidential living arrangements between adult children and their parents than characteristics of the parent (Aquilino, 1990; Crimmins & Ingegneri, 1990; Isengard & Szydlik, 2012; Ruggles, 2007; Ward, Logan, & Spitze, 1992). Parental economic considerations have become less important as a driver for intergenerational coresidence (Kahn, Goldscheider, & García-Manglano, 2013). As with other forms of intergenerational support (Albertini, Kohli, & Vogel, 2007; Attias-Donfut, Ogg, & Wolff, 2005), transfers of residential support seem to flow mainly from parents to children, even at later ages (Ward, Logan, & Spitze, 1992). This does not imply that parents' need for residential support is not associated with intergenerational coresidence, but parents simply appear to be in need for residential support dramatically less often than adult children.

The impact of several parent and child level characteristics on intergenerational coresidence appears to be moderated by age (Cooney, 1989; Lee & Dwyer, 1996). Middle-aged parents tend to be particularly likely to share a household with adult children when they are relatively healthy, wealthy and married, while older parents are most likely to share a household with adult children when they are widowed and their health is poor (Lee & Dwyer, 1996; cf. Hank, 2007; Roan & Raley, 1996; Ward, Logan, & Spitze, 1992; Smits, Van Gaalen, & Mulder, 2010). Middle-aged widowed mothers are more likely to share a household with adult children than mothers of similar ages who are divorced, but in old age the opposite pattern can be noted (Cooney, 1989). Middle-aged parents are more likely to a share a household with sons, whereas parents of older ages are more likely to live with daughters (Schmertmann, Boyd, Serow, & White, 2000).

As becomes clear in the above, cross-sectional findings on determinants of intergenerational coresidence are often difficult to interpret. This is because coresidential living arrangements may be the result of radically different life course trajectories. The child can simply never have left the parental home, the child can have left the parental home and moved back or the parent can have moved in with the child. Non-coresiding parents and children can also both move to a new house, but this kind of transition to intergenerational coresidence rarely occurs (Choi, 2003; Smits, Van Gaalen, & Mulder, 2010). The different life course trajectories all have their specific, and sometimes contradictory, predictors (Choi, 2003; Lee & Dwyer, 1996; Ward, Logan, & Spitze, 1992). Several scholars have therefore chosen a life course approach in which they focused on specific trajectories leading to intergenerational coresidence.

1.4.1 Adult children never having left the parental home

Parents and adult children may share a household because the child has not yet moved out of the parental home upon reaching adulthood. In early adulthood, most children still live with their parents and some never leave. In Europe, the average age of leaving the parental home is 26 (European Commission, 2012). De Jong Gierveld, Liefbroer and Beekink (1991) distinguish three main reasons why children leave the parental home. First, children may leave home to complete an education. Nilsson and Strandh (1999) show that pursuing academic education is a trigger for leaving the parental home. Second, adult children may leave home to start living with a spouse or a partner (cf. Mitchell, 2004). Choi (2003) finds that it were particularly unmarried adult children who coresided with their parents due to never having left the parental home, which leads her to argue that, due to missing the life event of marriage, these adult children "may never have gained the momentum […] to become independent heads of household" (p. 397). Finally, adult children may leave the home to gain more autonomy or independence. Cultural contexts may shape which of these reasons for nest leaving are most important. Holdsworth (2000) argues, for instance, that partnership formation as a key trigger for home-leaving is more typical for Southern Europe than for Northern Europe.

Different types of parental resources may foster or hamper nest leaving of adult children. De Jong Gierveld, Liefbroer and Beekink (1991) distinguish material and non-material resources that can be transferred to young adults, and material and non-material resources that cannot be transferred to young adults. The impact of different types of parental resources hinges on the reasons children may have for moving out of the parental home (De Jong Gierveld, Liefbroer, & Beekink, 1991).

Money and property are examples of transferable material resources. This type of resource may enable parents to support their children in their efforts to attain residential independence. De Jong Gierveld, Liefbroer and Beekink (1991) find that transferable material parental resources are associated with home leaving at earlier ages, particularly when children leave the parental home for reasons of autonomy and independence. However, these resources may also be used to lure adult children into staying in the parental home (cf. Avery, Goldscheider, & Speare, 1992; Manacarda & Moretti, 2006). Non-transferable material resources are conveniences that the parental home brings. One could think of mothers who take care of household chores, washing and preparing meals and the amount of physical space that the parental house brings. This type of resources tends to hamper nest leaving (De Jong Gierveld, Liefbroer, & Beekink, 1991). A convenient "hotel mum" that offers enough space for privacy may induce prolonged stays in the parental home. When adult children have a larger of siblings they tend to leave home earlier (Mitchell, Wister, & Burch, 1989). Arguably this so-called *crowding*-effect can be attributed to the parental home becoming a less attractive place for young adults to stay, because non-transferable material resources need to be shared with a larger number of brothers and sisters.

Non-transferable, non-material parental resources arguably make children more inclined to remain in the parental home. Here, one can think of caring, supportive parent-child relations, which make adult children less inclined to leave the nest at a younger age (Mitchell, Wister, & Gee, 2000). On the other hand, negative family circumstances, for instance due to parental disruption, can contribute to adult children's motivation to leave the parental home (Kiernan, 1992; cf. Goldscheider & Goldscheider, 1998). The finding that step-children and children of single parents leave home at relatively young ages (Mitchell, Wister, & Burch, 1989), may be explained by the possibly lower levels of non-transferable, non-material resources of their parental homes.

Next to parental resources, child gender is an important factor with regard to nest leaving. Daughters leave home earlier than sons (Billari, Philipov, & Baizan, 2001; European Commission, 2012; Mitchell, Wister, & Burch, 1989; De Jong Gierveld, Liefbroer, & Beekink, 1991), arguably to a large extent because women partner or marry at younger ages than men. The impact of care needs of the adult child on nest leaving has rarely been investigated, arguably due to the relative rarity of adult children who are in severe need of care. Recently, Smits, Van Gaalen and Mulder (2010) found, drawing on register data in the Netherlands, that disability of adult children was associated with sharing a household with a parent, but not with moving in with a parent or having a parent move in. This suggests that disabled adult children tend to remain in the parental home.

1.4.2 Adult children moving back to the parental home

After attaining residential independence, adult children may move back to the parental home. Children making this type of move have been referred to as "boomerang kids" (Mitchell, 2005). Adult children often move back to the parental home upon completion of transitional roles that are typical for young adulthood, such as being a student and being in military service (DaVanzo & Goldscheider, 1990; Mitchell, 2004). Coresidence upon such a transition is typically temporal (DaVanzo & Goldscheider, 1990).

A residential transition of this kind is also often induced by the adult children's need for residential support (Choi, 2003; Mitchell, 2004; Smits, Van Gaalen, & Mulder, 2010). When independently living adult children are encountered with setbacks the parental home may function as a haven. A loss of income, for instance, increases the likelihood that an adult child will return to the parental home (Smits, Van Gaalen, & Mulder, 2010). Divorce often implies increased need for residential support for adult children (Gram-Hanssen & Bech-Danielsen, 2008). Therefore is not surprising that divorced adult children, particularly sons, are likely to move back to the parental home (Smits, Van Gaalen, & Mulder, 2010).

While originally used to predict nest leaving behavior, De Jong Gierveld, Van Tilburg and Beekink’s typology of parental resources is useful as well with regard to “boomeranging”.
Non-transferable parental resources are positively associated with the likelihood of adult children returning to the parental home. In line with the feathered nest hypothesis (Avery, Goldscheider, & Speare, 1992), the value of the parental house is positively associated with an adult child’s likelihood to move in with a parent (Smits, Van Gaalen, & Mulder, 2010). When children live in higher value houses themselves, they are less likely to move in with a parent (Smits, Van Gaalen, & Mulder, 2010). Non-material non-transferable parental resources are relevant as well. Arguably because divorced older adults tend to have less close relationships with their adult children than those whose marriages have remained intact (Dykstra, 1997b; De Jong Gierveld & Dykstra, 2002; Kaufman & Uhlenberg, 1998), adult children are less likely to move back to the parental home after parental divorce (Smits, Van Gaalen, & Mulder, 2010).

1.4.3 Parents moving in with an adult child

Coresidential living arrangements may also be the result of a parent moving in with an adult child. A residential transition of this kind is typically induced by the older parent’s need for residential support (Choi, 2003; Smits, Van Gaalen, & Mulder, 2010). Inability to carry the financial costs associated with residential independence can induce living arrangement changes by older adults (Grundy, 1987). Scholars have devoted most attention, however, to care needs as an incentive for older adults to move in with or closer to children.

Litwak and Longino’s (1987; Longino, Jackson, Zimmerman, & Bradsher, 1991; Speare, Avery, & Lawton, 1991) developed a typology of elderly migration. Applying a developmental perspective, the authors distinguish three types of residential relocations of older people. The so-called *first move* is a residential relocation of a relatively young pensioner to an amenity rich location. First moves are typically associated with an increase in the geographical distance between older parents and their children. The *second move* is a move of older adult who is confronted with declining health. Emerging care needs trigger residential relocations to places close to kin who can provide informal care. The *third move* is a relocation to an institutional care setting. It is typically triggered by care needs that are too severe to be met by family caregivers.

Moving in with an adult child can be perceived as a *second move* in its ultimate form (Speare, Avery, & Lawton, 1991). While Litwak and Longino's typology was developed with the American context in mind, Smits, Van Gaalen and Mulder's (2010) study of (transitions to) intergenerational coresidence in the Netherlands shows that parental care needs are positively associated with the likelihood of a parent moving in with an adult child. Divorce and widowhood are also associated with such a change of living arrangements (Smits, Van Gaalen, & Mulder, 2010; cf. Strohschein, 2011). Conjunction of declining health and widowhood makes a transition to intergenerational coresidence particularly likely (Silverstein, 1995; cf. Bradsher et al., 1992; Litwak & Longino, 1987).

1.5 Contextual factors

The marked variation across countries and over time in the prevalence of intergenerational coresidence is related to the varying contexts of eras and countries. In this section, we discuss context specific opportunities and constraints for residential choice, as well as cultural preferences with regard to living arrangements.

1.5.1 Contextual opportunities and constraints

Contextual factors create a structure of opportunities and constraints that stimulate or hinder specific forms of family behavior (Dykstra, 2012). This also applies to family members' residential choices. The presence of affordable housing, for instance, is of great importance for particularly younger generations with a desire for residential independence (Robila, 2004). Furthermore, social welfare arguably helps younger and older adults to retain or attain residential independence, when they cannot afford to otherwise. Declines in the share of older adults living with adult children in the USA, England and Wales have been attributed to increases in social security benefits and pensions (Engelhardt, Gruber, & Perry, 2005; Grundy, 1987; McGarry & Schoeni, 2000; cf. Ruggles, 2007).

Public long-term care arrangements may shape the prevalence of intergenerational co-residence resulted from parents moving in with adult children as well. When care beds in institutional care settings are widely available, this encourages *third move* relocations (cf. Greene & Ondrich, 1990). Plausibly, some of the older adults who move to institutional care settings in situations of greater care bed availability would have opted for a shared household with adult children if care bed availability would have been scarcer. Public provision of home care can also mitigate the tendency of older parents in need of care to make residential transitions of the *second move* type, as it increases their ability of to retain residential independence (Pezzin, Kemper, & Reschovsky, 1996).

Ruggles (2007) argues that the decline in the prevalence of intergenerational coresidence in the United States since the middle of the nineteenth century can largely be attributed to changes in the system of economic production. The decline of home production that took place in this period reduced the value of coresiding children as an asset for parents. Furthermore, the rise of wage labor was accompanied by a great increase in the share of adult children attending higher education, and attending higher education triggers nest leaving. The increased clustering of employment opportunities (Sassen, 2006) may induce pressure children to live farther away from their parents (Ruggles, 2007; Van den Broek, Dykstra, & Schenk, 2013; cf. Van der Pers & Mulder, 2013).

Other contextual developments that are relevant with regard to intergenerational coresidence include increased marital instability (Amato & James, 2010; Lesthaeghe, 2007) and instability in labor earning (McManus & DiPrete, 2000). Both plausibly bolster the prevalence of "boomeranging".

1.5.2 Cultural preferences

The explicit or implicit point of departure of most scholars whose work on intergenerational coresidence is discussed here is that the privacy associated with residential independence is a *normal good* for adult children as well as for their parents. That is, when they possess the necessary means to live independently they will. Intergenerational coresidence, on the other hand, is considered an *inferior good*. The assumption is that, when they can, adult children as well as their parents will try to avoid this living arrangement.

In the post-war era, residential independence has increasingly become the norm in Western countries for older adults as well as for adult children (De Jong Gierveld & Van Tilburg, 1999; Grundy, 2000; Kobrin, 1976). More than six decades ago, Parsons (1949) already argued that it was "a failure to live up to expectations, an unwarranted expression of dependency” (p. 200) when children did not attain residential independence in young adulthood.

In line with social learning theory, Goldscheider and Lawton (1992) found that adult children who grew up in households that included grandparents have a more favourable attitude toward coresiding with parents who need residential support. However, due to the declining prevalence of intergenerational coresidence, ever smaller numbers of children are growing up in such multigenerational households. A further decline in the prevalence of intergenerational coresidence can thus be expected, as adult children of the future may be less supportive of intergenerational coresidence than those of today.

The work of some scholars suggests, however, that, while it may be dominant, the preference for residential independence is not universal. In Japan, living in the household of one’s eldest son is traditionally perceived as the ideal living arrangement for older adults (Takagi & Silverstein, 2011). The consistent finding that intergenerational coresidence is much more common in Mediterranean Europe than in Central and Northern Europe has been attributed to the stronger focus on primary group ties, such as those with family, in Southern Europe (Hank, 2007; cf. Reher, 1998), implying a weaker preference for residential independence in this part of the continent. Taking an even stronger position, Manacorda and Moretti (2006) posit that well-off Italian parents use their resources to bribe their adult children into staying in the parental house. This implies that intergenerational coresidence is a normal good rather than an inferior good for these parents. Cultural norms with regard to intergenerational coresidence also vary across groups within countries. Mitchell (2004) shows that attitudes toward intergenerational coresidence and residential independence vary markedly across young Canadian adults of different ethnic backgrounds (cf. Angel & Tienda, 1982).

1.6 In-depth focus on intergenerational coresidence in Eastern Europe

Given its specific context, it is unfortunate that intergenerational coresidence in Eastern Europe has received little scholarly attention. Compared to what can be noted in other parts of Europe, coresidence of married adult children with their parents is relatively prevalent in Eastern Europe (Castiglioni, Haragus, Faludi and Haragus (forthcoming), on IPUMS census samples from the early 2000s). In other parts of Europe coresidence appears mainly for unmarried adult children, i.e. those who are single, divorced, widowed. Also from the older parent’s perspective, Eastern European countries, and particularly Romania, exhibit high shares of married elderly who live with adult children (De Vos & Sandefur, 2002, based on IPUMS census samples from the beginning of the 1990s). Replicating De Vos and Sandefur’s calculations for the 2002 census, Castiglioni, Haragus, Faludi and Haragus (forthcoming) note that in the 1990s and early 2000s the prevalence of shared households with children had increased for married older adults in Romania, while the prevalence of shared households with children for unmarried older adults remained constant. Furthermore, the prevalence of shared households with other relatives increased between 1992 and 2002 for both married as well as unmarried older adults. These evolutions were paralleled with a decrease of older adults living alone (Castiglioni et al., forthcoming). Increases in coresidence have been noted in other Eastern European countries as well (see De Jong Gierveld, Dykstra, & Schenk , 2012 for Ukraine).

The relatively high prevalence of intergenerational coresidence in Eastern Europe has been attributed to the specific traditional household and family contexts in this part of the continent. In his closer look at the household and family contexts in the Balkans, Kaser (1996) shows that the neolocal-nuclear household formation system was traditionally characteristic for Romania, while the Bulgaria was characterized by patrivirilocal-lifecycle complexity. In the former system, sons received their equal shares of land and left the parents’ house in order to established separate residences after marriage, with the exception of the youngest or the oldest son, who remained with his parents (Kaser, 1996). In the latter case, sons remained living in the parental home after marriage and their wives came to live with them and their parents. The separation and the transmission of property into equal parts took place upon the death of the father or upon the marriage of all boys (Kaser, 1996). While the explanations based on the historical household systems of Eastern Europe may seem promising, Kaser (1996) and De Vos and Sandefur (2002, quoting Todorova 1996) show that the extended household was less spread in Eastern Europe than is sometimes assumed. In other words, historical household system in Eastern Europe, and particularly in Romania, did not favour extended households.

A second possible explanation for the relatively high prevalence of intergenerational coresidence in Eastern Europe is its specific housing situation. In their study on five Eastern European countries, Ahmed and Emigh (2005) tested two major hypotheses in the attempt to explain household composition: the life-style preferences hypothesis and the adaptive strategies hypothesis. The former hypothesis posits that families prefer a particular type of household formation, either extended or nuclear, and the wealthy are considered to have the ability to achieve the desired type, compared with other social groups. The latter hypothesis posits that families use household composition as an economic strategy, for pooling limited financial resources, especially during periods of economic transition. They found that extended households represent an adaptive strategy for the poor especially in countries where the transition to the market economy was slow and difficult, such as Romania, Bulgaria and Russia. Ahmed and Emigh (2005) argue that the extremely high costs of housing in these countries, exacerbated by privatization, are likely to have contributed to the spread of coresidence.

Referring to Eastern Europe, De Jong Gierveld, De Valk and Blommesteijn (2002) argue that, irrespective of norms and values about family responsibilities in these countries, the socio-economic and housing situation is an important trigger for coresidence. In many Eastern European countries, the housing situation has become increasingly precarious. For instance, during the communist period in Romania it was the state’s concern to ensure the housing stock, which was the state’s property. Short after the change of the political regime the housing stock was sold to the population, so the great majority of Romanians became owners. Not only the pace of construction of new dwellings, but also the share of constructions from public funds sharply decreased in the post-communist period (Dan, 1996; 2009). At present, the public funded housing stock accounts for 2% of all housing (Dan, 2009). The negative effect of the declining availability of affordable housing was aggravated by the sharp decrease in the purchasing power of population during the transition period and a spectacular increase in housing prices, leading to a housing crisis (Dan, 1996; 2009). Due to their limited financial resources, the negative impact of these developments was particularly harsh for the younger generation. Although programs of housing constructions for youth have been developed, their results go far behind the needs of population (Dan, 1996; 2009).

1.7 Future research

The overview of the literature on intergenerational coresidence presented here leads to several suggestions for further research. Intergenerational coresidence is a complex subject of research, as it can be the result of very different life course trajectories, each of which with its own specific determinants. We believe this complexity needs to be acknowledged and a life course approach is arguably best suited to do so. Considering the relevance of contextual factors, scholars may gain valuable insights on (pathways toward) intergenerational coresidence by investigating the impact of the current economic crisis and welfare state and long-term care developments. Given Eastern Europe's specific context and lack of scholarly attention that living arrangements in the part of the world have thus far received, research on (pathways to) intergenerational coresidence in Eastern Europe seems particularly promising.

Mitchell (2004) has argued that "more research is needed that disentangles socio-cultural and economic factors in the propensity of young adults to share parental households" (p. 122). A focus on interactions between cultural attitudes and economic factors seems particularly promising, as cultural attitudes determine whether intergenerational living arrangements are a normal good or an inferior good. Such an approach would not only be valuable with regard to research on coresidential living arrangements resulting from late nest leaving and "boomeranging", as proposed by Mitchell, but also to research on coresidence as a result of parents moving in with an adult child.

Additionally, scholarship on how cultural attitudes toward intergenerational coresidence are shaped has failed to reach consensus. Second demographic transition theory, for instance, postulates increased orientation towards fulfilling what following Maslow's (1943) theory of human motivation can be perceived as higher order needs. Due to the increased wealth and higher levels of education in European populations as a whole, basic needs such as those associated with survival and security have become less challenging to fulfil and people's attention has tended to shift to matters of esteem and self-realization (Lesthaeghe, 2007). In line with this, the privacy associated with residential independence is valued greatly. Alwin (1996) has shown, however, that the acceptance of intergenerational coresidence among Americans increased, rather than decreased, between 1973 and 1991. In order to better grasp the conditions under which intergenerational coresidence is a living arrangement by choice and under which it is a living arrangement by necessity more research is thus required.

2. The organization of caring and financial responsibilities both "up" and "down" family lines

Demographic changes observed in Europe (mainly population ageing, changes in family forms and living arrangements) result in both a growing demand for care for the elderly, as well as a declining number of potential care-givers within families (e.g., Abramowska-Kmon, 2011; Doblhammer & Ziegler, 2006; Gaymu, Festy, Poulain, & Beets, 2008; Légaré, 2006; United Nations, 2007; Vaupel & Von Kistowski, 2008). Despite the increasing fluidity and complexity of kin ties, families remain the main sphere of sociability and support (e.g., Kotowska et al., 2010; Saraceno, 2008a; Saraceno, Olagnero, & Torrioni, 2005). Pressures expressed by governments to stay longer in employment make it increasingly difficult to meet care demands, however. Especially, people aged 45-64 years, mainly women, seem to be caught by care responsibilities both “up” and “down” family lines (Gerstel & Gallagher, 2001; Haberkern & Szyldik, 2010).

The double burden of the “sandwich generation” has been widely discussed in both the scientific and popular literature (e.g. Chisholm, 1999; DeRigne & Ferrante, 2012; Golini, 2006; Grundy & Henretta, 2006; Künemund, 2006; Myers, 1988; Neal & Hammer, 2006; Spillman & Pezzin 2000). Presumably, persons in mid-life are engaged in care towards both younger and older generations as well as towards other family members (partner, siblings, cousins) or social network members (such as friends or neighbours). Moreover, they also provide financial support to adult children and less frequently to elderly parents (Fingerman, Pillemer, Silverstein, & Suitor, 2012). It is often suggest that “generational squeezes” will intensify in the future given increasing proportions of people belonging to four- or even five-generations family (De Jong Gierveld & Dykstra 2006; De Sandre 2006; Fokkema, Ter Bekke, & Dykstra, 2008; Golini, 2006; Grundy & Henretta; 2006; Matthews & Sun, 2006; Puur, Sakkeus, Põldma, & Herm, 2011; Saraceno, 2008a,). Another consideration is that increasing geographical distances between adult children and elderly parents due to migrations, and changes in life style (individualization) make reconciliation of care, on the one hand, and work and leisure activities, on the other hand, more difficult.

It is important to note, however, that empirical findings give little credence to the image of the “sandwich generation” (Brody, 1981; Miller, 1981), the men and women caught between simultaneous responsibilities for their parents and children. Adults typically occupy middle-generation positions between the ages of 30 and 60. This is not a period in the life course when both young children and elderly parents are likely to need care. For those in the younger part of the age range (i.e. those with child-care responsibilities), parents are not at risk of frailty. For those in the older part of the age range (i.e. those caring for their parents), children will generally have left the home. As several researchers have demonstrated (Agree, Bisset, &

Rendall, 2003; Dykstra, 1997a; Dykstra & Komter, 2006; Rosenthal, Martin-Matthews, & Matthews, 1996; Soldo, 1996) the image of a sandwich generation juggling care commitments towards parents and children is clearly a misconception of mid-life. Plausibly, the presence of competing care commitments may be a more salient issue for the young old, who often provide childcare to their grandchildren as well as care to their ageing parents.

A more appropriate depiction of mid-life is that of people under a double burden rather resulting from paid work and care responsibilities towards one of the generations (grandchildren *or* elderly parents). A vast majority of individuals is likely to be engaged in caregiving at certain stages of their life (Agree et al., 2003), but not all of them provide care up and down care simultaneously, and do it with the same amount of time and a frequency. One may suppose that a minority of the "sandwich generation" is squeezed between care provided to a grandchild or an elderly parent, but they may be under the pressure of providing other types of support (e.g. financial, emotional) to all generations within family networks.

Moreover, a demanded increase in employment rates among older workers (especially women) may lead to shifts in the distribution of time allocated to work, family and leisure. In other words, this may increase tensions between work and family life. Thus, these developments possibly are likely to influence the subjective well-being of all individuals in a family (adults, elderly and children).

In general, simultaneous exchanges both "up" and "down" family lines turn out to be rare according to most research, with studies consistently indicating that intergenerational support flows primarily downward, from parents to offspring (Albertini. Kohli, & Vogel, 2007; Attias-Donfut, Ogg, & Wolff, 2005; Fingerman et al., 2011; Kohli, 1999). A lack of reciprocal transfers between parents and adult offspring was evident in the empirically-derived typology of late-life families that Dykstra and Fokkema (2011) based on SHARE data. They found no pattern in these data that could be labeled "concurrent reciprocal transfers" between parents and adult children, as depicted by high probabilities of both downward and upward support. Rather, in addition to an autonomous type relationship (characterized by not living nearby, little contact or support exchange, and the refutation of family obligation norms), there were several types of relationships reflecting unbalanced exchange: a supportive at a distance type (not living nearby, frequent contact, refutation of family obligation norms, and primarily financial transfers from parents to adult children); a descending familialism type (living nearby, frequent contact, endorsement of family obligation norms, and primarily help in kind from parents to children); and, an ascending familialism type (living nearby, frequent contact, endorsement of family obligation norms, and primarily help in kind from children to parents). The youngest respondents in this sample were most likely to be classified in the supportive at a distance and the descending familialism types, whereas the oldest respondents were most likely to be in the ascending familialism type. The exchange of support among parents and adult children resembled a pattern of reciprocity in the long run, akin to Antonucci's (1990) support bank.

Whereas the literature on the middle generations typically considers transfers upwards to ageing parents and downwards to children and grandchildren, it tends to disregard transfers received by the middle generations from older and younger generations and from partners. Yet, older generations often serve as significant sources of support and help for young families, through financial transfers, caring for young children and provision of practical help (Attias-Donfut, Ogg & Wolff, 2005). Help from young adults to middle-aged parents has received little attention in the literature, which we view as an unfortunate omission. Young adults living at home should not be solely looked upon as dependents, but rather also as givers of support and care to their parents.

Future research

Bearing all above in mind, an issue for future research is to find out strategies chosen by the "sandwich generation" to provide care and financial support under different policy, economic and cultural contexts, and their implications for well-being. The typology of intergenerational policy regimes by Saraceno and Keck (2010) constitutes a point of departure to select countries according to their policy regimes, which are different in terms of ageing advancement, economic (labour market) developments, and the cultural context. The need to include policy measures in comparative research has been noted by Uhlendorff and colleagues (2011) in their report on challenges for research on families in Europe. In addition, the issue whether 'generational squeezes', results either from simultaneous care demands of younger and older family members or from reconciliation of work and up/down care responsibilities requires further examination. Finally, future research can shed more light on the possible impacts of "generational squeezes" on the well-being of children, parents and grandparents.

An important question for empirical research is whether the provision of help to parents reduces the likelihood of helping children (and vice versa). One might also expect that families differ in their commitment to intergenerational exchange and solidarity: those with strong commitments to solidarity tend to assist both generations rather than prioritize recipients, whereas those low in solidarity are less likely to help both generations. Grundy and Henretta (2006) call these hypotheses, respectively, the “hypothesis of competing demands” and the “hypothesis of family solidarity”. The results of their cross-national research comparing Great Britain and the United States broadly support the solidarity hypothesis.

In future research, other types of care regimes can be incorporated. Potential changes over time can also be investigated in longitudinal analyses.

Another contribution to the existing literature consists in identifying the way in which patterns of solidarity influence well-being and social integration. For instance, from an exchange theoretical perspective all giving involves costs (Emerson, 1976; Homans, 1961; Thibaut & Kelley, 1959), and too much giving, or giving to too many recipients, may come to involve too high costs. An alternative assumption may prove wrong the popular image of the burdens experienced by the so-called “sandwich generation”: according to altruism or solidarity theory support giving is not a pure cost but also brings rewards, as contributing to the well-being of others has positive consequences for one’s own well-being (Batson, 1998).

Future studies can refine and expand existing research insights in two ways. First, differences in the experienced costs of solidarity patterns can be expected in countries with different cultural norms and values with respect to caring obligations, and different care regimes. Examining these differences asks for cross-national comparisons of the relative merit of exchange theory versus solidarity theory in the various European countries. Second, well-being, general health and integration (for instance, as measured by labor force participation) can be compared in different dimensions of intergenerational exchange: the direction of exchange and the balance of the exchange. Does the association between intergenerational solidarity patterns and well-being and integration vary, depending on whether support is given up, down or across the family lineage? How does the balance (over- or underbenefitting, or balanced giving and receiving) affect well-being and integration?

3. Norms of family obligation and intergenerational support exchanges[1]

Country differences in intergenerational support exchanges in families are not only attributable to economic, policy, and housing contexts but also to cultural contexts. Several scholars have examined cultural contexts in terms of familialism (Daatland & Herlofson, 2003; Gans, 2007; Kalmijn & Saraceno, 2008), a broad term that describes “attitudes about the centrality and importance of the family and values surrounding the enactment of help and support norms between family members" (Parrot & Bengston, 1999, p. 76).

The conceptual apparatus used to explain cultural variations in intergenerational exchanges in families is diverse. Family attitudes often serve as a central concept (e.g., Daatland , Veenstra, & Herlofson, 2012), along with concepts like family norms (e.g., Liefbroer & Mulder, 2005), family norms (e.g., Jappens & Van Bavel, 2012) or norms of filial responsibility (e.g., Lee, Netzer, & Coward, 1994). While attitudes are seen as the individual orientation toward a specific situation–in our case intergenerational exchanges–, values are principles that transcend the particular (Rokeach, 1973). Another distinction is that between “internal” and “external”. Attitudes and values are internal (the latter is more encompassing or “higher in hierarchy” than the former). Norms are external because they represent standards of behaviour, and they are socially shared (Williams, 1968). Social norms (e.g., shared ideas about responsibilities of adult children vis-à-vis ageing parents) are more general than expectations (e.g., what a specific parent expects from his or her children). Studies assessing cultural variability focus on norms rather than individual, specific expectations. The former reflect broad underlying orientations and are therefore considered to be relevant to all members of the population, irrespective of the composition and quality of their family networks (Gans & Silverstein, 2006). In this report, we use the term “norms of family obligation” for beliefs and values about family members’ responsibilities to care for and support one another. They provide socially-shared guidelines for family behaviour.

Studying attitudes, beliefs and values about intergenerational support can give important insights into the rationale behind that behaviour (Finch & Mason, 1990) and may also help to explain how feelings of mutual responsibility are distributed within families (Ganong & Coleman, 1999; Goldscheider, Thornton, & Yang, 2001; Klein Ikkink, Van Tilburg &

[1] Parts of this section draw upon earlier reviews of norms of family obligation where Pearl Dykstra was a co-author (Cooney & Dykstra, 2013; Dykstra & Fokkema, 2012; Van Bavel, Dykstra, Wijckmans & Liefbroer, 2010).

Knipscheer, 1999). A focus on family obligations also has the advantage that it provides insight into potential family solidarity (Bonvalet & Ogg, 2007). Studies on family obligations serve as a source of information for policymakers to help them address the discrepancy between policy measures and public attitudes. They also offer tools for developing policy that is in line with people's preferences. From a policy perspective, studying personal attitudes towards normative family obligations provides insight into the extent to which policy measures do or do not match expectations in the population. It may give clues about how to devise policy measures that are in line with people's preferences. Finally, the relationship between attitudes and expectations on the one hand and the actual behaviour on the other hand determines to what extent people feel satisfied with the actual state of affairs.

Rossi and Rossi (1990) distinguish filial norms (i.e. normative obligations towards parents), parental norms (i.e. normative obligations towards children), and general kinship norms (i.e. normative obligations towards kin in general). The perceived family obligations between parents and adult children have been most widely examined and they are the strongest, followed by feelings of obligation towards siblings, grandparents and –children, and wider (affinal) kin (Rossi & Rossi 1990). However, relational factors play an important part too. Feelings of obligation are found to be stronger when support is reciprocal and legitimate, not too involved and avoiding the creation of a relationship of dependency. Obligations concerning instrumental and financial support therefore seem to be far more conditional than obligations concerning emotional support (Finch & Mason, 1991; Liefbroer & Mulder, 2006; Rossi & Rossi, 1990).

Scholars typically focus on filial responsibility—adult children's responsibilities towards aged parents Much less attention addresses feelings of obligation in the opposite direction, that is, parents' responsibility towards adult children (Herlofson, Hagestad, Slagsvold, & Sørensen, 2011). With few exceptions (De Vries, Kalmijn, & Liefbroer, 2009; Finch & Mason, 1993), the term parental responsibility refers to parents' responsibility for young children. Little is known about how people view their responsibilities as parents in middle and late life.

3.1 Individual-level differences in norms of family obligation

Norms of obligation are shaped by the socio-structural circumstances in which people live and by their cultural background (Daatland & Herlofson, 2003; De Valk & Schans, 2008; Finley, Roberts, & Banahan, 1988; Gans & Silverstein, 2006). Filial obligations reflect broad underlying values, and are therefore considered to be relevant to all members of the population (Gans & Silverstein, 2006). Nevertheless, norms of filial obligation can change under the influence of changes in people's personal circumstances (Finley et al., 1988), such as changes in the opportunities for providing care (conflicting activities), changes in care concerns (the arrival or decease of family members), or due to choices as to whether or not to provide support (retrospectively attributing choices made to personal norms). On the basis of the previous considerations, we argue that norms of filial obligation are shaped by four mechanisms: (a) the value patterns of the groups people belong to, (b) the constellation of their families, (c) the practical possibilities people have to help others, and (d) actual experiences of support exchange. This perspective is fleshed out below.

3.1.1 Group value patterns

The first characteristic we consider is *gender*. Given the way in which women are socialised to act as carers and given the traditional role of women as social secretaries and kin-keepers (Hagestad, 1986; Rosenthal, 1985), one might expect that women espouse stronger family norms than men. This expectation is not always borne out by the data. Some studies show that women are more supportive of filial responsibility than men (e.g. Rossi & Rossi, 1990; Seelbach, 1977; Stein et al., 1998; De Valk & Schans 2008), others show no significant differences between men and women (e.g. Burr & Mutchler, 1999; Lee, Peek, & Coward, 1998; Logan & Spitze, 1995; Wake & Sporakowski, 1972; Wolfson, Handfield-Jones, Glass, McClaran, & Keyserlingk, 1993), and yet other studies that women have a weaker sense of duty towards their parents than men (Liefbroer & Mulder, 2006; Daatland & Herlofson, 2003). Recent analyses using data from the Generations and Gender Surveys show that gender differences in espousing norms of family obligation differ by country (Herlofson, Hagestad, Slagsvold, & Sørensen, 2011). Women have weaker family norms than men in Norway, the Netherlands, Germany and France. The authors report no gender differences in family norms in Hungary and Georgia, but in Romania, Bulgaria and Russia women have stronger family norms than men. Van Bavel, Dykstra, Wijckmans and Liefbroer (2010) argue that women who express weaker feelings of obligation towards family members might give more realistic answers than men. Women may give less socially desirable answers because they are all too familiar with the practice of caring. As a rule, caring duties are performed more by women than by men (Gerstel & Gallagher, 2001; Haberkern & Szyldik, 2010).

The literature presents different views on how *age* relates to norms of family obligation. One view is that a sense of social duty is strongest in middle age, when the odds of becoming an informal carer are greatest. The underlying idea is that filial responsibility manifests itself as ageing parents increasingly face cognitive and physical limitations (Gans & Silverstein, 2006). A second view is that norms of filial obligation are strongest at a young age and subsequently decrease. Here, the underlying assumption is that a sense of obligation is rooted in adult children's desire to give their parents something in return for the investments they made in them when they were younger (Rossi & Rossi, 1990). Young adult children have had fewer opportunities to "get out of the red" than middle-aged children (Stein et al., 1998). A third view is that norms of obligation decrease in later life, as dependence on others becomes real. In this view, the elderly would want to relieve members of younger generations of the burden of care out of altruistic motives (Lye, 1996). Studies generally show that family obligations decline with age (Killian & Ganong, 2002; Lye, 1996; Rossi & Rossi, 1990; Stein et al., 1998; Ward, 2001), but a number of studies report no effect of age (Lee et al., 1994; Logan & Spitze, 1995), one study reports that respondents aged 75 and over had stronger feelings of filial obligation than younger respondents (Daatland & Herlofson, 2003). Liefbroer and Mulder (2006) show that age differences in norms of family obligation differ, depending on the type of obligation considered. Adults between 18 and 29 have a strong sense of obligation towards family in general, but also towards children and parents. General feelings of obligation towards family are lowest for respondents between 40 and 59 years. However, feelings of obligation towards parents are weakest among the oldest age category (60-79).

In the literature, various ideas have been developed about the relationship between a person's level of *education* and his or her family norms. Rossi and Rossi (1990) state that the better educated have stronger norms of obligation than the lesser educated. The underlying reasoning is that people with a higher level of education owe their parents more because they have received more investments from them. In other words, the better educated feel more strongly committed to do something for their parents in return for the substantial investments made in them in the past. At the same time, the more highly educated tend to be better able to afford to offer assistance. Kohn (1977) argues, however, that the more highly educated have weaker norms of family responsibility because they seek greater autonomy. Research has repeatedly found that the better educated have a more individualistic lifestyle than people with a lower level of education (Felling, Peters, & Scheepers, 2000), and for that reason one would predict an inverse association between level of education and the strength of filial norms. The literature on age differences in family norms by level of educational attainment shows mixed findings. Three studies using American samples report a positive effect of educational attainment on feelings of obligation (Rossi & Rossi, 1990; Ward, 2001; Zhan, 2004), one reports a negative effect (Lee et al., 1994) and one reports no effect at all (Logan & Spitze, 1995). Herlofson and colleagues (2011) show that patterns differ across countries. In Norway and Hungary those with higher levels of education are more likely to feel that adult children have duties towards ageing parents, whereas the reverse is found in the Netherlands, Germany, Romania and Bulgaria, while no age differentiation is reported for France, Georgia, and Russia.

Norms prescribing that children should support their parents are embedded in *religious ideologies* (Reher, 1998). Most Christian denominations teach that one should love and respect one's parents. Muslim doctrines do so even more strongly. Studies consistently show that people who belong to a particular religion, church or creed feel more strongly that family members should support one another than non-religious people (Daatland & Herlofson, 2003; Dykstra & Fokkema, 2012; Gans, Silverstein, & Lowerstein, 2009; Killian and Ganong (2002;.).

Ethnicity (or: country of origin) is another group characteristic we consider. The literature commonly makes a distinction between individualistic and collectivist cultures. Said simply, individualists see themselves as autonomous individuals and collectivists see themselves as belonging to a group (Kagitçibasi, 1996; Nauck, 2007). Most North and West European countries are characterised as individualistic societies. The countries where many migrants to this part of Europe come from (e.g., Turkey, Morocco, Somalia, Irak) can be typified as collectivist societies. Migrants from non-Western countries tend to have stronger feelings of filial obligation than non-migrants and migrants from Western countries (Burr & Mutchler, 1999; Dykstra & Fokkema, 2012; Fuligni, Tseng, & Lam, 1999; Lee et al., 1998; Liefbroer & Mulder, 2006; Rosenthal, 1986). Migration can have contrary effects on personal values (De Valk, 2006). On the one hand, the cultural orientation of first-generation migrants might gradually move towards that of the host country. In this case, first-generation migrants to western countries are exposed to more individualistic values through the media, through their children who are growing up, by socialising with the native population, and at work. On the other hand, the cultural orientation of first-generation migrants might move closer to that of their home countries. In this case, migrants hold onto "old" values in order to do away with feelings of alienation caused by their subordinate and isolated position in society. Dutch findings show that second-generation migrants tend to differ less from the native population in terms of the strength of filial obligations than first-generation migrants (Fokkema & Dykstra, 2012). This supports the view that people of non-Dutch descent who grow up in the Netherlands acquire a cultural orientation that is similar to that of people of Dutch descent.

3.1.2 Family constellation

People's *civil status* is the combined outcome of marital history and current partner status. Marital history indicates whether people have ever been married, have ever divorced, or have ever been widowed. Partner status indicates whether people share a household with a partner. The traditional view in the literature is that divorce and remarriage result in weaker feelings that family members should help one another (Coleman, Ganong, & Cable, 1997; Popenoe, 1988; Rossi & Rossi, 1990). A number of factors play a role: broken or damaged family relationships, having less time and money to help family members, and being too preoccupied with one's own problems to be sensitive to the needs of others. This view has recently been challenged, however; the negative effect of divorce on intergenerational exchanges appears to be weakening (Glaser, Tomassini, & Stuchbury, 2008). Moreover, Wijckmans and Van Bavel (2010) report stronger norms of filial obligation among divorcees, which is consistent with earlier findings showing that people who are single have higher expectations in terms of family support than those who live with a partner because they have a greater need for support (Dykstra & Fokkema, 2012; Lee et al., 1994; Ward, 2001). The assumption here is that their strong sense of filial responsibility is a reflection of how they themselves would like to be treated. In contrast, Lee, Netzer and Coward (1994) report stronger feelings of filial obligation among the married as opposed to the non-married. Finally, two other studies report no effect of marital status (Killian & Ganong, 2002; Logan & Spitze, 1995).

Rossi and Rossi (1990) have argued that a sense of responsibility towards ageing *parents* may weaken when older family generations are no longer alive. Elaborating on this view, Gans and Silverstein (2006) state that the death of one's parents entails a change of perspective: a shift from being a potential care giver to being a potential care recipient. There is no longer a need to provide informal care to the older generation. Altruistic feelings towards adult children, such as the desire to protect them from having to assume intensive care duties, may become more dominant. Following these arguments, one would predict weaker norms of filial obligation among those who have no surviving parents or parents-in-law. Recent studies have not found norms of filial obligation to be related to whether or not one's own parents or partner's parents were still alive (Dykstra & Fokkema, 2012; Herlofson et al., 2011).

Parental divorce may affect rationales for filial obligations such as norms of reciprocity and gratitude (Ganong & Coleman, 1998). Adult children may feel reluctant to repay parents who created breaches in their lives, or they may feel they have a lesser debt to repay. Moreover, they may feel less grateful to parents. Filial obligations seen as a moral duty that must be performed to be able to consider oneself a good person are less likely to be affected by parental divorce than norms of reciprocity and gratitude (Ganong & Coleman, 1998). Recent studies give credence to a continuity perspective, which assumes that family norms are resilient against changes in family structure (Dykstra & Fokkema, 2012; Gans & Silverstein, 2006; Wijckmans & Van Bavel, 2010).

With respect to the relationship between the presence of *children* and norms of filial obligation towards parents, the literature presents two different views. Both views, however, predict that the presence of children goes hand in hand with espousing weaker norms of responsibility towards ageing parents. We referred to one of these views above: the desire to protect adult children from having to assume care duties. The other view focuses on parental responsibilities. Adult children who have children of their own have "legitimate excuses" (Finch & Mason, 1993) not to care for older family generations. Findings generally support the notion that those with children tend to have weaker filial norms (Herlofson et al., 2011).

Liefbroer and Mulder (2006) discuss two contrasting hypotheses about the relationships between the presence of *brothers and sisters* and norms of obligation towards parents. One view is that the presence of siblings could contribute to a sense of belonging to a broader network of family relationships, and this sense of "belonging" would manifest itself in espousing stronger filial norms. Conversely, the presence of brothers and sisters could lead to weaker norms of obligation. The presence of alternative sources of support would mean that people feel less responsible for supporting the older generation (Van Gaalen et al., 2008). Few studies have included the presence of siblings in analyses of norms of family obligation. Insofar the research has been carried out, findings show that people with living siblings have weaker feelings of obligation towards parents than those without siblings (Dykstra & Fokkema, 2012; Keck, 2008; Liefbroer & Mulder, 2006).

3.1.3 Possibilities to provide support and norms of family obligation

It is hardly surprising that *health* plays an important role in determining people's ability to provide care. Following this reasoning, health problems would lead to weaker feelings of responsibility; the idea being that when people express norms of filial obligation they bear in mind their own physical limitations. An alternative line of reasoning starts from the perspective of a person with health limitations as the potential recipient of care. Presumably, the potential recipient strongly endorses norms of filial obligations because of an awareness of need. In a study reported by Dykstra and Fokkema (2012), health showed no association with the strength of filial norms. The authors note that they cannot rule out the possibility that the two expected health effects, a negative effect one from the provider's and a positive effect from the recipient's view, counterbalance each other. Unraveling the contrasting effects is an issue for future research.

Socio-economic status is a complex variable: it has an employment status component as well as an income component. Whereas both these components are expected to entail a weakening of family norms, they do so for different reasons (Finley et al., 1988). People with a paid job have less spare time than the unemployed, which means that they are less able to care for their parents. One would expect them to attune their sense of obligation to their practical circumstances and therefore to adjust it downwards, and more strongly so for those with fulltime jobs than for those with part-time jobs. As people who are in a better financial position can afford to buy private care, they would be more inclined to adopt a self-sufficient attitude. Consistent with these notions, studies have shown that the higher income groups have weaker norms of family obligation than people with the lowest income levels (Dykstra & Fokkema, 2012; Liefbroer & Mulder, 2006). Furthermore, findings indicate that people with paid jobs (whether part-time or fulltime) less strongly endorse norms of family obligations than jobless individuals (Herlofson et al., 2011; Dykstra & Fokkema, 2012).

3.1.4 Actual support exchange

Few have studied the relationship between feelings of responsibility towards parents and the actual *exchange of support*. So, rather than viewing norms of obligation as a determinant of support exchange, one might do the opposite by examining the extent to which actual instances of support exchange influence commitment to family norms. There is, of course, a mutual relationship between the two. One might assume, for example, that there is a stronger sense of filial obligation among both those who have received intensive support from their parents and those who have offered their parents intensive support. Festinger's (1957) cognitive dissonance theory forms the basis for this assumption. In this theory, cognitive dissonance, which refers to a situation in which people's behaviour does not tally with their personal values, is considered to be undesirable. People strive to reduce dissonance. In the current context, dissonance reduction means that giving (or receiving) support is retrospectively attributed to a strong sense of obligation. Alternatively, of course, not giving (or receiving) support could lead to the erosion of filial obligations. Findings from a study carried out by Dykstra and Fokkema (2012) largely show the expected positive associations between actual support exchanges and the strength of norms of obligation. Adult children who had provided intensive assistance to their parents in the past three months more strongly endorsed norms of filial obligation than those who did not provide such assistance. Moreover, those who had received intensive assistance from their children in the past three months more strongly espoused norms of filial obligation than those who had not received regular instrumental help from their children in terms of their support norms.

Herlofson and colleagues (2011) traced family norms over a period of five years in Norway. Though the authors did not exactly consider possible changes in response to support provision, they did look at changes in health, partner status, death of a parent, and the arrival of grandchild. None of these factors predicted the overall decline in the strength of family norms that was observed over the five-year period. The authors suggest a period effect as the most plausible explanation for the decline in support for filial obligations. They speculate that Norwegians have been increasingly confronted with possible future demands on families to provide care for old family members, and that this is an idea many turn down. This interpretation requires further analyses. More generally, changes in filial obligations over time is an issue warranting further research.

3.2 Cross-national differences

The views individuals possess regarding support to family members reflect the legal and care systems of their countries. Support for norms of family obligation tends to be lower in generous welfare states (Daatland & Herlofson 2003; Dykstra, 2010; Lowenstein & Daatland, 2006). Given the more limited public welfare system in East than in West European countries, it should not come as a surprise that GGS-data show that Bulgarians, Russians, Romanians and Hungarians more strongly believe that it is important to provide help to family members in need than do the Dutch, Germans and French (or Norwegians, see Daatland, Slagsvold & Lima, 2009).

As Haberkern and Szydlik (2010) contend, policy provisions are not only consistent with the values and norms of a society, but they can also have an effect on them. Their study based on data on state care provision, legal obligations and opinions on family care from 11 western European countries revealed three clusters of countries. The Scandinavian countries and the Netherlands have strong public-care systems, where the state is clearly regarded as being responsible for providing care for ageing family members (see also Daatland, Slagsvold & Lima, 2009). The Mediterranean countries and Germany and Austria have family-based care systems, where only a small proportion of people believe that the state has primary responsibility for older adult care. France and Belgium have arrangements which are in between the public-based and family-based systems. Switzerland does not clearly fit any of the clusters. Though it has extensive state-funded care, the cultural norm is that the family is primarily responsible for older adult care.

Intergenerational responsibilities in families are also formalized in laws. Here the state defines the duties of family members and delineates the range and duration of intergenerational responsibilities. Maintenance obligations both upwards and downwards are quite widespread in Europe and, depending on the country, involve differentiated sets of relatives and generational levels (Keck, Hessel, & Saraceno, 2009; Saraceno & Keck, 2008). Obligations to support are in general regulated downwards towards children and grandchildren and upwards to parents and grandparents, and in some countries even broader to second degree relatives such as aunts and uncles.

Twigg and Grand (1998) show that legal obligations toward ageing parents are linked to determined patterns of inheritance in French legislation (and thus in many country that follow the Napoleonic Code, including Romania). In countries that follow the common law (e.g., England) there is no legal obligation to support ageing parents, and testamentary freedom is the legal principle. It is not clear, however, if legal obligations are enforced or if they are largely ignored in different societies. In the Netherlands, for example, the civil Code stipulates the obligation to support parents in case of need in, but the obligation is never enforced because the social assistance law has granted help and support to older people irrespective of children's obligations.

3.3 Linking family obligations to support behaviour

Research linking family obligation to support behavior has produced inconsistent findings, especially in cross-sectional investigations. A study in the Netherlands, using data from 1992-1993, revealed that the more strongly adult children felt that family members should support one another, the more instrumental support the parents received (Klein Ikkink et al., 1999). In a study using cross-sectional data from 2006, a positive association between filial norms and upward intergenerational support was also found in China and Taiwan (Lin & Yi, 2011). Several American studies have also reported that providers and/or receivers of support score higher on measures of filial responsibility compared to those who are not involved in intergenerational exchanges (Silverstein & Litwak 1993; Stein et al., 1998). Other research finds no association between the endorsement of filial responsibility and actual support (Lee, Netzer, & Coward, 1994; Peek, Coward, Peek, & Lee, 1998).

Daatland and Herlofson (2003) document inconsistencies across countries. Older persons receiving family help more strongly endorsed filial obligations than did those without such support, but only in Spain and Israel and not in Germany, England and Norway. Cooney and Dykstra (2011) consider distinct attitudes regarding obligations to adult offspring and to aged parents in national samples from the United States and the Netherlands; they find limited evidence that obligations influenced the provision of functional support once the recipient's needs and the provider's resources were controlled. Only in the case of providing assistance to aged parents in the US sample were normative feelings predictive of functional support. They argue that norms are more powerful determinants of behaviors in countries with limited public support systems. Kalmijn and Saraceno's (2008) work revealed that filial responsiveness to parental needs varied widely across European countries, in line with overarching views of state versus family responsibility. In more "familialistic" countries, where residents feel strongly that aging parents should be cared for by their families, the association between the support provided by adult children and parental need is stronger than in more "individualistic" countries, where residents are less likely to feel that eldercare is primarily a family responsibility. Similarly, Viazzo (2010) argues that different explanatory models apply to support transfers in Northern and Southern Europe. In the Northern countries (e.g., Scandinavia, the Netherlands) with more generous welfare systems, transfers flow to the neediest, irrespective of any present or future reciprocating help, consistent with the altruistic model. In the Southern countries (e.g., Italy, Spain) with less generous welfare systems, transfers reflect the payment of services and visits, which are embedded in current and future obligations of reciprocity. Ultimately, transfers in Southern Europe are "driven by more binding moral obligations" (Viazzo, 2010, p. 147).

The complementarity of the exchange and altruism models of support also emerges in the work of Silverstein, Conroy, Wang, Giarrusso and Bengtson (2002), where various theories of intergenerational support were tested. First, they pose an investment model, whereby parents can expect to receive support from their offspring proportional to levels of assistance they provided earlier to the younger generation. Next, their insurance model builds on the investment model by applying a second condition—parental need. This model predicts parental support based on past level of assistance to offspring, plus parents' current need for help. Insurance "kicks in" when it is most needed, with one's benefits level depending on how much support was contributed earlier to the younger generation. In discussing reciprocity, Silverstein and colleagues emphasize the social components of this explanation, noting that social norms about the appropriateness of repayment are the force underlying reciprocal acts. He also refers to Homans' (1950) early writings on social groups, theorizing that long-term reciprocal exchanges between individuals promote group bonding and stability. Using 26 years of Longitudinal Study of Generations (LSG) data to examine instrumental and emotional support to aging parents, Silverstein's group finds merit for both models. Respondents who in their youth reported more activities with a parent reported higher levels of functional solidarity with aging parents over the subsequent two decades, confirming the investment model. Yet, evidence was found for the insurance model too, as parents' early financial investments in offspring (as teens and young adults) did not result in reciprocal support across all subsequent years, but instead predicted accelerated rates of help giving by offspring 25 years later when the parents reached older ages and likely needed more assistance.

Silverstein's team offered altruism as a possible explanation for intergenerational functional solidarity, noting that some studies have lent support for the idea that family members assist others in need, regardless of any past social exchange. Indeed, they found that children's functional and emotional support to parents increased as the older generation moved into advanced ages, “even under what may be considered to be estranged circumstances—when the early parent-child relationship was emotionally distant, had no time commitment, and involved no financial support” (Silverstein et al., 2002, p. S10). Of course, these authors recognize that underlying what they interpret as altruistic behaviors may be strong feelings of obligation. The findings noted here do suggest, however, that individuals may act in an altruistic manner—reflecting generic goodwill and concern for others in need, without having a particularly strong, positive relationship to the care recipient (cf. Albertini & Saraceno, 2008).

Longitudinal findings regarding the role of family obligations in support behavior are also mixed. Using data from the first three waves of the LSG, Silverstein, Parrott and Bengtson (1995) showed that sons’, but not daughters’, endorsement of filial responsibility norms predicted support to parents measured three years later. Yet, a later study, using more recent waves of LSG data, showed that daughters’ rather than sons’ espoused filial obligations were predictive of increased support to mothers (but not fathers) in need (Silverstein, Gans, & Yang, 2006). Results from the Norwegian Life-course, Ageing and Generations Panel study (NorLAG) revealed that attitudes towards filial responsibility predicted the provision of support to parents, but more so for sons than for daughters (Herlofson et al., 2011). Analyzing Dutch panel data, Dykstra and Fokkema (2009) also found that sons were more responsive than daughters to norms of filial obligation when mothers’ needs increased. Overall, the balance of evidence suggests that filial obligations have a stronger motivational component for sons than daughters. Females appear less sensitive to social prescriptions, perhaps because they take support provision for granted, are more likely to incorporate support tasks into their daily schedules, or are more intrinsically motivated than males. Appeals to social duty and responsibility seem to work better for sons than for daughters.

Failure to demonstrate a strong and consistent role of family obligations in explaining intergenerational support provision also may be understood by considering the resources and needs of each generation—part of what Silverstein and Bengtson (1997) refer to as the “opportunity structure” for exchange behavior. Intergenerational transfers require the resources of time and money, which, if available to the giver, are provided when the recipient has needs. Silverstein et al. (2006) point out that strong family obligations may be a necessary factor in intergenerational support exchange, but not sufficient for explaining support patterns. That is, strong feelings of family responsibility may predispose individuals to be supportive, but whether assistance actually materializes depends on the specific context of need. To illustrate, they found that only under conditions of declining parental health was the strength of filial norms significant in increasing levels of help provided by offspring.

3.5 Future research

In their recent report on challenges for research and policy regarding European families, Uhlendorff, Rupp and Euteneuer (2011) draw attention to the need to study all stages of family life, not just families with young children. Our focus on norms of obligation towards ageing parents and towards adult children nicely fits the call to pay attention to all stages of family life. In our overview of the literature on norms of family obligation and intergenerational support exchanges, we identified a number of issues warranting future research. As yet, there is insufficient understanding of the extent to which norms of family obligation predict helping behaviour, and whether the responsiveness to norms of family obligation varies by country context. Another topic concerns changes in family obligations over time. There is a dearth of knowledge on the effects of illness, family changes, and caring experiences on family obligation norms.

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