

Living Conditions and Quality of Life in Old Age

Perspectives of Interdisciplinary Longitudinal and International Comparative Survey Research in Europe

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Overview

- Concepts and findings of research on aging and old age conducted at the German Centre of Gerontology (DZA)
- Introduction of two studies in the field of research on aging
 - The German Aging Survey (Federal Ministry for Family, Senior Citizens, Women and Youth)
 - OASIS – Old Age and Autonomy (European Commission)
- Discussion of cross-sectional, longitudinal and comparative research perspectives

The German Centre of Gerontology (DZA)

- The German Center of Gerontology is an independent and interdisciplinary scientific institute
- Tasks as described in the statutes: Increase, collection, evaluation, processing, and transfer/dissemination of gerontological knowledge
- Two departments:
 - Information and documentation
 - Applied research
- Current studies:
 - The German Aging Survey
 - OASIS - Old Age and Autonomy

For further information see <http://www.dza.de>

The German Centre of Gerontology (DZA) – Objectives and approaches –

- Analysis of healthy aging in an extended multidisciplinary perspective of quality of life research, developmental psychology, family sociology, sociology of the life course, welfare state analysis etc.
- Focus: Quality of life in middle, old, and oldest age
- Analyses on the micro, meso, and macro level and their interaction
- Objective & subjective measures
- Quantitative as well as qualitative methods
- Cross-sectional & longitudinal perspectives
- Society specific as well as comparative analyses

The German Aging Survey Wave I

– Cross-Sectional research within Germany –

- The German Aging Survey is financially supported by the German Federal Ministry of Family, Senior Citizens, Women, and Youth

The first wave was conducted in 1996 by

- The Research Group on Aging and the Life Course (FALL), Berlin, Germany
(Prof. Martin Kohli (Director), Prof. Marc Szydlik, Dr. Harald Künemund, Dr. Andreas Motel-Klingebiel)
- The Research Group on Psychogerontology, Nijmegen, The Netherlands
(Prof. Freya Dittmann-Kohli (Director), Christina Bode, Dr. Gerben Westerhof)

The German Aging Survey Wave I

– Concepts and perspectives –

- Social reporting
 - Permanent observation of the living conditions of the elderly
 - Social policy information
 - First wave of a German social reporting system on aging and old age
- Scientific research (social- and behavioral sciences)
 - differential aging and social inequality
 - continuity and discontinuity over the life course
 - development of intergenerational relationships
 - work and retirement
 - determinants of quality of life

The German Aging Survey Wave I – Sample –

	West Germany		East Germany		Total
	male	female	male	female	
40-54	n=586	n=598	n=265	n=270	n=1719
55-69	n=627	n=515	n=330	n=307	n=1779
70-85	n=452	n=464	n=204	n=220	n=1340
Total	n=3242		n=1596		n=4838

The German Aging Survey Wave I

– Brief overview of the instrument –

- Self concept and life goals
- Health and health behavior
- Need of care and use of services
- Norms and values
- Activities and social participation
- Partnership and widowhood
- Family relations and social networks
- Support and transfers
- Education, work, transition into retirement
- Economic situation and standard of living
- Households, housing and mobility
- Subjective quality of life and well-being

The German Aging Survey Wave I

– Selected results –

- Positive evaluation of living conditions of the elderly in Germany
- Time after retirement became a expectable stage within the life course – secured by the welfare state and more and more open for individual planning at least for the 1920/30 birth cohorts
- High quality of life is mainly interpreted as result of massive and successful social policy intervention
- This is not only the case for health, housing, and income but also for social participation of the elderly and their family relations
- High welfare state dependency of old age can be shown for most of the life domains
- Shortenings in welfare state expenditures are expected to lead to a decline in QoL in older age sooner or later

The German Aging Survey Wave I

– Selected publications –

Kohli, M. & H. Künemund (Hrsg.) (2000): Die zweite Lebenshälfte - Gesellschaftliche Lage und Partizipation im Spiegel des Alters-Survey. Opladen: Leske + Budrich.

Dittmann-Kohli, F. (2001): Die zweite Lebenshälfte - Psychologische Perspektiven. Stuttgart, Berlin, Köln: Kohlhammer.

Kohli, M., H. Künemund, Andreas Motel & Marc Szydlik (2000): Grunddaten zur Lebenssituation der 40-85jährigen deutschen Bevölkerung. Berlin: Weißensee Verlag.

Kohli, M., H. Künemund, A. Motel & M. Szydlik (2000): Families Apart? Intergenerational Transfers in East and West Germany. In: Arber, Sara & Claudine Attias-Donfut (Hrsg.): The Myth of Generational Conflict: Family and the State in Ageing Societies. London: Routledge, 135-156.

Künemund, H. (2001): Gesellschaftliche Partizipation und Engagement in der zweiten Lebenshälfte. Empirische Befunde zu Tätigkeitsformen im Alter und Prognosen ihrer zukünftigen Entwicklung. Berlin: Weißensee Verlag (in print).

Künemund, H. & A. Motel (2000): Verbreitung, Motivation und Entwicklungsperspektiven privater intergenerationaler Hilfeleistungen und Transfers. In: Kohli, Martin & Marc Szydlik (Hrsg.): Generationen in Familie und Gesellschaft. Opladen: Leske + Budrich, 122-137.

Motel-Klingebiel, A. (2000): Alter und Generationenvertrag im Wandel des Sozialstaats. Alterssicherung und private Generationenbeziehungen in der zweiten Lebenshälfte. Berlin: Weißensee Verlag.

Szydlik, M. (2000): Lebenslange Solidarität? Generationenbeziehungen zwischen erwachsenen Kindern und Eltern. Opladen: Leske+Budrich.

The German Aging Survey Wave II – Age and aging in a longitudinal perspective –

- The German Aging Survey Wave II is again financially supported by the German Federal Ministry of Family, Senior Citizens, Women, and Youth
- The second wave is carried out by the German Centre of Gerontology (DZA)

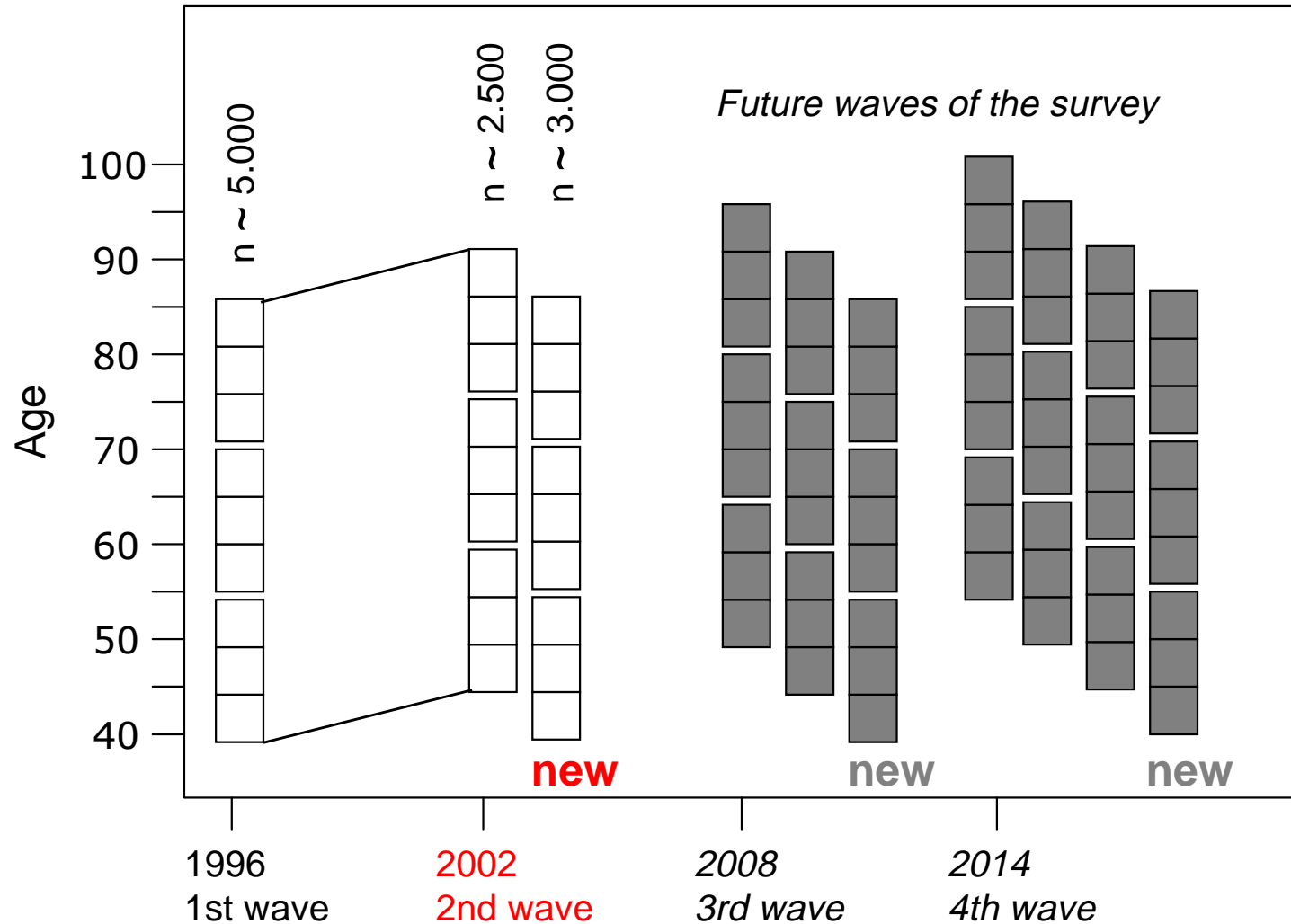
Principal investigators:

PD Dr. Clemens Tesch-Römer (Director), Heribert Engstler,
Dr. Hossein Shahla, and Susanne Wurm

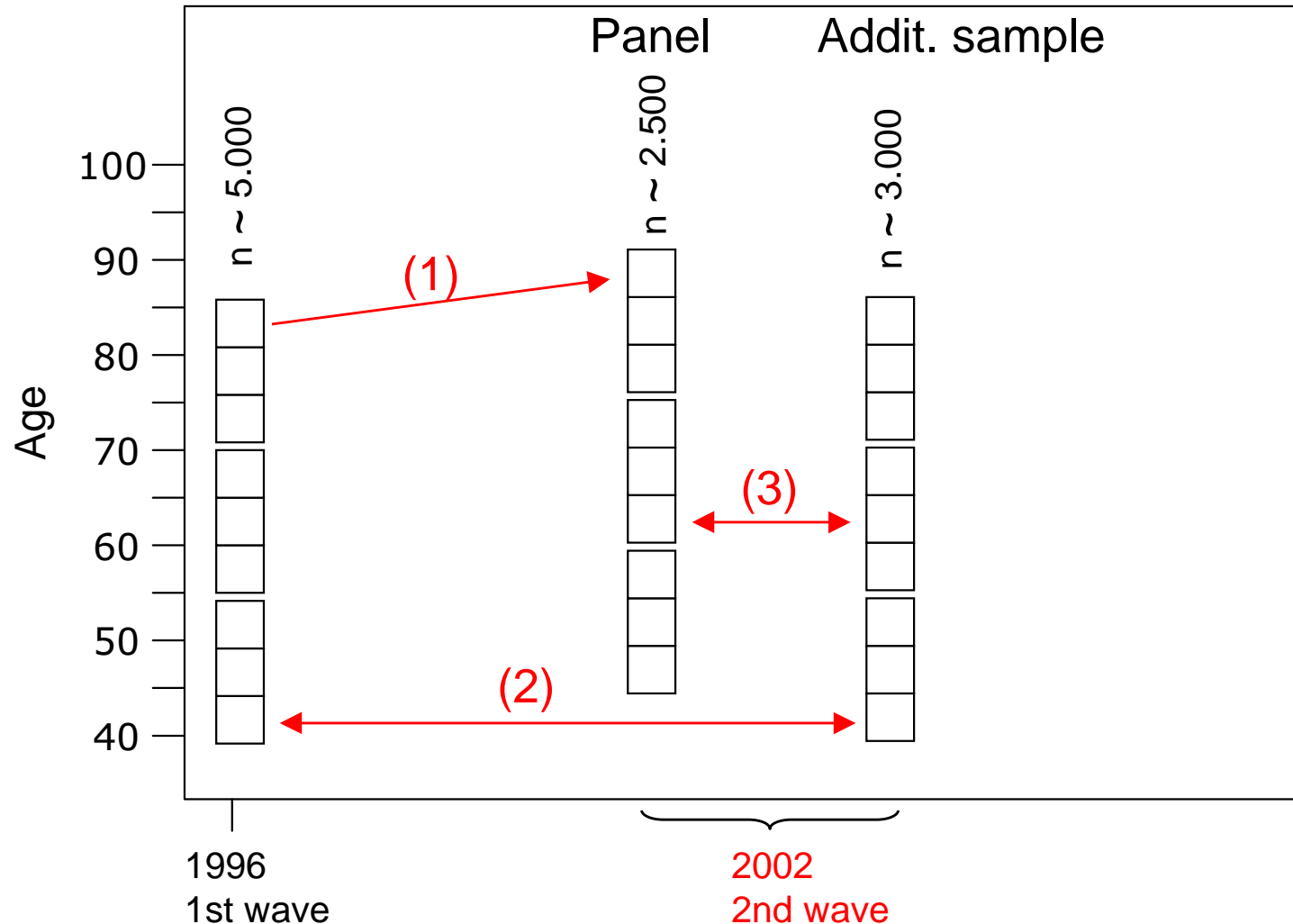
Associates:

Dr. Andreas Motel-Klingebiel, German Centre of Gerontology,
Dr. Harald Künemund, Free University Berlin

The German Aging Survey Wave II – Design –



The German Aging Survey Wave II – Perspectives of data analysis –



The German Aging Survey Wave II – Sample sizes and panel mortality –

	40-54 years	55-69 years	70-85 years	Total
Sample size Wave I (1996)	1719 (35.5%)	1779 (36.8%)	1340 (27.7%)	4838
Willingness to participate again (1996)	1214 (42.3%)	1017 (35.3%)	642 (22.3%)	2873
Panel test I (1998)	1098 (40.6%)	1001 (37.0%)	606 (22.4%)	2705
Panel test II (2000)	1015 (41.0%)	937 (37.9%)	522 (21.1%)	2474

The German Aging Survey Wave II – Main subjects of the German Aging Survey –

Subjects	Wave II
Self concept and life goals	standard.
Health and health behavior	extended
Need of care and use of services	new
Norms and values	x
Activities and social participation	x
Partnership and widowhood	extended
Family relations and social networks	x
Support and transfers	x
Education, work, transition into retirement	extended
Economic situation and standard of living	x
Households, housing and mobility	x
Subjective quality of life and well-being	extended

The German Aging Survey Wave II – Overall research questions –

- What are the living conditions and objective/subjective quality of life of people in the second half of their life course? (Cross-sectional description as delivery for social reporting which is one of the main tasks of the German Aging Survey)
- What are the changes in living conditions and objective/subjective quality of life over time in the different age groups?
- Which of the indicators of past living conditions and their evaluations predict quality of life in later life stages best?

The OASIS Project – Overall research question –

- How do living conditions, intergenerational family relations and service systems affect autonomy and quality of life of older people in the different societies?

OASIS – Participants

- **Norway** / Norwegian Social Research (NOVA), Oslo
(Prof. Svein Olav Daatland, Katharina Herlofson)
- **Spain** / University of the Basque Country, Bilbao
(Prof. Maria-Teresa Bazo, Iciar Ancizu García)
- **United Kingdom** / University of Keele
(Prof. Judith Phillips, Dr. Paul Kingston, Dr. Maureen Ray)
- **Israel** / University of Haifa (Co-ordination)
(Dr. Ariela Lowenstein, Prof. Ruth Katz, David Mehlhausen-Hassoen)
- **Germany** / German Centre of Gerontology (DZA), Berlin
(PD Dr. Clemens Tesch-Römer, Dr. Hans-Joachim von Kondratowitz,
Dr. Andreas Motel-Klingebiel)


OASIS – Study design

Survey design

	Norway	Spain	UK	Israel	Germany	Total
G1 (75+)	n=400	n=400	n=400	n=400	n=400	n=2000
G2 (25-74)	n=800	n=800	n=800	n=800	n=800	n=4000
Total	n=1200	n=1200	n=1200	n=1200	n=1200	n=6000

Qualitative study design

	Norway	Spain	UK	Israel	Germany	Total
G1 (75+)	n _{t1} =40	n _{t1} =40	n _{t1} =40	n _{t1} =40	n _{t1} =40	n _{t1} =200
	n _{t2} =40	n _{t2} =40	n _{t2} =40	n _{t2} =40	n _{t2} =40	n _{t2} =200
G2 (child/G1)	n _{t1} =40	n _{t1} =40	n _{t1} =40	n _{t1} =40	n _{t1} =40	n _{t1} =200
	n _{t2} =40	n _{t2} =40	n _{t2} =40	n _{t2} =40	n _{t2} =40	n _{t2} =200



*High risk of dependency
(physical health status/SF36)*

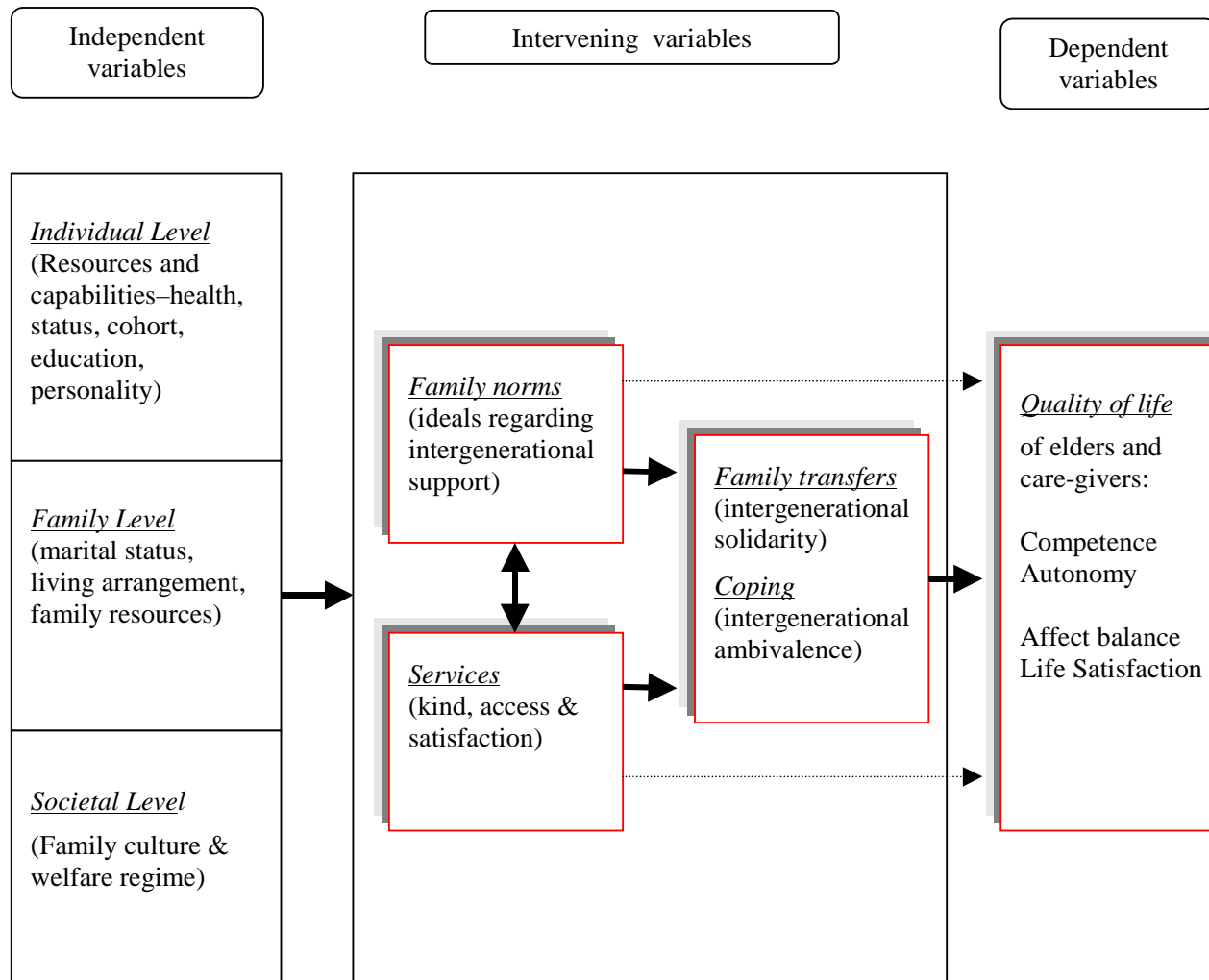
OASIS – Sampling

- Representative population samples from urban areas (municipalities of at least 100.000 inhabitants) stratified by age.
- Sample of 200 elderly (75+) at risk for dependency (based on their physical health status) and the ‘child they most rely on’ is drawn out of the survey sample to conduct qualitative interviews at two points in time.

Topics for qualitative longitudinal research:

- Coping with limited health
- Help from family, social network, and formal support systems
- Subjective aspects of aging, health, support, and quality of life

OASIS – Heuristic model (Lowenstein et al., 1999)



OASIS – Overview of the survey instrument

Contextual information

- demography
- house and environment
- socio-economic status
- income and wealth
- health and functional ability
- coping

Norms and preferences

- values
- preferences

Family and other network

- children / study child / grandchildren
- parents
- other family members
- solidarity, conflict & ambivalence
- friends and neighbors
- social capital

Welfare State

- help and services

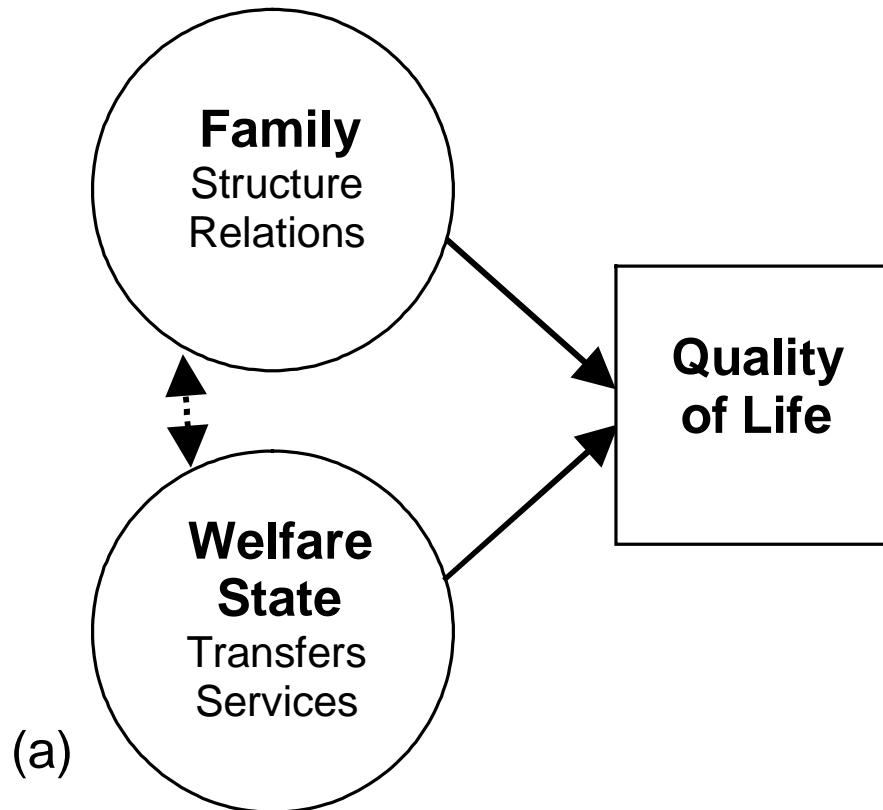
Outcome

- quality of life

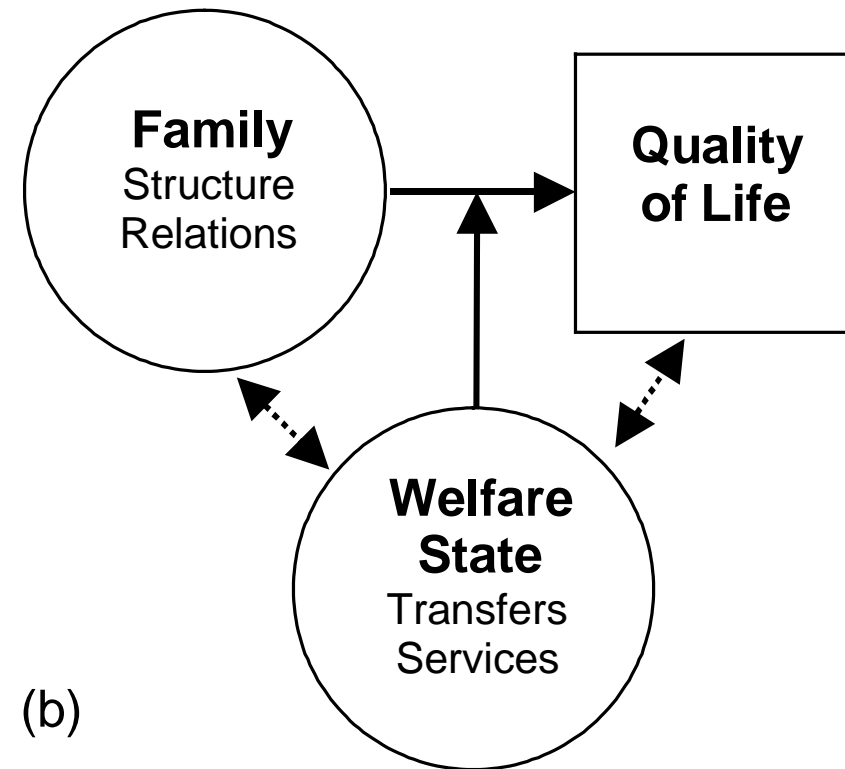
OASIS – Domains of the WHOQOL-BREF

Domain 1: Physical health	<i>Mobility, pain and discomfort, dependence on medical aids, energy and fatigue, sleep and rest, activities of daily living, work capacity</i>
Domain 2: Psychological health	<i>Bodily image and appearance, negative feelings, positive feelings, self-esteem, spirituality/religion/ personal beliefs, thinking, learning, memory and concentration</i>
Domain 3: Social relationships	<i>Personal relationships, social support, sexual activity</i>
Domain 4: Environment	<i>Financial resources, freedom, physical safety and security, health and social care: accessibility and quality, home environment, opportunities for acquiring new information and skills, participation in and opportunities for recreation/leisure activities, physical environment (pollution/noise/traffic/climate), transport</i>

OASIS – Basic models of comparative analyses on the impact of family and welfare states on quality of life (Motel-Klingebiel, Ray, Kingston et al., 2001)



Additive impact of predictors



Interaction effects of predictors

OASIS – Family, welfare states and quality of life in a comparative perspective – Selected preliminary findings –

- **Role of family and welfare state for quality of life**
The analyses partly confirm theoretical assumptions of an effect of children on the elder's quality of life and a welfare state regime dependence of this effect. Supporting results come from data of three out of four OASIS countries (Norway, Israel, Germany). But the Spanish case leads to preliminary rejection of the theoretical assumptions.
- Confounding influences from other sources. Moreover: Analyses have just started. Only rough indicators have been used so far.

Combining these perspectives in an international research context

– Summary and outlook –

- International Integration of Research Projects as a Special Challenge
 - Integration of national data

The German Aging Survey will be part of a developing research context. Similar projects are planned/carried out in Sweden, Norway, Austria, and The Netherlands
 - Integration within a joint research project

OASIS as an example international comparisons within a project
 - Combinations of both strategies

The OASIS five nation data set will be combined with data from the US in a comparative project currently developed
- International comparability must be of interest when planning and implementing new research on age and aging

