Ageing & Society **26**, 2006, 203–223.
doi:10.1017/S0144686X05004502 Printed in the United Kingdom

Filial norms and family support in a comparative cross-national context: evidence from the OASIS study

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ABSTRACT
The article aims to answer three questions: How strong are the bonds of obligations and expectations between generations? To what extent are different types of support exchanged between generations? What are the impacts of filial norms, opportunity structures and emotional bonds on the exchange of inter-generational support between adult children and older parents across societies? It reports findings from the five-country (Norway, England, Germany, Spain and Israel) OASIS study, which collected data from representative, age-stratified, urban-community samples of about 1,200 respondents in each country. The findings indicate that solidarity is general and considerable although the strengths of its dimensions vary by country. Most respondents acknowledged some degree of filial obligation, although the proportions were higher in Spain and Israel than in the northern countries, and there was greater variation in the tangible forms than in the expressed norms. Adult children were net providers of support, but older parents provided emotional support and financial help. Most support was provided to unmarried older parents with physical-function limitations. The effect of filial norms on help provision by adult children was moderate but significant and variable across the five countries, appearing more prescriptive in the south than in the north, where inter-generational exchanges were more open to negotiation. The findings demonstrate that cross-national analyses provide insights into both country-specific factors and the sometimes unexpected similarities among them.

KEY WORDS – filial norms, family support, elderly, cross-national context.

Introduction

This article presents both a theoretical discussion of family norms and inter-generational transfers and empirical findings from the cross-national, five-country study, *Old Age and Autonomy: The Role of Service Systems and*

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Inter-generational Family Solidarity (OASIS), of the impacts of filial norms, opportunity structures and emotional bonds on the support provided by adult children to their older parents. The rationale of OASIS was that because families choose different coping strategies in response to similar problems and pressures, and because countries have different welfare services to meet the needs of elders and their families, it is important to study these issues in various cultural contexts and with a comparative perspective. It was believed, for example, that families and welfare systems respond to the problems of modernisation in different ways partly because of variations in established traditions (Alber 1995; Daatland 2001). Although the challenges of population and individual ageing may be shared, each country's and each family's solutions can be distinctive. As an example, although family norms may be generally strong, there are considerable variations in how these norms are enacted (Rossi and Rossi 1990; Finch and Mason 1993; Daatland 1990; Katz and Lowenstein 1999; Lowenstein and Katz 2000). As Inglehart and Baker (2000: 19) put it, 'the broad cultural heritage of a society … leaves an imprint on values that endure despite modernization'.

Since the early 1980s, a proliferation of studies has shown a fairly consistent picture of the high involvement of families in care-giving to older people, and that the input of care for frail older people from outside the family is at best modest. British studies, for example, have estimated that close to six million adults (about 15% of the adult population) provided regular support of some kind to a sick or older person (Sinclair *et al.* 1990). Even in the Nordic countries, as in Sweden, where a relatively large percentage of women are in the labour force and over 40 per cent of older people live alone, family support is still central to elder care (Tornstam 1992; Sundstrom 1994). A comparative study of services and policies for older people in Denmark, Norway and Sweden established that family care is substantial and that collective responsibility through public services has not diminished its volume (Daatland 1997). Nonetheless, we still know too little about the guiding principles and values that shape families' responses – or non-responses – to older people's care needs.

In almost all societies, older adults expect to rely on their adult children as critical sources of support and care should they become frail or in need (Seelbach 1984; Rossi and Rossi 1990; Stein *et al.* 1998; Burr and Mutchler 1999). Evidence about the relationship between older parents' normative expectations and the support they receive from children is however equivocal. Lee, Netzer, and Coward (1995) in their Florida study, Lee, Parish and Willis (1994) in their Taiwan study, Eggebeen and Davey (1998) from an analysis of data from two waves of the United States *National Survey of Families and Households*, and Chen and Adamchak's (1999)

study in urban China, all found little evidence that beliefs concerning filial responsibility influenced the amount of support received from children. Others, though, have found direct associations between filial obligation and supportive behaviour (Parrott and Bengtson 1999; Silverstein, Parrott and Bengtson 1995; Rossi and Rossi 1990; Whitebeck, Hoyt and Huck 1994), while Stein *et al.* (1998) found that a child's feeling of obligation to a parent in a particular relationship was more important than the strength of normative filial responsibility expectations. The inconsistency of the evidence suggests that important factors which modify the relationship between filial expectations and filial behaviour have not been understood. In response, the purpose of the analyses reported here is to examine the relationships between the filial norms held by older and younger generations and the actual support provided by adult children to older parents.

The OASIS study

Our cross-cultural and cross-national research attempts to explain how cultural norms, societal institutions and social policy influence individual behaviour and action. The first step was to make a theoretically guided selection of countries for study, which OASIS undertook by reference to Esping-Andersen's (1990, 1997) typology of welfare state regimes. The five selected countries, Norway, England, Germany, Spain and Israel, each represented a different regime (institutional, conservative and residual) and familial culture (family-oriented and individualistic), in which inter-generational relationships were likely to differ (Reher 1998). The OASIS project sought to develop our knowledge of how autonomy in old age could be promoted to enhance the wellbeing of both older people and their family care-givers, so as to improve the evidence for policy and planning. The present article addresses three specific questions: How strong are the bonds of obligations and expectations between generations? What types of support are exchanged between younger and older generations? What is the impact of filial norms, opportunity structures and emotional bonds on the inter-generational support provided by adult children to older parents across societies?

Theoretical and conceptual background

A robust and appropriate theoretical framework for the study of ageing and old age should provide 'conceptual tools to interpret complex events and critically to evaluate the current state of ageing' (Biggs, Lowenstein

and Hendricks 2003: 16). The OASIS team therefore reviewed previous theoretical contributions, which established that inter-generational solidarity is the outcome of complex processes that link individualistic and small-group dynamics with societal or macro influences. It also became clear that studying the private or family sphere of social life encountered the greatest complexity. The OASIS study therefore adopted Bronfenbrenner's (1979) concept of the 'ecology of human development', which distinguishes the contributions of micro, meso and macro analyses to the understanding of the complex interplay between individuals, families and social structures. The specific theoretical and conceptual perspectives chosen for the OASIS study were: at the *macro* level, to understand variations in the nature and implications of variant welfare regimes and family cultures; at the *meso level*, to understand whether inter-generational families are characterised by solidarity, conflict or ambivalence; and at the *micro* level, to understand variations in the use of services and the quality of life. The present article focuses on the meso level; its guiding conceptual perspectives therefore pertain to filial norms and inter-generational family solidarity.

In an analysis of changes in the structure of society and the family, Sussman (1991) pointed out that many functions of the traditional family have been taken over by social institutions. It has long been argued that the decline of traditional family functions is an unavoidable outcome of modernisation and contemporary economic life. As one example, the increased residential separation of the generations is cited as evidence of the decline of the inter-generational family and of the isolation of older parents from their children (Parsons 1955). For others, the disengagement and isolation of older people have been interpreted as adaptive and functional strategies, not only for younger generations but for the older people themselves (Cumming and Henry 1961). Another factor influencing this debate is that the ability of women (the traditional care-givers) to provide care for older family members has been reduced by their increased participation in the labour market. Changes in family structure, especially high rates of divorce and single parenthood, have also been perceived as contributing to the 'decline of the family' (Popenoe 1993).

Such reports of the demise of the extended family are now widely accepted as premature (*e.g.* Silverstein and Bengtson 1997). Studies of inter-generational family relationships have revealed that adult children, even when separated by long distances, are not isolated from their parents but frequently interact and exchange assistance with them (Lin and Rogerson 1995). Feelings of family obligations and affective relationships spanning the generations have not been weakened by geographical separation. Family sociologists have shown that the contemporary

extended family maintains cross-generational cohesion (Bengtson 2001). The nuclear family has also kept most of its functions, in partnership with formal organisations (Litwak 1985; Litwak *et al.* 2003). In the light of this evidence, a key concern of the OASIS project was to assess the current state of inter-generational solidarity, including filial norms (normative solidarity).

Approaches to the study and explanation of inter-generational solidarity

Four theoretical emphases can be recognised in studies of inter-generational solidarity and, specifically, its prevalence and forms. They emphasise variously the retrospective, situational or prospective influences, or combine these three. *Retrospective* theories emphasise the role of early socialisation and cultural patterns in producing variations in normative beliefs and practices by race, ethnicity and gender. A variant is role theory, as applied to gender-specific roles and to the interactional roles of parents and children; it may be particularly useful for understanding how filial norms in families are constructed. *Situational* explanations are here-and-now oriented, and refer to characteristics that are either barriers to or motivators for solidarity, as with conflicting role obligations in work and family life, or the qualities of the relationships between child and parents. Among the tangible and common barriers are geographical distance and poor health. *Prospective theories* seek explanations in the expected future consequences of present actions and choices. The role and impact of self-interest and other drives are pertinent, including how people more or less rationally implement or actuate the norms that they hold. The theory of reasoned action, as adapted to the relationship between norms, attitudes, intentions and actual behaviour, is one specific example (Ajzen 2001; Ajzen and Fishbein 1980).

A study may of course employ a *mixed* conceptual and theoretical framework as when past, present and future influences are simultaneously examined. Exchange theory exemplifies this approach, as it considers both the genesis of reciprocal obligations in earlier contributions and the incentives for present and future resource exchanges. The social exchange framework may, for example, help us understand why some individuals sustain long-term, stressful care-giving situations with minimal formal assistance, while others call on formal carers at an early stage. Bengtson and colleagues' inter-generational solidarity framework exemplifies the mixed conception, with its integration of exchange theory and role theory (Bengtson and Roberts 1991). The model conceptualises inter-generational family solidarity as a multi-dimensional nexus of exchange relations

with six foundations: structural solidarity, associational solidarity, affectual solidarity, consensual solidarity, functional solidarity and normative solidarity. As this model encapsulates the central theoretical and empirical issues that have to be addressed in understanding the norms, expectations and realties of inter-generational solidarity and filial responsibility, it was adopted as the guiding framework.

Study design and sample

As most previous studies had been in only one country, which makes possible an ethnocentric bias, and only a few exceptions were known (Bengtson and Martin 2001; Hollinger and Haller 1990; Silverstein *et al.* 1998), the OASIS team agreed to carry out a cross-sectional study with a comparative cross-national perspective. The data were collected through face-to-face structured interviews with an age-stratified, urban, representative sample of about 1,200 respondents living in the community in each of the five countries. Sampling was confined to the populations of urban areas with populations of 100,000 or more. To enable a more detailed analysis of older people's circumstances and views, the population aged 75 or more years was over-sampled, and comprised about one-third of the sample (with 800 aged 25–74 years, and 400 aged 75 or more years). The final aggregate sample was 6,106 respondents. A full account of the OASIS model, design and methodology is available (Lowenstein and Ogg 2003).

Measures

A comprehensive review of the OASIS research instruments is available (Lowenstein *et al.* 2002). The *inter-generational solidarity* items were adapted from an instrument developed by Silverstein and Bengtson (1997) for their *Longitudinal Study of Generations* (LSOG) that began in the early 1970s. The six domains of the construct are covered by 54 questions, with many expressed in universal terms to establish the respondent's cultural values (their specific, individual inter-generational relations were collected by other questions) (Table 1). *Normative solidarity* was collected by a question on the level of agreement with two statements that express what adult children should do, and two that articulate what elderly parents should expect. The responses were structured with a five-point scale from strongly agree ('1') to strongly disagree ('5'), and the summed scores ranged from '4' to '20'. Inter-correlations between the four items across all countries were moderate ($r = +0.29$–0.49). Responses to the four items

TABLE 1. *The measures of the dimensions of inter-generational solidarity*

Dimension	Definitions and measures	Value labels
Structure	Geographic separation distance that constrains or facilitates interaction between older parents and their children.	1 Living together 2 Living <10 minutes apart … 6 Living 3+ hours apart.
Association	Frequency of face-to-face contacts	1 At least weekly 2 Less than weekly
Affectual solidarity	Emotional relations between parents and children, measured by three questions on emotional closeness, getting along together, and communication.	1 Extremely well … 6 Not at all well[1]
Functional solidarity	Mutual exchange of assistance between parents and children, operationalised as providing or receiving help from at least one child in one or more of: house repair and gardening, shopping and transport, household chores, personal care, financial assistance and emotional support.	1 Receives help 2 Does not receive help[2]
Consensus	Similarity of opinions and values between older parents and their children	1 Similar 0 Dissimilar
Normative solidarity	Or filial (piety) norms. Four-statement familism scale: a. Adult children should live close to their older parents so they can help them if needed. b. Adult children should be willing to sacrifice some of the things they want for their own children in order to support their frail elderly parents. c. Older people should be able to depend on their adult children to help them do the things they need to do. d. Parents are entitled to some return for the sacrifices they have made for their children.[3]	1 Strongly agree … 5 Strongly disagree 4–20 Aggregate score

Notes: 1. Inter-correlations between the three questions across all the countries were high (from $r=+0.63$ to $+0.75$): a mean score of the three items was used. 2. Inter-correlations between the six areas across all the countries were low ($+0.11$ to $+0.48$): the items were used separately in the analyses. 3. Based on the scale developed by Lee, Peek and Coward (1998).

were examined both separately and as an additive scale. The alpha score for the scale was 0.79.

The measures of *personal and familial attributes and resources* included: gender, a dichotomy for marital status ('1' married), the number of living adult children (aged 18 or older), the level of attained education on a three-point scale ('1' primary, '2' secondary, '3' higher education), and a dichotomy of perceived current financial situation ('1' comfortable). In addition, capabilities in the Activities of Daily Living were measured

with the 12-item short form of the SF-36 health questionnaire: a higher score indicates better functioning, and the summed score may range from '1' to '100' (Ware and Sherbourne 1992).

The analyses

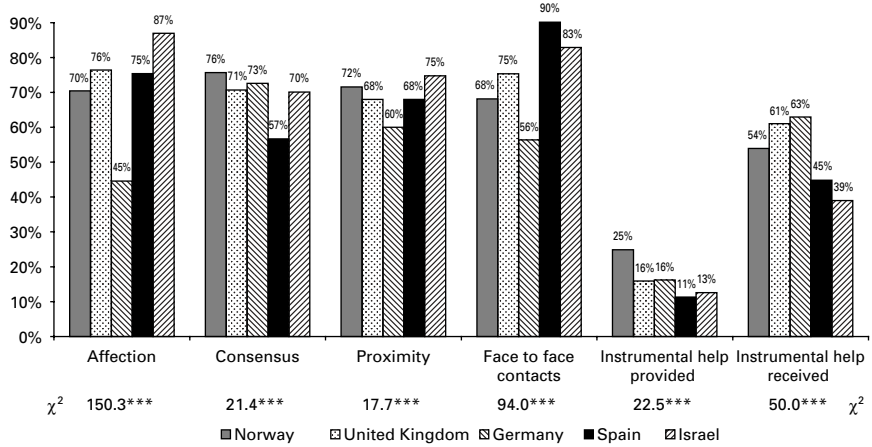
The analysis began by collating the descriptive statistics for the independent variables of inter-generational solidarity and filial norms for each country. Next, the distribution of the dependent variables (the two-way flow of support between older parents and adult children in six areas) for each country was established. To establish their independent effects, the bivariate relationships among all the variables were analysed by Pearson correlation coefficients. Lastly, to assess the impact of filial responsibility expectations on the support received from children, ordinary least-squares (OLS) regression models were calibrated separately for mothers and fathers, controlling for demographic variables, residential proximity and emotional solidarity. Separate models were generated for each of the five countries and for the pooled sample.

The empirical findings

Inter-generational solidarity

Figure 1 presents the levels of reported inter-generational support along the six dimensions of inter-generational solidarity. Following Silverstein and Bengtson (1994), the dimensions were treated as dichotomous indicators, *e.g.* affect was represented as very close ('1') or not so close ('0'). The vertical axis of Figure 1 represents the percentage of respondents with the higher score for each item. The first-order correlations for the pooled sample between the six solidarity dimensions were all positive but moderate to low ($r_{xy} = +0.26$–0.34), indicating their relative independence. Functional solidarity is here indicated by only 'instrumental help', *i.e.* help in household chores, house repair and gardening, and shopping and transport. More details about the help provided and received are given later in Tables 4 and 5.

The country differences were significant on all six dimensions, mainly because one or two countries deviated from the general pattern. Figure 1 shows that a high percentage of respondents reported strong affectual solidarity (except in Germany), reported a consensus between parents and children (except in Spain), lived close to their children, and had frequent face-to-face contacts with them (except in Germany). More instrumental help was received by parents from their children than *vice versa*. There is no objective standard against which to evaluate these scores,



Notes: Affection: feel very close to. Consensus: share similar views. Proximity: lives less than half an hour away. Contact: at least weekly contact. Instrumental help provided and received: to or from at least one child of three kinds: household chores, house and gardening, shopping and transport. The chi-squared statistics refer to differences among the five countries (4 degrees of freedom).
Source: Lowenstein and Ogg (2003).
Significance level: *** $p < 0.001$.

Figure 1. Distribution of intergenerational family solidarity dimensions among people aged 75 or more years in five countries.

but one may reasonably conclude that the data show substantial levels of inter-generational integration, except that in Germany the scores were low on three of the six dimensions. The country differences were inconsistent, *e.g.* Spain had a high score for associational solidarity partly because of high co-residence rates, but an average score for affectual solidarity and a low score for consensus.

Family norms and ideals or the level of normative solidarity form the background to inter-generational family relations. Several United States studies have concluded that filial responsibility norms are still strong, and to a large extent are shared across class, gender, age and ethnicity (Hamon and Blieszner 1990; Lee, Peek and Coward 1998). It was therefore of great interest to establish whether the same applied in the four European countries and Israel. Table 2 presents the respondents' filial responsibility norms, as measured by the level of agreement with the four normative statements. The majority of respondents in all five countries accepted some degree of filial obligations, but the differences among the countries, although moderate, were highly significant ($p < 0.001$). Agreement was greater in Spain and Israel than in Germany, England and Norway. If the level of agreement in Spain defines a familistic orientation, then filial obligation norms were quite strong in northern European countries too, even in more populous urban

TABLE 2. *Level of acceptance of filial obligations, by item and country*

Domain of obligation	Norway	England	Germany	Spain	Israel
	Percentage who agree or strongly agree				
Item 1 (should live close)	29	31	40	57	55
Item 2 (should sacrifice)	41	47	36	44	37
Item 3 (able to depend on)	58	41	55	60	51
Item 4 (entitled to returns)	38	48	26	55	64
Agree with at least one item	76	74	68	83	83
Sample size	(1,195)	(1,172)	(1,255)	(1,173)	(1,183)

Notes: The Samples were of the population aged 25 or more years living at home in large urban settings (100,000+ population) in each country. Estimates produced from samples weighted to reproduce the national age structure (25+ years). Differences, when existed were statistically significant at $p<0.001$.
Sources: OASIS surveys. The scale was adopted from Lee, Peek and Coward (1998).

areas and in Norway's highly developed state-welfare regime. It appears, therefore, that neither urbanisation nor welfare state expansion are incompatible with felt filial obligations.

There were greater country differences in the character than in the strength of filial norms. Most particularly, the view that children should live close to their parents showed a north–south divide (Reher 1998), with far more support in Spain and Israel than in Germany, England and Norway. Respondents in the latter three seemed to subscribe to a norm of independence between the generations, both in terms of living arrangements (item 1), and in their rather negative attitude to the reciprocity norm – that parents are entitled to the return of care from their children (item 4). Table 3 compares the beliefs and attitudes about filial norms of respondents aged 75 or more years with those of younger adults. The age differences were modest or non-existent in Israel and Norway, but older people in Germany and even more in Spain were more supportive of filial obligations than younger adults. Previous studies have generally reported an inverse relationship between age and filial obligation norms (Daatland 1990), but the OASIS data replicate the finding only for England. The English respondents had the lowest agreement with familistic norms, and the Spanish the highest.

Exchange of informal support

The exchange of help and support is an integral part of daily life in nearly all families, but patterns and dependencies between parents and children change over the life-course. At most of its stages, parents are usually net providers, but when they reach advanced old age, many become net receivers. Many of those aged from the mid-seventies and older are, however, providers of significant support to their children. The exchanges

TABLE 3. *Prevalence of familistic, ambivalent and non-familistic attitudes by age and country*

	Norway	UK	Germany	Spain	Israel
			Percentage		
Attitudes of those age 75+years					
Familistic[1]	30	22	40	54	36
Ambivalent[3]	42	41	44	39	41
Non-familistic[2]	28	37	16	8	23
			Percentage (*Sample size*)		
Familistic attitudes by age group					
25–49 years	28 (492)	37 (327)	29 (385)	44 (435)	44 (491)
50–74 years	29 (271)	26 (417)	28 (331)	42 (338)	41 (319)
75 or more years	30 (382)	22 (353)	40 (416)	54 (344)	36 (338)

Notes: 1. Familistic: in agreement with three or four filial obligation items (see Table 1). 2. Non-familistic: in disagreement with three or four filial obligation items. 3. Ambivalent: all other combinations.

must be examined closely and by drawing on the reports of both the providers and the receivers (which, as will shortly be discussed, are rarely identical).

Tables 4 and 5 show the help received and provided, with particular reference to parents aged 75 or more years, in its six domains: instrumental support such as house repairs and gardening, transport and shopping, household chores, personal care, financial assistance, and emotional support. An element specific to the parents' support is the care of grandchildren. Table 4 presents the adult children's reports, and Table 5 the parents' reports. The former shows that most adult children provided one or more types of support to their parents during the preceding year (range from 70% in Spain to 87% in Norway). Emotional support was provided by the majority (62–74%) of adult children, and instrumental help (for transport and household chores) was also common, no less so in Norway than in Germany and Spain. Few adult children provided personal care, however, probably because few parents were frail enough to require it, and among those who did, some would have moved to an institution. The low level of institutional care and high parent-child cohabitation rates probably explain the high level of personal care in Spain.

Adult children gave more than they received and so were net providers. This was established by the parents' as well as the children's reports. Older parents were not only receivers, however, although their assistance to their children was mainly in the form of emotional support and, in Norway, Israel and Germany, as financial help (Table 5). The clear pattern is that instrumental help flows upwards (to the older generation) and, when pension levels and living conditions allow, financial support

TABLE 4. *Adult children's reports of help provided to older parents (aged 75+ years) and received from them, by type of help and country*

	Norway	England	Germany	Spain	Israel
			Percentages		
Provided help to older parents					
Emotional support	71	62	74	65	69
Transport/shopping	58	45	49	26	41
House repair/gardening	48	31	31	21	22
Household chores	27	29	34	22	18
Personal care	9	5	9	16	12
Financial support	4	14	7	18	23
At least one of above	87	76	83	70	74
Received help from older parents					
Emotional support	46	39	53	42	59
Transport/shopping	6	6	0	3	1
House repair/gardening	9	2	3	1	5
Household chores	7	4	4	6	5
Baby sitting, child care	18	–	4	6	10
Personal care	0	1	1	1	1
Financial support	26	8	11	7	47
At least one of above	59	44	54	45	67
Sample size	165	133	99	138	147

TABLE 5. *Older parents' (aged 75+ years) reports of help provided to adult children and received from them, by type of help and country*

	Norway	England	Germany	Spain	Israel
			Percentages		
Provided help to adult children					
Emotional support	39	46	49	44	41
Transport/shopping	7	8	8	6	2
House repair/gardening	9	7	9	3	1
Household chores	2	7	8	10	2
Child care – baby sitting	20	8	7	11	11
Personal care	0	1	3	2	0
Financial support	23	11	13	9	20
At least one of above	56	54	52	50	49
Sample size	337	318	352	322	340
Received help from adult children					
Emotional support	47	56	57	63	56
Transport/shopping	42	56	52	42	37
House repair/gardening	34	35	44	28	16
Household chores	16	31	38	39	15
Personal care	2	10	16	14	7
Financial support	3	9	3	13	12
At least one of above	70	75	81	75	69
Sample size	333	322	355	325	341

flows downwards. While there is no standard or norm by which to evaluate the reported patterns of exchange, given that the levels were fairly similar across the five countries with very different family traditions and welfare regimes, and allowing that our measurements have not captured the volume or frequency of help, the exchanges may reasonably be described as considerable. It can also be concluded that more generous welfare-state provision, as in Norway, does not discourage family support exchanges, indeed the opposite effect is more likely.

The congruence between the parents' and the children's reports should also be noted, although the children did report that they provided more help than the parents reported receiving. A perfect match should not be expected; both parties may want to put their best foot forward, the children by overstating what they provide, the parents by presuming to be more self-sufficient than they really are. Many perceptual and objective explanations can be envisaged, *e.g.* minor exchanges such as posting a letter are inconsistently counted as help or care, or a gift of surplus garden produce may be seen as helpful by the donor but a nuisance by the recipient. The discrepancies varied by country, being greatest in Norway and least or even reversed in Spain.

Multivariate analysis

The impact of filial norms, emotional bonds and opportunity structures on inter-generational support patterns was explored through a series of multiple regression analyses of the children's reported help to their parents. A model of help to both mothers and fathers aged 75 or more years for the pooled sample was calibrated, and separate country models for help to mothers and to fathers (except for England for which the data were missing). The independent variables include the characteristics of the providers and the receivers, their subjective norms, and the quality of the parent-child relationship (see Table 6). The marital status of the adult children and whether they had children was included as an indicator of opportunity (or competing obligations). As help logically responds to needs, the age and needs indicators for the receivers were included. The affective and associational solidarity indicators were entered as indicators of the relationship between provider and receiver; as were the residential separation distance (indicating opportunity), and whether or not help had been received from the other party, which enabled the role of reciprocal obligations to be tested.

The two left-hand columns of Table 6 show the standardised regression coefficients for help to parents aged 75 or more years for the pooled sample (the samples were too small for a separate analysis for each

TABLE 6. *Regressions of factors associated with adult children's provision of help to their parents*

	Help to 75+ yrs mothers[1]	Help to 75+ yrs fathers[1]	Help to mothers (all ages)					Help to fathers (all ages)				
			Norway	Germany	Spain	Israel	Total	Norway	Germany	Spain	Israel	Total
			Standardised regression coefficients									
Child's characteristics (provider)												
Gender (1 = daughter)	0.091	0.103	−0.040	0.084	0.040	0.000	0.017	−0.076	0.012	−0.031	0.063	−0.004
Age	0.017	0.063	−0.055	0.040	−0.014	0.156*	0.043	0.025	0.035	−0.116	0.189*	0.045
Marital status (1 = married)	0.040	0.097	−0.096*	−0.008	−0.048	−0.117*	−0.077**	−0.126*	0.080	0.001	−0.237***	−0.097**
Has children (1 = yes)	−0.053	0.040	−0.185***	−0.130*	−0.112	−0.091	−0.128***	−0.150*	−0.064	0.002	0.034	−0.055
Normative solidarity	0.020	0.147	0.058*	0.146**	0.027	0.023	0.054*	0.107*	0.199**	0.088	0.046	0.111***
Parent's characteristics (receiver)												
Parent status (1 = both alive)	−0.097	−0.080	−0.173***	−0.104*	−0.131**	0.080	−0.120***	−0.019	−0.097	−0.070	0.014	−0.033
Age	0.036	0.079	0.150*	0.203**	0.073	0.083	0.128***	0.127	0.165*	0.111	−0.014	0.092*
Need's help (1 = yes)	0.223***	0.185	0.187**	0.199**	0.267**	0.325***	0.244***	0.173**	0.051	0.145*	0.303**	0.185***
Receive services (1 = yes)	0.033	−0.068	0.087	−0.031	−0.014	−0.169*	−0.041	0.051	0.013	0.020	−0.178	−0.041
Characteristic of relationship												
Geographical distance	−0.148	−0.247*	−0.159*	−0.145	−0.126	0.034	−0.065	−0.106*	0.013	−0.119	−0.155	−0.120*
Affectual solidarity	0.004	0.087	−0.004	0.031	−0.043	0.116*	0.024	0.066*	0.004	−0.058	0.118*	0.061*
Associational solidarity	0.364***	0.441***	0.286***	0.268**	0.208*	0.088	0.159***	0.161*	0.050	0.177	0.342***	0.166**
Help received from parents [2]	0.241***	0.023	0.264***	0.361***	0.458***	0.241***	0.352***	0.280***	0.454***	0.487***	−0.011	0.295***
Country												
Germany	−0.006	−0.105										
Spain	−0.097	−0.414***										
Israel	−0.168*	−0.122										
R^2	0.234***	0.279***	0.299***	0.385***	0.334***	0.221***	0.265***	0.266***	0.319***	0.282***	0.207***	0.188***
Sample size	(302)	(162)	(450)	(339)	(392)	(455)	(1,636)	(346)	(234)	(277)	(308)	(1165)

Notes: Ordinary least-squares regression coefficients. England not included because of missing information. 1. Pooled samples (all countries except England) 2. Yes = 1.
Significance levels: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$.

country). The countries were represented as dummy variables, with Norway as the reference case. The factors influencing help to mothers and fathers were broadly similar and were dominated by contact frequency and parental needs. It is not surprising, of course, that the frequency of association was strongly related to helping because it is intrinsic to the process. Opportunity may also play a role, as indicated by the negative coefficients for residential separation distance (although it was not significant for help to mothers). Reciprocity made a difference, but only for help to mothers. Access to services, however, did not reduce the help from children, but nor did it stimulate such help. Norms played a role in the provision of help to fathers ($p = 0.06$), but less so for mothers. Country differences were moderate, with Norway having high rates of help, and significantly low rates of help to mothers in Israel and to fathers in Spain.

The *country models* included all adult children with parents (of any age), and the larger sample sizes identified additional significant effects. In Table 6, the middle and right-hand column-sets display the results, respectively, for help to mothers and help to fathers. The coefficients suggest that similar factors applied: parental needs, like declining health and physical functioning; being widowed and greater age positively associated with help in all countries, but there were differentials. Single parents received more help, probably in response to having a greater need for extra-household help. Competing obligations among the adult children, as indicated by being married and having their own children, negatively associated with help rates, but again not in all the countries. Greater residential separation distance was also a barrier to helping but not in all countries. Reciprocity, however, had a general influence, in that children who reported receiving help from parents also gave more help to them. Helping was also positively related to association (contact frequency), which is consistent with the view that helping is an integral part of family interaction. Lastly, emotional closeness, as indicated by affectual solidarity, did not substantially increase the help for mothers, although it was a factor in help for fathers. Similarly, both normative solidarity and needs emerged as slightly stronger stimulants of help for fathers than for mothers. Relationships with mothers may universally be more 'protected' or non-negotiable, while exchanges with fathers may be more dependent on compatibility, duty and needs.

Discussion and conclusions

Limitations of the study

Before a final evaluation of the findings, some limitations of the data should be considered. First, they refer mainly to contacts and transfers

to and from more healthy and active older people, that is, people who lived at home and were willing and able to be interviewed. If and how the model coefficients might change for parents with more intense personal care and support needs requires another study with a different sample. Second, the data are exclusively cross-sectional; a longitudinal design would have provided a more dynamic picture. Third, the samples of parents and adult children were independent and not from the same families; and fourth, the respondents were all from populous urban areas, and the situation in rural areas might be different. One should note, however, that the finding that solidarity levels and inter-generational transfers are substantial among contemporary urban populations in affluent countries adds credibility to the 'family optimists' who argue that inter-generational solidarity is sustained under modernity (Bengtson 2001).

Obligations, bonds and solidarity between the generations

The findings indicate that solidarity was in general considerable although there were variations in the strength of its dimensions in the different countries. The majority of respondents espoused some degree of filial obligation, although more in Spain and Israel than in the three northern countries. By their acceptance of filial norms, the respondents in England and Norway emerged as the least 'familistic', perhaps reflecting their emphasis on independence between the generations and the lack of a legal obligation to provide support for aged parents. There were in general also high levels of association, affection, consensus and help exchanges, but also country-specific deviations that were hard to explain but which might be related to the ways in which familial norms were perceived and implemented in different cultural contexts. Does a legal obligation to provide economic support to older parents, as in Israel or Germany, increase inter-generational exchange, and does well-developed state welfare, as in Norway, promote independence between the generations?

Spain and Norway showed the greatest contrast among the five countries, Spain being the most 'traditional' familistic society with frequent contacts, close affectual relations and a high level of normative solidarity. Norway is the most affluent and has the most elaborate welfare regime, with high provision of older people's services, but it also sustains a strong family system, with average levels of affection and contacts, and high levels of help exchanges and consensus between the generations. The variation in the strength of expressed filial obligations (normative solidarity) was congruent with Reher's (1998) north–south division of European family types (with stronger ties in the south). The division was

not however replicated for the other solidarity dimensions, indicating that Reher's hypothesis may be valid for the normative dimension (duty) but not for the more personal and instrumental qualities of family relationships (affection, association, consensus and transfers).

The country differences were greater for the profiles than for the levels of solidarity, and even more so for filial norms, which came across as more prescriptive in the south than in the north. It may be that norms act as general guidelines and are open to negotiation in specific circumstances, as suggested by Finch and Mason (1993). A universally recognised obligation may take different forms when circumstances change (Lowenstein and Katz 2000). Such malleability is supported by other findings of the OASIS study, *e.g.* that filial solidarity is compatible with generous welfare state arrangements, and that strong filial norms do not necessarily imply agreement with the view that the family is the 'natural' care provider (Daatland and Herlofson 2003). To be sure, the strength of filial norms was associated with the level of provided help, but the association was neither strong nor universal.

The main overall finding of these analyses and the OASIS project is that, while there were more similarities than contrasts in inter-generational family relationships among the five countries, there was also considerable variation in the ways in which filial norms were translated into emotional and instrumental support and help. Normative beliefs are sufficiently flexible to adapt to new social realities such as gender equality and increased female participation in paid-work. Family exchanges may be becoming less duty-driven and more open to individual variation, and personal affection and attachment may be increasingly important for family cohesion and inter-generational ties. Normative obligations live on, but may increasingly be modified by affection and choice, so that family relationships are transforming into more personal and less predictable forms.

The sources of solidarity and mutual exchanges

The findings support both the retrospective and situational theories of inter-generational solidarity. The respondents in all five countries supported the idea of filial obligations, but their forms were more abstract and unconditional in the south, and more situational and less prescriptive in the north. In Norway, particularly, a resolution with the superficially competing norm of independence between the generations appears to have been achieved. The importance of situational factors is evident in that help is responsive to parental needs and related to opportunity, residential separation and competing responsibilities, so that those who

received most support either had limitations in physical functioning or were single (mostly widowed). Gender, contrary to expectations, associated with neither help received nor help provided – as only frequency and not volume of help were recorded, this may be a measurement bias. Sons and daughters may not differ in their tendency to help, but daughters will often take the major load and responsibility (Lee, Dwyer and Coward 1993; Silverstein, Parrott and Bengtson 1995). We need more detailed data about the types and volumes of help in order to differentiate the role of daughters and sons, but the findings indicate that sons may have become more active in the family-help system than has usually been recognised.

The strong role of retrospective influences (or of the historical and family context) was evident both in the (weak) association between filial obligations and helping, and in the (strong) association between help given to parents and help received from them. A person's acquired reciprocity and more general filial norms do seem to play a role in family help provision, as do here-and-now needs and opportunities. Situational factors, including opportunity and competing obligations, appear to be recognised as legitimate factors in the negotiation of how obligations shall be implemented in practice. To what extent self-interest and prospective returns play a role is not evident from the present findings and requires specific study.

Several of the similarities and differences between the countries can be linked with either individual agency or the social structure. Some are probably related to variations in family norms, family cultures and patterns of behaviours, as well as to social policy traditions and the existence or not of a legal obligation for parental care. The evidence from the OASIS study suggests that in Germany and Spain, many more of those aged 75 or more years subscribe strongly to filial norms than either younger adults in their own countries or their age-peers in the other countries (Table 2). Several new questions are raised by this finding. Are the attitudes of younger cohorts in traditionally familistic countries like Spain converging with the more individualistic attitudes of northern Europe? Are the 'welfare regimes' in formerly familistic societies converging towards the northern mixed form in which informal and formal care play complementary roles? As it was found that attitudes differed more between countries than among the age groups in each country, there is a case for more attention to be given to cultural and nation-specific welfare histories and circumstances. This analysis has demonstrated amply that cross-national analyses produce original and compelling insights into the country factors that modify patterns of inter-generational exchange, into the intriguing differences among them, and into the sometimes unexpected similarities.

Acknowledgements

The OASIS study was supported by the European Commission, Quality of Life and Management of Living Resources Programme (1998–2002), Fifth Framework Programme (contract QLK6-CT1999-02182).

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Accepted 29 September 2005

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