

Intergenerational conflicts about social equity, expectations and obligations: lessons from the United States

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Abstract

"Justice across generations" has become a policy issue throughout the Western-industrial world during the past decade. Debate about intergenerational equity involves the distribution of resources and obligations across age groups and generations. Our analysis suggests that debate centres around five specific issues: (1) Conceptual confusions between age groups and family generations; (2) disagreements over the meaning of "equity"; (3) arguments about whether supporting the old is an unbearable public cost; (4) differing opinions about familial expectations, obligations and burdens; and (5) discrepancies between media coverage and empirical evidence on intergenerational relations. While these issues first surfaced in the United States, it can be expected that such disputes will arise in many other nations with similar economic environments, demographic profiles, and public sentiment regarding welfare and entitlement spending. We conclude by examining the potential for increased intergenerational solidarity as an outcome of discussions about equity.

"Justice across generations" has become a policy issue throughout much of the Western-industrial world during the past decade (Myles & Quadagno, 1992; Thomson, 1993; Walker, 1993). Scholars and policy analysts have questioned the fairness of the distribution of resources and obligations across age groups (Preston, 1984; Callahan, 1987), and politicians and popularizers have predicted age-group conflict caused by an ageing and dependent population (Longman, 1987; Lamm, 1985). The targets for "intergenerational equity" advocates are government programmes benefiting older age groups which are financed by contributions from the current working-age population. These programmes are seen as jeopardizing the economic welfare of younger age groups and costing middle-aged groups too much, especially in terms of the tax burden which these groups face (e.g. Kotlikoff, 1992). However debate has virtually ignored or trivialized the exchanges that occur at the private level of families and individual community service (see Bengtson & Harootyan, 1994). As a consequence, intergenerational relations in the United States have been cast in a negative light and with an uncertain future.

In South Africa, after the excitement surrounding the recent free elections is re-directed toward the larger task of operationalizing campaign goals, it is plausible that the "inter-

generational justice" claim will be felt as well. Perhaps lessons learned by gerontologists during the US experience can be constructive to South Africans dealing with high old-age pension costs and increasing pressure for adequate housing, electricity, education, and employment opportunities for all age groups. In this paper we suggest that, at least in the United States recently, conflicts around "intergenerational equity" reflect five specific issues: (1) Confusions between exchanges and support within families and those that occur between age groups; (2) disagreements over what should be the standard for a fair distribution of societal resources between groups; (3) arguments about whether financing the welfare of society's oldest members will "doom" the economic health of our nation and the prosperity of future generations; (4) differing opinions about what can be expected of family members and what is an unfair burden on them; and (5) discrepancies between media coverage and empirical evidence on the nature of intergenerational relations. While these issues may have first surfaced in the United States, it can be expected that such disputes will arise in nations with similar economic environments, demographic profiles, and public sentiment regarding entitlement and welfare spending. We conclude by examining the potential for increased intergenerational solidarity, rather than conflict, as an outcome of discussions about equity across age groups.

The issues explored in the following pages are of relevance to gerontological researchers and policy makers in South Africa because social changes – so visible in the region recently – and the demographic realities of population ageing may soon require a renegotiation of the obligations and expectations across age groups, families and individuals. There are, of course, differences in the age structures of the US and South Africa: in the US persons 65 years and older represent 12.6 % of the population, while in South Africa they represent less than 4 % of the population. America is an ageing society but South Africa is still a youthful one – persons age 15 and younger comprise nearly 40 % of the population (Møller, 1994). There are, however, some important similarities between the two countries: both have diverse ethnic sub-populations and social conditions contributing to income inequalities between and within groups; both are traditionally "individualistic" cultures, with the collectivistic orientations of a "welfare state" repugnant to many in the electorate. Our hope is that the discussion to follow concerning the negotiations of social change and population ageing in the United

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States will promote debate and analysis by South African scholars on these future concerns, as the country prepares to face a changing social contract between population subgroups, the government, and the responsibilities and obligations between the two.

Conceptual confusions: age groups vs generations

Conceptual confusions blur the intergenerational equity debate over the fair distribution of resources and burdens (Laslett, 1992; Bengtson & Murray, 1993). The term "generation" is frequently but incorrectly used to represent both age groups (birth cohorts) and family lineages. The result is that debates over important policy issues become imprecise and attempts at measuring attitudes about "intergenerational equity" are often sloppy. Part of the confusion over what is fair in American society stems from this lack of conceptual precision – which "generations" do we mean?

The multiple meanings reflected in the term "generation" can be seen in a recent volume explicitly dedicated to defining what justice across generations means in the United States (Cohen, 1993). For example, various authors in the volume use the term "generation" liberally without ever defining it, applying the term to aggregates of different age groups or cohorts, individuals and their families, or *both*. Which "generations" are the focus? The contributors to this volume, sensitive as they are to issues of "equity," appear to have difficulty defining the other half of the concept "generations." These conceptual confusions will continue to disable productive discussion and empirical assessment of justice and equity between "generations" unless we answer the question of which generations we mean. In turn, attempts to develop public policies that benefit multiple generations will fail until we determine which generations policies are targeting (Tynes, 1994). Table 1 summarizes distinctions between the popular term "generation" and the social scientific terms which distinguish the contexts in which the concept of "generation" is used. (For further discussion of terminology in this area see Bengtson, Cutler, Mangen & Marshall, 1985.)

Table 1
Which generation? Principle terms used in social and policy analysis

Popular term	Precise concept	Operationalization	Level of analysis
Generation	Age cohort	5 or 10-year birth group	Macrosocial level
Generation	Kinship lineage descent	Social/biological succession	Microsocial level
Generation	Age group	Multi-year birth cohort	Macrosocial level

Source: Bengtson (1993).

What do we mean by "equity"?

In addition to confusion regarding which generation equity debates are about, there is no agreed-upon meaning or standard of equity. We do not share a common basis from which to judge the fairness of situations, resource distributions, or expectations and obligations (for illustration of this point see Laslett & Fishkin, 1992). *Equity* may be defined as the norm that social rewards and benefits should be distributed in a fair fashion. But does equity mean that the goal of public policy should be to ensure equal distribution of public spending on

all age groups, or only on those most in need within each age group (Kingson & Williamson, 1993)? Does an equitable distribution of resources guarantee equal treatment of all age groups? Is an equitable familial exchange one that is balanced with reciprocal transfers of resources (Dowd, 1975), or is it a familial exchange that occurs when there is a need (Eggebeen & Hogan, 1990), regardless of whether or not the exchange is reciprocated? How can a notion of fairness be applied to family relationships where expectations and obligations change as people age and their positions within the generational chain shift (see Bengtson, Rosenthal & Burton, 1990)?

Differing answers to these questions exist because citizens endorse values that are sometimes contradictory. For example, Americans are noted for the high value they place on individualism and independence but they also value support of dependent populations; Americans encourage strong intergenerational bonds while at the same time supporting policies that work against the wellbeing of families. These contradictory values are enforced through normative expectations and standards of behaviour surrounding personal responsibility, duty, altruism and social reciprocity (Gouldner, 1960). Policy makers and researchers disagree over how to operationalize these normative standards and apply them to public policies and family relations (see Aaron, Mann & Taylor, 1994). Operationalizing intergenerational equity either as a policy *objective* or as a guiding *framework* has very different implications for various age groups and family members, and consequently for relations between them. If intergenerational equity is a policy objective, then legislation might specifically aim to make resource distributions fair despite need or outcome; on the other hand if it is a guiding framework, then intergenerational equity might be only one principle among many that is used in policy formulation and evaluation of outcomes. Generational equity disputes thus far have been about outcomes *and* approaches: one goal is to reduce the perceived inequity in the current distribution of public resources between the old and young, including a reduction in welfare spending on the old; another goal is to use an intergenerational perspective when setting the policy agenda so that the mutual needs of the old and young are addressed. In the United States, the goal of resource redistribution has captured a great amount of public attention and driven political debates.

"Scapegoating": are the costs of supporting the old unbearable?

Intergenerational equity has been used as a rallying cry for politicians and activists aiming to redistribute and restructure the current distribution of public resources benefiting the old and young (Walker, 1993; Kingson & Williamson, 1993). The central question which these equity advocates raise is, "Will financing the aging of America and its oldest members doom the economic health of our nation and the prosperity of future generations?" They definitively answer yes, and make the following points:

- (1) The ageing of the American population will overwhelm the nation's public pension system of Social Security, leaving behind a battered and broken programme with little left for when the current working population retires (e.g. Buchanan, 1983; Makin, 1988).
- (2) The American demographic profile, with its increasingly large elderly population, will bankrupt Medicare, the nation's health-care system for the elderly, robbing younger age groups of scarce health-care resources (e.g. Callahan, 1987; Pear, 1991). Not only do the elderly use more health-care resources than other age groups but

they participate in a national health-insurance system which other age groups do not receive.

- (3) The retirement age in the US is falling, with seniors electing to retire earlier than their predecessors. This trend is occurring at a time when older workers are needed in the American workforce; thus, early retirement is considered selfish behaviour on the part of the elderly (e.g. Callahan, 1987; D'Antonio, 1993).
- (4) There is some evidence of waning support for the American welfare system (e.g. Murray, 1984; Stoesz & Karger, 1992).

However there is evidence to the contrary suggesting these four points do not prove that the elderly are ruining the American economy. Instead, it has been argued that the elderly have become the scapegoats for economic hard times (Binstock, 1983). Evidence against the above four points includes the following:

Social Security. Despite campaigns to undermine the cross-class support of the US Social Security system (Quadagno, 1992), it is economically viable at present and operating with a large surplus. Recent estimates suggest the system will function well into the late 2020s as the large baby-boom birth cohort (those born between 1946 and 1964) retires and begins to receive benefits. While steps were taken in the mid-1980s to build up the Social Security reserves precisely for the expected increase in pay-outs brought on as the baby boomers retire, the pay-outs to future retirees will be less than those received by earlier retirees relative to the amounts they contributed (Aaron, Bosworth & Burtless, 1989). This is the case not because the elderly are receiving more than their fair share of social support resources, but rather because any new pay-as-you-go pension system inevitably pays more out in benefits to early recipients than it does to later recipients once the system has matured. Moreover, recent changes to the Social Security system have raised the age at which full-retirement benefits will begin (based on life-expectancy predictions), and there have been increases in the taxes that wealthier elderly persons now pay on greater proportions of their benefits. The problems of the Social Security system, as well as other entitlement programmes, will affect younger generations who will suffer if the benefits are not scaled back by the next decade. It is the size of the baby-boomer cohort and the level of the benefits entailed, rather than the lack of elder responsibility for contributing to the system, that will cause strains on the public pension system for future groups of retirees.

Health-care costs. Health care is a real and costly concern for the United States but not because the elderly receive Medicare health coverage. Rather, the costs of health care have risen sharply and uncontrollably for many years and for all age groups (Aaron, 1991). Limiting the amount of health care elders receive will not increase the amount of health-care resources young children are given. Policy in the US is not rational enough to guarantee that health-care spending cut from one area is directly shifted to health-care spending in another area (Binstock, 1993). Moreover, age-based rationing is not a defensible alternative given our ethical and moral traditions; there is clear support against such an option (Smeeding, Battin, Francis & Landesman, 1987). The real issue is whether to extend health-care coverage universally to all age groups, and it is this issue which American politicians and interest groups are struggling over currently in the nation's legislative committees. Past attempts to achieve universal health coverage and cost-contained health costs have

failed; it remains to be seen if partisan politics once again get in the way of health-care reforms directed toward these ends.

Retirement age. It is true that the retirement age in America is falling, as it is in many industrialized nations, but this social reality is more a consequence of technological changes and early retirement incentive policies than selfishness on the part of the elderly (Quinn, Burkhauser & Myers, 1990). The shift in American employment from goods to services, and the adoption of new, knowledge- and computer-intensive technologies have left many untrained older workers behind (see Myles & Quadagno, 1992).

Support for welfare. Overall, there is surprisingly strong and consistent support for the American welfare system. Support varies by political affiliation, income and perceived "deservingness" of welfare recipients but *not by age* (Day, 1990; Lomax Cook & Barrett, 1992). Persons of all ages express support for the American welfare system which includes Social Security, Medicare and Medicaid (health care for the very poor of all ages), and there is evidence to suggest that the system is here to stay (Marmor, Mashaw & Harvey, 1990).

The baby boomers. America has successfully weathered the great demographic challenge that the baby boomers (the birth cohort resulting from high fertility rates from 1946-1964) presented as children and young adults moving through the educational system and now entering middle-age (Russell, 1982; Easterlin, 1987). There is no reason to believe that American society will not be able to adapt as the baby boomers move into old age. Demographics are not destiny, and we have more than 15 years to prepare for the first wave of baby-boom retirees around the year 2010.

In summary, despite attempts to scapegoat the elderly as the cause for economic troubles, the elderly are not the cause of current deficits and rising health-care costs, nor will they ultimately be the cause of the success or failure of the American welfare system. Much larger economic and social forces are at the root of these conditions, namely low rates of private and public savings, slowed growth and productivity, a trade deficit and a looming national deficit (Aaron *et al.*, 1989; Kotlikoff, 1992). Are the elderly, however, responsible for the burdens facing many families who must care for their ageing parents? Do they hold unjustified and unfair expectations of their children? It is to these issues of equity at the level of family relations that we now turn.

Familial expectations, obligations and burdens

The concept of intergenerational equity is applicable to the expectations, obligations and burdens operating within the microsocial context of the family. Until recently, exchanges that occurred within families were not included in the intergenerational equity debate, and conflicts arising over expectations among family members were not legitimated as part of the broader policy debate over justice. However, efforts have been made to incorporate the domain of family obligations into the intergenerational equity framework, and to legitimate private exchanges within families that contribute to the welfare of individuals (e.g. Bengtson & Harootyan, 1994). To that end, researchers have tried to measure the monetary value of private transfers of time, help and volunteer activities between family members, in an attempt to show how such exchanges contribute to the balance between intergenerational expectations and obligations between age groups and family members (Kronebusch & Schlesinger, 1994).

Despite attempts to demonstrate the amount of exchanges that occur between family members of different ages, new circumstances are arising which strain intergenerational relations and public policy towards families. First, the current care needs of the elderly population are projected to increase as elders live longer with chronic, functionally disabling (but not life-threatening) diseases. Questions have arisen as to how much care can be expected of family caregivers who *already* provide an estimated 80 % of care to the elderly. Some state-level policies have attempted to legislate family caregiving by making children legally responsible for the care and medical expenses of parents, but these filial responsibility laws are rarely enforced because of the ethical issues they raise about the bonds within families and the right of the government to impose standards on the family unit (Bulcroft, Van Leynseele & Borgatta, 1989). Thus not only is there tension in some families over who is responsible for care, but also there is a hesitance on the part of government to tell family members what they ought to do for each other. It is possible that such "compulsory altruism" could be used by government to avoid more federal expenditures on the old (Walker, 1993).

Second, there is a growing concern among younger aged adult children that their parents "expect too much" of a sacrifice from them, especially in terms of financial assistance in old age. To the contrary, however, survey data reveal that family members *do not* expect undue burdens of each other, and, in fact, parents expect *less* of adult children and more of themselves than adult children think their parents expect or they feel obligated to provide (Lawton, Silverstein & Bengtson, 1994). These inaccurate perceptions can cause tension and disagreement when they are not expressed and clarified. And, unfortunately, Americans do not usually express normative expectations of elderly parents or adult children; perhaps this failure to communicate familial expectations is why there is more perceived tension than actually found in families regarding generational obligations and expectations.

Third, familial expectations about co-residency between parents and adult children is becoming a critical issue, and the equity of these living arrangements is relatively unknown. Co-residency offers more opportunity for conflict between generations to occur, but it also allows for intergenerational transfers of resources. In the United States a strong emphasis is placed on independent living for parents and adult children, but the US 1990 Census showed that approximately a third of unmarried elderly persons shared households with their children or other related generations (Goldscheider, Biddlecom & McNally, 1994). Reality does not match the norm in these cases. In South Africa, there is a much stronger norm for shared living arrangements, with more than 90 % of urban black older persons residing in multigenerational households (Ferreira, Møller, Prinsloo & Gillis, 1992). Researchers are just beginning to understand the shared responsibilities, unique conflicts, and exchanges of support that occur in these familial living arrangements. Economic necessity, intergenerational dependency, or familial obligation are possible reasons for these types of living arrangements, and each reason may have different implications for the quality of family relationships and perceptions of intra- and intergenerational equity.

These three issues – family caregiving, expectations of financial assistance, and co-residency – reflect conflicts between expectations and obligations. These types of family-level issues are similar to public policy debates over intergenerational equity, and both have been turned into sensational topics by the influential American media. The media has added to the power of advocates wanting to curb welfare

spending under the guise of "intergenerational equity" by making justice across generations and age groups a theme in many news stories, bringing the notion of inequity into every American household.

The media, the facts, and the discrepancies between the two

A headline in the *Los Angeles Times* asked, "Is it fair to tax 20-somethings to pay Social Security and Medicare for their great-grandparents?" (Pinkerton, 1994). This type of pointed and one-sided commentary is standard fare in the United States press (Marshall, Lomax Cook & Marshall, 1993). Similar headlines have warned that the elderly are greedy geezers who are not "footing the bill" for their own costs to society (Rosenblatt, 1992), and that "generational economics" (Samuelson, 1994) are leading to a "financial tug of war" between generations (Galloway, 1992). The cover story for *Worth* magazine said, "They fed you. They clothed you. They love you madly. ARE YOUR PARENTS ROBBING YOU BLIND?" (Weisberg, 1992). A Sunday newsmagazine cover story continued the theme: "Golden oldies: The WWII generation got it all. What's left for the rest of us?" (D'Antonio, 1993).

These media images of intergenerational equity conflicts are dramatic, and their use can be a powerful political tool that helps shape sentiment and form public opinion (Edelman, 1988). And, at times, the media can be a source of biased information. Pitting the old against the young ignores the diversity within each group as well as the heterogeneity of their needs. The media crusade aimed at identifying inequities has contributed to the myth that equity between age groups means that funds should be diverted from the elderly to the young, thereby solving all of our nation's economic problems. This over-simplifies the true economic issues, and does so at the expense of achieving real reform in programmes that benefit all age groups. Rather than assessing the successful outcomes of old-age programmes for the elderly, their families and different age groups, all old-age welfare programmes are deemed too costly.

The empirical evidence suggests that actual public sentiment differs from the tone portrayed in news stories (Bengtson & Harootyan, 1994): that is, there is little evidence based on national probability surveys of a "war" going on between "the generations." The rhetoric in the mass media does not match the reality (Marshall *et al.*, 1993). We report below two empirical studies relevant to perceptions of age-group inequalities and policy inequities: one a nationwide, cross-sectional survey of birth cohorts; the second, a longitudinal study of three-generation families.

Are younger cohorts in conflict with older cohorts over policy issues across age groups?

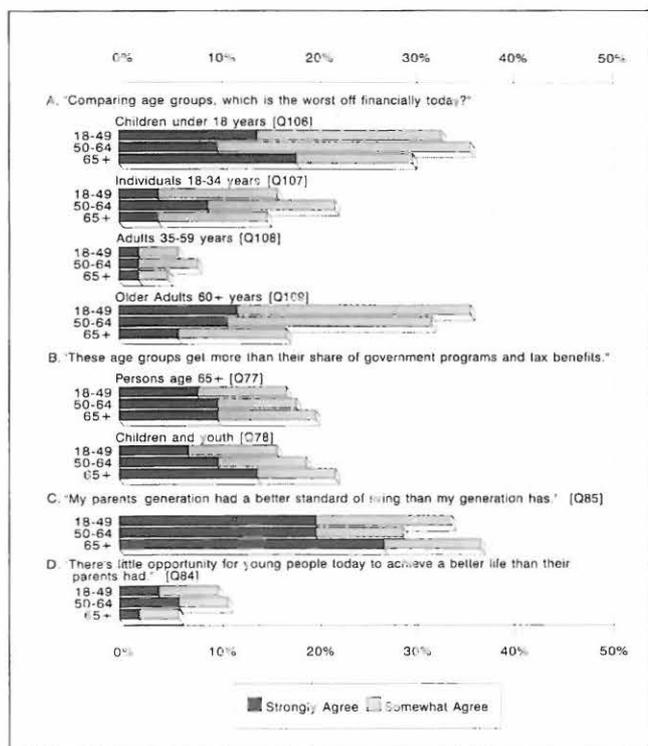
In 1990 the American Association of Retired Persons (AARP) fielded a nationwide survey of 1 500 adults, ages 18 to 90, to examine perceptions of inter-age inequities and potential conflicts. It was intended to explore various aspects of contemporary "linkages" between age groups and to discern areas in which intergenerational and intercohort stresses or conflicts may exist. The study focussed on assistance, emotional and financial links between adult generations, and on the prevailing attitudes, values and opinions that are related to these behaviours among different birth cohorts.

Data from these respondents provide little evidence of perceived conflicts between age groups in contemporary American society (see Bengtson & Harootyan, 1994). The issues that have been the focus of discussions of tensions and conflict between cohorts have been economic issues, usually

framed as issues of "intergenerational equity." Equity was defined in the survey as the relative wellbeing of different age groups, and the equitable distribution of government benefits among them.

To what extent are there perceptions of general inequalities between age groups, and do these perceptions vary by age of those responding (see Figure 1)? First, participants were asked to compare age groups in terms of which is the "worst off financially" in today's American society. The respondents were almost equally divided in terms of targeting children or the aged; in fact, one in ten saw both groups as well off, and another one in ten saw both as badly off. Overall about 33 % agreed that children are worse off, while 33 % agreed that older people are worse off. Of interest is the finding that older adult respondents (those 65+) were the least likely, among the three age groups (18-49; 50-64; 65+), to target older adults as the worst-off age group today.

Figure 1
Perceptions of current age group inequalities and inequities: financial status, governmental assistance and life changes



Source: AARP "Generational Linkages" Survey (1990).

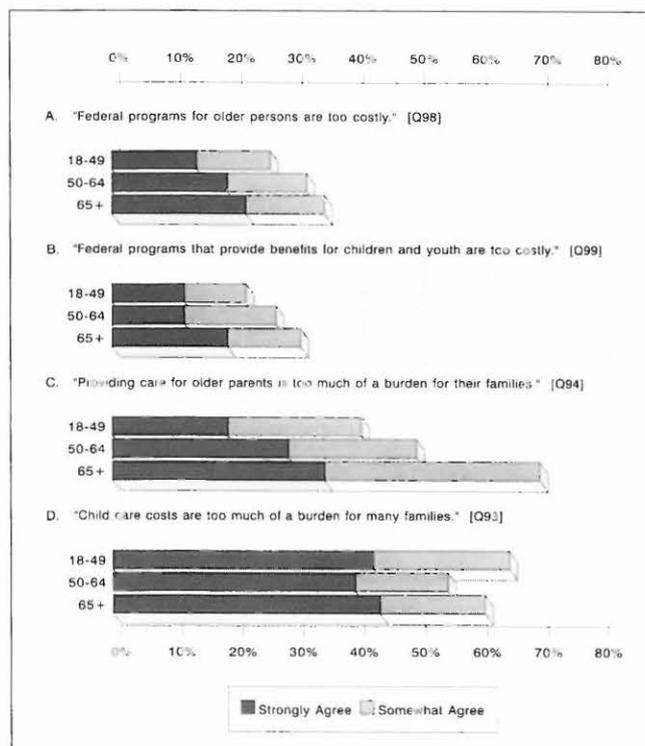
Which age group is perceived as receiving an inequitable amount of government benefits? The respondents' answers here were surprising. Fewer than one in five felt that any age category received "more than their fair share." And of those who did perceive inequities, the advantage was not to the elderly. In fact, only 18 % of all respondents felt that the elderly receive "more than their share of government programs and tax benefits." Of interest is that elderly respondents (age 65+) endorsed this opinion more often than the other age groups (20 %). Moreover, 18 % felt that children and youth receive more than their fair share. The strongest endorsement was by those aged 65+ (22 %), the second by those aged 50-64 (19 %), and the third by the 18-49-year group (17 %).

Are there also perceptions of differences in the opportunities and life chances available to different age groups? Only one in three respondents did agree that "My parents'

generation had a better standard of living than my generation has." And what is interesting is that those persons of ages 18-49 endorsed this item less frequently (34 %) than did the oldest age group (37 %) – the latter referring to parents born at about the turn of the century. But with regard to opportunities for youth today, less than one in ten respondents disagreed with the statement, "There's little opportunity for young people to achieve a better life than their parents."

Another issue in the "generational justice" debate concerns the financial burden of support to the elderly, compared to other age groups (see Figure 2). Here again perceptions of different age groups are important, and the survey responses may be surprising. What are the perceptions of the relative cost of governmental programmes for older persons and then for children and youth, compared to other age groups? Three in ten respondents agree that "Federal programs that provide benefits to older persons are too costly" (the age group which agrees most strongly – 35 % – are those 65+). But almost the same number feel that "programs for children and youth" are "too costly" as well. Again, the oldest age group is most in agreement (31 %).

Figure 2
Perceptions of financial "burden" in supporting age groups: costs to government and families



Source: AARP "Generational Linkages" Survey (1990).

What about family resources and the perceived burden of providing support for older versus younger members? Half the respondents felt that "Providing care for older parents is too much of a burden for their families." The oldest age group endorsed this item more highly than the others (51 %). Six out of ten respondents felt that "Providing care for children is too much of a burden for their families." Here 61 % of the oldest generation endorsed this item. By comparing responses to the items discussed above, it can be seen that "burden" is perceived to be greater for families than for government when questions of age-group dependencies are the topic, and that the oldest respondents do not respond in favour of their own potential self-interest.

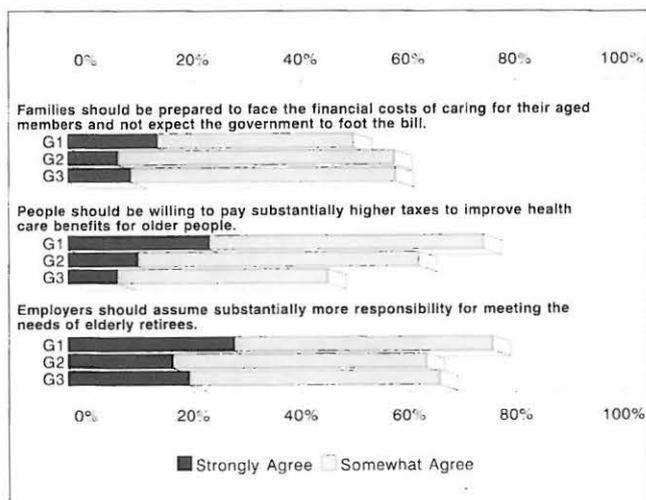
Two other perceptions of respondents in this survey are important. Should all people over age 65 pay a larger share of their medical costs than they do today? Less than one in ten respondents surveyed responded affirmatively, in striking contrast to what "intergenerational equity" advocates might suggest. Moreover, of those who did agree, the oldest age group was in greatest agreement. Have advocates for older Americans been more successful than those representing children and youth? Slightly more than one in three respondents agreed – one might expect the perception of an "elderly lobby" influencing policy to be far higher, given the media hype about the influence of "the elderly" in federal policy making. Again, of those who did agree, the oldest age group endorsed this item more than other age groups.

In sum, findings from the AARP 1990 survey suggest that today there is strong cross-age group support in American society, and little evidence of age-group tensions and conflicts.

Do grandparents, parents and grandchildren agree or disagree about familial and public sector support for the elderly?

Turning now to the microsocial level of analysis, there also appears to be strong intergenerational support but in certain instances there also is potential for conflict. The University of Southern California Longitudinal Study of Generations (Bengtson, 1975; Bengtson & Roberts, 1991) has examined issues of continuity and change within the lives of individuals and families for over 20 years. Data collection began in 1971, with an original sample of 2 044 individuals aged 16-91 from 328 three-generation families who were members of a large health-maintenance organization. By the third wave of data collection, in 1988, the grandparents' average age was 81; the parents' average age was 61; and that of the grandchildren, 39. In general, the sample is ethnically homogeneous (predominantly white) but socio-economically diverse. While data may vary by cultural group, results suggest some interesting patterns. Of importance to the issue of "intergenerational equity" are the attitudes which family members in the survey have expressed regarding public policy issues, particularly familial versus governmental responsibilities for elder care (see Figure 3).

Figure 3
Responses to open-ended questions by generation



Source: A Longitudinal Study of Generations and Mental Health (1988).

How different are the grandparents' views from those of grandchildren with regard to cross-age supports? More than half of these family members agreed that "Families should be prepared to face the financial costs of caring for their aged members and not expect the government to foot the bill." However, the oldest generation (grandparents) was the *least* supportive of this statement, and those highest in agreement were the children and grandchildren, whose parents and grandparents are most at risk for dependency and the need for health care. It is also of interest that female family members expressed lower endorsement of this opinion than did males. A similar item was asked of three-generation urban black families in South Africa (Møller, 1994), with somewhat different results. When asked disagreement with the statement "It is better for older people to be cared for by experts like nurses than by their families," the oldest generation disagreed with this statement *more* than did the middle and youngest generations. Similarly, in the South African sample when family members were asked agreement with the statement "It's a child's duty to look after his/her parents when they are old," the oldest generation agreed with this more than did the middle and youngest generations (Møller, 1994).

In the US three-generation study, over six out of ten respondents agreed that "People should be willing to pay substantially higher taxes to improve health-care benefits for older people." But here there were significant differences between family generations: aged grandparents and ageing parents endorsed this item more than the adult grandchildren (age 37 to 41). When family members were asked if employers should assume substantially more responsibility for meeting the needs of elderly retirees, over seven in ten respondents agreed. There were no statistically significant generational differences. However both the youngest and the oldest generations expressed higher agreement with this policy. Women gave higher endorsement of this opinion than did men.

These data suggest three things. First, in this study there is little evidence of intergenerational disagreement on these "aged responsibility" issues. Moreover, there is little evidence of intergenerational self-interest – in fact, "intergenerational altruism" seems a more plausible interpretation. Second, the norms of primary family responsibility for financial support of aged family members are supported by the majority of survey respondents. However, almost an equal number do not support the idea that families should be expected to shoulder the burden of financial support for elderly family members. That is, families expect that there will be some form of aid *in addition to* private resources when they reach old age. In contrast, the emphasis on family responsibility versus government or professional responsibility for elders is a more pronounced expectation of the oldest generation in the South African three-generation family study. Third, in the US three-generation study there are gender differences in endorsement of public policies, depending on whether or not it is the family or the employer that would be asked to take responsibility. When the family is expected to assume this role, women give less support for this policy. Conversely, when the question concerns employer responsibility for meeting the needs of elderly retirees, men are less supportive of this policy than are women.

Lessons from the US and prospects for the future

Intergenerational equity and the five conflicted issues we have discussed, while reflective of the US experience, also can manifest themselves in other nations, given the proper economic environment, population ageing, and freedom of the press to expand and explode issues into problems. For that

reason, the following lessons from the US encounter with intergenerational equity disputes can be drawn:

- (1) The issue arose during the political and economic context of the 1980s where federal retrenchment on government programmes, particularly welfare spending, was the norm.
- (2) Media coverage has effectively simplified the debate to young versus old, ignoring the complexity and true causes of current economic issues.
- (3) Population ageing has been inappropriately blamed as a cause of social demise: too costly, too burdensome, and unfair to other age groups.
- (4) Issues that arise within the domain of the family have been confused with those that arise at the level of public policy; the concerns and needs are different at times.
- (5) Unclear conceptualization has forced incomplete analysis and measurement of the situation. New data incorporating private transfers with public expenditures are beginning to shed light on the fairness of resource distributions and obligations.
- (6) Public sentiment does not necessarily match the sentiments portrayed in media accounts of intergenerational inequities. There is very little empirical evidence of strong tensions between generations; there is a great deal of media "hoopla" about tensions.

What might happen in the next decades in the United States? While the basis for intergenerational conflict does exist (Bengtson & Achenbaum, 1993), there are several reasons to predict future solidarity rather than conflict across age groups and generations. There may be an emergence of new roles for older persons as day-care volunteers or teachers in economically-strapped school districts. There may be more seniors working in part-time jobs in lieu of full retirement. Some seniors may reciprocate to future age groups by working to preserve the environment. There may also be greater "elder altruism" in support of proposals to cut the deficit, with wealthy elders paying a greater share of the tax burden than their less well-off peers. Elders may increase their power of self-determination and choose to have living wills and other advance directives which stipulate the circumstances under which they no longer want life-sustaining treatment, or expensive and heroic medical measures to save their lives.

Further, more years of shared lives across generations may increase solidarity within families, bringing with it a valued "kin-keeping" role for elders who create new norms of old age. Last, there will undoubtedly be greater potential for both instrumental and socio-emotional support from elders to younger generations within families in the future, such as the support grandparents can provide to grandchildren and adult children during destabilizing periods of divorce or poverty.

In South Africa, it is likely the same basic concern leading to conflict or solidarity will arise: What is a fair distribution of public and private resources, obligations and expectations? However, the context in which these issues are addressed in South Africa may be different from the United States, and the mix of other social influences (especially the high unemployment rates of middle-aged and older persons) and political history will undoubtedly impact public perceptions of fairness. In Canada, for example, conflict between generations has not yet materialized in the media (Marshall *et al*, 1993); in Britain the issue of intergenerational equity has been less publicized by the press than it has been in the US (Walker, 1993). Some explanations offered for the greater salience of the issue in America but not in Canada or Britain are that (1) the US lacks comprehensive welfare policies that regulate relations between age groups, and (2) the US has historically

preferred individual, market-oriented solutions to government interventions to solve social problems.

As observers in the United States, we have been fascinated by the extensive television, print and radio coverage of the free elections in South Africa in April 1994, and the portrait presented to the Western hemisphere for the first time of a nation uniting itself. This an heroic step for the citizens of South Africa who have struggled so long to achieve this goal. However, as the media coverage has pointed out, the task now before the new leadership is to meet basic social needs – housing, employment, basic health care, education – and to address the allocation of public resources to these newly recognized problems. If the rate of change in the social condition for all South African citizens is not fast enough, what will happen to relations across age groups, population subgroups, and within families? How will epidemics such as AIDS impact caregiving expectations across generations and strain norms of family obligation? For South Africa, there are two primary issues that will undoubtedly be faced as the population ages and social change occurs: (1) How will changes in the power structure within the government and among groups of citizens alter the social contract between government and the people? (2) What are the implications of this shift for family relations, individual expectations, and intra- and cross-age group relations? In short: Which are the changes that strengthen intergenerational bonds, and which are those that raise intergenerational conflicts?

We suggest that gerontologists and policy makers in South Africa utilize three important lessons from the US experience as they address these questions. First, the expectations and obligations across family generations must be distinguished from those that exist between age groups; the microlevel must not be confused with the macrolevel in terms of intergenerational supports. Second, the objective of "justice across generations" can mean either equity or equality across generations and age groups. Which of these two goals dominates will determine the path of debate, reform and possible conflict. Third, political and media rhetoric do not always match empirical evidence; less rhetoric and more facts are needed.

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The family, which offers kin support to ageing members, is a major focus area in African gerontology. Traditional African family life is being subjected to the strains of modernization, urbanization and dislocation, and family nucleation. It is not known to what extent older Africans may hope to enjoy support and respect from their families in the future.

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