Life course research approaches to the study of older people

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Why take a life span and life course perspective?

What is a life span perspective?

What is a life course perspective?
Life Course because your Life Span is Historically placed
Historical Experience of Three Cohorts of Older Americans: A Timeline of Selected Events 1923-2008

1929 - Stock market crashes

1934 - Federal Housing Administration created by Congress; 1935 - Social Security Act passed; 1937 - U.S. Housing Act passed, establishing Public Housing

1941 - Pearl Harbor; United States enters WWII

1945 - Yalta Conference; Cold War begins
1946 - Baby Boom begins

1950 - United States enters Korean War

1955 - Nationwide polio vaccination program begins


1964 - United States enters Vietnam War; Baby Boom ends

1969 - First man on the moon
### Historical Experience of Three Cohorts of Older Americans: A Timeline of Selected Events 1923-2008 (continued…)

<table>
<thead>
<tr>
<th>Year</th>
<th>Historical Events</th>
<th>Legislative Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>1973</td>
<td></td>
<td></td>
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<tr>
<td>1978</td>
<td></td>
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<tr>
<td>1983</td>
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<td>1988</td>
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<td>1993</td>
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<td>1998</td>
<td></td>
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<tr>
<td>2003</td>
<td></td>
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</tr>
<tr>
<td>2008</td>
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</tbody>
</table>

1923 Cohort:
- 75 years old
- 65 years old
- 55 years old

1933 Cohort:
- 65 years old
- 55 years old
- 45 years old

1943 Cohort:
- 55 years old
- 45 years old
- 35 years old

**1980**: First AIDS case is reported to the Centers for Disease Control and Prevention

**1989**: Berlin Wall falls

**1990**: United States enters Persian Gulf War

**2001**: September 11 - Terrorists attack United States

**2003**: United States enters Iraq war

**2008**: First Baby Boomers begin to turn 62 years old and become eligible for Social Security retired worker benefits


**1983**: Social Security eligibility age increased for full benefits; 1984: Widows entitled to pension benefits if spouse was vested

**1986**: Mandatory retirement eliminated for most workers; 1987: Reverse mortgage market created by the HUD Home Equity Conversion Program

**1990**: Americans with Disabilities Act passed


**2005**: Deficit Reduction Act passed realigning Medicaid incentives to provide noninstitutionalized long-term care; 2006: Medicare prescription drug benefit implemented; Pension Protection Act passed
<table>
<thead>
<tr>
<th>Life Span</th>
<th>Life Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>Groups</td>
</tr>
<tr>
<td>Processes</td>
<td>Social pathways</td>
</tr>
<tr>
<td>Trajectories</td>
<td>Roles, transitions</td>
</tr>
<tr>
<td>Endogenous (micro)</td>
<td>Exogenous (macro)</td>
</tr>
</tbody>
</table>
Both the Life Span and Life Course Perspectives…

Understand Human Experience to be:
- Long-term/life long
- Multilevel
- Contextual
- Dynamic

Influenced by macro & micro factors
- Gains and losses
- Risks and resiliencies
Life Span/Life Course Sequence

Growth (Stress) → uni-directional

Environment → Outcome

Gene → Outcome

Gene Environment Interplay <---> Outcome
<table>
<thead>
<tr>
<th>Life Span</th>
<th>Life Course Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infancy</td>
<td>Race, Class, Ethnicity</td>
</tr>
<tr>
<td>Childhood</td>
<td>Organizations</td>
</tr>
<tr>
<td>Adolescence</td>
<td>Gender, Culture</td>
</tr>
<tr>
<td>Adulthood</td>
<td>Work, Employment</td>
</tr>
<tr>
<td>Aging</td>
<td>Family/Generations</td>
</tr>
</tbody>
</table>
## Major Themes

### Life Span Research
- Individual Differences
- Adaptivity & Plasticity
- Allocation of Resources
- Self-regulation

### Life Course Research
- Age Stratification
- Cohort and Historical Period Effects
- Accumulation of (In)Equalities
- Linked Lives

Differential Trajectories and Pathways of Development/Change
Linking the Micro to the Macro Multiple Levels of Influence

Environment/Culture/Society

Family/community

Individual

Gene/Biology

YOU
The Interacting Family
The Developing Individual and Family
Examples of Historical Placement:

The World with or without…

Communication:
radio, TV, internet, email, SKYPE

Transportation: horse, boat, train, plane, rocket

Politics: UN, USSR, EU, 9/11, Iraq War, Fall of Gaddafi, etc.
Examples of Historical Placement:

Health….

Preventive Health Behaviors: exercise, diet, smoking, drinking

Medications: for infections, prevention, treatment, disease control

Surgery: to diagnose, treat, cure
Convoys Over the Life Course

Properties of the Person

Social Network

Social Support

Support Satisfaction

Health & Well-being

Properties of the Situation
Convoys of Social Relations

- They are life-span
- They are longitudinal
- They are hierarchical
- They can be positive, negative or both
- They are often multigenerational
- They can have ethnic, religious, cultural characteristics
- They have antecedents and consequences
Yin and Yang of Methodologies

Qualitative and Quantitative

focus groups, in-depth interviews
convenience \( \leftrightarrow \) representative samples

Methods: experimental; biomedical; fMRIs, observational, self-report; mailed questionnaire, telephone, in-person interviews

Statistical Analysis: correlations, regressions, structural equation models; growth curve models, event and time series
Some Examples
## SAMPLE CHARACTERISTICS

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>JAPAN</th>
<th>FRANCE</th>
<th>GERMANY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Sample</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>1703</td>
<td>1846</td>
<td>553</td>
<td>516</td>
</tr>
<tr>
<td>Age</td>
<td>8-93</td>
<td>8-92</td>
<td>70-103</td>
<td>70-105</td>
</tr>
<tr>
<td><strong>Selected Sample</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>285</td>
<td>270</td>
<td>553</td>
<td>516</td>
</tr>
<tr>
<td>Age</td>
<td>70-93</td>
<td>70-92</td>
<td>70-103</td>
<td>70-105</td>
</tr>
<tr>
<td>70-79</td>
<td>202</td>
<td>215</td>
<td>363</td>
<td>172</td>
</tr>
<tr>
<td>80+</td>
<td>83</td>
<td>55</td>
<td>190</td>
<td>344</td>
</tr>
<tr>
<td>Male</td>
<td>98</td>
<td>129</td>
<td>336</td>
<td>258</td>
</tr>
<tr>
<td>Female</td>
<td>187</td>
<td>141</td>
<td>217</td>
<td>258</td>
</tr>
</tbody>
</table>
Average Network Size by Country

- U.S.: 8.56
- Japan: 7.35
- France: 7.69
- Germany: 9.74
Average Positive Network Quality by Country

- U.S.: 4.83
- Japan: 4.27
- France: 4.71
Average Negative Network Quality by Country
Total CES-D Means by Country

- U.S.: 10.5
- Japan: 11.8
- France: 7.8
- Germany: 14

Colors correspond to:
- Blue: U.S.
- Red: Japan
- Yellow: Germany
- Dark Green: France
Subscales Composition in CES-D by Countries

USA (70-93)
- Depress: 24.3%
- Somatic: 30.3%
- Positive: 18.2%
- Interpersonal: 36.6%

JAPAN (70-92)
- Depress: 62.0%
- Somatic: 12%
- Positive: 26.4%
- Interpersonal: 22.5%

FRANCE (70-103)
- Depress: 41.2%
- Somatic: 28.5%
- Positive: 15.6%
- Interpersonal: 22.5%

GERMANY (70-105)
- Depress: 58.1%
- Somatic: 15.6%
- Positive: 12%
- Interpersonal: 22.5%
Life Satisfaction

[Mean of 7-point scale: 1=Completely Dissatisfied to 7=Completely Satisfied]
## SAMPLE CHARACTERISTICS

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Japan</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>8-12</td>
<td>201</td>
<td>205</td>
</tr>
<tr>
<td>13-19</td>
<td>139</td>
<td>74</td>
</tr>
<tr>
<td>20-39</td>
<td>492</td>
<td>498</td>
</tr>
<tr>
<td>40-59</td>
<td>519</td>
<td>409</td>
</tr>
<tr>
<td>60-69</td>
<td>221</td>
<td>229</td>
</tr>
<tr>
<td>70-79</td>
<td>215</td>
<td>202</td>
</tr>
<tr>
<td>80+</td>
<td>55</td>
<td>83</td>
</tr>
</tbody>
</table>
Self-Efficacy: Age x Country

Age Category x Country Interaction is significant at p < .01

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Japan</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>20-29</td>
<td>3.1</td>
<td>4.0</td>
</tr>
<tr>
<td>30-39</td>
<td>3.2</td>
<td>4.0</td>
</tr>
<tr>
<td>40-49</td>
<td>3.2</td>
<td>4.0</td>
</tr>
<tr>
<td>50-64</td>
<td>3.3</td>
<td>4.0</td>
</tr>
<tr>
<td>65-74</td>
<td>3.4</td>
<td>4.0</td>
</tr>
<tr>
<td>75+</td>
<td>3.2</td>
<td>3.8</td>
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</tbody>
</table>

Significance: **
Reciprocity
Prevalence by Country and Gender

Provide More
Japan Male: 5%
Japan Female: 5%
U.S. Male: 10%
U.S. Female: 13%

Equal/Reciprocal
Japan Male: 75%
Japan Female: 74%
U.S. Male: 79%
U.S. Female: 80%

Provide Less
Japan Male: 5%
Japan Female: 20%
U.S. Male: 21%
U.S. Female: 11%
Predictors of Reciprocity
Characteristics Related to Providing More and Less

<table>
<thead>
<tr>
<th>More likely to… →</th>
<th>Provide More (compared to Equal)</th>
<th>Provide Less (compared to Equal)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Japan</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Males</td>
<td>Older Age</td>
<td>Younger Age Not Married</td>
</tr>
<tr>
<td>Females</td>
<td>U-Shaped Age Distribution (Quad.)</td>
<td>Younger Age Not Married</td>
</tr>
<tr>
<td><strong>U.S.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Males</td>
<td>Older Age Not Married Higher Levels of Educ.</td>
<td>Younger Age Not Married</td>
</tr>
<tr>
<td>Females</td>
<td></td>
<td>Younger Age Not Married</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Smaller Network Size</td>
</tr>
</tbody>
</table>
Predictors of Life Satisfaction

Japan

Equal/Reciprocal Exchanges of Support
(compared to Provide More)

Receive More
(compared to Equal/Reciprocal)

Female
Married
Higher Levels of Educ.
Larger Total Network Size

U.S.

Gender by Network Size and Reciprocity interactions were not significant in both Japan and the U.S.

Older Age
Married
No Difficulty with IADLs
Larger Total Network Size
Forgiveness and Social Relations

Ethnic Differences in US

- Focus groups of Middle Eastern, non-ME Caucasians, African American college students
- Small convenience sample telephone interviews of adults
- Planned Representative sample
Experimental Data on Hoarders

Preston, Stansfield & Chester

- Older Hoarders; Older non-Hoarders; College Students (non-hoarders)
- Undergraduates were more like older hoarders
- Older non-hoarders exhibited few if any hoarding behaviors
- Compulsive hoarders are avoidant and impulsive focused on material possessions and nonhuman relationships to satisfy life goals. They are possessive, depressed, have less control.
Senior Living Data

Sample Description:

- Random sample of age 70+ households in the U.S. from the Thomson Reuters/University of Michigan Monthly Survey of Consumers

- Data from a 20-month period (July 2009–February 2011) pooled to create a larger sample of the American public 70+ (N = 1185)

Demographics:

<table>
<thead>
<tr>
<th>Category</th>
<th>%</th>
<th>Mean (SD)</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td></td>
<td>77.7 (5.9)</td>
<td>70-97</td>
</tr>
<tr>
<td>Gender (% Female)</td>
<td>60.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Race/Ethnicity (% non-white)</td>
<td>10.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Married</td>
<td>45.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Widowed</td>
<td>39.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education (years)</td>
<td></td>
<td>13.3 (2.6)</td>
<td>1-17</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td></td>
<td></td>
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<td>--------------------------------</td>
<td>------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-Rated Health (% Very Good or Good)</td>
<td>78.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life Satisfaction (Very Satisfied or Somewhat)</td>
<td>91.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Never/Rarely Feel Lonely</td>
<td>68.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Health Limitations</td>
<td>72.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Difficulty with Driving</td>
<td>66.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Difficulty Getting Around Community</td>
<td>85.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very/Somewhat Satisfied with Public Transportation</td>
<td>44.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercise (i.e., walking jogging, aerobics)</td>
<td>73.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participate in Recreational Activities (i.e., cards)</td>
<td>43.7</td>
<td></td>
<td></td>
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<tr>
<td>Use a Computer</td>
<td>50.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Never worry about independence</td>
<td>38.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Never worry about financial matters</td>
<td>39.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home is Very/Somewhat Convenient to Grocery/Drug Stores</td>
<td>90.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home is Very/Somewhat Convenient to Exercise Facility</td>
<td>70.7</td>
<td></td>
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</tr>
</tbody>
</table>
Summary and Conclusions (take away messages)

- Old people (and the rest of us) are affected by their life span and life course experiences
- One size does not fit all
- Multiple methodologies and Multiple designs are useful approaches to understanding behavior of all people and of older consumers
Thank You
Four Subscales of CES-D Depression

**Depressed Affect**
- I felt sad
- I felt lonely
- I felt fearful
- I felt depressed
- I had crying spells
- I thought my life had been a failure
- I felt I could not shake off the blues

**Positive Affect**
- I was happy
- I enjoyed life
- I felt hopeful about the future
- I felt as good as other people

**Somatic Activities**
- I could not get ‘going’
- My sleep was restless
- I talked less than usual
- I felt that everything I did was an effort
- I did not feel like eating; my appetite was poor
- I was bothered by things that don’t usually bother me

**Interpersonal Depression**
- People were unfriendly
- I felt that people disliked me
Self-Efficacy in Japan & the US

Significant Difference at p < .001
Self-Efficacy
(General and Social)

[Mean of 5-point scale: Higher Score = Greater Efficacy]