LIVING CONDITIONS OF THE ELDERLY IN SWEDEN:

TRENDS 1980-1998

AND COMPARISONS WITH SOME MID-1990S ESTIMATES FOR THE EUROPEAN UNION

Since 1974, Statistics Sweden (SCB) has conducted large annual sample surveys of individual and household living conditions in Sweden (Undersökningar av levnadsförhållanden, that is, Surveys of Living Conditions or, for short, Ulf, see Box 1) The February 1998 issue of SINET (No. 53) contained my review “Living Conditions and Inequality in Sweden: National Trends 1975-1995 and Comparisons with Mid-1990 Estimates for the European Union” (Series Living Conditions, Report 91, Statistics Sweden 1997). In reviewing the Swedish statistics, my contribution was to provide complementary data for the other 14 member states of the European Union (EU) for the mid-1990s. The report under review here – entitled in English “Living Conditions of the Elderly 1980-1998” – appears as number 93 in the series of reports on Living conditions.

The report comprises nearly 290 pages – unfortunately, for foreign readers – in

Box 1: The Swedish ULF surveys - a short account

Results from the ULF surveys are based on interviews, data from Labour Force Surveys, as well as administrative records (income and tax registers). Accordingly, the ULF has two features: (1) by complementing interviews with data from official sources, and (2) by adding consecutive in-depth modules. These forms in design makes ULF an integrated system of social surveys rather than of an isolated survey.

Date are conceptualized into social indicators (SIs) in twelve social domains, as follows:

- Education
- Employment & working time
- Working environment
- Finances
- Housing conditions
- Transportation & communication
- Recreation
- Social relations
- Political participation/resources
- Self assurance, safety
- Health
- Social mobility.


Swedish only (because of budget restrictions for translation resources). In addition to the presentation of results, Appendix 1 in the report contains description of the Level of Living Surveys, i.e., a brief history, design and size of samples, estimation, and confidentiality protection. Below is a list of chapter headings with brief notes on contents – to provide an overview and sample of topics in the volume:

- Measuring welfare and social reporting excluded (Ch. 1)
- Exit from working life (Ch. 2) (contains international comparisons)
- Economic resources (Ch. 3) (includes some international comparisons on disposable income)
- Material living standards (Ch. 4) (contains international comparisons of the level

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SINET News is successor to: Social Indicators Newsletter (Social Science Research Council), Social Indicators (American Institute for Research)
of living standards among the elderly

- Housing conditions (Ch. 5)
- Health (Ch. 6)
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- Family and social networks (Ch. 9)
- Leisure (Ch. 10)
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The ULF-surveys included in 1980-98 approximately 120,000 persons, aged 20-84 years (of which about 41,000 were in the age span 55-84). Data were obtained in interviews – with queries about the domains listed above.

The report presents both cross-sectional and trend data, in three modes of presentation:

1) An extensive set of tables reporting about 90 strata of the population (age categories, gender, family situation (i.e., cohabitants), social class and combinations of these categories).

2) Analytical diagrams, depicting living conditions at three points in time during 1990-1998, controlling for sex, socio-economic class, family, and region. These analyses are based on multivariate logit methods (cf., SINET, Feb 1998, p 10). The results are presented in graphs. N.B. The mode of presentation under points 1 and 2 both give a picture of collectives.

3) A third approach used in presenting results in the report comprises longitudinal analysis, in which individual changes in living conditions from the mid-1980s to mid-1990s are shown. This approach captures the situation for a panel of elderly person that were in the age of 45-76 years in the middle of the 1980s.

As previously stated, the report comprises nearly 290 pages. It is not possible to do justice to this rich work in a short review. Therefore, in an attempt to provide a brief account, a selection has to be made on topics to be covered here. Thus, I have organized this essay by focusing on an international as well as a national stance. First, the international comparisons made in the report, concerning member states in the European Union (EU) with respect to (a) employment rates, and (b) material standards are reviewed in the main section heading “Employment and standard of living in the European Union.” Second, the national stance – focusing on Sweden – will be limited to an account about income and poverty topics (interrelated ones, for sure!). These issues are reported here under the heading “Trends in income & poverty – the case of Sweden.”

The diagrams/graphs in this review have been provided in English to me by Statistics Sweden; in the original report they are in Swedish only. This applies to all images at hand (2.12; 2.13; 4.30: 3.1, and 3.7. Note: the original numbering has been preserved here.
to facilitate comparison with the report itself.

Employment and Standard of Living in the European Union (EU)

In this section, the issue of employment is dealt with in the subsection “Gender employment...” while the topic of living standards is labeled “Material standards....”

Gender Employment in the EU: 1988 Data  

Diagrams 2.12 and 2.13 display employment rates among elderly men and women respectively in the EU in 1998 – for the key to country abbreviations, see Box 2, point (1).

In these “gendered” diagrams, countries are grouped according to data concerning three “welfare delivery systems,” that is, those that are commonly considered to be the main sources of economic well-being: the labor market, the welfare state, and the family. These three systems play different roles in various countries, and thus have diverse consequences for the distribution of living conditions in strata of the national population.

In the Nordic cluster – generally speaking – high employment, an extensive welfare system, but split up family ties, prevail. In contrast, the Southern cluster shows low employment rates (especially among women), restricted collective welfare, but stronger family bonds (implying that the “family” has a stronger responsibility for the support of its members, than is the case in a “Nordic context”). The countries in Central Europe comprise a cluster somewhere between the Nordic and the Southern ones.

These overall observations, however, do not take gender into account. When this is done, the following facts can be stated: In 1998, older Swedish and Danish men had a considerably higher employment rates, compared to the EU-mean (EU 15 in Diagram 2.12) but many countries had rates almost as high. This applies to countries with a high proportion of population in provinces, and in agriculture (Portugal, Greece, Spain, Ireland). Diagram 2.13 illuminates the fact that the employment rate for Swedish women is “outstanding” in the EU, be it among those “less than 60 years of age” or those beyond. For instance, in the 60-64 age bracket, 44 per cent of women in Sweden are still in the labor force. This percentage is considerably larger that the 14 per cent of the mean for EU 15.

Material Standards – Inequality Among EU Countries in 1994.  As mentioned previously, my review in the February

(Continued on next page.)
1998 issue of SINET contained several data comparisons with the then 14 EU Member States for the mid-1990s. The following account similarly concentrates on a comparison of living standards of the “EU-elderlies.” For the measurement of the “standard of living” concept, an inequality index has been construed as an extension of logistic regression; for characteristics of this approach, cf., Joachim Vogel: Living Conditions and Inequality in the European Union. (Eurostat, Working Document, Population and Social Conditions, E-1997:3, Ch. 14.) The composite inequality index used, is based on six indicators, available in the European Community Household Panel Surveys (ECHP), in addition to the Nordic surveys of living conditions (Finland, Sweden, Norway). The six indicators are as follows:

1) Living in affluence (disposable income exceeds 150 per cent of the national average)
2) Absence of overcrowded housing
3) High standard of housing space
4) Ownership of a dishwasher
5) Ownership of a car
6) Ownership of a second home.

The inequality indices are estimated as averages for the above indicators – with multivariate controls for gender, class, region, and family composition. In sum, the inequality index may be interpreted as a difference in the share that these generational strata (consisting of 45-64 olds, 65+) have access to in terms of the components of the above list (expressed in mean values).

Graph 4.30 shows differences between generations in the EU. (For country abbreviations, see Box 2, point (2).) The image displays the gap between the senior citizens, that is, those 65+, and the middle-aged cohorts, 45-64 year olds. The graph reveals some rather unexpected findings: high indices imply that pensioners in the Nordic countries (Denmark, Finland, Norway, Sweden/Iceland excluded) have considerably worse living standards (in comparison with the 45-65) than several of the other EU countries. Furthermore, there is a South European cluster with low inequality indices, and a cluster of Middle European countries in between. Evidently, Swedish pensioners as well as their “peers” in the other Nordic countries have lower material living standards, in comparison with middle-aged Swedes, than pensioners in other EU countries, specifically those that are living in South Europe. How come? There are many possibilities for explaining these “generation gaps.” A primary factor is the role played by the family: in the South of Europe, it is relatively common that single elders—often frail ones (with low pensions and poor health) reside with their adult children, sharing the household and utilities that are included in the inequality index. By contrast, in the Nordic countries “frail elderly people” almost as a rule live in their own households. Thus, in sum, the graph depicts, above all, the fact that the family in Southern Europe takes a stronger responsibility for their elders than it is taken in the other EU states (implying a type of “compensation” for lower pensions and public services).

Trends in Income & Poverty - The Case of Sweden

I now turn to some findings from unique Swedish data sets with respect to the development of (a) incomes, and (b) poverty. First, consider the picture of income trends displayed in Diagram 3.1. It shows analyses of income differences by age in two periods—the mid-1980s (1983-1986), and the mid-1990s (1994-1997). All data series controlled for sex, social class, family, and region. The display reveals, among other things, that the development of incomes has varied considerably for various ages. All age groups 50+ have experienced substantial increases in income standards (according to an income index defined as disposable household income divided by the poverty line, which equals 100). Second, bearing on the issue of poverty in Sweden, Diagram 3.7 shows that the quotient of poverty has diminished among the elder pensioners. (Please notice the marked increase among 20-24 year olds—an effect of lower employment rates and incomes foregone. In this part of the report, logit regression analysis—a multivariate statistical approach, has been applied in order to control for sex, class, family situation, and region (for reference, see above).

Comment

The report being reviewed shows welfare consequences that aging brings forth—here concentrating of several types of transitions, from (1) work to pension, (2) cohabition to single (widow, widower), (3) healthy to ill, and on the economic situation among the elderly. The report analyses such transitions with twelve welfare components by both a cross-sectional and a longitudinal approach, focusing on the 1980s & 1990s. The vast amount of data in the report warrants commentaries from many points of view. However, the present review does not explore in any detail the wealth of information in the report. For instance, the presentation by sex should have provided much “food for thought” about policy implications about the “engendering” of statistics. Furthermore, the regional tables in the report have much to tell about regional variation in, for example, income, health, poverty, material standards in the 65+ segment of the population (with regard to socio-economic class, region etc.). The compendium provides statistics and indicators that contribute to the modeling of population specific “tracks” related to the elderly. In addition, in a non-monetary way, the statistics/indicators con-
(Continued from previous page.)

Diagram 3.1. Income index: the disposable household income divided by the poverty line (=100).
By period and age. Controlled for sex, social class, family and religion. Percentage.

Diagram 3.7 Poverty, by period and age.
Controlled for sex, social class, family and region. Percentage. N=50,000.

As for comments on policy implications of the report, it is hoped that the data will be used in several quarters — and “wet the appetite” of the users. The book offers a comprehensive account, essential for policy practitioners, at a range of scales, from the national to the regional. (The sample design does not allow data to be portrayed at a local level.) For example, data explored in the report on socio-economic class and on gender may constitute an important component in the modeling of the impact of “old age” in time and space. The comparison of Swedish data with the measures for other EU members (e.g., employment by gender, standard of living) are certainly of value in indicating the position of Sweden in an European context. Regrettably for foreign readers, the report is only in Swedish because of budget constraints; resources are even lacking for the presentation of even the main findings in English.

~Leif H. Gouiedo

THE JOURNAL OF HAPPINESS STUDIES – CALL FOR PAPERS

The Journal of Happiness Studies is a new international scientific quarterly on subjective appreciation of life. The editors welcome contributions from philosophy, social sciences and the life-sciences. The journal is published by Kluwer Academic. Editors are: Ruut Veenhoven (sociologist, Erasmus University Rotterdam, Netherlands), Ed Diener (psychologist, University of Illinois, USA) and Alex Michalos (philosopher, University of Northern British Columbia Canada). The first issue appeared in June 2000. The full text is available free on the publishers website: http://www.wkap.nl/journals/johs. The scope of the journal is described in detail in the editorial statement of that first issue. For more information, contact the editor-in-chief: Prof Ruut Veenhoven, Erasmus University Rotterdam, POB 1738, NL3000DR Netherlands, E-mail: veenhoven@fsw.eur.nl.
COMMENTARY ON CHARTBOOKS ON THE ELDERLY AND POLICY IMPLICATIONS

Editor’s Note: In the current issue, Leif Goutedø reviews the report on living conditions of the elderly in Sweden, and, in the November 2000 issue of SINET, I reviewed a recent chartbook on the well-being of older Americans (Older Americans 2000: Key Indicators of Well-Being, 2000, Federal Interagency Forum on Aging-Related Statistics). Reflecting on the latter chartbook, Abbott Ferriss has the following commentary to complement that given in the November 2000 review. In addition, he has located a nice commentary (reproduced below) by Henning Friis on the policy implications of these indicator efforts.

Comments on the U.S. Federal Chartbook on the Elderly

1. The Chartbook presents only data assembled by the Federal establishment, the U.S. Bureau of the Census especially the Current Population Survey, the National Health Interview Survey, the National Long Term Care Survey, Supplements on Aging, the Medicare Current Beneficiary Survey, the Continuing Survey of Food Intake by Individuals, the Health and Retirement Survey, the National Vital Statistics System, and others. These are formidable sources. But no non-Federal surveys or sources are used. From these much could be learned. No General Social Survey data, even though the Fed supports it. No Gallup or Survey Research Center, University of Michigan, or other sources are drawn upon. The volume is the product of the Federal Interagency Forum on Aging Related Statistics. But, only Federal statistics. Much is missing because of this.

2. The analysis of cohorts brings new understandings into study of the life course. Cohorts have a place in a volume such as this. People pass through periods of depression, war, nesting times, parting times, the good and the ill. These affect the developmental stages of life and so, cohorts have a place in the study of the elderly population. Cohorts should reach back into the more vigorous ages.

3. Much is missing. How to our elders spend their leisure time? TV watching, newspaper reading, volunteer activities, and both indoor and outdoor recreation activities? How much of their time contributes to community social activities, such as help with welfare services, with services to youth, to other elderly? Do they vote? What do they think about current political issues? Are they conservative, as the stereotype of them has them? Some have wealth: how do they allocate it?

4. The section on health and health care is ably done. From the self-reported health indicator, the elderly appear to be doing fairly well. But there is no other general or specific quality of life measure(s). The General Social Survey has several such measures that would enlighten us. Quality of life measures in addition to health are needed.

5. While our data gathering instruments (identified above in point 1) individually measure critical dimensions of the elder’s life, they lack integration. Income is in one place but where is health? Some effort should be made to integrate the several data gathering Federal vehicles so that a composite picture could be had. Living arrangements should be coupled with sociability, income, health, social participation, subjective well-being, and other such life indicators.

6. The volume gives us one table of international comparisons and one table of state comparisons. Especially state comparisons would be revealing, not necessarily for trends, but for use in identifying the regions that may be low or high on indicators. While not all data are available by state, those data sets offering state comparisons should be shown.

Friis on Policy Implications

In this connection, a study of the situation of the elderly in Europe resulted in comments on policy implications by Henning Friis. Friis recently retired as director of the Social Science Research Council of Denmark, and published his review of policies affecting the elderly in the European Journal of Gerontology, vol. 1, no.2, November 199, entitled, “New Directions in Policies for the Elderly in Europe.” Relative to Western Europe he reviewed various approaches to the timing of retirement. He discussed the various pension plans of European countries, finding that the economic situation of the elderly had improved. He found, however, that the trend was toward income inequality among the elderly, especially affecting divorced or widowed women. He looked for an improvement in this, however. He also discussed health care and housing/community care of the aged. His treatment of “Future Relations Between Generations” follows:

“Hitherto policies for the elderly have as most other policies usually been decided by middle aged males. The elderly themselves have until recently been the onlookers who had to take what was coming. This can be expected to change, slowly in some countries, more rapidly in others.

The background of the new cohorts, coming into their sixties during the next decades, will be different from that of the present cohorts of elderly. The majority in coming cohorts have been used to a higher standard of living, better housing and other consumer habits. They have attended school for more years and more often had vocational and higher education. More of the women have joined the labor force. The health of the coming young olds can on average be expected to be better than was the case of their predecessors.

“They have also had a greater variation and freedom in their lifestyle and attitudes. This goes particularly for the new cohorts of elderly women. A study has been made regarding the political opinions and political participation of the coming elderly in Denmark. Its conclusion is that they generally will have less respect for authorities than their predecessors, and they will be less politically alienated.

“With this background it seems likely that more among the future elderly will find it unacceptable to be excluded from de facto political influence as is the case now in most countries. The sheer increase in their percentage of the voters will also have an impact. We can expect them to fight energetically for what they perceive as their rights. They will on several issues not form an united front, as their interests may differ, but they will want to have a say. The growth in recent years in pensioners’ associations and similar bodies is already a sign in this direction.

“Relations between the younger and the older in our countries have heretofore been rather harmonious. Traditionally, older people are viewed as a vulnerable group,
where many are suffering from bad health, and where the majority has a very low income. It is likely that this image will change somewhat in the future, the attitude of the younger to policies for the elderly may be influenced by the recognition that elderly are not generally in the pitiful state, and that an increasing number among the future pensioners will have disposable incomes which are higher than those of many working young families.

“The future attitudes of the younger will probably also be influenced by the fact that there will be fewer younger to transfer a growing share of the results of their work to the increasing number of elderly outside the labor market. These issues were taken up at a conference in Cambridge in 1988, from which the papers were available under the title “Workers versus Pensioners.”

“It was the intention of the last 20 years of policies for the elderly, that the present and the future elderly should have better life than their predecessors. In this we succeeded. It is argued that the better-off elderly are gaining more than the poor by the general improvement of pensions and services. This is probably true, but it must be remembered that this in many countries was necessary to secure the needed political support. Further, policies covering all elderly, poor and rich, have had as one of their essential purposes to remove stigmatization of low income groups.

“It will be very unfortunate if policy makers use the affluence of some elderly as an argument to reduce benefits for the elderly in general. We must not forget that there also in the future will be a large group among the elderly who have low incomes, bad housing and weak health. It is here where future policies for the elderly must have their focus.”

~ Abbott L. Ferriss

A NEW WEB QUALITY OF LIFE WEB SITE

A new World Wide Web Site has been established by Deakin University in Australia. It combines information from the Australian Center on Quality of Life and OzQol: The Australian Society for Quality-Of-Life Studies. The site can be accessed through two addresses as follows: http://acqol.deakin.edu.au and http://www.ozqol.org respectively. The objective of both groups is to enhance and complement the work of ISQOLS. Since these sites are maintained by Deakin University, all available information can be scanned or downloaded free of charge.

VISITORS TO THE SITE ARE WELCOME TO SUBMIT FUTURE UPDATES TO THE LATEST ADDITIONS TO A NEW WEB QUALITY OF LIFE WEB SITE.

To gather knowledge and expertise related to both theoretical and applied areas.

To facilitate research links with industry, government and the community.

The opening page of the Web site also contains the following definition of the Quality of Life construct:

Quality of life is emerging as a central construct within many disciplines, such as those comprising the social sciences, economics, and medicine. Its attractions, in part, is that it offers an alternative to some traditional disciplinary views about how to measure success. First, it directs attention onto the positive aspects of people’s lives, thus running counter to the deficit orientation of these disciplines. Second, it extends the traditional objective measures of health, wealth, and social functioning to include subjective perceptions of well-being.

RESULTS OF 2001 ISQOLS ELECTIONS

M. Joseph Sirgy, Executive Director of the International Society for Quality of Life Studies, indicates the following outcome of the recent ISQOLS elections: President-Elect: Wolfgang Glatzer; Executive Director: M. Joseph Sirgy; Vice-President of Publications: Bob Cummins; Vice-President of Programs: Don Rahtz; Vice-President of Publicity/Membership: Anne Dannerbeck; Vice-President of Professional Affairs: Mohammed Abdel-Ghany; Vice-President of Academic Affairs: Aaron Ahuvia and Joar Vitterso; Vice-President of Development: Robin Widgery; Vice-President of External Affairs: Elaine Sherman and Leon Schiffman; Board of Directors: Ferran Casas, Edward Diener, David Efraty, Richard Estes, Mike Hagerty, Sten Johansson, Albert Kozma, Filomena Maggino, Mahar Mangahas, Lee Meadow, Valerie Moller, T. Moum, Heinz-Herbert Noll, Marcie Parker, Bill Pavot, Mark Peterson, Michael Pusy, Josh Samli, Willem Saris, Andrew Sharpe, Ruut Veenhoven, Muzaffer Uysal, Joachim Vogel, Alex Wearing, Bruno Zumbo.
THE 2001 ISQOLS CONFERENCE
AND WEB PAGE

Call for Papers and Program Announcements

Fourth International Society of Quality of Life Studies Conference

29 November to 1 December 2001

Conference Theme: How to Measure Quality of Life in Diverse Populations

The Wyndham Hotel, Washington DC, USA

Conference Program Co-Chairs: Don Rahtz, Joe Sirgy, and Josh Samli

M. Joseph Sirgy, Executive Director of the International Society for Quality of Life Studies, recently has communicated that the 2001 ISQOLS conference World Wide Web Page is up and running. The website location is http://www.business.wm.edu/isqols. You also can get to the website by visiting ISQOLS homepage at http://www.cob.vt.edu/market/isqols and clicking on the 2001 Conference. The Web Page contains information on details for submission of a paper for the conference, names and addresses of track chairs, and registration information. A hard copy of the call for papers has been printed and mailed to people who are on ISQOLS mailing list. If you have not received your copy in the mail, please let Joe Sirgy know and he will send you one. If anyone would like to know more about the 2001 ISQOLS Conference, please communicate with Joe Sirgy (sirgy@vt.edu), Don Rahtz (dxraht@dogwood.tyler.wm.edu), or Josh Samli (jsamli@unf.edu) as soon as possible.

SINET

Social Indicators Network News

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