Intergenerational Support of Older Adults by the 'Mature' Sandwich Generation: The Relevance of National Policy Regimes

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In this article we examine the association between national welfare regime and the propensity of middle–aged and older individuals with adult children of their own to provide social support to aged parents. Using data from mature adults (50+) in 26 European countries, we examine whether older and younger generations compete for the time resources of the middle "sandwiched" generation, and whether national policy context shapes this competition. Contrary to expectations, we found that sandwich generation members were less likely to provide support to their parents in Conservative–Mediterranean and East European regimes, but more likely to do so in universalistic Social–Democratic regimes. This evidence supports the hypothesis that well–developed welfare states "crowd–in" family support to older individuals. Middle generation members who provided social support to their adult children tended to provide to their older parents as well. This was particularly true in the two regimes where resources and public benefits tend to be more generous and may be interpreted as

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state benefits that reduce intergenerational competition. Findings are discussed in terms of the capacity of state policies to shape the allocation of family resources to older adults where extended family lineages have become the norm.

Introduction

In this article we examine the association between national welfare regime and the propensity of middle–aged and older individuals with adult children of their own to provide social support to aged parents. In light of rapid population aging and governments that are struggling to serve the needs of a burgeoning number of older adults, furthering our understanding of intergenerational support to older adults is highly salient. We focus this investigation on a group we label the *mature sandwich generation* — individuals who are potentially responsible both for older parents and launched adult children — and the unique challenges they face in juggling competing demands for social support from multiple generations. Social support can be defined in behavioral, emotional, and economic terms. Our consideration of the term refers to behavioral support that typically comprises instrumental or practical help that is informally provided to others in their homes, such as housework, shopping, and cooking. Such help may be vitally important to older adults whose functional abilities are diminishing and may be similarly important for adult children who are juggling work and family responsibilities.

An important aspect of this research is our consideration of how the middle generation's provision of social support to aging parents is shaped by whether support is also provided to young adult children, and by the type of welfare regime in the countries within which they reside.

Most countries of the world are experiencing unprecedented rates of population aging, magnifying concerns over the solvency of pension funds and the cost of medical and long–term care over the next several decades.[1] However, population aging is occurring along with other worrying social trends. One of these is the acute drop in fertility rates, which has reduced both the size of the working age population paying into public programs, and the supply of children to support their older parents.[2] With regard to the challenges of aging faced by European countries, one of the gloomiest scenarios

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1 OECD, Pensions at a Glance 2019: OECD and G20 Indicators (2019), https://doi.org/10.1787/b6d3dcfc-en.

2 Johan Nilsson et al., *Changes in the Expression of Worries, Anxiety, and Generalized Anxiety Disorder with Increasing Age: A Population Study of 70 to 85–Year–Olds*, 34 Int'l J. Geriatric Psychiatry 249 (2019).

projects that population aging will increase the old age dependency ratio in European Union nations in the range from 35% to 66% between 2000 and 2050, possibly requiring tax increases of up 33% or debt financing to pay for the obligations owed older citizens.[3] As a result of structured commitments to older individuals, combined with welfare state retrenchment due to the economic crisis of 2007, policymakers are rightfully concerned that neither family nor state provisions for older adults will be adequate to serve the large number of older persons expected in the near future, particularly among the oldest–old — typically those 85 years of age and older — who are most vulnerable and likely to experience unmet need due to resource insufficiency.[4]

In this article, we make use of a unique dataset that contains measures of intergenerational support in 26 European countries, encompassing four welfare regime types that form the basis for cross–national comparisons. We focus on the nations of Europe, which for several reasons represent a useful laboratory for examining these issues. First, there is significant variation in public policies as well as in family support preferences across these nations. Second, these nations also have similarities in that they are economically developed, and most are integrated within a common European market, currency, and/or political structure. These differences and similarities provide leverage in attributing support differentials to welfare regime type.

We begin the thematic portion of this article by discussing what we label "the mature sandwich generation" — namely middle–aged individuals who have both adult children and living parents — a category of adults that is one of the most demographically expanding. We follow this discussion by reviewing a popular model for defining welfare state regimes in terms of the generosity of their social policies. We develop the argument that the mature sandwich generation is a net provider to family members and arguably the group most sensitive to national welfare state policies. We then present a description of the multinational dataset and measures used in our analysis. Multivariate models are specified to identify (1) whether providing social support to older parents is influenced by whether social support is provided to adult children, and (2) how welfare regime type is associated with social support provided to older parents and alters the relationship between giving to adult children and giving to older parents. Finally, we discuss the implications for developing social policies that serve older adults, and future research directions.

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3 Assaf Razin & Efraim Sadka, The Decline of the Welfare State: Demography and Globalization (2005).

4 *Id*. at 3.

I. The Mature Sandwich Generation

The stresses faced by those who occupy the sandwich generation have been a subject of discussion for several decades. A common theme of this branch of research has been the danger of resource depletion and the accompanying distress from simultaneously serving the demands of several generations. This type of support provider — which was originally considered to consist mainly of middle aged women who are responsible for both dependent children and vulnerable older parents — has been shown to represent a small segment of the population. However, given increases in life expectancy, the mature sandwich type in which all three generations are adults has become more common. The verticalization of generational structure has long been noted by family scholars such as Bengtson.[5] Although delayed fertility and growing childlessness have slowed the progression of this trend, three and four generation families are now the norm in contemporary society.

Demographic change as a result of increased life expectancy in the developed world implies that generational sandwiching is common in the developed world and by some accounts increasing in prevalence. In the early 21st century, 79% of American 30–year–olds had at least one living grandparent, a nearly fourfold increase over the last century.[6] More recent trends have been observed by Wiemers and Bianchi, who found a 20% increase in sandwiching among women in late middle age between 1988 and 2007 in the United States,[7] and by Matthews and Sun, who estimated that almost one–third of Americans were members of family lineages consisting of four generations.[8] Evidence from Europe reveals similar patterns, with research showing that one quarter of middle–aged adults (aged 50–60) were in four generation families.[9] Having three or four generations co–surviving each

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5 Vern L. Bengtson, *Beyond the Nuclear Family: The Increasing Importance of Multigenerational Bonds*, 63 J. Marriage & Fam. 1 (2001).

6 Peter Uhlenberg, *Historical Forces Shaping Grandparent–Grandchild Relationships: Demography and Beyond*, 24 Ann. Rev. Gerontology & Geriatrics 77 (2004); Merril Silverstein, *Intergenerational Relations Across Time and Place*, 24 Ann. Rev. Gerontology & Geriatrics 13 (2004).

7 Emily E. Wiemers & Suzanne M. Bianchi, *Competing Demands from Aging Parents and Adult Children in Two Cohorts of American Women*, 41 Population & Dev. Rev. 127 (2015).

8 Sarah H. Matthews & Rongjun Sun, *Incidence of Four–Generation Family Lineages: Is Timing of Fertility or Mortality a Better Explanation?*, 61 J. Gerontology S99 (2006).

9 Emily Grundy & John C. Henretta, *Between Elderly Parents and Adult Children: A New Look at the Intergenerational Care Provided by the 'Sandwich Generation'*,

other in adulthood presents opportunities for many types of intergenerational exchanges; however, elongated lineages may produce stresses, with the more advantaged middle generation in the position of simultaneously serving as provider to older and younger generations with exigent needs.[10]

The competing demands faced by the sandwich generation have been compounded by historical trends over the last several decades. First, although the economies of many countries in Europe have been improving in the wake of the 2007–2008 global economic crisis, employment opportunities for young adults are still limited. The average youth unemployment rate across European countries exceeds 20%, albeit with considerable variation, reflecting a contracted labor market.[11] The economies of Greece and Spain are good examples of how austerity programs designed to fulfill European Union financial requirements have created struggles for workers entering the labor market or starting their careers.[12] In light of these challenges, younger adults are increasingly likely to rely on their parents for assistance.[13] Second, due to increases in dual–earner families, grandparents are increasingly likely to provide care for grandchildren, particularly in countries with limited childcare benefits.[14] Such efforts by grandparents may compete with meeting the needs of the oldest generation in four generation families. Third, increases in life–expectancy have resulted in greater and more extensive demands on adult children to provide support to older parents who exhibit a decline in mental and physical health.[15]

A key question with respect to helping behavior by the sandwich generation is whether transfers up and down the generational ladder are competitive or complementary. Competitiveness implies that providing to one generation lowers the likelihood of providing to another generation, whereas complementarity

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26 Ageing & Soc'y 707 (2006).

10 Martin Kohli, Harald Künemund & Jörg Lüdicke, *Family Structure, Proximity and Contact*, *in* Health, Ageing and Retirement in Europe — First Results from SHARE 164 (Axel Börsch–Supan et al. eds., 2005).

11 Barbara Gontkovicova, Bohuslava Mihalčová & Michal Pružinský, *Youth Unemployment — Current Trend in the Labour Market?*, 23 Procedia Econ. 1680 (2015).

12 Alex J. Kondonassis, *Recessions, Budget Deficits, and Austerity: A Comment on the US and European Economies*, 29 J. Applied Bus. Res. 1 (2013).

13 John C. Henretta, Matthew F. Van Voorhis & Beth J. Soldo, *Cohort Differences in Parental Financial Help to Adult Children*, 55 Demography 1567 (2018).

14 Corrine Igel & Marc Szydlik, *Grandchild Care and Welfare State Arrangements in Europe*, 21 J. Eur. Soc. Pol'y 210 (2011).

15 Jennifer Wolff & Judith Kasper, *Caregivers of Frail Elders: Updating a National Profile*, 46 Gerontologist 344 (2006).

implies that providing to one generation increases the likelihood of providing to another generation. Recent research has shown that the cost of providing care for older relatives has a negative effect on college savings, implying a competitive relationship between older and younger generations.[16] With the focus only on women, intergenerational exchanges between sandwich generation members and their older parents and adult children were examined in England and the United States; in both countries, providing help to parents was more likely among those providing help to adult children, even after socioeconomic resources were controlled for.[17] The authors interpret this result as supporting a complementary model of family functioning where family solidarity promotes giving to all family members in need.[18] Thus, a cursory summary of the literature suggests that providing social support — or time transfers — may be better described as egalitarian across generations, whereas providing financial support — or money transfers — may be better described as competitive across generations. The current research examines only social support to older individuals because this form of support becomes increasingly important with aging and, as we will later discuss, is far more prevalent than financial support in the European countries considered.

II. Typology of Welfare Policy Regimes

Our theoretical approach links micro–family interactions involved in the provision of social support to older parents, and the macro–national context in which this occurs. A welfare regime represents a package of benefits that are allocated based on more or less restrictive criteria.[19] The most widely used scheme for classifying nations based on welfare provision is that developed by Esping–Andersen, which classifies almost all countries into the following groups:[20]

- *Social-Democratic* states*,* in which all citizens are incorporated under a single universal welfare system and are equally eligible (e.g., Sweden and Denmark).

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16 Vicki L. Bogan, *Hosehold Asset Allocation, Offspring Education, and the Sandwich Generation*, 105 Am. Econ. Rev. 611 (2015).

17 Grundy & Henretta, *supra* note 9.

18 *Id.*

19 *See* Pearl A. Dykstra, *Cross–National Differences in Intergenerational Family Relations: The Influence of Public Policy Arrangements*, 2(1) Innovation in Aging (2018).

20 Gosta Esping–Andersen, Social Foundations of Postindustrial Economies (1999).

- *Liberal market* states where assistance is means–tested and modest social insurance plans typically target lower income individuals (e.g., Germany and the United Kingdom).
- *Conservative* states, in which citizens will only be assisted by the state when personal resources are exhausted and where traditional values encourage family assistance (e.g., Spain and Greece)
- *Eastern European/Post Soviet* states represent a mixed type that, depending on the country considered, has elements of social democratic regimes with conservative preferences for family assistance.[21]

The availability of multinational data focusing on older adults and their kinship networks has allowed scholars to compare intergenerational family relationships with the same instrumentation across a variety of societal and cultural contexts in Europe, such as OASIS,[22] SHARE,[23] and the Generations and Gender Survey.[24] Each of these research programs derives comparable samples from multiple European countries with the explicit goal of examining how national context influences health, economic, and social conditions of older adults. For instance, Bonsang used SHARE data to examine transfers to older parents from middle–aged children in 10 European countries, generally finding a greater likelihood of time transfers in the more Northern countries and a greater likelihood of financial transfers in southern Mediterranean c/ountries.[25] Albertini, Kohli, & Vogel used data from the same dataset, concentrating on transfers from middle–aged and older adults to adult children, and finding downward flows of both types more common in the welfare states of Northern Europe.[26]

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21 H.J.M. Fenger, *Welfare Regimes in Central and Eastern Europe: Incorporating Post–Communist Countries in a Welfare Regime Typology*, 3 Contemp. Issues & Ideas Soc. Sci. 1 (2007).

22 Ariela Lowenstein, Ruth Katz & Svein O. Daatland, *Filial Norms and Intergenerational Support in Europe and Israel: A Comparative Perspective*, 24 Ann. Rev. Gerontology & Geriatrics 200 (2004).

23 Axel Börsch-Supan et al., *Data Resource Profile: The Survey of Health, Ageing and Retirement in Europe (SHARE)*, 42 Int'l J. Epidemiology 992 (2013).

24 Andres Vikat et al., *Generations and Gender Survey (GGS): Towards a Better Understanding of Relationships and Processes in the Life Course*, 17 Demographic Res. 389 (2007).

25 Eric Bonsang, *How Do Middle–Aged Children Allocate Time and Money Transfers to Their Older Parents in Europe?*, 34 Empirica 171 (2007).

26 Marco Albertini, Martin Kohli & Claudia Vogel, *Intergenerational Transfers of Time and Money in European Families: Common Patterns — Different Regimes?*, 17 J. Euro. Soc. Pol'y 319 (2007).

Thus, the evidence indicates that countries with more generous social policies provide resources that make intergenerational support transfers possible. We add to this literature by focusing on the mature sandwich generation and considering how aggregations of countries based on welfare regime type, as well as social support provided to adult children and grandchildren, influence social support provided to older parents.

Research Questions and Hypotheses

We take a supply and demand perspective to organize factors that shape the decision to provide support to older parents in multigenerational families, Supply refers to the personal resources of individuals in the middle generation that enhance their ability to provide support (e.g., income), as well as public resources of government–provided services (e.g., welfare regime generosity); demand refers to the needs of the older generation (e.g., health and partnership status) in conjunction with the competing demands of younger generations (e.g., social support to children and care for grandchildren). Further, we examine how the impact of personal supply and demand factors are sensitive to welfare regime generosity to vulnerable citizens, which may offset or enhance family provisions. For instance, the impact of parents' health may be weaker in more generous welfare states where universal coverage and greater benefit levels minimize the impact of parental need on children's support responses.

The political economy gradient suggested by our welfare state typology maps well with filial obligation, which tends to vary inversely with the degree of welfare development. Familistic values are generally stronger in the *Conservative–Mediterranean* regimes of southern Europe than in the *Social Democratic* nations of northern Europe.[27] With regard to intergenerational relations, older parents have greater interaction with and live closer to their adult children the more southerly their location on the European continent.[28] Recent research suggests that the involvement of adult children with their older parents tends to be more volitional in the welfare states of northern Europe

27 Franz Hollinger & Max Haller, *Kinship and Social Networks in Modern Societies: A Cross–Cultural Comparison Among Seven Nations*, 6 Eur. Sociol. Rev. 103 (1990); Ronald Inglehart & Wayne E. Baker, *Modernization, Cultural Change, and The Persistence of Traditional Values*, 65 Am. Soc. Rev. 19 (2000).

28 Karsten Hank, *Proximity and Contacts Between Older Parents and Their Children: A European Comparison*, 69 J. Marriage Fam. 157 (2007).

than in the residualist states of southern Europe where parental involvement tends to be more obligatory based on filial duty and reciprocity.[29]

While cultural differences across nations certainly cannot be dismissed as a factor that shapes elder care preferences of family members in our subsequent analyses, we consider cultural type to be isomorphic with policy regime type. That is, more traditionally familistic cultures, such as those found in Mediterranean nations, will tend to have more restrictive public polices as well. We maintain that the values underlying the welfare state are based on cultural propensities that play out on multiple levels of analysis. National culture, as defined by ideational beliefs and norms that structure patterns of behavior within a country, may, at the very least, be a necessary antecedent to enacting particular social policies, and at most a force that informs and motivates those policies.[30] In this way, cultural values govern the ideal relationship between society, its constituent subgroups (such as families) and individuals.[31] For instance, nations that promote egalitarian and broadly redistributive polices explicitly enact a cultural preference for the value of equality over private privilege, such that the basic needs of all individuals are ideally met regardless of family resources and personal circumstances.

To the extent that universalistic policies comprehensively support families, they may be construed as reflecting a pro–family orientation, albeit one based on collectivistic principles. Research suggests that welfare state generosity may *crowd–in* certain types of intergenerational assistance. One such study found that strong social safety–nets for frail and disabled individuals enhanced casual and intermittent types of family support to older adults by lifting the onerous burden of fulltime caregiving.[32] This dynamic is reflected by the willingness of families to "top off" generous state welfare provisions.

With the aid of several consortia of multinational research groups in Europe and beyond, it is now possible to directly compare various aspects of intergenerational relationships across countries with different welfare structures using theoretically informed models such as that developed by Esping–Andersen.[33] Evidence suggests that institutional retrenchment of state–provided pensions and long term care benefits — a trend accelerated

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29 Martina Brandt, Klaus Haberkern & Marc Szydlik, *Intergenerational Help and Care in Europe*, 25 Eur. Soc. Rev. 585 (2009).

30 Katherine Daniell, The Role of National Culture in Shaping Public Policy: A Review of the Literature (2014).

31 Geert Hofstede, Culture's Consequences: International Differences in Work-Related Values (1980); Ronald Inglehart & Christian Welzel, Modernization, Cultural Change, and Democracy: The Human Development Sequence (2005).

32 Brandt, Haberkern, & Szydlik, *supra* note 29.

33 Esping–Andersen, *supra* note 20.

by the financial crisis of the last decade — compels individuals to rely more on traditional social obligations embedded in intergenerational relationships and less on public programs to manage the risk of resource depletion and disability in old age.[34] Increased privatization of risk has emerged as a trend in an emerging "post–welfare state" historical period that is consistent with the neoliberal goal of "crowding–in" family support of elders, not by providing benefits to individuals and families, but by decreasing spending on public programs. These issues are important beyond their obvious academic interest. The balance between state and family provisions to older adults has implications for fundamental aspects of society, for example the gendered allocation of kinship and work roles, and the degree of inequality and resource redistribution at the national level.

Our expectations with regard to competition between older and younger generations for the time resources of the middle generation are built on the following theoretical types, which are based on the relationship between giving up and down the generations:

- *Independent giving* = No relationship between providing up and down the generations
- *Competitive giving* = Negative relationship between providing up and down the generations.
- *Complementary giving* = Positive relationship between providing up and down the generations.

In addition, we examine which of the three intergenerational support patterns noted above holds within each welfare regime. We expect greater competition in the less generous Conservative–Mediterranean and East European welfare regimes, where scarce public resources would place the middle generation in a position requiring them to make a choice between supporting parents or children, given the public resource constraints.[35] Social democratic regimes would be characterized by independent giving or complementary giving because the middle generation's efforts would be replaced by state provisions, and competitive giving would not be necessary. We expect liberal–continental regimes to fall in–between social democratic regimes and conservative–Mediterranean regimes because the service eligibility criteria of liberal–

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34 Christopher Phillipson, *Globalization and the Reconstruction of Old Age: New Challenges for Critical Gerontolog*, *in* The Need for Theory: Critical Approaches to Social Gerontology 163 (Simon Biggs, Ariela Lowenstein & Jon Hendricks eds., 2003).

35 Eastern–European regimes are difficult to categorize using the Esping–Andersen scheme because they represent countries that have experienced severe economic strain but have lingering socialist traditions.

continental regimes are more restrictive than the former but more generous than the latter.

III. Method

A. Data Source and Study Sample

Our analysis uses data from the Survey of Health, Aging and Retirement in Europe (SHARE), a longitudinal study launched in 2004 to study changing demographic trends in Europe and to better understand the dynamics of the growing population of persons aged 50+. SHARE is a multidisciplinary, cross–national databank of microdata on health, psychological and economic factors in the older population.[36] The SHARE survey is harmonized with leading international surveys in the United States, England, Ireland, Japan, China, India, and Brazil, among other countries.[37] As a pan–European project, SHARE makes it possible to compare the economic con/dition, health, and welfare of older people in various European countries over time, and provides a research infrastructure for public policymaking on behalf of the aging population.

The present study uses data gathered in five of six SHARE surveys conducted between 2004 and 2015[38] in the following countries: Austria, Germany, Netherlands, France, Switzerland, Belgium, Ireland, Luxembourg, Sweden, Denmark, Spain, Italy, Greece, Israel, Portugal, Czech Republic, Poland, Slovenia, Estonia, and Croatia.

We specifically focus on the "mature sandwich generation" — individuals who have both at least one living parent and at least one living adult child, neither of whom are sharing a household with the "sandwiched" person. We pool multiple time periods in order to maximize the size of the within–country samples. Of the 69,192 observations in the sample across the six time periods considered, 14,838 were identified as being in the mature sandwich generation, the sub–sample on which the current study focuses.

B. Measures

Dependent variable. In each of the survey waves considered, respondents were asked: "In the past twelve months, have you and/or your partner/spouse given help to any family member outside your household, to a friend, or to

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36 Leah Achdut et al., *Transitions Among States of Labor Force Participation in the Old Age*, 12 Eur. J. Ageing 39 (2015).

37 Börsch-Supan et al., *supra* note 23.

38 Wave 3 was not used as it did not collect relevant data for our analyses.

a neighbor?" If participants answered in the affirmative, they were asked to whom they provided help from a list of recipient types. Those respondents who mentioned older relatives (mother, father, mother–in–law, father–in–law, stepmother, grandparent, aunt, uncle) are deemed to be helping the older generation. We use the term "parents" as a representative term to indicate the older generation, recognizing that the large majority of help was devoted to parents.

Explanatory variables. Explanatory variables predicting whether or not support is provided to older parents comprise four categories:

1. *Background sociodemographic characteristics*: These variables reflect sociodemographic characteristics that may predispose or inhibit helping behaviors, and include: gender; age in years; household income from all sources (made equivalent to Euros in nations with different currencies); number of years of education; net worth calculated as the total value of real estate and financial assets; and labor force participation.
2. *Family resources and constraints*: These variables represent factors that may enhance or hinder the provision of help to older parents, and include the following: number of siblings; living with others; number of children; the presence of grandchildren for whom the respondent provides any care; and the presence of grandchildren for whom the respondent does not provide any care.

   Respondents who mentioned helping younger relatives (children, son–in–law, daughter–in–law, grandchild, niece, nephew) are deemed to be helping the younger generation. Another family variable is whether financial support is provided to children. In order to simplify the terminology, we refer to this category of recipients as "children". For descriptive purposes, we also constructed a category consisting of all other recipients of social support (partner/spouse, brother, sister, other relative, friend, ex–colleague, neighbor, ex–spouse/partner, other acquaintance).
3. *Demand factors*: Variables that together represent the need of the older generation for help consist of parents' health scored on a 1–5 scale, with 1 denoting excellent health and 5 signifying poor health. If both parents are alive, this variable is coded as the worse parent's health, the assumption being that the worse off parent incurs a greater demand for social support from adult children. In addition, widowhood, a second indicator of need, is measured as whether only one parent is alive vs. both parents are alive.
4. *Welfare regime*: The final group of variables indicates type of welfare regime corresponding to the country of residence. Welfare regime designation is based on the typology most commonly used in the literature as developed

by Esping–Andersen.[39] These types and their constituent nations are: liberal–market (Austria, Germany, Netherlands, France, Switzerland, Belgium, Ireland, Luxembourg); Social–Democratic (Sweden, Denmark), Conservative–Mediterranean (Spain, Italy, Greece, Israel, Portugal); and East European (Czech Republic, Poland, Slovenia, Estonia, Croatia).

There are several methodological limitations to our analysis that deserve mention. First, we examined only the occurrence of helping behavior without regard to its frequency and intensity. It is probable that help ranges from intermittent casual assistance to intensive caregiving. As research by Brandt, Haberkern, and Szydlik suggests, intensive physical caregiving is less common in Social–Democratic regimes than in other policy contexts due to crowding out by state services.[40] Because we broadly focus on whether or not social support is provided to older individuals without regard to its intensity, our measurement provides a general account of family functioning and likely represents more common types of intermittent support over intensive caregiving.

Second, there are likely to be country–specific differences in support patterns based on idiosyncratic policy and cultural elements that are unique to each nation. However, practical restrictions on sample size, given the sample selection criteria (i.e., having a living parent and a non–residential adult child), would have substantially reduced the statistical power needed to detect results at the level of individual nations.

IV. Results

The distribution of social support or help provided by the "sandwich generation" to various types of recipients is shown in Figure 1. Slightly more than half of this generation gave no social support to anyone in the twelve months preceding the interview date. Almost one quarter (27%) gave support to parents exclusively and 7% gave to children exclusively, with 5% giving to both generations. Altogether, almost one third (32%) of the sandwich generation provided support to older parents. Social support provided to adult children was fairly minimal, with an overall prevalence of only 12%. Finally, 8% provided support to people who were not in older or younger generations, presumably to family or friends in the same generation as the respondent.

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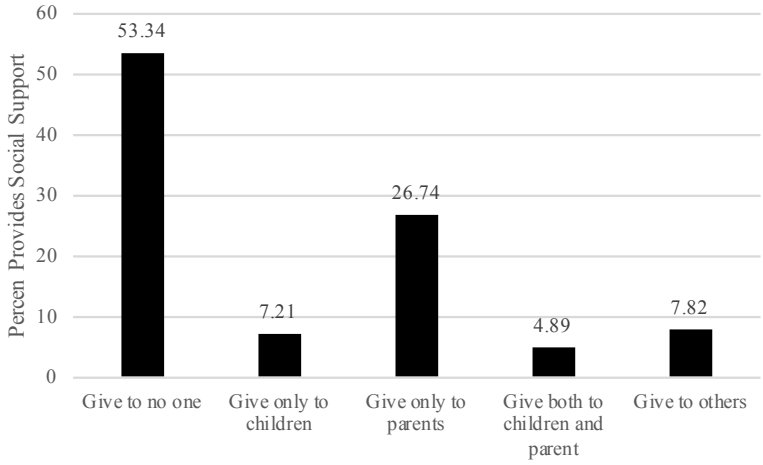
39 Esping-Andersen, *supra* note 20.

40 *Brandt, Haberkern & Szydlik*, *supra* note 29.

Figure 1: Distribution of providing social support to various generations



Source: Survey of Health, Aging and Retirement in Europe (SHARE).Wave 1, Wave 2, Wave 4, Wave 5, Wave 6 in the following countries: Austria, Germany, Netherlands, France, Switzerland, Belgium, Ireland, Luxembourg, Sweden, Denmark, Spain, Italy, Greece, Israel, Portugal, Czech Republic, Poland, Slovenia, Estonia, and Croatia.

Table 1 presents bivariate associations between providing help to parents and background characteristics, economic resources, family resources and constraints, and demand factors. These associations reveal that providing help to parents is more common among middle–generation members who are younger and, female, have greater economic resources and higher levels of education, and who participate in the labor force. Providing help to older parents is also more likely among those who have fewer siblings and fewer children, and who live with a spouse. Evidence of complementarity is found in a significant positive association between providing help to parents and providing help to adult children. Provision of help to parents tends to be less common among sandwich generation members who have grandchildren for whom they are not providing care. In addition, support tends to be given to older parents who are in poorer health; however, there is no association with whether or not members of the parental generation have a surviving partner.

Table 1. Bivariate associations between providing social support to parents and selected individual and family attributes[1]

			Give social support to parents	Don't give social support to parents	F / χ^2
Background	Age (mean, s.d.)		57.36 (5.09)	57.63 (5.37)	8.71**
	Gender (percent)	Male	37.69	46.65	104.617***
		Female	62.31	53.35	
Economic resources	Household income [Euros] (mean, s.d.)		51,047 (60,321)	40,891 (60,491)	90.61***
	Education (mean, s.d.)		12.554 (3.818)	11.547 (4.129)	199.74***
	Household net worth [Euros] (mean, s.d.)		341,036 (474,272)	273,435 (458,630)	68.22***
	Labor force	In the labor force	58.86	52.70	48.171***
		Not in the labor force	41.14	47.30	
Family resources and constraints	Siblings (mean, s.d.)		2.081 (1.832)	2.489 (2.208)	121.64***
	Living arrangement (percent)	Lives with partner	80.10	78.40	5.544*
		Don't live with partner	19.90	21.60	
	Children (mean, s.d.)		2.338 (1.089)	2.490 (1.269)	50.33***
	Social Support to children	Give	36.89	26.03	73.088***
		Don't give	63.11	73.97	
	Grandchildren	Don't have grandchildren	44.07	40.06	108.700***
		Have grandchildren and don't take care of them	15.21	22.61	
		Have grandchildren and take care of them	40.72	37.33	
Demand factors	Poorer health of parents	Self–reported health (mean, s.d.)	3.555 (1.114)	3.464 (1.105)	20.98***
	Parents' survival	One parent alive	77.05	77.26	0.079
		Both parents alive	22.95	22.74	

Source: Survey of Health, Aging and Retirement in Europe (SHARE). Wave 1, Wave 2, Wave 4, Wave 5, Wave 6 in the following countries: Austria, Germany, Netherlands, France, Switzerland, Belgium, Ireland, Luxembourg, Sweden, Denmark, Spain, Italy, Greece, Israel, Portugal, Czech Republic, Poland, Slovenia, Estonia, and Croatia.

Significance levels: * $p<0.05$, ** $p<0.01$, *** $p<0.001$

[1] Parentheses denote standard deviation value

In order to estimate the unique effects of each of the factors discussed, we use multivariate logistic regression analysis to produce predicted odds ratios (OR) for each factor that are informative about the relative increase in the odds of support being provided to the older generation, adjusted for all other variables in the model. Significant odds ratios that are greater than one are interpreted as increasing the probability of providing help to parents, and those less than one are interpreted as decreasing the probability of providing help to parents. We estimate the model using a hierarchical approach in Table 2, first including sociodemographic background characteristics, then adding family resources/constraints, followed by demand/need factors, and finally in Table 3 separate analyses by welfare regime type.

Table 2. Logistic regression estimates of giving social support to parents in full sample

	Model 1	Model 2	Model 3	Model 4
	Odds Ratios	Odds Ratios	Odds Ratios	Odds Ratios
Age	1.005	1.004	1.002	0.997
Gender (ref=female)	0.645***	0.652***	0.650***	0.642***
Household income	1.000***	1.000***	1.000***	1.000***
Education	1.054***	1.046***	1.045***	1.038***
Household net worth	1.000***	1.000***	1.000***	1.000**
In labor force (ref=not in labor force)	1.191***	1.162***	1.172***	1.077*
Siblings		0.932***	0.928***	0.926***
Lives with others (ref=lives alone)		1.101**	1.095*	1.156***
Number of children		0.919***	0.918***	0.907***
Gives social support to children (ref=does not give)		1.468***	1.502***	1.331***
Have grandchildren and don't take care of them (ref= no grandchildren)		0.753***	0.739***	0.746***
Have grandchildren and take care of them (ref= no grandchildren)		1.052	1.043	1.024
Poorer health of parents			1.116***	1.142***

	Model 1	Model 2	Model 3	Model 4
	Odds Ratios	Odds Ratios	Odds Ratios	Odds Ratios
One parent alive (ref=both parents alive)			1.109**	1.131***
Welfare regime type (ref=Liberal Continental)				
Social–Democratic				1.535***
Conservative–Mediterranean				0.590***
Eastern European				0.653***
Constant	0.176***	0.275***	0.231***	0.362***
Log likelihood	-8,752.	-8,649	-8.449	-8,311
Observations.	14,253	14,253	13,905	13.905

Source: Survey of Health, Aging and Retirement in Europe (SHARE). Wave 1, Wave 2, Wave 4, Wave 5, Wave 6 in the following countries: Austria, Germany, Netherlands, France, Switzerland, Belgium, Ireland, Luxembourg, Sweden, Denmark, Spain, Italy, Greece, Israel, Portugal, Czech Republic, Poland, Slovenia, Estonia, and Croatia.

Significance levels: * p<0.1, ** p<0.05, *** p<0.01.

The first model, which includes background sociodemographic characteristics, reveals that men in the sandwich generation are 35% less likely than women to provide help to parents. Greater resources in the form of household income, education, net worth, and participation in the labor force increase the likelihood of providing support to older parents.

In the second model we add family resources and constraints. These results show that the odds of the sandwich generation members providing support to older parents are 7% lower for each additional sibling, 8% lower for each additional child, and 25% lower among those with grandchildren to whom they do not provide care as compared to those without grandchildren. However, the odds of providing support are 10% higher among those living with others as compared to those who live alone. Thus, there is some evidence that families are splitting responsibility among siblings, but nonetheless competition is suggested in that children and grandchildren are suppressing social support provided to parents. Living alone may represent the lack of personal resources that can assist in supporting provision to parents. Those in the sandwich generation providing support to adult children have 47% greater odds of providing support to parents, suggesting a correspondence in giving to different generations.

In the third model we add parental health and widowhood, two factors that might increase the demand for support by elevating the need of parents. The

odds ratio for parental health reveals that "sandwich–generation" members have 12% greater odds of providing support to parents for each point of worsening health on the 1–5 scale. In addition, the odds of support being provided to widowed parents are 11% greater than the odds of support being provided to non–widowed parents.

Finally, in the fourth model we include the welfare regime types in which respondents reside (Social–Democratic, Conservative–Mediterranean, and Eastern European, which are compared to Liberal–Continental). Because background personal and family characteristics are controlled for, the impact of regime type can be interpreted as being independent of those characteristics. We find that sandwich generation members living in Social–Democratic welfare regimes have 54% greater odds of providing social support to older parents as compared to those in Liberal–Continental regimes. In contrast, those in Conservative–Mediterranean and Eastern–European regimes were less likely to provide support, by 41% and 35%, respectively.

Next we use logistic regression to examine predictors of providing social support to parents within each type of welfare regime. Table 3 presents the odds ratios for the full set of variables previously considered. We focus on variation in the effects of the resources/constraints and demand/need factors, noting that the effects of background sociodemographic factors are largely consistent across welfare regimes.

Table 3. Logistic regression estimates of giving social support to parents by welfare regime type

Welfare Regime Type	Liberal–Continental	Social–Democratic	Conservative–Mediterranean	Eastern European
Predictors	Odds Ratios	Odds Ratios	Odds Ratios	Odds Ratios
Age	0.991	0.992	1.002	1.014
Gender (ref=female)	0.666***	0.672***	0.621***	0.515***
Household income	1.000*	1.000	1.000***	1.000*
Education	1.051***	1.019	1.010	1.042**
Household net worth	1.000*	1.000	1.000**	1.000***
In labor force (ref=not in labor force)	1.031	1.154	0.975	1.214
Siblings	0.956***	0.867***	0.895***	0.873***
Lives with others (ref=lives alone)	1.234***	1.363***	1.047	0.716**

Welfare Regime Type	Liberal–Continental	Social–Democratic	Conservative–Mediterranean	Eastern European
Predictors	Odds Ratios	Odds Ratios	Odds Ratios	Odds Ratios
Number of children	0.879***	0.914**	0.969	0.937
Gives social support to children (ref=does not give)	1.484***	1.324***	1.162	0.869
Have grandchildren and don't take care of them (ref=no grandchildren)	0.782***	0.946	0.523***	0.725*
Have grandchildren and take care of them (ref=no grandchildren)	1.012	1.044	0.971	1.143
Poorer health of parents	1.134***	1.147***	1.146***	1.275***
One parent alive (ref=two parents alive)	1.168***	1.223**	0.996	0.912
Constant	0.436**	0.919	0.206**	0.059***
Log likelihood	-4,086.9129	-1,774.7628	-1,400.5058	-993.2457
Observations	6,578	2,654	2,827	1,846

Source: Survey of Health, Aging and Retirement in Europe (SHARE). Wave 1, Wave 2, Wave 4, Wave 5, Wave 6 in the following countries: Austria, Germany, Netherlands, France, Switzerland, Belgium, Ireland, Luxembourg, Sweden, Denmark, Spain, Italy, Greece, Israel, Portugal, Czech Republic, Poland, Slovenia, Estonia, and Cro\atia.

Significance levels: * p<0.1, ** p<0.05, *** p<0.01

The likelihood that "sandwich generation" members provide social support to parents is greater among those with fewer siblings across all four welfare regimes. In Liberal–Continental and Social–Democratic regimes, the likelihood of providing to parents is greater among those with fewer children and who provide social support to their adult children. Indeed, in these two regimes, sandwich generation members were, respectively, 48% and 32% more likely to provide support to parents if they were also providing support to their adult children. Having grandchildren to whom care is not provided is related to lower odds of giving to parents in all but the Social–Democratic regime. Finally, poorer health of parents is related to a greater likelihood of providing care in all welfare regimes, but having one surviving parent elevates the likelihood that support is provided only in Liberal–Continental and Social–Democratic regimes.

V. Discussion

In this article, we employed perspectives from the political economy theory developed by Esping–Andersen regarding welfare regimes to examine social support provided by adult children to their aging parents. Due to population aging and the growth of extended family structures, pressures on middle–aged adults to provide support to other generations have never been greater. Key to our approach is that personal resources, the demands of younger generations, and government welfare production converge to produce incentives and disincentives for those in midlife to provide support to the older generation. Moreover, we have proposed that welfare–state context modifies the impact of resources and demands on support provision.

In terms of the welfare regime context, we found that sandwich generation members were less likely to provide support to their parents in Conservative–Mediterranean and East European regimes, but more likely to do so in universalistic Social–Democratic regimes. This evidence supports the hypothesis that well–developed welfare states "crowd–in" provision of help to older relatives. This interpretation can be explained by a variety of factors such as relief from the burden of providing intensive care, as well as shorter hours and greater discretionary time granted to workers in highly developed welfare states.

We found no evidence of intergenerational competition for social resources of the sandwich generation with regard to social support. Those who provided social support to their adult children tended to provide for their older parents as well. This was particularly true in the two regimes where resources and public benefits tend to be more generous and may be interpreted as the state crowding–in family support. In terms of the social condition of older parents, adult children were more likely to provide social support to parents who were widowed than to parents who were partnered, and this was particularly true in Social–Democratic and Liberal–Continental regimes. Again, this may represent a version of "topping off" more generous social policies that serve widowed elders who are among the most vulnerable members of the older population and in the greatest need of support.

In terms of our hypotheses concerning competitive vs. complementary giving to generations, the results support a model of joint giving. One could argue that this represents a form of altruism on the part of sandwich generation providers — that is, the propensity to give to family members as a generalized preference or personality trait such as conscientiousness — and which could be considered in future research on this topic However, evidence that this finding holds in the two most generous welfare regimes supports the hypothesis that public policy may enable families to care for their own in several generations

by making it easier to make such contributions. A model of generational independence characterizes support provision in the two more conservative welfare regimes, such that giving help does not appear to be driven by a common societal factor.

While our analysis focused on social support, in the form of helping behavior or time transfers, another way that families assist each other is by providing monetary assistance. However, financial provisions are rare in the developed nations studied, reported by only 2.7% of middle generation members in our sample. However, in ancillary analyses (not reported), we find that monetary support to older parents is less common in the Social–Democratic regime as compared to the Mediterranean and Eastern European regimes, presumably because pensions are more generous in the former set of nations. To the extent that support services can be obtained on the private market, intergenerational financial transfers may enable older parents to purchase needed services. Thus, we may be under–estimating the full degree to which younger generations make social support available to their parents.

Our empirical definition of welfare regimes was based on one of the most widely employed theoretical models in the literature to characterize the organization and generosity of state benefits. Although much research has refined these designations over the years,[41] we found Esping–Anderson's scheme to have face validity, a long history of empirical validation, and a degree of parsimony that made it attractive for reaching broad conclusions. We might also add that our sample inclusion criteria (e.g., having a surviving parent and a non–coresident adult child) restricted our ability to examine within–country patterns with sufficient statistical power, which would require the pooling of national samples by regime type. While country–specific analyses may yield interesting results, the relatively low country–specific sample sizes made the results unstable and difficult to interpret with the empirical model employed.

The seemingly perplexing finding that social support was more prevalent in the more advanced welfare states may be explained by the purported goal of the state to maintain the wellbeing of families across the lifespan by helping them help themselves. We cannot discount the possibility that these findings are rooted in a national culture of altruism, which is unmeasured in our study. Nevertheless, fears that the welfare state is a force of de–familization appears not to be supported by our research with respect to social support to older parents. Finally, we acknowledge the difficulty in attributing to welfare regime generosity a causal impact on within–family assistance behaviors. Indeed,

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41 Ji Young Kang & Marcia K. Meyers, *Family Policy Changes Across Welfare and Production Regimes, 1990 to 2010*, *in* Handbook of Family Policy 66 (Guðný Björk Eydal & Tine Rostgaard eds., 2018).

the culture may play an equal or even more dominant role in the political economy. On the other hand, cultural values and welfare state policies are often isomorphic with each other. Welfare regimes tend to be consistent with national cultural preferences — for instance, familism in Mediterranean countries and individualism in Nordic countries. Yet as we have seen, individualistic values may belie a type of familism that is manifest at the collective or societal level. Therefore, we urge some caution in attributing to policy factors causal impacts on family behavior.

Conclusion

In this research we examined policy–related context as it pertains to elder care from adult children who are uniquely positioned in the mature sandwich generation. Although the results are not entirely clear–cut, the evidence on balance points to mutuality in the support provided to older adults living in more generous welfare regimes. This mutuality applies both within the family (i.e., complementarity between giving to children and parents) and outside the family (living in Social–Democratic nations). These results are likely to raise as many questions as they answer. Perhaps the most important issues to resolve relate to the specific policy positions that may affect the supportive behavior of the sandwiched middle generation. Future research may address these questions by considering specific policy profiles of nations, such as pensions, long–term care availability, and unemployment benefits, as well as examining whether welfare state retrenchment or expansion corresponds with changes in intergenerational family behaviors. Future research might also examine whether socioeconomic position is equally important across welfare regimes in order to isolate the independent contribution of personal and state resources within particular macro–societal policy and cultural contexts.

Nevertheless, we note that our findings are not as paradoxical as they might at first seem. Welfare state provisions, when considered as public transfers from wealthier to poorer generations, represent intergenerational solidarity at the macro–level; such transfers may promote intergenerational solidarity in private family life as well. This conclusion counters narratives that public initiatives crowd–out family support and lead to inefficiencies, and points to the fallacy of considering private and public support for older individuals as mutually exclusive.