Life Course Research of Middle and Old-Aged Persons (Part 1) — Panel Study Results on Changes in Daily Life (1999)

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1. The Objectives of Life Course Research

(1) Reason for Initiating Life Course Research

There is little dispute that a major cause of the prolonged economic recession has been the delay in dealing with the aftermath of the bubble economy. But hidden beneath the political and economic turmoil is another source of economic stagnation — the inability of the social security system to keep pace with changes in the population structure caused by the declining birthrate and rapid aging.

In the past, as long as the population was growing, the economy also grew because of the expanding demand. The main function of social security was to smooth out rough spots, for example by providing poverty relief. However, in an aging society with low birth rates, social security will be expected to address not only poverty relief, protection of the weak, and relief for distressed persons in a competitive society, but more proactive functions as well — such as ensuring equality of opportunity, and satisfying the diversity of demand.

Changes in society call for flexible and diverse responses by social security. For instance, the government currently provides childcare services for children when their guardians are at work or ill. However, as more women enter the work force and two-income households become prevalent, it will become increasingly important to provide childcare suited to diverse needs.

The present social security system was designed to deal with the issues of postwar Japan. To be workable in the future, its fundamental concepts will need to be revised with an integrated approach covering demographic, economic and social factors. Only then can a suitable social infrastructure be built for the aging society.

(2) Need for Life Course Research

Demographic, economic and social changes accompanying the maturing society are causing diverse life course patterns to emerge. For example, various factors cause people to choose to have fewer children, or to live alone throughout their life. In turn, how individuals live and carry out their life course can cause demographic, economic and social changes.

In the contemporary social structure, inconsistencies have arisen from the interdependence of demographic, economic and social changes and the social security system. Enhancing the social infrastructure requires that we first distinguish the diverse life course patterns caused by the growing emphasis on the individual and pursuit of quality of life. However, there is currently insufficient data on how life course patterns are diversifying, and how alterations are being caused by individualization.

Moreover, there is no substantiated explanation of the dynamic relationship between life course and the socioeconomic system, or of that between life course and cultural norms. Our view is that the life course is strongly affected by the era in which an individual lives — the social values — but not completely prescribed by it. In any case, regarding the need adjust social security and the social infrastructure to changes in the population structure, we believe it is vital to scientifically approach life course changes and provide a structural explanation.

Begun in 1997, our life course study focuses on the vanguard of the aging society — middle-aged and old-aged persons. By explaining their life course changes, our aim is to gather data that will provide insights into how to modify social security and other aspects of the social infrastructure for a society with growing life expectancies.¹

Our survey sample consists of persons born between 1933 and 1947. Each person's life course history is recorded using the reminiscence method, and their future life course is tracked at two-year intervals using the panel method. 2

This paper is the first of a three-part report analyzing the results of two surveys conducted in 1997 and 1999. The time frame allows us to note the impact of the economic recession, failures of major financial institutions, and other significant social events on the daily life and life course of middle and old-aged persons. In Part 1, we outline the life course research, and focus on changes in daily life between 1997 and 1999. The second and third parts will report on changes in the household budget and employment situation.³

2. Life Course Research and the Panel Study Method

Life course refers to the particular path that an individual travels over a lifetime. The life course research approach treats a lifetime as a story composed of successive events in all domains of life. ⁴ Stated differently, it dissects the interaction between a person's life and historical time longitudinally rather than in cross sections.

Research methods that pursue the life course of individuals exist in other disciplines besides sociology. In recording an individual life course, biographies and autobiographies are an important source of information. ⁵ Autobiographies contain detailed descriptions of the changing times and changes in daily life. Life course research often relies on interviews and other methods to obtain detailed information on an individual's daily life.

However, our research relies on written questionnaires for information on an individual's past and current situation. This is because one of the key objectives of the study is to obtain data on quantitative changes in the daily life of the persons surveyed.

The method of using written questionnaires to track life course changes among the same individuals is identical to the panel study method, which observes changes continuously in a fixed sample. Thus at the outset of the study, we asked the participants to cooperate over the next decade in five surveys conducted at two-year intervals (Figure 1).

Tracking the same individuals over time makes it possible to explore areas not covered by existing statistical surveys. For example, in ordinary sampling surveys, if a fixed proportion of people is jobless regardless of economic conditions, the data is insufficient to conclude whether different people are jobless each time, or the same people are repeatedly becoming unemployed. Our approach would clarify this question.

The sampling area of the survey was nationwide; random sampling was conducted after dividing the country into 15 regions, and further subdividing by size of city. The sampling method is called area sampling. ⁶ The sample size is 1,034 persons.

Year of birth	1997 (completed)	1999 (completed)	2001 (planned)	2003 (planned)	2005 (planned)
1933 – 37	60 - 64	62 – 66	64 – 68	66 – 70	68 – 72
1938 – 42	55 – 59	57 – 61	59 – 63	61 – 65	63 – 67
1943 – 47	50 – 54	52 – 56	54 – 58	56 - 60	58 - 62

Figure 1 Survey Schedule and Age of Participants

Figure 2 Historical Periods and Social Changes Experienced by Participants (by topic)

1933	- 1944	1965 ·	- 1974
33	Japan withdraws from League of Nations, cancels	65	Vietnam war; special loans by BOJ
	Washington Naval Disarmament Treaty	66	Frozen food
36	Feb. 26 incident; Anti-Comintern Pact with Germany	67	"3 C's"; middle class awareness reaches 89.2%
37	Marco Polo bridge incident	69	Increase in elderly suicides; Apollo moon landing
38	National mobilization law; electric power control law	70	Photochemical smog; Osaka Expo
39	Nomonhan incident; price controls	71	War against garbage
40	Tripartite Pact	72	Return of Okinawa; emission standards; proposal for remod-
41	Pacific war begins		eling Japanese archipelago; senile dementia
42	Food control law	73	First oil crisis; silver seats for elderly
1945	- 1954	1975 ·	- 1984
45	Pacific war ends; market trains and black markets	75	People born in postwar era comprise majority
46	Constitution promulgated; first agricultural reform	77	Shark loans
47	Electric power crisis; population of Tokyo surges	78	Uncertainty
48	Maruko price controls dismantled	79	Second oil crisis; rabbit hutches
49	Dodge Line	80	Japan becomes largest automaker; home video decks
50	Korean war	81	Full moon package tours
51	Power conservation campaign; removal of barracks	82	"Neaka/nekura" personality typing
52	Japan joins IMF & World Bank; resident registration; labor	83	Era of "light, thin, short & small"; increase in suicides among
	strikes using power outages		older men
53	Restriction on luxury good imports; regular TV broadcasting; streetside TVs	84	"Marukin/maruhin" wealth gap
		1985 ·	_
1955	– 1964	85	Spiritual marketing hype; video cameras
55	Japan joins GATT	87	Black Monday
56	End of "postwar era"; rebuilding of wooden houses	89	Asset bubble; consumption tax introduced
58	Large apartment buildings; 3 sacred goods;	90	Stock market crashes; elderly divorces increase
	"instant gratification era"	91	"Honest poverty"
59	Motorization era begins	92	Land prices plunge; corporate restructuring
60	Income doubling plan; smog	93	Partial liberalization of rice
61	War against traffic; 60% diffusion rate for TVs	94	Pension reform
63	Pollution	97	5% consumption tax
64	Liberalization of overseas travel; Tokyo Olympics	98	Failures of large financial institutions;
			establishment of LTC insurance law
Sou	rce: Showa History Annals, Mainichi Newspaper, 1	989.	
000			

3. Characteristics of Survey Participants

The panel study covers men born between 1933 and 1947. At the time of the first survey in 1997, they were 50 to 64 years old. As mentioned earlier, our primary reason for choosing this generation is that these people are at the leading edge of the aging society. During the 10-year period of the study, they will experience retirement and its drastic effects on daily life and household finances, as well as officially cross the 65-year-old threshold for classification as elderly persons.

The sample contains a mixture of participants with wartime experience and those born after the war. When the war ended, the oldest participants were 12 years old, while the youngest are baby boomers born after the war (Figure 2).

What the participants have in common are the experiences of helping build the flourishing postwar economy, and living through the two oil crises of 1973 and 1979. During their formative years from 1945 to 1960, the society was still strongly influenced by prewar values such as inheritance by the old-

est child and the father's uncontested authority in the family. Nonetheless, the generation under study helped to create new values and a new culture for postwar Japan. In particular, the baby boomer generation has led Japanese society by its sheer size.

When the generation under study began working in the early 1960s, Japanese management practices such as the seniority wage structure and long-term employment had just taken root. The same generation also saw the rise of the contemporary division of labor in the family, wherein the husband would work at a company that rewarded long-term service, while the wife took care of the home and raised the children. However, following the collapse of the bubble economy, the seniority wage structure and long-term employment became too costly for companies to maintain. The generation under study — being the oldest and highest paid employees — has taken the heaviest toll from corporate restructuring. The failures of major financial institutions, which occurred after the first survey, have also clearly impacted the participants in the second survey.

4. Changes in Daily Life Among Survey Participants

Below we examine living conditions among the participants in the transition to retirement and old age by comparing the results of the 1997 and 1999 surveys. The analysis focuses on changes over time in three age cohorts. ⁸ The analysis of life course changes — for example, changes in household finances among the cohort engaged in long-term care, and changes in employment — will be addressed in subsequent reports.

(1) Husband's Health Declines First

Between 1997 and 1999, the percentage of participants reporting good health declined by over 10 percent from 49.9 percent in 1997 to 38.3 percent in 1999. While the sharpest decline (11.4 percent) was in the youngest cohort, the oldest cohort, on the threshold of being classified as elderly, showed a 7 percent decline (Figure 3).

						(%)
		Sample size	Healthy	Fairly healthy	Not very healthy	Not healthy
1997 total		1034	49.4	35.3	11.7	3.3
1999 total		1034	38.3	40.0	12.4	3.0
1042 47	1997	299	56.9	35.1	5.7	1.3
1945 - 47	1999	299	39.8	42.5	10.7	1.0
1038 - 42	1997	306	53.9	32.0	10.5	3.6
1930 - 42	1999	306	42.5	39.9	9.8	3.3
1022 27	1997	429	41.0	37.8	16.8	4.4
1900 - 01	1999	429	34.3	38.5	15.4	4.2

Figure 3 Health Condition of Participants

On the other hand, the health condition of spouses has not changed significantly. This may be explained in large part by the five-year difference in average age between participants and spouses: 59.6 years for participants, compared to 55.0 years for spouses, of whom 15.5 percent are under age 50 (1999 survey). Thus the age difference may explain the relatively more health condition of the spouses (Figure 4).

						(70)
		Sample size	Healthy	Fairly healthy	Not very healthy	Not healthy
1997 total		978	57.0	30.3	10.8	1.8
1999 total		974	59.1	28.1	7.7	2.7
1042 47	1997	277	63.5	27.4	7.6	1.4
1943 - 47	1999	274	62.4	26.3	7.3	1.5
1029 42	1997	297	58.6	29.0	11.1	1.3
1930 - 42	1999	297	65.7	23.9	6.1	2.7
1022 27	1997	404	51.2	33.2	12.9	2.5
1933 - 37	1999	403	52.1	32.5	9.2	35

Figure 4 Health Condition of Spouses

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(2) Long-Term Care Situation

No significant change has occurred in the incidence of long-term care recipients among household members (6.5 percent in 1997, 6.6 percent in 1999). The main care recipients are the participant's parents; fathers account for 11.8 percent of care recipients, down from 22.7 percent in 1997, while mothers account for 54.4 percent, down slightly from 57.6 percent (Figure 5).

Figure 5 Presence of Care Recipient, and Relationship to Participant

									(70)
		Presenc reci	e of care pient	Relationship to participant				nt	
		Sample size	Yes	Yes Sample Spouse Own Own father moth				Spouse's father	Spouse's mother
1997 total		1008	6.5	66.0	3.0	22.7	57.6	3.0	12.1
1999 total		1024	6.6	68.0	5.9	11.8	54.4	1.5	10.3
1042 47	1997	294	5.8	17.0	5.9	47.1	29.4	-	17.6
1945 - 47	1999	296	6.4	19.0	-	21.1	63.2	-	15.8
1029 12	1997	300	7.0	21.0	-	19.0	76.2	4.8	4.8
1930 - 42	1999	305	8.9	27.0	7.4	11.1	55.6	-	7.4
1022 27	1997	414	6.8	28.0	3.6	10.7	60.7	3.6	14.3
1955 - 57	1999	423	5.2	22.0	9.1	4.5	45.5	4.5	9.1

By age, in the youngest cohort, the percentage of cases in which the participant's mother is a care recipient has more than doubled, from 29.4 percent to 63.2 percent. Most of these parents were born in the 1920s; for older parents, the percentage needing care has decreased.

In the oldest cohort, the need for care is shifting from parents to spouses. Spouses account for 9.1 percent of care recipients, up from 3.6 percent in 1997. Thus in the 15-year age spread of the participants, we find that participants in their 50s need long-term care for their parents, while those in their mid-60s are starting to need it for themselves. 70 percent of care recipients receive care at home, with the spouse being the main caregiver over 70 percent of the time. These figures remain largely unchanged (Figures 6 & 7). Moreover, in the youngest cohort, the spouse is the main caregiver in 90 percent of the cases. Since this cohort has a high employment rate, the spouse is responsible for providing care at home.

Women are said to experience care three times in their lives — they give care to their parents, then to their husband, and finally receive care themselves. Our survey results strongly confirm this pattern.

				(%)
		Sample size	Self	Spouse
1997 total		66	12.1	72.7
1999 total		68	19.1	77.9
10/2 /7	1997	17	-	76.5
1943 - 47	1999	19	-	94.7
1029 12	1997	21	9.5	71.4
1930 - 42	1999	27	33.3	63.0
1022 27	1997	28	21.4	71.4
1933 - 37	1999	22	18.2	81.8

Figure 6 Primary Caregiver

Figure 7	Where	Care	Recipient	Receives	Care
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(%)

		Sample size	Home	Hospital	Elderly facility	Other
1997 total		66	77.3	16.7	12.1	-
1999 total		68	75.0	22.1	7.4	1.5
1042 47	1997	17	88.2	5.9	5.9	-
1943 - 47	1999	19	63.2	26.3	15.8	-
1029 12	1997	21	71.4	19.0	19.0	-
1938 – 42	1999	27	85.2	18.5	3.7	-
1022 27	1997	28	75.0	21.4	10.7	-
1355 - 57	1999	22	72.7	22.7	4.5	4.5

(3) Employment Situation in the Weak Economy

The percentage of participants who are employed and receive earned income fell from 80.9 percent in 1997 to 73.2 percent in 1999. By age cohort, the decline is largest for the middle cohort, falling from 93.1 to 78.8 percent. Considering that this cohort was age 55 to 59 in 1997, and 57 to 61 in 1999, the employment rate is still quite high by international standards. Indeed, although the rate for the oldest cohort declined, over half (57.1 percent) are still working (Figure 8).

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		Sample size	Employment rate of husbands	Sample size	Employment rate of wives
1997 total		1034	80.9	978.0	54.2
1999 total		1034	73.2	974.0	48.3
10/2 /7	1997	299	95.3	277.0	61.4
1943 - 47	1999	299	90.6	274.0	62.4
1029 12	1997	306	93.1	297.0	56.9
1930 - 42	1999	306	78.8	297.0	49.5
1022 27	1997	429	62.0	404.0	47.3
1933 - 37	1999	429	57.1	403.0	37.7

Figure 8 Employment Rate of Husband and Wife

In the period between the two surveys, the failures of major financial institutions such as Hokkaido Takushoku Bank and Yamaichi Securities. While the economy's jobless rate rose in this period, the percentage of survey participants who lost their jobs also rose from 2.8 to 5.6 percent. Increases are seen in all age cohorts, indicating that corporate payroll adjustments have affected a broad age range of older employees (Figure 9). By industry, employment rates of participants declined in construction, manufacturing, public utilities, finance and insurance and real estate.

				(70)
		Sample size	Yes	No
1997 total		1034	2.8	93.3
1999 total		1034	5.6	94.2
10/3 - 17	1997	299	2.3	95.3
1943 - 47	1999	299	4.0	96.0
1029 12	1997	306	3.3	94.1
1930 - 42	1999	306	6.5	93.5
1033 - 37	1997	429	2.8	91.4
1300 - 07	1999	429	6.1	93.5

Figure 9 Experience of Loss of Employment

The employment rate among spouses also declined from 54.2 percent in 1997 to 48.3 percent in 1999. However, differences emerge based on the husband's age cohort. The oldest cohort's spouses, who are approximately 60 years old, saw a 10-percent decline in their employment rate from 47.3 to 37.7 percent. Most jobs held by spouses are part time jobs (33.6 percent), while their husbands are mostly regular company employees (33.8 percent). But among men aged 60 or older, the percentage of part-time workers increases to 16.3 percent, equaling that of regular company employees (Figure 10).

Figure 10 Type of Employment of Participant and Spouse

			Participant		Spouse			
		Sample size	Sample Regular size employee Part-time			Regular employee	Part-time	
1997 total		836	37.8	3.6	531	21.3	32.6	
1999 total		757	33.8	7.5	470	18.3	33.6	
1042 47	1997	285	51.9	0.7	169	22.5	36.7	
1943 - 47	1999	271	49.4	1.5	171	22.2	38	
1029 12	1997	285	42.1	0.7	170	25.3	28.8	
1930 - 42	1999	241	34	5.4	147	17	32	
1022 27	1997	266	18	9.8	192	16.7	32.3	
1933 - 37	1999	245	16.3	16.3	152	15.1	30.3	

17

(0/)

(%)

Thus with regard to the employment of older persons, our surveys reveal that the employment rate remains high among persons in their 50s, but starts declining at age 60. In addition, amid the economic recession, layoffs have drastically affected persons in their 60s. While limited efforts are being made to promote the employment of older persons by retaining and rehiring, our surveys so far show no sign of improvement.

(4) Socioeconomic Conditions Increase Anxiety in Daily Life

With regard to the anxieties of daily life including long-term care, household finances, and retirement life, we found several areas of heightened anxiety. The most pronounced increases in anxiety are for financial difficulty in retirement life, own unemployment or that of a family member, need for long-term care for spouse, and inability to keep up with technological changes (Figure 11).

The results indicate that rapid advances in information technology including cell phones and personal computers, combined with the uncertain prospects for the economy, have directly impacted the anxiety level of older persons.

			(70)
Concern	1933 – 37	1938 – 42	1943 – 47
Own death puts burden on family	0.02	0.10	0.01
Own illness or accident	-0.11	0.00	0.05
Illness or accident in family	-0.05	-0.07	-0.03
Need care for self	-0.06	0.04	-0.02
Parents need care	0.01	0.05	0.07
Spouse needs care	-0.13	-0.13	-0.08
Financial hardship after retirement	-0.15	-0.19	0.03
Unemployment of self or family member	-0.16	0.10	-0.14
Financial hardship due to loan repayment	-0.01	0.13	0.07
Insufficient accumulation of assets	-0.16	-0.06	-0.01
Difficulty with technological advances	-0.24	-0.12	-0.17
Loss of family cohesiveness	-0.14	0.01	-0.12
Difficulty in relationship with friends	-0.10	-0.04	-0.08

Figure 11 Increase in Anxiety from 1997 to 1999 by Concern

(0/)

Note: Negative values indicate increased anxiety.8

5. Social Changes and Changes in Daily Life

In examining the daily life of middle and old-aged persons from a life course perspective, we found that the cohorts surveyed have the following characteristics: their lifestyle is based on a sexual division of labor established in the postwar period, and the support and care for elderly parents occurs at home and is primarily done by the spouse. Thus they exhibit the traditional pattern of taking care of the parents who raised them. For this reason, survey participants are more apprehensive about needing long-term care for their spouse than for themselves.

In addition, we found that economic worries over the past two years including the increase in layoffs, financial system instability, and the weak economy have affected their daily life. The employment rate of persons in their 60s has declined, and a growing proportion are concerned about their financial condition in retirement. Amid ongoing employment adjustments, public pensions are crucial for financial security after retirement. But while the oldest cohort already relies on pension benefits and has strong expectations toward public pensions, the youngest cohort strongly believes that public pensions are unreliable (Figure 12).



Figure 12 Opinion Regarding Reliability of Public Pensions

The youngest cohort still has major expenses ahead including those for their children's education and wedding. The fact that their public pension causes anxiety clearly has negative implications for consumption and the economy. Herein lies a key reason that the social security system must be intimately tied to demographic, economic, and social changes.

This report analyzed changes in daily life among the three age cohorts. While the maximum age difference of participants is 15 years, we observed clear differences among the cohorts that can be attributed both to aging and to cohort characteristics. Thus while it may be convenient to lump together all older persons, we need to recognize that in fact they are quite diverse.

In the next report, we present a more detailed analysis of the employment situation and draw implications for constructing a social infrastructure for the aging society.

Notes

- The present research is successor to the *Research Study of Family Changes in Japan* (1996) by NLI Research Institute. Guidance and advice were provided by the following: Prof. Kanji Masaoka, Waseda Univ.; Prof. Junko Fujimi, Taisho Univ.; Prof. Yoshio Higuchi, Keio Univ.; Prof. Shinji Nozawa, Meiji Univ.; Prof. Naoko Shimazaki, Waseda Univ.
- 2. In the panel study method used, the first survey was conducted in 1997, and the same survey participants will be surveyed again every two years for a ten-year period. The third survey is scheduled later in 2001.
- 3. The research team consists of Kishida, Takeishi, Ono, Matsuura, and Itotani. Ono and Itotani track changes in household finances, and Takeishi and Matsuura changes in employment.
- 4. See *Life Course Theory*, (in Japanese) T. Okubo and N. Shimazaki, eds., Hoso Daigaku Kyoiku Shonkokai, 1995.
- 5. See *The Life Course: A Sociological Perspective*, by John A. Clausen, Prentice Hall, 1985. See also, *Sociology of Life History*, (in Japanese) T. Nakano and A. Sakurai, eds. Kobundo, 1995.
- 6. In area sampling, sampling locations are chosen through random sampling, and persons are then selected who live the area and meet the necessary conditions. We chose this method over random sampling of public registries, which may be suitable in terms of ensuring randomness, but has the problem of restricted access in many localities, and is also extremely expensive. The 15 blocks are as follows.

Hokkaido Tohoku (Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima) Tokyo (prefecture) Capital area excluding Tokyo (parts of Chiba, Saitama, Kanagawa, Ibaraki) Kanto excluding capital area (non-metropolitan Tokyo areas of Gunma, Tochigi, Yamanashi, Chiba, Saitama, Kanagawa, Ibaraki) Hokuriku (Niigata, Toyama, Ishikawa, Fukui) Chukyo (parts of Aichi, Gifu, Mie) Non-Chukyo (non-Chukyo areas of Shizuoka, Nagano, Aichi, Gifu, Mie) Osaka (prefecture) Keihanshin excluding Osaka (Keihanshin areas of Nara, Kyoto, Hyogo) Non-Keihanshin (non-Keihanshin areas of Shiga, Wakayama, Nara, Kyoto, Hyogo) Chugoku (Tottori, Shimane, Okayama, Hiroshima, Yamaguchi) Shikoku (Tokushima, Kagawa, Kochi, Ehime) Kita Kyushu (Fukuoka, Nagasaki, Saga, Oita) Minami Kyushu (Kumamoto, Miyazaki, Kagoshima, Okinawa)

- 7. Cohort refers to a group of individuals having a statistical factor in common such as age, year of birth, employment, etc.; for example, a particular age group such as the baby boomers. We chose to define cohorts by year of birth after analyzing the survey results. Otherwise, it generally refers to a generation. See *The Compact Dictionary of Sociology*, (in Japanese) Yuhikaku, 1997.
- 8. To obtain change in level of anxiety, we assigned from 1 point (not anxious) to 5 points (very anxious) to the responses, averaged the scores, and subtracted 1999 scores from 1997 scores.