

International Handbook of Population Aging

International Handbooks of Population

Volume 1

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Editor

International Handbook of Population Aging

 Springer

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Introduction

Peter Uhlenberg

The classic handbook of population, *The Study of Population* edited by Philip Hauser and Otis Dudley Duncan, was published in 1959. As described on the dust jacket, this book was "...an encyclopedic summary of the field of demography, ranging from its historical beginnings to promising subjects for its future study..." Not only was "population aging" not included as the title of one of the 28 chapters in this encyclopedic volume on demographic knowledge but the term was not even included in the index. Demographers at that time did, of course, understand the determinants of a population's age distribution and a discussion of this topic was included. But population aging was simply not an issue of much interest at a time when the world population was still young – the number of children under age 15 in 1960 was 7 times larger than the number of people over age 65 and the number under age 5 was 22 times the number over age 80. Even in Northern and Western Europe in 1960, where the demographic transition was most advanced, there were twice as many children under age 15 as there were people over age 65.

But decreasing fertility and increasing life expectancy after 1960 altered the ratio of young to old in the world population and population projections to 2050 suggest that global population aging will progress rapidly in coming decades. The most dramatic population aging is occurring among populations with sustained very low fertility rates. In Southern Europe, which has become the region of Europe with lowest fertility in recent decades, the number of people over age 65 exceeded the number of children under age 15

by the beginning of the twenty-first century and projections show that by 2035 there will be twice as many over age 65 as under age 15. In Italy and in Japan, where extraordinarily low fertility is persisting, projections indicate that by 2050 there will be three times as many people over age 80 as children under age 5. Although population aging is progressing at different paces in different parts of the world, significant population aging is expected in every region of the world in coming decades. The emergence of global population aging as one of the most important demographic trends in the world today has stimulated scholars to give increasing attention to its social, political and economic implications. Indeed, research in the area of population aging has now progressed to such an extent that it seems timely to offer an international handbook focused on the demography of aging.

The United Nations' 2007 edition of *World Population Ageing* (<http://www.un.org/esa/population/publications/WPA2007/wpp2007.htm>), identifies four salient aspects of global population aging. First, population aging is unprecedented in human history. Throughout almost all of world history the old made up less than 5 percent of the population in any country and in no region of the world did older people ever comprise more than one-tenth of the population before 1950. Second, population aging is pervasive, now affecting nearly every part of the world. Even in the less developed regions of the world, the per cent of the population aged 65+ is projected to triple between 2000 and 2050 (from 5 percent to 15 percent). Third, population aging is enduring – there is no serious prospect of future reversals of the population aging now occurring around the world. Fourth and most important for this volume, population aging has profound consequences. The chapters in this handbook offer

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state-of-the-art overviews of research on many of the profound consequences and implications of population aging.

The chapters in *Part I* focus on three basic population aging issues that are foundational for the chapters that follow. Joshua Goldstein begins this discussion by addressing why, from a demographic perspective, populations age. This involves first identifying how population aging is measured and then explicating how specific changes in demographic behavior determine changes in population age distribution. The second issue concerns the empirical data available to study population aging. An overview of the population data available and a variety of issues related to analyzing these data are covered in the chapter by Markus Schafer and Kenneth Ferraro. Donald Rowland completes this overview section with an essay on the broad historical development of global population aging and on future prospects for population aging. In complimentary ways, chapters 1 and 3 both discuss the relationship between the demographic transition and population aging.

Part II explores the extent of population aging in several different areas of the world and the most salient issues related to population aging in each of these areas. Ten countries or regions were selected for special attention in this section. Three of these regions are in Europe, where significant population aging first occurred. Countries in Southern Europe have experienced extraordinarily rapid aging in recent decades and now have some of the oldest populations in the world. Cecilia Tomassini and Giovanni Lamura review what is happening here, with special emphasis on Italy. The Nordic countries (Gerdt Sundstrom) were among the first to experience population aging and represent societies in which strong welfare states have given a great deal of attention to policies related to needs of older people. A still different pattern of population aging is seen in Russia and Eastern Europe (Natalia S. Gavrilova and Leonid A. Gavrilov), where populations are declining in size and where old-age welfare systems were radically altered as a part of the restructuring that occurred when the Communist regimes fell.

Three other countries receiving special attention are in Asia. Japan (Naohiro Ogawa, Rikiya Matsukura, and Maliki) has the oldest population of any major country today and is expected to maintain that place in coming decades, as it continues to age rapidly. China (Feinian Chen and Guangya Liu) is of great interest to

demographers, not only because it has the largest population of any country (1.3 billion) but also because the government has played such a pivotal role in its demographic transition. The precipitous drop in fertility following implementation of the one-child policy will lead to unparalleled population aging in China over the first half of the twenty-first century. Finally, an interesting comparison of different paths to population aging is provided by examining developments in South and North Korea (Dudley L. Poston and Mary Ann Davis).

Despite the enormous amount of attention given to population aging in the United States, the United States actually has a younger population than other highly developed countries. Reasons for this are made clear in the chapter written by M.E. Hughes and Tracey LaPierre on population aging in Canada and the United States and comparisons between these two neighboring countries reveal some important contrasts.

The final three regions included in this section have not yet experienced rapid population aging but merit attention in order to fill out the global nature of population aging. Population aging in Mexico and Latin America (Rebeca Wong and Alberto Palloni) will accelerate in coming decades and in many areas this will occur in the context of weak economies and high levels of inequality. Compared to other regions of the world, the populations of West African countries (Isabella Aboderin) are expected to remain relatively young in the coming decades. Still, major demographic and social changes are occurring in West Africa and these changes have significant implications for the well-being of older persons in this region. Finally, Kathryn M. Yount and Abla Sibai review research in Arab countries, where concern with aging issues is only recently emerging and where support for older people is still viewed primarily as a private matter.

Part III contains four chapters examining different aspects of the relationship between population aging and migration. Don Bradley and Charles Longino note that although older people are less likely to move than younger adults (i.e., most people “age in place”), there are a number of interesting questions related to post-retirement migration. They give special attention to how cohorts entering old age in coming decades (the “baby boomers”) may have different later life mobility patterns than those that preceded them. Both historical and contemporary patterns of international retirement migration are discussed in the chapter by Tony

Warnes. He shows how the freer global movement of capital and people produces great diversity in types of international migration among retirees. Although most international migrants are not old at the time of migration, they often grow old in the country to which they immigrated. Judith Treas and Jeanne Batalova discuss issues related to this aging of immigrants and how the later life well-being of immigrants might be affected by recent changes in international migration patterns and by migration policies. Finally, Charles Keely writes a historically informed chapter on “replacement migration” – the extent to which international migration can be used to counter the effects of fertility and mortality rates on population age distributions.

Part IV focuses on economic and labor force challenges created by population aging. Perhaps no population aging issue has received more attention than the future viability of social security programs. Diane Watts-Roy and John Williamson survey public old-age pension programs in a number of countries and discuss how countries differ in responding to the challenge of funding these programs when there is a changing ratio of retirees to workers. In addition to public pensions, private pensions are also an important source of income for older people in many developed countries. Angela O’Rand, Donald Ebel and Katelin Isaacs provide a comparative perspective on how private pension programs fit into old-age income strategies and how private pension programs are currently changing. Reliance on pension income could, of course, be reduced if workers exited the labor force at later ages. Historical trends in labor force participation at older ages and prospects for significantly extending the average work life are discussed by Sara Rix. The flip side of labor force participation in later life, retirement, is the focus of David Ekerdt’s chapter. He considers not only the social, economic and political forces that shape retirement patterns but also the meaning of the retirement stage of the life course for members of a society. Because older people differ in the amount of income they receive from public pensions, private pensions and continuing to work, as well in value of their assets, there is substantial inequality in income within the older population. Melissa Hardy reviews both the empirical and theoretical literature dealing with income inequality in later life and shows how a life course perspective provides insights into sources of inequality.

Part V deals with changing patterns of longevity and health in later life. Robert Hummer, Richard Rogers, Ryan Masters and Jarron Saint Onge examine causes both of the large declines reported in mortality at older ages in recent decades and of the persistent differentials found in late life death rates. Sarah Laditka and James Laditka review the growing literature on active life expectancy, where the crucial question is whether the years of life added by declining mortality are lived in a healthy or unhealthy state. Central to the concept of active life expectancy is the age pattern of disability in a population. Both theoretical and empirical discussions of this topic are included in the chapter on demography of disability by Scott Lynch, J. Scott Brown and Miles Taylor. Finally, Pamela Herd examines in depth an issue introduced in the three preceding chapters – the relationship between social class, health and longevity.

The challenges of meeting the health care needs of aging populations probably receive as much research and policy attention as the challenges related to funding social security programs. The chapters in *Part VI* consider three facets of providing health care for the elderly. Stephen Crystal and Michele Siegel examine health care policies in a variety of countries, as well as the relationship between population aging and national health costs. Edward Norton and Sally Stearns critically review what is known about end of life health care expenditures under changing demographic conditions. However, national health care expenditures do not fully reflect the extent of caregiving because they do not consider the value of the extensive caregiving provided by kin. The chapter by Emily Agree and Karen Glaser fills in this void as it covers the demography of informal caregiving.

Population aging has important implications not only for old age income and health care but also for the structure of social relationships in later life. Several aspects of aging and social relationships are covered in *Part VII*. The demographic forces that produce population aging also produce changes in the composition of families and kin networks. Pearl Dykstra compares rates of childlessness across societies and through time and explores the implications of being childless in old age in different settings. Linda Waite focuses on demographic change and marital status in old age and on the relationship between marital history and well-being. The final chapter in this section, written by Deborah

Carr and Susan Bodnar-Deren, explores gender differences in the experience of widowhood.

Part VIII consists of two concluding chapters dealing with the future of aging. Jay Olshansky and Bruce Carnes look at the historically unprecedented increase in life expectancy over the past one hundred and fifty years and ask whether we should expect the same trend in increasing longevity to persist through the twenty-first century. In the final chapter, Dale Dannefer and Robin Shura consider the highly significant issue of the cultural meaning of age and old age in modern societies. As older people become an increasingly large proportion of the population, will past tendencies toward age segregation and marginalization of elders be reversed?

A remarkable shift occurred between 1960 and the present in population issues considered most salient and problematic. In the 1960s the “population explo-

sion” drove a great deal of demographic research and led alarmists to predict dire global consequences of unprecedented rates of population growth. But as fertility rates plummeted in the last half of the twentieth century, attention shifted to a new demographic phenomenon – “graying of the population”. Again, there is a spate of alarmist writing, this time warning about the perils of population aging. The writers of the chapters in this handbook do not portray population aging as a crisis. However, they do recognize that there are profound global implications of the population aging now occurring. An aging world presents human societies with both challenges and opportunities. A starting place for responding to these is an understanding of what is occurring. The chapters in this handbook provide an exceptional overview of what is known about population aging and its implications and the issues that future research will need to address.