

**Appendix 1**

**Project description**

**Panel Database for Elder Research in Denmark  
4. Round - 2012**

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FSE is here applied for a share of the costs for the 4<sup>th</sup> round of the longitudinal panel database for elder research in Denmark. Already the Danish Parliament has granted 3. mio. DKK through the so called “satspuljemidler” in connection with the general bill of finance for 2012.

## **1. Field of Research**

The longitudinal database for elder research was established in 1997 with the overall purpose of providing a base for research on the elderly population within social science and humanities and to some extent social medicine within primarily three fields:

- Older people's functional ability, well-being and living conditions and lifestyle (everyday life), including older peoples experiences with loneliness.
- Older people's working conditions, especially retirement and work environment and the elderly as a resource in the labor market.
- Older people's use of public services and receipt of transfer income.

In relation to these broad research fields the database has the overall objective to contribute to conduction of five main types of analyses:

1. Age related changes, meaning changes for a given birth cohort with increasing age.
2. Generational differences, ie differences between people of the same age but born in different time periods.
3. Cross-sectional differences, ie differences in disability, welfare and living conditions between different birth cohorts at a given time.
4. Reasons why and when certain events or certain behavior occurs (eg retirement, relocation, widowhood, loneliness, etc.).
5. Effects of certain events or conditions (eg, retirement, relocation, widowhood, loneliness, etc.).

This database for elder research differs from other existing databases by having a strong focus on social networks and social relationships on psychological well-being, on the consumption of public care and care services, on preferences in terms of housing, on retirement and retirement pension issues and processes around retirement. The database is unique in that these issues can be analysed in combination with registry data. Furthermore, the database comprises a sufficiently large number of individuals to give possibilities for research within a wide range of research topics.

## **2. Quality and relevance of the database**

The survey of older people aged 52 years and older has so far been carried out in 1997, 2002 and 2007. The database contains panel data. All respondents in all rounds are sought re-interviewed in subsequent rounds. To the extent that it has not been possible to interview participants from the previous rounds, the sample is supplemented with new persons within each of the participating cohorts.

The database is specially constructed to illustrate relationships between conditions in middle age

and conditions in old age. In the first round in 1997 the sample was drawn among individuals who were born in 1920, 1925, 1930, 1935, 1940 and 1945. A sample of a total of 5,865 persons was interviewed when the respondents were respectively 52, 57, 62, 67, 72 and 77 years of age. It is the plan to re-interview this population every five years. In 2002 the sample comprised surviving respondents from 1997 (total 4.634) and a new cohort of people born in 1950 (a new cohort of 52-year-olds). The other cohorts were supplemented with new persons in order to ensure a sufficient number of respondents for future updates. A total of 8,200 interviews were completed in 2002 when the oldest cohort had become 82 years of age.

In 2007 interviews were achieved with a total of 7,010 respondents from the surveys in 1997 or 2002. A cohort born in 1955 was added and the other cohorts were supplemented with additional randomly sampled persons. In total 9,633 interviews were completed in 2007, of which were 226 immigrants from non-Western countries, who entered the sample by a double chance of being drawn from the population register.

By now the survey data base include 13,075 persons, who have participated in the three rounds this way:

Only 1997	1,160
1997+2002	1,267
1997+2002+2007	3,367
1997+2007	70
Only 2002	1,015
2002+2007	2,558
Only 2007	3,638
In all	13,075
In all 1997	5,864
In all 2002	8,207
In all 2007	9,633

It is in 2012 the plan to carry out a new 4<sup>th</sup> round of the survey with a gross sample of approx. 13,500 persons consisting of surviving respondents from previous rounds supplemented with a new sample from the cohort of 52 year olds born in 1960. Furthermore, the sample of the other cohorts will be supplemented to compensate for loss and thus to ensure the future database. The sample will, as in 2007, include people with permanent residence in Denmark who are not Danish citizens, including 824 immigrants from non-Western countries. Like in 2007 immigrants from non-Western countries belonging to the selected cohorts will be oversampled in order to achieve a more substantial number of completed interviews representing this group.

The interviews will be conducted in autumn 2012, which is the time of year when the previous rounds of interviewing took place. The panel requires that the questionnaire largely remain constant at each round and that the necessary revisions and adaptations are implemented with care. This revision will take place in first half of 2012.

Like in 2002 and 2007 interviews will be carried out by telephone, but where telephone interview is not feasible interviewing will be completed by visit. Data ready for analyses will be available to all researchers and other interested in spring 2013 by the Centre for Survey and Survey/Register data (CSSR).

### **3. Theoretical foundation and variables**

The database is designed to cover the above mentioned three overall purposes:

*Older people's functional ability, well-being and living conditions and lifestyle (everyday life), including older peoples experiences with loneliness.*

Functional ability is understood broadly as encompassing physical, mental, emotional and cultural ability to cope with demands and situations in everyday life. The same applies to the word well-being, which expresses the subjective experience of a given situation and its relationship to the surroundings. Living conditions and lifestyle refers to conditions such as socioeconomic position, housing, local area characteristics, social contacts, activities, and leisure activities. Empirical studies have shown that some elderly are benefitting from continuous good living conditions, while others (fewer) are accumulating negative living conditions indicating a tendency to polarization among the elderly

*Older people's working conditions, especially retirement and work environment and the elderly as a resource in the labour market.*

The database provides possibilities to analyse the various factors that might explain expected and actual retirement age, including income before and after retirement, wealth, health, family, education, leisure time activities, social relationships and working conditions. Also information about the situation of the spouse in relation to work, retirement and pensions is covered in some detail.

*Older people's use of public services and receipt of transfer income.*

As a general framework it is assumed that older people's consumption of public social and health care services is a function of the interaction between health and functional ability, social relations and mental resources. Need for services is triggered mainly by poor health and impaired functionality, which has some age related ad physical preconditions, but the need for public services relies as well on an interaction with mental health resources and social relations and resources (eg family, social networks, work / activities , economics).

To cover the overall research areas the following topics are included in the questionnaire:

- Gender, age, marital status and household
- School education and vocational education
- Labour market position most of life
- Housing and housing costs
- Access to facilities in the local residential area
- Housing preferences
- Functional ability, disability, self-rated health and memory
- Social network

- Activities in and outside the home
- Loneliness and mental wellbeing
- Employment status
- Attitudes towards work and retirement
- Economic situation, retirement pensions, wealth
- Work environment and working conditions
- Need for help
- Caring relationships in the informal social networks
- Home help and home care, use of aids and appliances, use of day centers.

*The situation of older people among the immigrant population from non-Western countries*

The proportion of elderly people with different ethnic background than Danish is to grow hastily in coming years. This makes it relevant to put special focus on current living conditions of his group compared with ethnic Danes, including expectations for their situation in old age. Like in 2007 in order to achieve a more substantial number of interviews the sample will be drawn with at double chance for this group to be elected.

#### **4. Relevance of the database to the participating research environments**

The Elderly panel database is exploited by a number of different research environments in Denmark, and the list of scientific publications by Danish researchers wholly or partly based on the database is hastily increasing (see appendix 2).

The network of research environments exploiting the panel database for elderly research (See appendix 3) comprise researchers that already have utilized the data or are planning to make further use of the data. However, the list is to be considered preliminary, as we might not have knowledge about projects exploiting the database.

At SFI - The Danish National Centre for Social Research, the following research projects are ongoing based on this database:

*Disability and old age - a contradiction in social policy.?* The VELUX Foundation has supported a project at SFI on transitions between disability and aging. The project will look at how life is lived for the disabled who are getting older and the elderly who are getting disabled to reveal the challenges that the demographic trends creates for the welfare state. What individual, social and legal definitions are used to distinguish between disability and normal aging weakness, and is there a difference in the expectations to social rights and obligations between the disabled and the weakened elderly? Professor Tine Rostgaard, University of Aalborg has a part in this project.

New ways of ageing. Financed by Ministry of Social Affairs, this project investigates developments in ageing in Denmark for different generations of elderly and over the years. The project looks into how the life story and life style of the individual affects the situation in older age and thus give an indication of how future care needs will appear for the elderly. This project is carried out by Scientific assistant Heidi Hesselberg Lauritzen.

Based on data from this database, AKF has conducted research that sheds light on, among other things, which factors play a role when the elderly consider moving and when they actually do move. AKF has also researched what moving means for the well-being of the elderly.

## **5. Access to all data free of charge**

Survey data from all rounds of the database are available for other researchers and for educational purposes or for anyone else interested in the data. The new round of data to be collected in 2012 will be made available immediately after the data collection has been completed.

In 2007 SFI received a grant from FSE to provide a free on-line access to the data on the SFI website using the software Nesstar, which is used as well by international surveys like the European Social Survey. Here the data was made available for simple on-line analyses or for downloading of the whole or part of the database. SFI did have the necessary licenses from the Norwegian Social Science Data Service for the years 2008-2011, but has by now ceased to provide this service as the free access to data are about to be made available through the Centre for Survey and Survey/Register data (CSSR).

CSSR offers access to Danish surveys, including all rounds of the Panel database for Elderly Research, through two main channels:

- 1) CSSR Open Access Databank, which offers easy access to leading Danish surveys, using the Nesstar solution. This part of the databank is open to students, journalists, researchers and others with an interest in surveys on social affairs and health.
- 2) CSSR Survey/Register Databank, which provides access to survey data linked to relevant register information. This service is provided in collaboration with Statistics Denmark and is only available to academic researchers who are affiliated with a Danish academic institution.

To encourage international co-operation between researchers all documentation around the CSSR databanks are made available in English. CSSR has in 2011 granted an amount of 100,000 DKK for the translation into English of necessary documentation around the first three rounds of the Panel Database for Elderly Research: questionnaires, variable names, labels and formats, documentation concerning data collection etc. Access to the database through CSSR will be available in March 2012. The new 4<sup>th</sup> round of the database will be made available as soon as data collection has been completed.

## **Appendix 2**

### **Network of research environments using the Panel database for Elderly Research**

*SFI - Det Nationale Forskningscenter for Velfærd* v. bl.a. Seniorforsker Torben Fridberg, Seniorforsker Mona Larsen. Ph.d. studerende Michael Jørgensen, Videnskabelig assistent Heidi Hesselberg Lauritzen

*Institut for Økonomi, Politik og Forvaltning, Aalborg Universitet* v. bl.a. Professor Tine Rostgaard.

*Institut for Sociologi og Socialt Arbejde, Aalborg Universitet* v bl.a. professor Lisbeth B. Knudsen og professor Tine Rostgaard.

AKF, Anvendt KommunalForskning v. bl.a. docent Eigil Boll Hansen



## Appendix 3

### **Preliminary list of publications by Danish researchers wholly or partly based on the Panel database for Elderly Research.**

February 2012

(Not included: "Specialeopgaver" og other theses worked out by students.)

Amilon, Anna: *Danskernes forventninger til pension*. SFI – Det Nationale Forskningscenter for Velfærd, 08:01

Arendt, Jacob Nielsen, Eigil Boll Hansen, og Thomas Kvistholm Thrane (2002): *Ældres funktionsevne og offentlige social- og sundhedsudgifter*. AKF forlaget.

Arendt, Jacob Nielsen, Eigil Boll Hansen, og Thomas Kvistholm Thrane (2002): Kan forbedringer i ældres levevilkår lette forsørgerbyrden? *Nationaløkonomisk Tidsskrift*. 140(3), s. 1-23.

Arendt, Jacob Nielsen. (2003): *Betydningen af indkomst for folkepensionisters levevilkår og velbefindende*. København: AKF forlaget.

Arendt, Jacob Nielsen, Eigil Boll Hansen, Henning Olsen, Martin Rasmussen, Jeanet Bentzen og Brian Rimdal (2003): *Levekår blandt folkepensionister uden supplerende indkomst*. København: Socialforskningsinstituttet, publikation 03:15.

Arendt, Jacob Nielsen (2005): Income and "outcomes" for elderly: Do the poor have a poorer life? *Social Indicators Research*, 70, 3.

Bentzen, Jeanet (2003): *Sociale relationer og helbred – Er de ensomme meget ensomme, og er der sammenhæng mellem ensomhed og sygdom?* København: Socialforskningsinstituttet. Arbejdsrapport 08:2003.

Bjørn, Niels Henning & Mona Larsen (2003): Tilbagetrækning udskudt. *Social Forskning - Nyt fra Socialforskningsinstituttet* 2003:2, s. 14-15.

Bunnage, David og Hans Helmuth Bruhn (1999): *De unge ældre i år 2010*. København: Socialforskningsinstituttet, publikation 99:2.

Gottschalk, Georg, Eigil Boll Hansen og Maria Gleerup (2005): *Ældres flytteovervejelser og faktiske flytninger. Hvad fremmer og hvad hæmmer flytninger? – en analyse blandt 50-80-årige i 1997-2002*. København: AKF, Arbejdsrapport.

Gottschalk, Georg, Eigil Boll Hansen og Kræn Blume Jensen (2007): Får ældre det bedre af at flytte? *Gerontologi*, 23(1).

Hansen, Eigil Boll & Merete Platz (2006): *Portrætter af gamle ensomme – gør boligen en forskel?* Videnscenter på Ældreområdet.



Hansen, Eigil Boll & Georg Gottschalk (2006): What Makes Older People Consider Moving House and What Makes Them Move? *Housing, Theory and Society*, Vol. 23, No. 1, 34-54.

Jensen, Kræn Blume (2005): *Is there a relation between residential mobility and well-being among elderly people?* AKF, Working paper 2005(6).

Jæger, Mads Meier og Anders Holm (2004): *How stressful is retirement? New evidence from a longitudinal fixed-effect analyses.* CAM Centre for Applied Microeconometrics, Institute of Economics, University of Copenhagen. Working paper 2004-19.

Jørgensen, Michael: *Danskernes indbetalinger til pension – Hvordan påvirker tilknytningen til arbejdsmarkedet de fremtidige pensioner?* SFI – Det Nationale Forskningscenter for Velfærd, 08:11.

Larsen, Mona (2004): *Retaining Older Workers in the Danish Labour Market*, Ph.d.-afhandling, Nationaløkonomisk Institut, Handelshøjskolen i Århus.

Larsen, Mona & Nabanita Datta Gupta (2007): *Identifying the Impact of Health on Individual Retirement Plans Employing a Wide Array of Health Measures.* Copenhagen: The Danish National Institute of Social Research, Working Paper 07:2007.

Larsen, Mona (2008): Does Quality of Work Life Affect Men and Women's Retirement Planning Differently? *Applied Research in Quality of Life*, 3:23-42.

Larsen, Mona and Datta Gupta, Nabanita (2010): The Impact of Health on Individual Retirement Plans: Self-reported vs. Diagnostic Measures. *Health Economics*, 19 (9), 792-813.

Larsen, Mona, Henning Bjerregaard Bach og Lise Sand Ellerbæk (2011): *55-70-åriges forbliven på arbejdsmarkedet. Adfærd, forventninger, aftaler og kendskab til regler.* København: SFI – Det Nationale Forskningscenter for Velfærd 11:13.

Mehlsen, Mimi, Merete Platz og Pia Fromholt (2003): Life Satisfaction Across the Life Course: Evaluations of the Most and Least Satisfying Decades of Life. *The International Journal of Ageing and Human Development*. Vol. 57, no. 3.

Olsen, Henning (2005): *Alderdommens aktive kvinder og mænd - Kvinders og mænds visioner om en aktiv og ligestillet alderdom med særlig henblik på kønsdifferentierede ældretilbud.* København: Socialforskningsinstituttet, Arbejdsrapport 05:2005.

Platz, Merete (2000): *Danskere med livserfaring – portrætteret i tal.* København: Socialforskningsinstituttet, publikation 00:8.

Platz, Merete (2003): Ældredatabasen – En guldgrube af oplysninger – og af høj karat. *Social Forskning - Nyt fra Socialforskningsinstituttet* 2003:2, s. 12-13.

Platz, Merete (2005): *Et ældreliv i ensomhed?* Skriftserien fra Gerontologisk Institut nr. 9. København: Gerontologisk Institut.

Platz, Merete (2005): *Kan ældre mænd holde hus – og gør de det? En undersøgelse af midaldrende og ældre kvinders og mænds huslige gøremål*. Videnscenter på Ældreområdet.

Platz, Merete (2006): *Ældres helbred, selvhjulpethed og velbefindende - en dystre fremtid?* Videnscenter på Ældreområdet.

Platz, Merete (2010): *Ældres helbred og velbefindende 2007 - og udviklingen siden 1997*. Videnscenter på Ældreområdet.

Rasmussen, Martin (2003): *Indkomst og levevilkår for pensionister*. *Social Forskning - Nyt fra Socialforskningsinstituttet* 2003:4.

Rostgaard, Tine & Marta Szebehely (2012): *Changing policies, changing patterns of care: Danish and Swedish home care at the crossroads*. *European Journal of Ageing – Social Behavioural and Health Perspectives*. DOI 10.1007/s10433-011-0209-1.

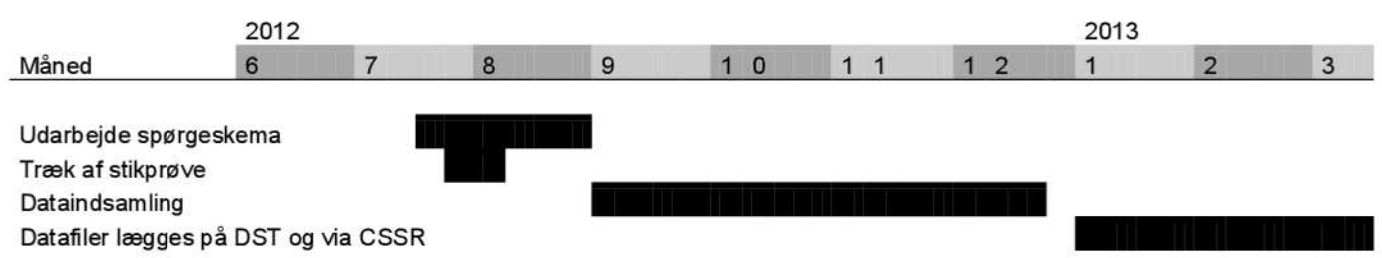
Swane, Christine E. og Eigil Boll Hansen (2003): *Fysisk svækkede ældres hjælp i hverdagen*. *Gerontologi og samfund*. nr. 1.

## Appendix 4

### Time schedule

#### Time schedule

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The data-collection will be carried out by SFI-Survey and will be delivered in January 2013.

