

Reciprocity in intergenerational relationships in stepfamilies

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Introduction

The rising costs of healthcare and other social welfare programmes and the efforts of the federal, state and local governments to reduce services that are provided by governmental agencies have increased the importance of distinguishing personal and familial responsibilities from public (that is, governmental) obligations to dependent individuals. Societal debates about collective, familial and individual responsibility for dependent individuals are not new, but demographic and social changes have made the issue of who will assist dependent family members an increasingly important topic.

Increased longevity and reduced fertility in the past few decades have profoundly affected the structure of families in the United States. Just as in other industrialised nations, life expectancies in the US have been increasing (Vaupel and Kistowski, 2005), which has resulted in more multiple-generation extended families than ever before (Uhlenberg and Kirby, 1998). These multiple-generation families are different than in the distant past, however, because lowered fertility means that there are fewer younger family members to care for greater numbers of older people than was true just a couple of generations ago. Younger adults are therefore likely to have more older kin that potentially need aid, which has fuelled societal concerns about the well-being of older adults.

Unlike many other industrialised nations, the US lacks a comprehensive system of government-sponsored social programmes for its citizens. Although there are a few federal support programmes for older adults (that is, Medicare, which provides funds for health-related needs), and even fewer state programmes that are primarily for low-income older people, for the most part responsibilities for the care and support of older adults have been seen in the US as belonging primarily to families.

The belief that families are obligated to care and support older kin is so widespread that 30 of the 50 states have filial responsibility laws that define which family members are obligated to provide care and what care they are obligated to provide (Bulcroft et al, 1989 **[[not in refs]]**). Critics have argued that these laws and other US social policies about intergenerational care and assistance are based

on the outdated and questionable assumptions that kin networks are unwaveringly emotionally close and loving, families have readily available members to assist older kin and family membership is stable (Hooyman and Gonyea, 1995). These assumptions do not reflect the experiences of many, if not most, families in the 21st century. For instance, families vary in the degree to which members are emotionally involved in each other's lives and, with most adult men and women in the paid workforce, there are fewer families with available kin to provide aid. Moreover, family membership is not always constant; families in the US have experienced decades of structural changes due to divorce, remarriage and cohabitation, and these changes make kinship more ephemeral than in the past.

Although the divorce rate has levelled off after years of increasing (Kreider, 2005), many US families have been and will continue to be affected by divorce and subsequent family transitions. An increasing proportion of older adults have been divorced, and it can reasonably be expected that the number of ever-divorced older people will be higher in the future than it is now (Kreider, 2005; Cornman and Kingson, 1996). Moreover, most divorced people remarry (Kreider, 2005), as do many widowed individuals. Consequently, nearly half of all US marriages are remarriages for one or both partners (US Census Bureau, 2000), and in many of these remarriages one or both partners have offspring from prior relationships. About 17 per cent of minor children reside in a household with a stepparent (Fields, 2001), and approximately 40 per cent of adult women will reside in a remarried or cohabiting stepfamily household as a parent or stepparent during their lifecourse (Bumpass et al, 1995). Many of these individuals will remarry and be in stepfamilies later in life – in 2001, 58 per cent of ever-divorced men and 41 per cent of ever-divorced women over the age of 49 were remarried (Kreider, 2005) – and this number is likely to grow, given extensions in the life span and improvements in the quality of later life.

US policy makers are therefore faced with laws and social policies that are designed for a mid-20th century extended family at a time when multigenerational family structures are becoming increasingly more complex. In addition, it is probable that beliefs and attitudes about intergenerational responsibilities are also more complex than they were in the last century (Ganong and Coleman, 1999). For instance, although most **[[add 'North'?]]** Americans usually agree with the statement that 'adult children should take care of their parents when they get old' (for example Lee et al, 1994), a sentiment suggesting that there is consistency among attitudes and social policy about intergenerational aid and support, researchers have reported far less agreement about intergenerational assistance when individuals are asked to consider real-life contexts (for example Rossi and Rossi, 1990; Ganong and Coleman, 1999). Divorce, remarriage and non-marital repartnering are among the relevant contexts that affect beliefs about intergenerational assistance.

Motives for making intergenerational resource exchanges

Several rationales have been offered to explain why people do or do not make intergenerational transfers of resources. Among them are:

- *A norm of family obligation*: this norm asserts that intergenerational transfers are duties that must be performed because individuals are related to each other (Silverstein et al, 2002). Obligations to help kin exist regardless of other factors, such as resource availability, responsibility for the problem or closeness of the relationship.
- *Altruism based on kinship ties*: evolutionary theory contends that there is a genetic predisposition to care for those with whom one is genetically related (Cheal, 1988). Economists also propose altruism as a motive for intergenerational transfers because it makes the donor happier than alternative uses of those resources would (Becker, 1981).
- *A norm of reciprocity*: this is the belief that children owe debts to their parents that should be repaid when the parents are elderly and in need of aid and the children are grown up (Cheal, 1988; Bengtson et al, 2000). This norm is consistent with exchange theories of relationships, which would propose that middle-generation households transfer resources to their children because they expect some type of reciprocity from their children in the future (*delayed restricted exchange*; Ribar and Wilhelm, 2002). A variation of this reciprocity norm has been called the *downstream strategy of obligation* (Boyd and Richerson, 1989), or the *generational chain of obligations*; in this version of reciprocity norms, adult children transfer resources to older generations because, if they do not, they believe it would be less likely that they themselves will receive support in the future from successive generations. In other words, the middle generation aids the older generations, and for those actions they will be repaid by the next generation of kin.
- *A norm of gratitude*: this is the belief that offspring want to help parents because they are grateful for parents' past help and sacrifices (Brakman, 1995). This norm is contingent on whether or not the parents are deserving of offspring gratitude for their childrearing sacrifices.
- *A moral duty*: in this view, intergenerational resource exchanges must be performed if one is to meet personal or religious moral standards of what a good person should do (Finch, 1989). Intergenerational transfers are made because that is what a moral person does, regardless of whether or not the recipient *deserves* the help.
- *Emotional attachments*: if relationships are emotionally close, then intergenerational transfers are more likely than if they are distant (Cicirelli, 1991).
- *As a function of intergenerational solidarity*: in an early model of intergenerational solidarity, transfers between generations are based on familistic norms, affection, an opportunity structure that facilitates interactions between generations and perceptions that intergenerational exchanges have been reciprocal (Bengtson

and Roberts, 1991). Another early model of intergenerational solidarity proposes that transfers are based on frequent contact, positive sentiments, agreement on values and beliefs, a perceived commitment to meeting family obligations and the opportunity structure for interaction (Rossi and Rossi, 1990).

Most of these rationales for intergenerational transfers are based on the assumption that parents take care of and nurture children when the children are young and helpless, behaviours that elicit aid from the younger generation when they become adults, and the older generation is relatively more dependent. Some of these explanations (that is, *reciprocity*, *altruism* based on kinship ties, *gratitude*, *intergenerational solidarity*) are explicit in asserting that intergenerational transfers of adult children are based on repaying debts to parents for past help. This repayment assumption is more implicit in the *emotional attachment* explanations for intergenerational transfers, but it is present in most of the other explanations. For example, attachments to parents are stronger when children's needs have been met by parents throughout the lifecycle. An adult child who is securely attached to a parent who has been a supportive and loving caretaker is more likely to allocate resources to that parent than a less-securely attached adult will help an unsupportive parent. Only in the *normative family obligations*, *altruism* and *moral duty* arguments is the assumption of reciprocity absent.

Many of these models of intergenerational assistance have been criticised as not recognising inherent ambivalences in intergenerational relationships (Connidis and McMullin, 2002; Ha and Ingersoll-Dayton, 2008). Much of the criticism has been directed toward the intergenerational solidarity and normative family obligations models, but the critique also applies to other explanations.

Divorce, remarriage and intergenerational assistance

Divorce and intergenerational exchanges

Researchers in the US have consistently found that divorced parents and their adult offspring exchange fewer resources with each other than continuously married parents and their adult offspring (for example Amato et al, 1995). Parental divorce, and the parent-child relationships that evolve after separation and divorce, may have the effect of giving adult offspring fewer reasons to help their parents, especially parents who did not live with them when they were children. Reduced contact over time may lead to decisions not to allocate resources to help parents when children reach adulthood and parents reach old age (Cooney, 1994). There is evidence for this in that divorced fathers, who are less likely to have physical custody of children after divorce than mothers, have been found to be less likely to exchange financial support with their children than divorced mothers (White, 1992; Curran et al, 1998). It may be that frequent contact between parents and children following divorce is necessary for there to be feelings of kinship, gratitude,

attachment to the parent, family solidarity and a sense that there are debts to be repaid. Children may be seen as having a lesser debt to repay than they would have had if parents had maintained contact with the child and continued to provide financial, tangible and emotional support to them. Moreover, the desire to help an older parent may be reduced if the definition of kinship is altered when parents divorce (Johnson, 1988). Non-residential parents who have little contact with their children following divorce may not be seen as family members by the children when they grow up. A filial sense of duty to them may be eliminated because of this redefinition (Cooney, 1994).

A few researchers have found that continuously married parents and adult children exchange more resources than divorced parent–child pairs, regardless of the amount of contact between parents and children after the divorce (White, 1992; Aquilino, 1994). Perhaps divorce strains family ties and lowers relationship quality and emotional closeness between parents and children, regardless of residence or frequency of interactions. If so, motivation to exchange resources would be reduced.

Later-life divorce and intergenerational exchanges: there has been relatively little research on the effects of later-life divorce on intergenerational exchanges. One study found that later-life divorce is associated with sons receiving less financial help from parents than daughters (Aquilino, 1994). Motivation to exchange resources across generations may be less affected by later-life divorce, but there is little empirical evidence that has addressed this issue.

Offspring divorce and exchanges: divorce also affects intergenerational transfers between divorced adults and their older parents, although it is not clear if these effects are long lasting or temporary. Research findings on the effects of offspring divorce on resource exchanges have been mixed. Researchers who found that divorced offspring help their parents less than married children speculated that divorced offspring think their parents have fewer needs, feel less filial obligation and perceive more limits to their abilities to help than married offspring (Cicirelli, 1983). The divorce of adult children is thought to increase the demands they make on their parents for aid while reducing their capacities to lend aid to their parents (Spitze et al, 1994). This pattern of exchanges is presumably due to the economic demands of divorce on adult children (that is, greater expenses, working more) and parents' reluctance or unwillingness to request help from them (Johnson, 1988).

However, not all studies have found that divorced children give less help and support to parents than married children (Spitze et al, 1994), nor do divorced children feel less obligated to assist parents (Brody et al, 1994). A relational *continuity perspective* argues that parent–child relationships over the lifecourse are characterised by continuity (Rossi and Rossi, 1990; Spitze et al, 1994). Divorce of offspring may result in temporary alteration in exchange patterns, with parents

helping their children more and adult children helping their parents less, but eventually long-term patterns of exchange resume.

The gender of the divorcing child and the presence of grandchildren are factors that may influence exchanges between generations. Daughters generally maintain contact with parents more than sons; daughters are more likely to have custody of children than sons, so parents and daughters are more likely to exchange resources than are parents and sons (Johnson, 1988; Spitze et al, 1994).

Remarriage and intergenerational exchanges

Remarried parents (White, 1992) provided less support to adult children than parents in first marriages, but remarried mothers gave some types of support as much as married mothers (Amato et al, 1995; Marks, 1995). Remarried mothers also exchanged more with children than remarried fathers (White, 1994a; Amato et al, 1995). Amato et al (1995) found that even though remarried mothers gave as much to adult children as first-marriage mothers, they received less support from children than first-marriage mothers. Reasons offered to explain these findings (see White, 1994a, 1994b) include: differences between remarried adults and adults in first marriages in attitudes about their financial obligations to assist children (Marks, 1995); normative beliefs about intergenerational responsibilities after remarriage (Ganong and Coleman, 1998a, 1998b); and differences in family solidarity. It should be noted that the studies mentioned here focus on adult child–parent relationships in families in which the parental remarriage occurred when children were minors. Little is known about the effects of remarriages on parent–adult child relationships when the remarriages occur after the offspring are grown up **[[okay to add ‘up’?]]**.

After they remarry, non-residential parents of minor aged children often had less contact with those children than they did before (King and Heard, 1999), although some parents had more or similar levels of involvement (Manning and Smock, 1999 **[[changed from 2000, okay?]]**). Remarriage of a parent with physical custody of children had inconsistent effects, with some researchers finding that it reduced child support payments (for example Folk et al, 1992), and some finding no relation between remarriage and child support (for example Lin, 2000).

Older parent–adult child relationships after remarriage: there is growing evidence that parents who remarry have less contact with their adult children than non-divorced parents (Aquilino, 1994; Bulcroft and Bulcroft, 1991). This may lead to fewer exchanges of resources.

Remarriage and step-relationships: most studies have found that stepparents do not provide as much instrumental and financial support for young children as parents for their children in first marriages (for example Pezzin and Schone, 1999). In general, stepparents are less involved in raising their stepchildren than either parents in stepfamilies or parents in first-marriage families are in raising

their children, so they may have built less social capital when the children were young. Stepparents with children from prior relationships may also have a financial obligation to those children that lowers their ability to support stepchildren. However, some researchers have found no differences in resources exchanged between stepparents and stepchildren and biological parent–child ties in first marriages (Aquilino, 1994).

Motives to assist after remarriage

Familial responsibilities become more ambiguous following marital transitions; divorces and remarriages cause family members to rethink whether certain individuals continue to be relatives or not. For example, after divorce, parents may lose contact with their children, and remarriage potentially adds members to the pool of kin (new partners, their children and extended family). Step-kin acquired through remarriage may be seen as replacements for relatives lost via divorce (with family-based obligations transferred from old kin to new step-kin), as additional family members, or they may not be seen as kin (thus no obligations to allocate resources across generations are added). For some individuals, family members are only people who share genetic or legal ties (Schneider, 1980).

Decisions about making intergenerational transfers between stepparents and stepchildren may not involve the same factors as decisions regarding resource allocations between children and parents. Stepparent–stepchild bonds are ambiguous, and cultural guidelines regarding appropriate behaviour for mutual responsibilities and interactions in stepchildren–stepparent relationships are either absent or unclear (Cherlin, 1978). There are also few legally mandated responsibilities between stepchildren and stepparents. The emotional bonds between stepparents and stepchildren tend to be less cohesive than parent–child bonds because: (a) stepparents and stepchildren often have spent little time together, reducing chances to develop close bonds; (b) stepchildren may feel loyalty to their parents that prevents them from trying to get close to the stepparent; and (c) some stepparents rush into parental (that is, disciplinary) roles before they have developed an emotional bond, which deters them from establishing warm relationships with stepchildren (Coleman et al, 2000 **[[not in refs?]]**). The weaker emotional bonds in stepfamilies may contribute to structurally weaker social networks than in first-marriage families (White, 1994b; Widmer, 2006), resulting in lower family solidarity and **fewer felt obligations** **[[OK?]]** between stepfamily members. Even when stepparents develop close relationships with stepchildren, and many do, most stepparents are additional adults in the lives of adult children, rather than substitutes for deceased or absent divorced parents, which may mean that stepparents are perceived as having less claim for assistance from adult stepchildren. Rossi and Rossi (1990) found that people perceived greater family obligations to parents than to stepparents. Consequently, in some families resources may not be adequate to include stepparents. If stepparents are seen as having less right to

receive aid than parents, then they will be more likely to have to seek assistance from non-familial sources.

However, several of the explanations proposed for intergenerational transfers between parents and children may be applied to intergenerational transfers between stepchildren and stepparents. For example, *norms of reciprocity*, *gratitude* and *emotional attachments* could be the bases for decisions about intergenerational transfers between stepchildren and stepparents. It may be that the more closely step-relationships resemble parent-child relationships, the more likely similar decisions will apply. For example, when step-relationships resemble close parent-child bonds, when the stepparent and stepchild have spent years together in the relationship, and when stepparents have served as the functional equivalents of parents, then decisions about intergenerational transfers may apply to step-relationships. The more step-relationships deviate from parent-child ties, the less likely it is that similar decisions about intergenerational transfers between stepchildren and stepparents will be made.

There are several reasons to expect that older parents and adult offspring from stepfamilies may differ from parents and adult children from first-marriage families in the amount of intergenerational transfers of resources. Differences between remarried or cohabiting repartnered parents and parents in first marriages in support of adult children have been attributed to a number of factors. For example, parental divorce and separation of cohabiting couple relationships when children are young, and the relationships between children and parents that subsequently evolve, may result in adult offspring having fewer reasons to help parents later in life, especially parents who did not live with them when they were children.

Parents' remarriage/repartnering also may disrupt parent-child bonds when children are young. In a series of studies about normative beliefs about intergenerational obligations following divorce and remarriage, Ganong, Coleman and colleagues found that (a) kinship, (b) intergenerational closeness or relationship quality and (c) prior patterns of assistance between generations (that is, reciprocity) were significant influences on judgements about whether intergenerational responsibilities existed, and, if so, how much help should be given (Coleman and Ganong, 1998; Coleman et al, 2005; Ganong and Coleman, 1998a, 1998b, 1999, 2006a). Other contextual factors were important for attributing how much help to give, such as available resources and other demands on kin, but these were not as important as perceiving kinship bonds, closeness and reciprocity.

The Family Obligations Project

In research that we have conducted over the past 15 years we have examined cultural beliefs about intergenerational relationships when families have been affected by marital transitions in either older or younger generations. In our work, we have focused on how divorce and remarriage affect beliefs about intergenerational assistance. We have examined perceived obligations to both genetic and step-kin, and have examined beliefs about aid given to both older

and younger family members. In this chapter we discuss the findings of this programme of research, focusing mostly on beliefs about intergenerational reciprocity in stepfamilies.

Consensual beliefs about intergenerational family relationships and support are important to examine because such beliefs function as parameters within which individuals define and negotiate their responsibilities to kin, they serve as criteria to measure how well individuals are functioning as family members and they provide a framework that people use to justify and explain their conduct to others. What people actually do in relationships is based partly on personal beliefs about appropriate actions between kin and partly on widely held expectations about what should be done regarding family responsibilities (Finch and Mason, 1993; Ganong and Coleman, 1999). Normative beliefs about intergenerational responsibilities are also important to understand because such beliefs influence the development and application of public policy (Finch and Mason, 1993).

Overview of the Intergenerational Obligations Project

We have completed about 24 studies that focused on intergenerational obligations. All of these studies used multiple segment factorial vignettes (MSFV) (Ganong and Coleman, 2005), which is an elaboration of factorial survey methods (Rossi and Nock, 1982). Factorial surveys combine elements of survey research and experiments in that participants are randomly sampled and presented with brief vignettes in which the researcher has randomly manipulated levels of the independent variables (Rossi and Nock, 1982). Using this experimental method, researchers can examine the effects of different levels of the featured dimensions of the vignettes on participants' attitudes and beliefs. In our adaptation of the factorial surveys, MSFV surveys, participants are presented with vignettes that are divided into several separate units, or segments, that together form a story to which people are asked to respond. The MSFV in our studies contained two to five segments and respondents were asked questions after each segment. Additionally, new independent variables were randomly added in subsequent segments. Each segment thus contained a unique set of independent variables.

In each study several hypotheses were examined. Each study contained different independent and dependent variables, although over time some variables were included in more than one investigation as we sought to determine if varying contexts elicited different responses. Independent variables in the vignettes usually included the type of relationship between the adults (for example parent–child or stepparent–stepchild; stepgrandparent–stepgrandchild or grandparent and grandchild **[[grandparent–grandchild?]]**). Other frequently measured independent variables included relationship quality, prior patterns of resources exchanged between the adults (for example reciprocity in resources exchanged or non-reciprocated resource exchanges), and the amount of resources available to family members (for example they had many resources or few). In all of the studies there was at least one change in marital status among either the oldest

generation or middle-generation adults because we wanted to see how structural transitions in multigenerational families brought about by divorce and remarriage affected beliefs about intergenerational assistance.

The dependent variables in these studies included a variety of ways of providing intergenerational assistance, including helping older adults with activities of daily living (ADL), physical caregiving and providing financial support. The studies were designed to: (a) test the effects of randomly assigned independent variables on dependent variables (beliefs about intergenerational assistance); (b) examine the relations of respondent characteristics and their beliefs about intergenerational assistance; and (c) explore respondents' rationale for their beliefs about intergenerational assistance. In addition to examining the effects of independent variables on the dependent variables (questions about intergenerational assistance), we also asked participants after each segment to explain their answers with open-ended questions.

Although many of our studies were from regionally drawn samples, in this chapter we report primarily on results from a national sample of 3,316 adults that were contacted via telephone interviews. Nearly half (48.5 per cent) were men. The age of the participants ranged from 18 to 89, with a mean of 43.8 years. More than half had children ($n = 573$); 146 had stepchildren. Of the 43 per cent that were married, about one fourth of them were remarried. Nearly one third had never been married, 19 per cent were divorced or separated, and about eight per cent were widowed. The ethnic diversity in this study was comparable to the distribution of the ethnic and racial composition of the US (US Census Bureau, 2000), and the sample resembled **[[add 'North?']]** American society as a whole in religious preference, education, household incomes and employment status.

The sample was obtained with a multistage probability sampling design using random digit dialing (RDD) of telephone numbers selected from valid telephone exchanges in the US. The multistage sampling involved three stages. The first stage was grouping of metropolitan areas or counties nationwide. The second grouped smaller areas – cities, towns and rural areas. The third was a random selection of households of each of the first and second stages. To ensure adequate racial and ethnic diversity in the samples, areas known to have high proportions of African American, Asian American and Latino residents were over-sampled. Eligible respondents were people 18 years of age or over. The response rate was 54 per cent.

Respondents were read a multiple-segment vignette **[[MSFV?]]** describing a family in which an older adult experienced a dilemma. After each segment was read, respondents were asked questions about what a specific character in the vignette should do about helping another character. The characters' first names and relationships (for example his stepfather, her mother) were read to the participants. At the end of the segment, respondents were asked in an open-ended question to provide a rationale for their answers to the prior questions. After responding to the vignettes, participants were asked demographic questions, including age, sex, marital status, parental status, income, ethnicity, education and **religiosity**

[[religion?]]. We also gathered information about personal experiences related to helping or being helped by a family member.

Beliefs about intergenerational reciprocity among stepfamilies in later life

Parent–child relationships in stepfamilies

Kinship counts, but so do reciprocity and relationship quality: traditionally, in most societies, kinship status between adults and offspring is important because intergenerational kinship means that there are special bonds of duty and responsibility between generations. Such cultural expectations have been called family obligation norms, filial obligations, filial piety (in Asian cultures) and filial responsibilities (Ganong and Coleman, 1999). In the past, and in traditional societies now, kinship obligation norms influence what people do when younger or older family members are in need of assistance.

Social scientists have argued that kinship definitions are more flexible than in the past (Scanzoni and Marsiglio, 1993). Instead of limiting family membership to individuals related by the traditional standards of genetic and legal bonds (Schneider, 1980), today's postmodern families are said to rely on more fluid markers of kinship, such as mutual affection and shared interests (Scanzoni and Marsiglio, 1993). Divorce, cohabiting relationship terminations and remarriage/repartnering can result in changes in how family members define who is in and who is out of their kin networks. Individuals who diminish the amount of contact they have with others after separation or divorce may lose kinship status in the eyes of other family members, for instance, as may parents who have conflicted or hostile interactions with children and who are emotionally distant. If remarriage of a parent creates emotional distance between parents and children or if aid to children is reduced by remarriage, then there also may be effects on how kinship between parent and child is perceived.

In our studies of normative beliefs about intergenerational obligations kinship was immutable for only a minority of respondents. That is, for approximately 25 per cent of the participants in multiple studies examining multiple tasks, intergenerational obligations between parents and adult children were unaffected by marital transitions, relationship quality, prior patterns of helping or other factors (Ganong and Coleman, 1998a, 1998b, 1999, 2006 **[[a or b?]]**; Coleman et al, 2005). The exception was inheritance, where nearly all thought that genetic kin took precedence over step-kin (Coleman and Ganong, 1998).

Most people in our studies, however, thought that kinship alone was inadequate justification for providing intergenerational aid – these individuals perceived lower obligations and suggested less help be given when parent–child relationships were emotionally distant or hostile, contact had not been maintained after divorce or remarriage and parents had not aided children in the past. In such situations, intergenerational exchanges were more discretionary than obligatory. Kinship

was still relevant, but did not automatically carry with it special considerations that overrode other relational factors.

Reciprocity: adult children were not thought to be obligated to help parents who did not fulfil expected parental responsibilities to care for the children when they were young (Coleman et al, 1997; Ganong and Coleman, 2006b). Family obligation norms no longer applied when genetic kin had not observed the *norm of reciprocity* between generations (younger family members owe older family members for having raised them). In some studies, we presented families in which the patterns of aid in the past had been reciprocal or unbalanced; however, even in studies in which reciprocity was not a variable, respondents spontaneously mentioned the need for children to repay parents as a rationale for providing assistance to them.

Kinship ties had value and meaning to our samples, but without past histories of mutual helping, it was almost as if the special loyalties and responsibilities attendant to sharing kinship were lost (Coleman et al, 1997; Ganong and Coleman, 1999, 2006b). Children were seen as having a lesser debt to repay than they would have had if parents had maintained contact and continued to provide financial, tangible and emotional support to them. Divorced and remarried older parents who were perceived to have broken the reciprocity ‘contract’ had lost any ‘rights’ to be the recipients of help from adult children.

Relationship closeness: more important than genetic ties to judgements about intergenerational aid and support was relationship quality (Ganong and Coleman, 1998a, 1998b, 1999, 2006a). Moreover, marital status of older adults and their adult offspring and the acuity of need for help were far less relevant than how well they got along with each other. In fact, emotional closeness was a key factor for most respondents in our studies. Parents and children were thought to be much more obligated to help each other when the relationship was characterised by emotional closeness than by distance. When relationships were distant or hostile, any help provided was discretionary and much more limited than when parent–child bonds were emotionally close. As with reciprocity, in some studies we manipulated the level of closeness in relationships, but even when we did not, individuals used closeness as a criterion for making judgements about the amount of help to be offered. In some studies, participants interpreted the lack of contact after divorce and remarriage as an indicator of relationship closeness, suggesting that frequent contact between parents and children following divorce, separation or remarriage may be necessary for there to be warm attachment to the parent.

Stepparent–stepchild relationships

Kinship: stepgrandparents, stepparents and stepchildren may become family members, even without legal connections (via adoption) or without sharing genetic ties (Schmeekle et al, 2006 **[[changed from 2005, okay?]]**); Widmer,

2006). However, several studies have found that the inclusion of step-kin as part of a family network is quite variable (Schmeekle et al, 2006; Widmer, 2006). Young stepchildren identify various configurations of people as members of their families, sometimes including stepparents and sometimes not, and they utilise a broad array of criteria for kinship, such as sharing genetic ties, living together, living with the child's non-residential parent and being important to the child for some reason. Some adolescent stepchildren consider their stepparents to be parents, friends or outsiders, depending on the nature of the relationship (Fine et al, 1998 **[[not in refs]]**). Adult stepchildren also employ a variety of criteria to decide who is in their family networks (Schmeekle et al, 2006). Stepfathers and stepmothers also have been found to vary greatly in how and when they claim stepchildren as kin. Some stepparents and stepchildren attain/are assigned quasi-kin status (Ganong et al, 2002), which is loosely defined as a type of kinship bond that lacks some of the glue of genetic bonds – affection, loyalty and a sense of obligation exists among quasi-kin, but perhaps not as much as to genetic kin. Relationships with intergenerational step-kin can be considered to be: (a) the same as genetic kin; (b) almost like kinship; (c) close friendships; (d) acquaintances; (e) strangers; or (f) something much more negative. How step-relationships are defined is an important factor in understanding and predicting resource exchanges between older stepparents and adult stepchildren.

In our studies, when step-kin were seen as family, then norms of filial obligations applied just as if there were genetic and legal ties (Ganong and Coleman, 1998a; Coleman et al, 2005). In practice, this means that step-relationships characterised by past mutual exchanges of resources and emotional bonding are generally seen as kinship ties, and intergenerational obligation norms apply. Meeting norms of reciprocity in the past and closeness between step-kin are seen as indicators that the participants think of each other as family. This is easier to achieve when stepparents have helped raise the stepchildren than when remarriage occurred after the stepchildren were grown **up** **[[okay to add?]]** and gone from parental households.

Reciprocity norms and relationship closeness: stepparents and stepchildren who develop emotionally close relationships or who have helped each other in the past (that is, the stepparent had helped raise the stepchild or they had mutually assisted each other as adults) were perceived to have obligations to assist each other as much as possible, and at levels similar, but not quite equal, to older parents and adult children who had close ties and reciprocal exchanges (Ganong and Coleman, 1998a, 1998b, 1999; Coleman et al, 2005). When long-term stepfamily relationships are emotionally close, then family members are expected to assist each other in times of need.

Step-relationships formed in later life would not have the opportunities that long-term stepparents and stepchildren would have to build emotional bonds and exchange resources with each other, thus reducing the likelihood that older stepparents and adult stepchildren would exchange resources or perceive each

other as kin (Ganong et al, 1998; Ganong and Coleman, 2006a). Although direct reciprocity norms may not apply in later-life step-relationships, other types of reciprocity influenced judgements about intergenerational assistance in our studies – for instance, some people thought that older stepparents should be helped by adult stepchildren as a way to repay the stepparents for help the stepparents provided to the genetic parents or as an indirect way to repay parents for their past aid by helping their new spouses/partners.

In summary, the importance of *norms of kinship obligations* and *reciprocity*, and the relevance of *emotional attachments* between generations help explain decisions about intergenerational transfers between stepchildren and stepparents. It may be that the more closely step-relationships resemble parent-child relationships, the more likely similar decisions will apply. For example, when step-relationships resemble close parent-child bonds, when the stepparent and stepchild have spent years together in the relationship and when stepparents have served as the functional equivalents of parents (for example helping raise children, providing children with resources), then decisions about intergenerational transfers may apply to step-relationships just as they do to genetic parent-child relationships. The more step-relationships deviate from parent-child ties, the less likely that similar decisions about intergenerational transfers between stepchildren and stepparents will be made (Ganong and Coleman, 1999). And these conclusions held true across racial and ethnic groups in the US (Coleman et al, 2006).

Policy implications

Both familism and individualism have been used by US politicians to support the *public burden* perspective of family policy. The public burden model takes the position that the responsibility of caring for dependent older people and children is the duty of family members; policies and laws are designed to make sure that families assume their responsibilities (Hooyman and Gonyea, 1995). The results of our studies do not support the public burden argument that most people believe that families are unconditionally responsible for dependent family members. Given our data, it is questionable that the surge towards personal responsibility regulations in recent years will be met with widespread support. Ambivalence rather than unwavering acceptance appears to be the normative view.

Policies need to reflect the variability of family structures. Criticisms have been levelled at US policies that assume that families change membership relatively rarely, and then only via marriage, birth and death (Hooyman and Gonyea, 1995). Divorce and remarriage are not rare experiences, however, and they result in significant alterations in family membership. Some of these changes in membership involve changes in perceived intergenerational responsibilities, which have implications for family policy. Most US family policy is based on the nuclear family ideology (Hooyman and Gonyea, 1995). If dependent older people are to be well served by society, it is important that beliefs about families become more flexible.

It is hard to establish family policy when kinship is dynamic, based not only on membership changes because of divorce and remarriage, but also on idiosyncratic and personal criteria of kinship rather than on static criteria. On the other hand, it is foolish to base policies on the assumption that family members are seen as unconditionally, or even generally, obligated to help each other. This appears to be an erroneous assumption, particularly for families in which there have been marital transitions. Competing ideologies of kin responsibilities and fluid definitions of kinship make it difficult to establish uniform policies. Do our data give some direction about how policies might be constructed that could reflect such diverse public opinion?

The most elegant policy solution is to employ society-wide safety nets (national health insurance), but these are often derided as public burdens to be avoided. Our data indicate that there is a need for policies that ensure a safety net for childless older people and for divorced older people who are cut off from their children. The lack of a perceived unconditional obligation to assist an older parent with physical care may suggest that there needs to be a safety net for all older people, whether they have grown children or not. Perhaps safety nets such as care insurance and nursing home insurance can fit the niche between familial responsibility and governmental responsibility.

Our results overall suggest that policy makers need to think more broadly and flexibly about families. It would do law makers in other societies well to observe the progress and outcomes of the efforts of other countries, as well as to widen their lens from the nuclear family ideology.

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