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Population Change and Life Course: Taking stock and looking to the future

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Taking stock and looking to the future

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Abstract:

This paper takes advantage of the insights from the culminating conference of the Population Change and Lifecourse Strategic Knowledge Cluster (PCLC), a collaborative network of academic researchers and policy people, in partnership with a number of Canadian federal agencies. The PCLC focused on strategic issues regarding population change, and on research that takes a life course perspective, with the central objective of sharing the associated knowledge.

We first summarize and note some important observations from the Conference sessions that were dedicated to "taking stock", specifically on: Aging and paid work; Health over the life course; Immigrants and migrants; Population composition: Aboriginal and Visible Minorities; Caregiving and social participation; Families; and Aging, lifelong learning and life course flexibility. The summary points to the need to pay attention to various sub-groups as we adapt to changing population; and, that attention to life course enables analysis of how given groups are more vulnerable than others.

Based not only on the presentations at the conference, we finish with reflections on future considerations in terms of (1) strategic issues, (2) data issues, and (3) collaborative structures that would support a continuation of the interface of research, data, policy, and partnerships. With the winding up of the Population Change and Lifecourse Strategic Knowledge Cluster (PCLC), our purpose here is to take advantage of insights from our culminating conference, and reflect on (1) strategic issues, (2) data issues, and (3) collaborative structures.

Background

First, it is useful to provide some context and background. The Strategic Knowledge Clusters, funded by the Social Science and Humanities Research Council, were designed as collaborative networks with a focus on generating knowledge in given areas of strategic concern. The PCLC brought together two previous groups, one on "Population Change and Public Policy" and the other on "Lifecourse and Bringing all the Threads Together". From the outset, a partnership was established through the Population, Work and Family Policy Research Collaboration, as proposed by the then Policy Research Initiative. As seen through the titles of the Cluster's thematic committees, the substantive areas of interest included: work, family, care, health, immigration, aging and lifelong learning.

The life course perspective pays particular attention to the situation of people at various life course stages, including comparisons over cohorts, and to questions of cumulative advantage or disadvantage over the life course. This perspective naturally includes the household and

family context, including the family links that go beyond the household. Family units, however defined, are but one of the networks in which individuals are located. Individuals are also situated in macro-level contexts, on matters ranging from community and historical circumstance to the demographics, including questions of population size and the relative size of population groups, however defined.

Population change pays particular attention to the determinants and consequences of population change. Following on the Review of Demography and its Implications for Economic and Social Policy (1986-92), the focus tends to be at the macro level, with an emphasis on policy adaptation to the changing size, distribution and composition of the population.

There are important theoretical and analytic advantages to the focus on "population change and life course." Life course transitions are often also demographic transitions and a life course approach comes naturally to demographic analysis. In addition, macro demographic conditions are part of the context and determinants of life course transitions; when aggregated at the macro level, life course transitions bring population change (size, distribution, structure, composition).

There is also a tension between the perspectives of "population change" and "life course." In particular, life course approaches can bring undue focus on individual level behaviours and on differences in individual outcomes, at the expense of macro-level considerations such as population size, the relative size of groups, and the issues of growth.

Taking Stock

Without claiming to do justice to the various presentations and discussions of the Conference, we note briefly some important observations from the sessions that were dedicated to "taking stock".

A key question is the need to pay attention to various sub-groups of the population as we adapt to changing population. In addition, it is through attention to the life course that we are able to analyze how given groups are more vulnerable than others.

1. Aging and paid work

Several policy areas need to be considered in the context of a higher proportion of elderly in the population.

Yves Carrière and colleagues observe that pushing back age at eligibility to Old Age Security and Guaranteed Income Supplement has been justified in terms of inter-generational equity, but this policy can undermine intra-generational equity, an area where Canada has made much progress in the past decades. The groups that are disadvantaged with a later age at eligibility are those with lower life expectancy, lower life expectancy in good health, and those who lose their jobs before retirement.

Lori Curtis and Kathleen Rybczynski observe that female baby boomers have especially benefited from more education and labour force participation. Family changes have also increased the proportions of lone-parents. Women who are particularly disadvantaged in the face of retirement are those who have not benefited from the policy shift that has occurred, away from providing social safety nets for the poor, and toward expanding education and labour market skills (i.e. social investment).

As leader of the Cluster thematic committee on Aging and Paid Work, Ellie Berger concluded that there are two pictures of paid work in later life. In one perspective, older workers are challenging barriers associated with being forced to work to survive financially, being displaced in mid-life, experiencing disability or health conditions, being unskilled or having lack of up-to-date skills, and ageism. On the other hand, work in later life can be "positive and enriching" for those who are able to work, highly skilled workers, educated workers, those motivated by work rather than pay, and for those looking for new opportunities for growth.

Employment and Social Development Canada has been removing obstacles to work by older adults. This has contributed to higher labour force participation at older ages. However, it has not benefited persons who are not able to work, for health or other reasons. The focus on removing obstacles to work that generates benefits for the elderly needs to be complemented by addressing needs of persons at younger or family building stages of the life course.

Thus, in aging and paid work, besides paying attention to both intergenerational and intragenerational equity (Carrière et al.), we need to have policies that work for various population groups, starting with women and men who often have had different life course trajectories (Curtis and Rybczynski).

2. Health over the life course

Questions of power and cumulative disadvantage over the life course bring considerable health inequalities among older adults. Amélie Quesnel-Vallée and her colleagues focus on (1) building health questions into the various policies and programs related to the elderly, (2) age-friendly

environments, and (3) targeted outreach to isolated and low-income adults to ensure access to health and social service opportunities.

Zoua Vang and her colleagues find that the healthy immigrant effect does not apply uniformly across demographic groups and across measures of health. For instance, the healthy immigrant effect is particularly evident in adulthood, and this effect applies more to men. Immigrant women have poorer maternal health, and mental health of immigrant mothers is especially disadvantaged.

The consideration of health over the life course brings us to pay particular attention to those who have suffered cumulative disadvantage and to ensuring that our health system is accessible to situations where there is more vulnerability (Quesnel-Vallée et al.), such as the mental health of immigrant women who may be isolated from traditional sources of support (Zoua Vang).

Policies like RRSP, TFSA, and the private financing of long-term care, accentuate the lifetime cumulative inequalities.

As leader of the Cluster thematic committee on Health over the Life Course, Amélie Quesnel-Vallée concluded that there is much capacity in Canada for both fundamental and applied research on health inequality over the life course. She noted in particular the 2014 QICSS International Conference on Social Policy and Health Inequalities: An International Perspective, with select papers slated to be available through a special issue of *Canadian Public Policy*.

From the perspective of the Public Health Agency of Canada, Marie DesMeules observed that there has been much progress in integrating equity into public health research, both for studying the determinants of inequality, and proposing policies that would reduce inequity. Besides the importance of life course considerations and seeking to determine which inequalities are most salient, there is need for more research in the areas of mental health, family violence, and early childhood development.

From the perspective of Health Canada, Sylvain Paradis noted the challenges of policy sector researchers in deciding where to set the priorities and where policy would produce the most noticeable change. Policy questions include value questions, for instance, the relative priorities of values associated with immigration, health, human rights, etc. Through Statistics Canada and the Canadian Institute for Health Information, there is much data development but huge challenges remain. There is need to re-think the social contract between academic and public

sector researchers, in the context of the realignment of research capacity of government, and more access to funding on the part of academic researchers.

3. Immigrants and migrants

By observing the interface between identity and intergroup relations, Christoph Schimmele and Zheng Wu propose that (1) strong ethnic identities are not incompatible with a sense of belonging to Canada, and (2) immigrants react to exclusion through in-group solidarity and a rejection of the mainstream.

In their review of the literature on education migration, Ann Kim and Gunjan Sondhi conclude that the pull factors motivating international students include academic quality, the value of an overseas education in the home country, and for about half of students, the possibility of permanent migration. The authors propose that receiving countries should prioritize social development, intercultural understanding and the quality of education as goals, in addition to labour and economic benefits.

As leader of the cluster thematic committee on "Immigration and migrants," Barry Edmonston observes that we have considerable data and analysis on (1) who immigrates and (2) the progress of immigrants and their children in Canada, but there is need for more research on (3) the effects on Canada beyond the demographics: labour market, fiscal, effects on business, the arts, etc.

Immigration and Citizenship Canada is well placed to follow the "express entry" admissions through data on various outcomes. More generally, Umit Kiziltan observes that the analysis of immigrant integration will benefit from the larger availability of linked data based on the census, surveys and administrative files (landing and residence status, citizenship, revenue, hospitalization, etc.). At the same time, more resources are needed for the associated data cleaning and documentation, and to ensure that access does not violate the Statistics Act.

Immigration has changed not only in terms of places of origin but in terms of sustained higher levels than was the case in the earlier post-war years. Analyses need to also take into consideration the economic circumstances, especially at the period of arrival.

4. Population composition: Aboriginal and Visible Minorities

Robert Bourbeau and his colleagues conclude that inter-provincial migration is low for the Aboriginal population, but residential mobility is more common than for the non-Aboriginal

population. Although they are, on average, economically advantaged in urban areas, the net flow of Status Indians favours reserves rather than urban areas.

Especially compared to the Aboriginal population, there is much more limited health data and research regarding the visible minority population. Karen Kobayashi and her colleagues propose that indicators of visible minority and immigration status be more regularly included in data collection. The Canadian Community Health Survey is identified as the most promising data set for studying questions of visible minority health.

The presentations on immigrants (Kim and Sondhi), First Nations peoples (Bourbeau et al.), Visible Minorities (Kobayashi et al.) and Second Generation youth (Schimmele and Wu), have all highlighted the heterogeneity within these population categories. There is a strong need for having the proper identifiers in various data sets, so that the appropriate analyses and comparisons can be undertaken.

In his commentary on research and data, Martin Cooke noted in particular the lack of repeated samples of the Aboriginal population and proposed that the greatest gain would be through linking the Canadian Community Health Survey to administrative data.

From the perspective of Aboriginal Affairs and Northern Development Canada, Gonzague Guéranger proposes that Aboriginal administrative data should include the Indian Register. For research on the Aboriginal population, there is a strong need to engage the associated stakeholders.

5. Caregiving and social participation

Jacques Légaré and his colleagues observe in particular the high growth of the oldest-old population (85+), along with inadequate knowledge on this population, and a serious risk of inadequate services. In industrialized countries like Canada, aging will no longer be a function of fertility reductions, but of longer life expectancy and in particular the lower mortality of persons at the oldest ages. The authors recommend that social policies be based not on age but on the characteristics of the oldest-old, in particular the state of health and income.

In terms of research, data and policy, there is a need for structures like SEDAP (Social and Economic Dimensions of an Aging Population) or the British New Dynamics of Ageing, linking researchers from various disciplines and policy makers. Légaré further proposes that these discussions be grounded in micro-simulation and associated projections.

As leader of the Cluster thematic committee on Caregiving and Social Participation, Janet Fast observes that there has been an upsurge in research activities and a more effective caregiving lobby. We know more about caregivers: supply and demand, what they do, negative and positive economic and health consequences, care networks, the interface of family and formal care. The areas where more knowledge is needed include especially the high risk sub-groups, the accumulation of costs and risks over time, transitions into caregiving, care trajectories, and implications of public and private supports on caregiver outcomes. There is need for longitudinal and administrative data. The Canadian Longitudinal Survey on Aging, based on respondents aged 45-85, has a good set of caregiver identifiers.

From the perspective of Employment and Social Development Canada, Miriam Koene observed the need for more research on the impact of intensity and duration of caregiving on income, health and wealth accumulation. There is need for more knowledge on the family context, including the risk factors for families, in order to unpack policy issues.

It was noted that, depending on cultural backgrounds, activities of caregiving may be seen as part of family interactions and interdependence, rather than caregiving per se.

6. Families

François Héran concludes that family policies can have an impact on fertility, especially if there is a mix of measures, confidence in the continuity of support, and a legal context that recognizes flexibility in family structures. Child premiums can affect the timing of childbearing, but not the level of cohort fertility. Traditional "familist" approaches, that promote marriage and a breadwinner division of labour, are anti-natalist. Particularly important is the positive relationship that has emerged between women's labour force participation and fertility levels across developed countries. Thus policies that support the dual roles of work and care are particularly important: parental leave, child care and work-life flexibility. Direct financial transfers are also important, as is the recognition of diversity across families, in terms of marriage or cohabitation, one parent or multiple-parents, same sex or opposite sex, and gender equity.

As leader of the Cluster thematic committee on Families, Zheng Wu organized a 2013 symposium on Aging Families and the publication of select papers in a special issue of the Canadian Journal of Aging (December 2014). His "Review of research on aging families: emerging issues" has used the following themes: structural diversity, family relationships, caregiving and intergenerational transfers, living arrangements, and partnerships in later life. The synthesis has also identified areas in need of further research, such as: living arrangements

among step-families, the effects of caregiver burden on care-recipients, non-marital relationships in late life, effects of singlehood and divorce on health and well-being of older adults. In particular, there is a lack of longitudinal data on family relationships.

Given the diversity and complexity of families, Nora Spinks, Vanier Institute of the Family, emphasized the need for research on how transfers vary across family forms.

7. Aging, lifelong learning and life course flexibility

Life course changes can be used as learning events, and it is important to know how learning occurs at various life course stages. Kjell Rubenson noted that the data and research have tended to focus on learning for work. The sites for learning include work, family, leisure, community and society. A life course perspective challenges the front-end financing approach to education and raises issues of "slight" rebalancing of public funds for education to better align with life course change and challenges. All countries have substantial age differences in learning participation, but the sharp decline is now occurring in the mid-50s rather than the mid-40s, because of increased employer support for education and training. Besides economic benefits, adult learning is associated with various aspects of well-being, from higher life satisfaction, less depression, to greater involvement in volunteer work and democratic participation.

As leader of the Cluster thematic committee on Aging, lifelong learning and life course flexibility, Paul Bélanger noted various other domains besides formal and vocational education: inter-generational learning, parental education, patient learning, health competency, and how to pilot a life change. There is need for research on the kind of learning that can compensate for cumulative disadvantage over the life course. For instance, the loss of skills is highest for those with least skills.

From the perspective of Employment and Social Development Canada, Annette Ryan noted that while 80% of employment insurance benefits support the transitions from work to work, the other 20% is associated with the transitions from work to childbearing and from work to caring. There is a need to know how training is best deployed, at work, between work, and before work. Not only does learning affect labour supply, but the training offered by employers affects the demand for labour on the part of employers.

The issues include how to build creativity and diversity at the community level.

Looking to the future

In seeking to derive lessons for the future, we here focus on three themes: strategic issues, data issues and collaborative structures. This section of the text is less based on presentations at the 19-20 March conference, providing instead a summary from the perspective of the Directors of the Strategic Knowledge Cluster on Population Change and Lifecourse.

Strategic Issues

Doug Saunders uses the example of Germany to highlight the various approaches that can be invoked to deal with population aging and labour shortage: flexible retirement, increase women's labour force participation (including through parental leaves and child care), immigration, and better integration of immigrants and children of immigrants into the core labour force.

Jan Kestle highlights the following trends that need research and policy attention: boomerang kids, growth of the Asian population, and aging in place. Kestle also highlights the importance of having good population estimates, to have the right denominators, and the appropriate weights for making population estimates based on a sample.

Melinda Mills highlights the strong increase in the age of women at first birth, which involves a postponement of some five years across OECD countries between 1970 and 2005. Mills emphasizes the importance of transdisciplinary biosocial genetic research, proposing that a proper combination of biological or genetic factors (including the location of genetic variants, and polygenic) and socio-environmental factors (including structure, status, network, capital, and lifestyle) are important to the analysis of fertility (including age at first birth, number of children and infertility) and other demographic behavior.

Through its series on Canadian Megatrends, Statistics Canada is highlighting potential strategic issues, including several that relate to the topics that have been associated with the Cluster:

- Canada goes urban (April 2015)
- Pensions: The ups and downs of pension coverage in Canada (March 2015)
- Lone-parent families: The new face of an old phenomenon (February 2015)
- Canada's crime rate: Two decades of decline (January 2015)
- Resources: Long-term shifts in commodities (December 2014)
- Fertility: Fewer children, older moms (November 2014)
- Population growth: Migratory increase overtakes natural increase (October 2014)

Through its forward-looking exercise entitled "Imagining Canada's Future" the Social Science and Humanities Research Council (SSHRC) has developed six Future Challenge Areas, including "What might the implications of global peak population be for Canada?" This theme includes six sub-questions relating to (1) nurturing the next generations, (2) family change into the future, (3) life cycle issues and implications of state regulation, (4) global migration and cities of the future, (5) changing demographics in rural and remote communities, and (6) impacts of global peak population with respect to Canada's energy and resource consumption and climate change. Based on a contract with SSHRC, the PCLC Discussion Paper 2(1) elaborates on each of these sub-themes.

Through CIHR and SSHRC, Canada is part of the EU Joint Programming Initiative on demographic change entitled "More Years, Better Lives". This initiative has four research domains: (1) quality of life, health and well-being, (2) economic and social production, (3) governance and institutions, and (4) sustainable welfare. The first Call for Proposals, entitled "Extended working life and its interaction with health, wellbeing and beyond," has a focus on the drivers to, and constraints on, extending working life, along with the implications of extending working life for older workers (50+), new labour markets, health, wellbeing and intergenerational equity.

In "The Enabling Society", Peter Hicks (2015) proposes that changing demographics, technology and public expectations are bringing us to consider a new model for social policy. In particular, there are "(1) demands for customized programs and services that are better aligned with individual citizens' needs, (2) greater need for flexibility and alternative options to help people transition between work, education, care and family responsibilities over their life course, and (3) shifting public attitudes toward the instruments of social policy, with more support for tools that build individual capabilities (such as education) than for passive income support". Hicks further proposes that Canada's income security system be reconfigured around three pillars: guaranteed annual income, social insurance, and lifetime accounts. The guaranteed annual income would be administered through the tax system as an extension of the Child Tax Benefit, the Guaranteed Income Supplement and Spousal Allowance for seniors, and the Working Income Tax Benefit. It would provide a very minimal guarantee that would not be a disincentive to work, especially at older ages. Social insurance would return to the core mandate of Employment Insurance in providing income replacement during periods of either unemployment or disability. Lifetime accounts would take the form of Registered Retirement or Education Savings Plans and the Tax Free Savings Accounts, as vehicles for saving for retirement, education, parental leave, caring and other withdrawals from the labour force.

Peter Hicks proposes that there is a pressing need to reform the retirement income system in particular, since it currently provides high transfers to persons who may also have significant

incomes through employment and investments. This high transfer to seniors is in contrast to much lower transfers to families with children, including direct transfers, parental leave and child care.

Data Issues

Frans Willekens has usefully listed the various types of new data, ranging from personal attributes, activities, expenditures, behavior and values, to the broader context in which people live, and social interaction across individuals and networks. Besides being collected directly, the data may originate as byproducts of administrative processes, and it may be longitudinal and spatiotemporally referenced (GPS). In terms of research infrastructure, Willekens includes data archives, data centres, and data linkage. Data analysis includes pattern recognition, modeling and simulation, life histories, social interaction and social network analysis.

The United Kingdom has a long history of making survey data available for secondary analyses by the research community, through facilities provided by the Economic and Social Research Council (ESRC) in collaboration with the various statistical agencies. Tim Holt has further elaborated on how governance and infrastructure are being developed in the context of new data. Three phases are envisioned: (1) administrative data, (2) business and local government, and (3) social media and third sector such as charities. For administrative data, the key approach is to separate the "identification data" and the "payload data" in such a way as to permit record linkage and data updates while maintaining privacy. The overall governance is through a Board which operates within the National Statistics Authority, accountable to Parliament. Besides governance and infrastructure, big data necessitates the development of research methods, and strengthening the skills and capacity of the research community in the use of these new methods.

Statistics Canada has been using administrative data in its programs since 1918 and there are currently over 500 administrative files used to produce statistics in some 40% of Statistics Canada's statistical programs. Lynn Barr-Telford further elaborated on the Social Domain Linkage Environment (SDLE) tool-set that provides a platform for data linkage. This is not a linked data base but an environment for record linkage activities, including governance to provide adherence to policy and privacy requirements. The two major components are a derived record depository and key registry, providing links to various data: census, vital statistics, survey data, health data, Canadian Cancer Registry, tax data and immigration data. Besides extending the value of longitudinal surveys by linking respondents to longer term outcomes, this structure enables efficient links to data across multiple sectors in the social domain (i.e. health, justice, education) to complement surveys and data development. A

specific example is that of the re-contact project that provides indicators of re-contact for persons in the criminal justice system, with the potential to help develop crime control strategies and programs aimed at ensuring better outcomes for at-risk populations.

Benoît Laplante notes that administrative data are mostly at the individual level. There is much work to be done in transforming the data into shape for life course analysis and to incorporate the influence of people who are in the respondent's network.

Melinda Mills emphasizes that new data efforts should not be at the expense of strong longitudinal surveys. While linked data offers new possibilities for research, they also come with new complexities, including the need for specialized training. Mills also highlighted the difficulties in using Canadian data in comparative research, given the lack of access to RDC data from outside of the country.

Tim Holt observes that the training needs range from PhD and post-doc specializations to specialized training for a given data set, and internships for students at given government ministries.

Michael Wolfson notes that there is often a disconnect between academic proclivities and public policy needs. For instance, longitudinal analyses cannot be done as cottage industries, there is need infrastructure and personnel.

The Council of Canadian Academies has released a report on "Accessing health and health-related data in Canada" discussing the technological and methodological challenges of access, along with the associated benefits and risks, and legal and ethical considerations. A "data stewardship" model is proposed, including governance practices on privacy, research, information and networking.

The International Union for the Scientific Study of Population (IUSSP) has undertaken a review to determine how demographers, and demographic skills, could contribute to the Data Revolution. This includes the measurement and analysis of the various dimensions of population stocks and flows: e.g. health and mortality, fertility and reproductive health, migration and immigrant integration, population growth and age structure, which affect economic growth prospects and the environment. The report highlights questions such as how to make the most with limited and imperfect data, and how to develop appropriate population-related indicators (e.g. Sustainable Development Goals). The IUSSP has also announced new panels on "Big data and population processes" and "Microsimulation and agent-based modeling in demography."

Collaborative Structures

There are important policy and research reasons for maintaining the kind of collaborative work for which the Cluster was established, that is, an interface of research, data, policy, and partnerships. Given the reduced research capacity of government, Sylvain Paradis has proposed that we need to re-think the social contract between the academic and public sectors. In particular, structures are needed for sponsoring ongoing discussions between researchers and people responsible for policy development. With also the termination not only of the PCLC, but also the program on Social and Economic Dimensions of an Aging Population (SEDAP), Jacques Légaré proposes that we need to evolve new structures for academic and public sector discussions in the area of population aging. Légaré proposes the example of United Kingdom's New Dynamics of Ageing, including Modeling Ageing Populations to 2030 (MAP 2030).

The Canadian Research Data Centre Network (CRDCN) is an important existing structure. The CRDCN has developed an infrastructure not only for data access but for interactions with the policy sector on questions of data development, training and knowledge mobilization. Data development has included not only protocols for access, but collaboration with the policy sector on the kinds of data that will be most useful.

The 2013 and 2015 conferences of the Population Change and Lifecourse Cluster have sponsored good interactions between academics and persons from the federal policy sector, on research, data and policy. The features of these conferences that have been particularly useful include: organization as a continuous plenary, some 100 people with half from the academic side (including students) and half from a broad range of federal departments, held in Ottawa, by invitation, at no cost to participants, presentations providing a synthesis of an area of research rather than specific research results, commentaries focusing on arising issues with regard to research, data and policy, and maximizing the potential for interaction and participation (e.g. table discussions followed by general discussions). Two other beneficial features included in the 2015 Conference were: the availability in advance of the Conference of synthesis reports through the PCLC Discussion Paper Series; and the presence of leading international experts on data issues, which allowed both academics and policy people to see how Canada measures up in the international context.

More broadly, from the outset, the PCLC has sponsored exchanges between the academic and policy sectors through partnerships with federal government departments, including student internships and faculty exchanges. It has funded a number of data development and knowledge mobilization projects, including syntheses of given areas of research and associated policy

questions. Its Research Briefs and Policy Briefs have been used to promote the visibility of given research results and associated implications. We have seen the importance of including partners from the outset in promoting knowledge mobilization. The Cluster's legacy has also included support for the next generation of researchers through sponsoring attendance at international conferences, participation in training and workshops, spending time away from a student's home university, and internships in government departments.