

Title

Trajectories of Intergenerational Transfer from Adult Children to Middle-Generation Parents after the Death of an Older Parent: Longitudinal Evidence from Multigenerational Relationships in South Korea

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Introduction

The death of a family member deeply resonates throughout the entire family structure (Walsh & McGoldrick, 2013). Grandparents, beyond their familial roles, provide invaluable moral support, shaping the family dynamics in profound ways (Bengtson, 2001). The absence of a grandparent exerts its impact not only on children but also extends to grandchildren, highlighting the intricate intergenerational connections within families (Monin, Levy, & Kane, 2015). Adult grandchildren, facing such a loss, often grapple with the complexity of grief, experiencing its direct and indirect effects for the first time (Manoogian, Vandenbroeke, Ringerling, Toray, & Cooley, 2018). Additionally, concerns about a middle-generation parent's well-being may arise from factors beyond grief, including mental or physical health, self-care, and financial challenges. Despite the significance of these experiences, family research has traditionally focused on the connections between two generations, often neglecting the broader family context in which the death of a grandparent shapes the grief experiences of adult grandchildren (Stokes, Kim, Kim, & Fingerma, 2021).

Furthermore, the gender composition of grandchildren might portray different trajectories of intergenerational transfer following the loss of the first generation. Bereavement within families often involves shared experiences rather than purely individual processes. In Confucian societies such as South Korea (hereafter Korea), societal norms emphasize collective responsibility, leading to shared familial burdens (Kim & Park, 2000). Gender roles significantly shape family dynamics, with sons traditionally focusing on financial support for parents, while daughters maintain emotional connections (Das Gupta et al., 2003). Despite these prevailing gendered roles, there is a lack of comprehensive explanation for the relationship between grandparent loss and intergenerational transfer in Korea due to insufficient evidence.

In this study, we aim to examine the temporal patterns of intergenerational transfer at multiple points in time both before and after the loss of the first generation. To account for observed and unobserved individual-level heterogeneity, we employ fixed effects models which provide a robust analytical framework. In order to understand the gendered nature of these trajectories, we investigate whether the gender composition of adult children matters. By integrating these various dimensions, we aim to provide a nuanced understanding of the multigenerational dynamics of coping with bereavement within families in Korea.

Data and methods

Data and study population

The present study utilizes data from the Korean Longitudinal Study of Ageing (KLoSA), which is a nationally representative longitudinal study of adults aged 45 or older in Korea. Since 2006, the survey has been conducted biennially to investigate socioeconomic, psychological, and health-related aspects, with the goal of supporting policies aimed at improving the lives of middle-aged and older Koreans. The study obtained consent from all participants and ensured that the data were de-identified before being made available in a publicly accessible database. As the study relied on secondary analysis of publicly available data, it was granted an exemption from ethical approval. The current study is based on longitudinal data collected from 2006 (Wave 1) to 2020 (Wave 8) over a span of fourteen years. Out of a total of 3,158 individuals with at least one surviving parent and child simultaneously across eight waves, 1,247 individuals experienced the death of an older parent during the study period (8,138 observations).

Measures

Dependent variable

Financial transfer from adult children refers to the total quantity of financial support received per child in the previous year. Direct monetary assistance, such as cash, or the payment of expenses, such as medical bills, insurance, tuition, mortgage payments, or prior taxes, are examples of financial assistance. Due to the asymmetries of the quantity variable, a logarithmic transformation was employed for analysis.

Independent variable

The primary independent variable in this study was the time to loss of an older parent (in years). To determine the period between the older parent's death and the interview, we subtracted the date of the older parent's death from the date of the interview. We then grouped these values into six categories: the first year (months 0 to 11), second year (months 12 to 23), third and subsequent years (months ≥ 24 to 35) after the loss, as well as the last year (months -12 to -1), second year (months -13 to -24), third and subsequent years (months ≤ -25) before the loss. For participants who did not experience the loss of an older parent during the observation period, this variable was set to a constant.

Control variables

We have incorporated a number of time-varying control variables. The middle generation's control variables are categorized into four groups: 1) demographic characteristics, 2) socioeconomic status, 3) living arrangements, and 4) health status. The demographic variables include age, marital status, and place of residence. The measures of socioeconomic status consist of educational attainment, household income, homeownership, and economic activity. Living arrangements were estimated through two binary variables: household size and the number of living children. Finally, health status variables are the number of chronic diseases and impairments in ADLs. The younger generation's control variables are the average characteristics of each child. They consist of the mean of the children's age, the proportion of children with high school degrees, the proportion of employed children, proportion of married children, and the proportion of children living with a middle-generation parent.

Statistical Analysis

In this study, we conduct fixed effects (FE) models to estimate temporal changes in intergenerational transfer before and after the death of an older parents. FE models provide estimates of within-person temporal changes in financial transfer while controlling for all time-invariant individual heterogeneity, including both observable and unobservable factors. To determine the trajectory of intergenerational transfer before and after the loss of a child, we evaluate the levels of intergenerational transfer at multiple time points, commencing three years prior to the bereavement and extending to three years and beyond after the loss.

Results

Table 1 explores the impact of the time elapsed since the loss of a grandparent on the financial transfers from adult children to middle-generation parents. To address potential unobserved differences, FE regression models were employed. In Column 1, the data indicates a significant increase in financial transfers from adult children even before the event ($b = 0.192$, $CI = 0.023-0.362$), and this trend continues even two years after the loss ($b = 0.224$, $CI = 0.042-0.407$). Columns 2, 3, and 4 indicate variations in these associations based on the gender composition of adult children. Despite the increasing financial transfers after the loss among the parents with both sons and daughters (Column 2), it was not statistically significant. Interestingly, Column 3 showed that bereaved parents with only sons received increased average financial transfer within the first year after the event ($b = 0.610$, $CI = 0.174-1.046$) and remained statistically significant after two years ($b = 0.476$, $CI = 0.106-0.847$). However, there were no significant changes in financial transfers for parents with only daughters (Column 4).

Figure 1 illustrates the shifts in financial transfers by displaying the predicted values of financial transfers in relation to the time since the loss of an older parent. Financial transfers from adult children rose before the death and endured through the second year after the loss. Notably, distinct transfer patterns emerged based on the gender composition of adult children. Following the death of an older parent, middle-generation participants with both sons and daughters experienced a surge in financial transfers within the first year, which continued for over two years. Parents with only sons received financial support in the year of the loss, extending within two years after the loss. In contrast, those with only daughters witnessed a significant increase in financial transfers in the year preceding the loss. However, the trajectories of financial transfers were not statistically significant among those with both sons and daughters and those with only daughters.

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Table and Figure

Table 1. Effect of time to loss of older parent on financial transfer from adult children

	(1)	(2)	(3)	(4)
Sample	All participants	Both sons and daughters	Only sons	Only daughters
Estimation model	FE	FE	FE	FE
Middle generation's controls	Yes	Yes	Yes	Yes
Younger generation's controls	Yes	Yes	Yes	Yes
	Coef. [CI]	Coef. [CI]	Coef. [CI]	Coef. [CI]
Time to loss of grandparent (ref. $\leq 3^{\text{rd}}$ year)				
-2 nd	0.046 [-0.139,0.232]	0.017 [-0.229,0.263]	0.176 [-0.187,0.538]	-0.097 [-0.617,0.423]
-1 st	0.192* [0.023,0.362]	0.080 [-0.154,0.314]	0.315 [-0.049,0.679]	0.275 [-0.142,0.692]
+1 st	0.268** [0.073,0.463]	0.235 [-0.021,0.492]	0.610** [0.174,1.046]	-0.126 [-0.610,0.358]
+2 nd	0.224* [0.042,0.407]	0.211 [-0.034,0.456]	0.476* [0.106,0.847]	-0.085 [-0.549,0.380]
$\geq +3^{\text{rd}}$	0.174 [-0.026,0.375]	0.137 [-0.133,0.407]	0.331 [-0.094,0.756]	0.092 [-0.426,0.610]
Observations	8138	4199	2407	1532

Note. The 95 percent confidence intervals are in brackets. The middle generation's control variables include age, marital status, residential area, logged household income, homeownership, economic activity, educational attainment, household size, the number of living children, the number of chronic diseases and impairments in ADLs. The younger generation's control variables include the mean of the children's age, the proportion of children with high school degrees, the proportion of employed children, proportion of married children, and the proportion of children living with a middle-generation parent.
* $p < 0.05$; ** $p < 0.01$

Figure 1. Trajectory of financial transfer over time relative to loss of older parent

