

Learning, debating, and deciding: the contribution of longitudinal and lifecourse research to shaping public policy in Canada

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Learning, debating, and deciding

- Shaping the future of longitudinal and lifecourse research in Canada: launching a Longitudinal and Lifecourse **Strategic Research Cluster** at the Social Sciences and Humanities Research Council, in partnership with other Councils, Statistics Canada, federal departments, Policy Research Initiative, provincial agencies, and NGOs
- Doing research and shaping public policy in the lifecourse perspective : the contribution of a proposed household panel study for Canada, the Socioeconomic and Health Integrated Longitudinal Survey (**SHILS**)

The contribution of longitudinal analysis

- Measure the incidence of events (such as the loss of a job) or states (such as poverty)
- Estimate transition rates (such as moving out of poverty or finding a new job)
- Evaluate how strongly various factors are associated with these events and transitions, so as to determine what causal processes are at play
- Examine short term transitions (for instance those related to income and employment), as well as longer term dynamics (for instance those related to conjugal unions, professional orientation, lifelong learning, accumulation of assets and debts, health, aging, and so on)
- In the long run:
 - Examine influences across generations
 - Estimate changes in transition rates (for instance, before and after a major policy change)

The lifecourse approach

- Human agents make choices and build their future on the basis of the opportunities and constraints arising from their past: the need for *longitudinal* data
- Individuals obtain resources from different institutions and contribute to them: family, communities, markets, and the public sector: the need for *integrated* data
- In particular, human agents operate in the context of linked lives, that is, of the interdependencies constructed mainly around family and intergenerational relations: the need for *household* data

Representing multidimensional causal processes in people's trajectories

- The lifecourse results in the accumulation or decumulation on various accounts:
 - Economic capital
 - Human capital
 - Health capital
 - Social capital

Two representations of the lifecourse perspective

- The Policy Research Initiative's "A lifecourse approach to social policy analysis" : *Olivia's story*
- The multiplexity of causal processes in people's trajectories : A representation of the SHILS household panel survey proposal

Figure 1 - The flow of resources between Olivia and the main institutions of society
(The agents or pillars of the welfare state)

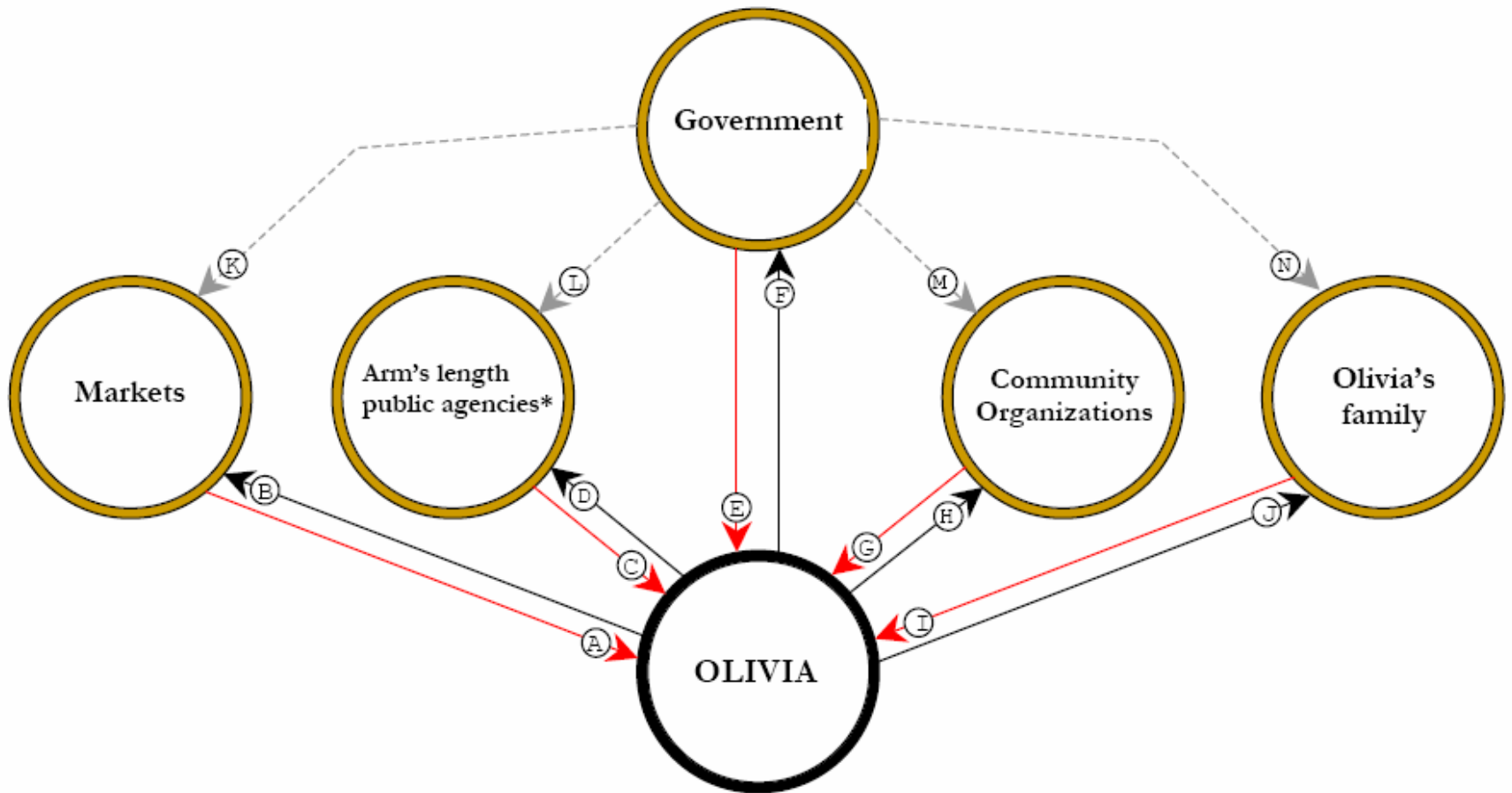


Figure 4. Financial Flows: Olivia's income, expenditures and savings at four specific times

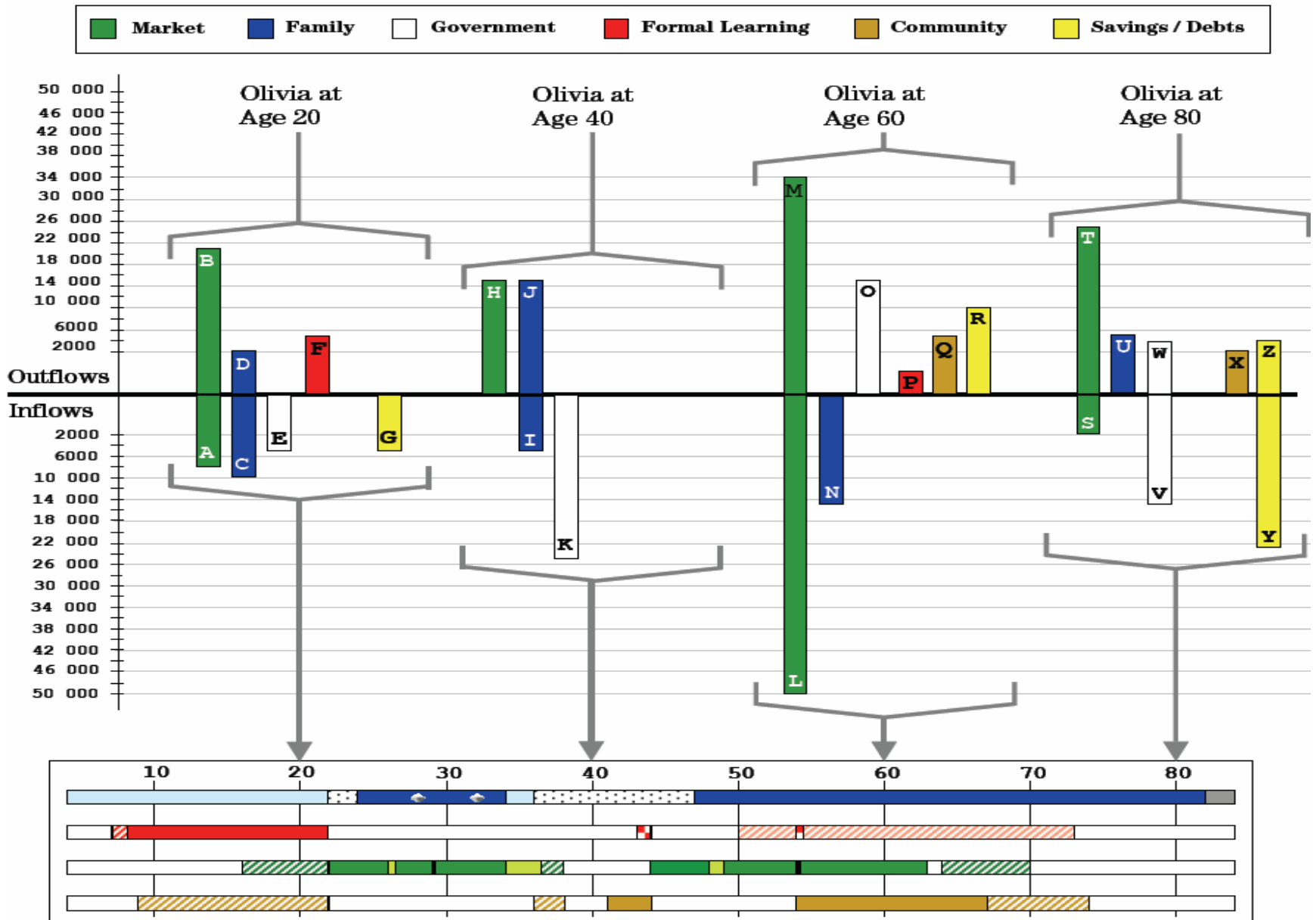
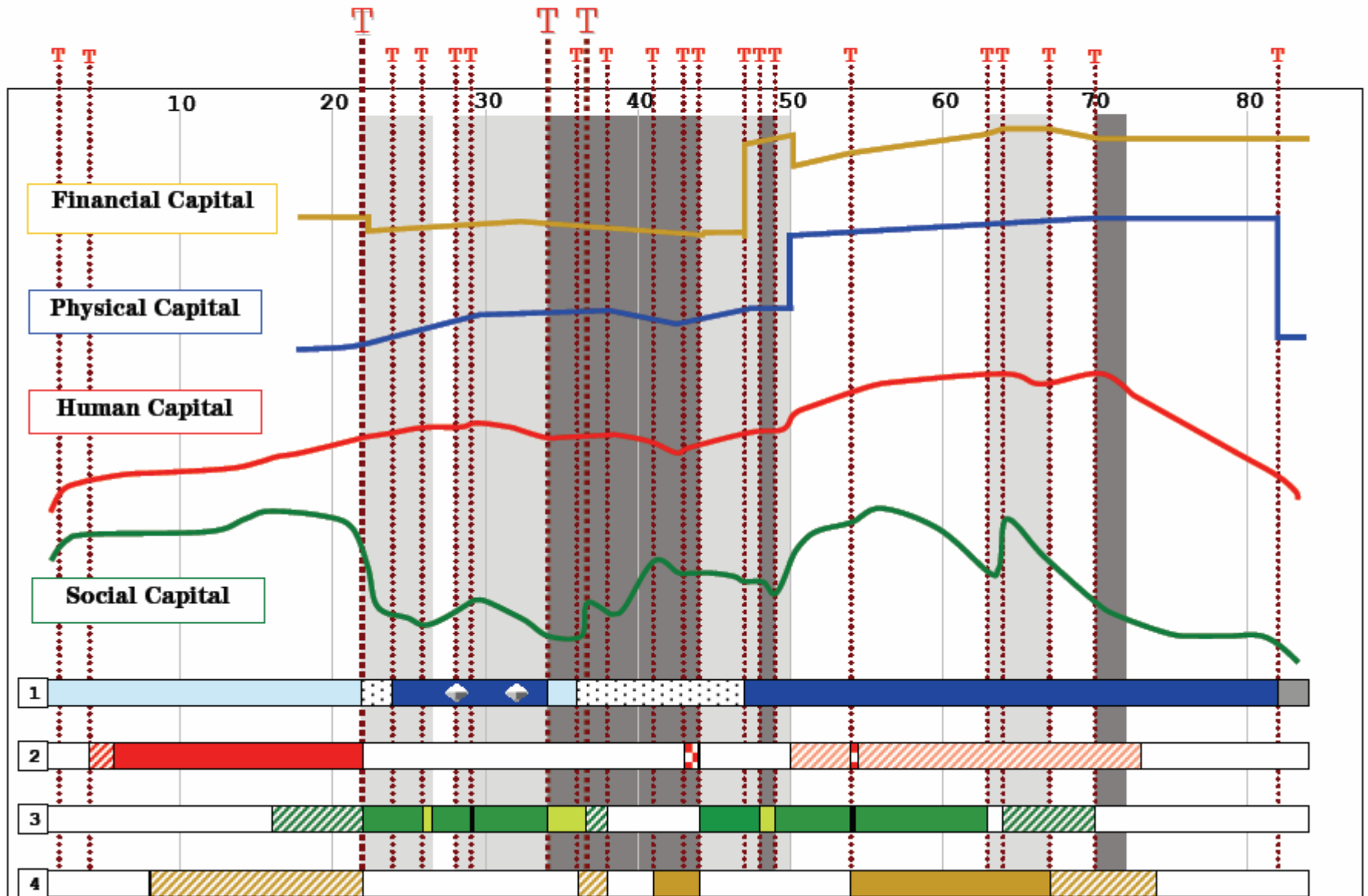
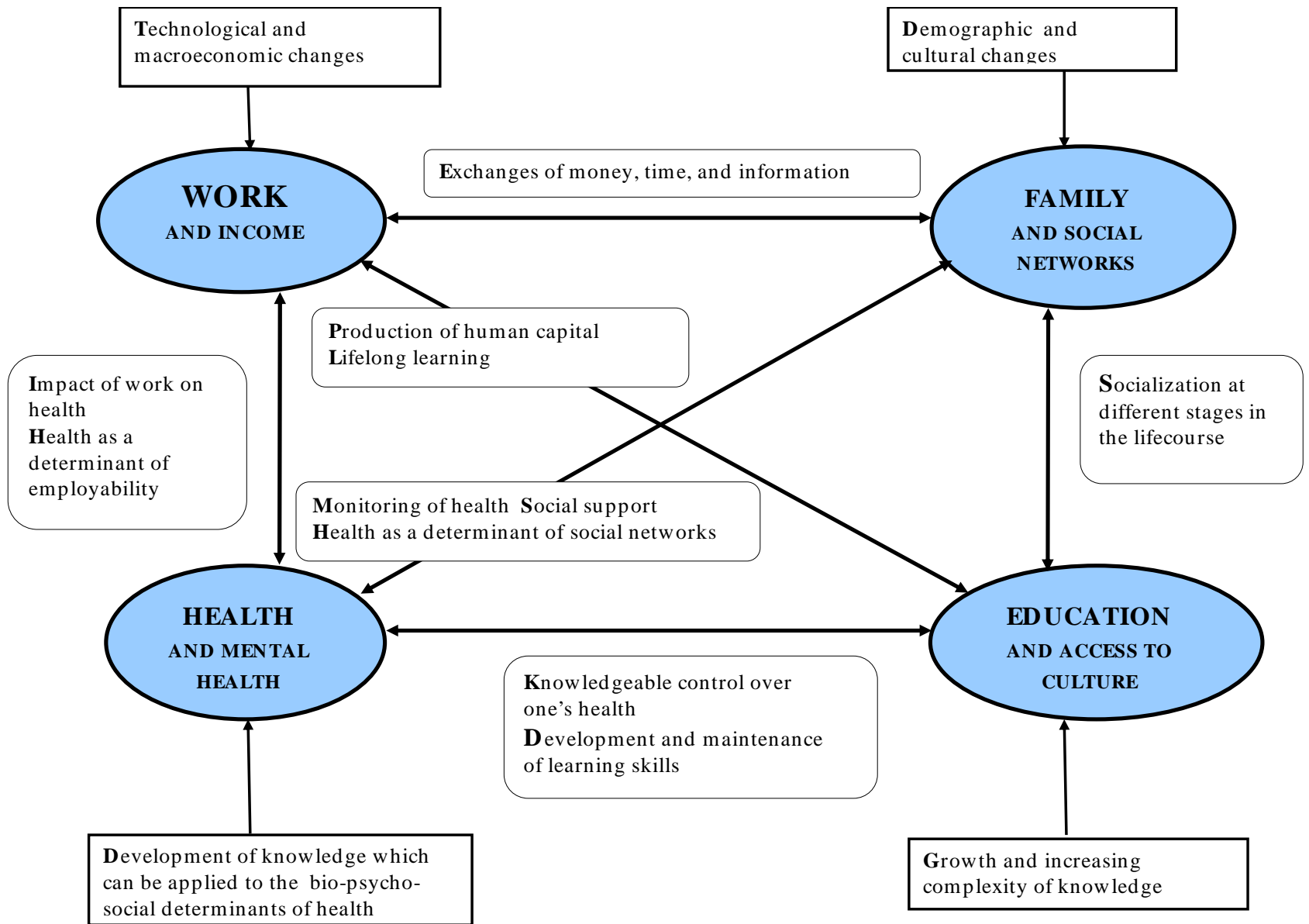


Figure 6 – Putting it all together
Transitions, pressure points, resources, and well-being
over the course of Olivia's life





Poverty as a policy issue that requires a lifecourse approach

- Poverty is diverse: some people are poor more or less permanently, others intermittently, and still others only momentarily; these situations obviously call for different policy interventions.
- Poverty cannot be reduced to a simple lack of income: it also involves, both as causes and as consequences, a myriad of interconnected factors such as health, education, employment, family situation, and social capital.
- A key policy goal is to avoid that the interaction of these factors lead to almost irreversible social exclusion.

Aging and retirement as policy issues that require a lifecourse approach

- The *age of retirement* is a major challenge for public policy in Canada.
- The retirement decision is made on the basis of a number of interacting factors, having to do with one's health, the availability of financial resources, one's employment history and job quality, and eventually with the spouse's retirement plans and health.
- All these elements echo the trajectories of the individuals involved

Active aging and generational exchanges as policy issues that require a lifecourse approach

- We age differently according to the multifaceted circumstances of our lives, including our early years. This impinges on how healthy, independent, and active we will be in old age, and thus on how much of a burden we will represent for our descendants and for society
- Grandparents can also contribute to the education and health of their grandchildren. Paquet has shown that grandparental involvement is a powerful and widely available protection factor against the health gradient among infants

Reconciling earning and caring as a policy issue that requires a lifecourse approach

- As Jenson puts it, having a job is often not enough to earn a living (hence the rising concern for the "working poors"), but it also seems like "too much" for the time available
- The results of the Health Canada research by Duxbury and Higgins are worrying: even among relatively privileged workers, reconciling work and family obligations has become increasingly difficult, with notable health consequences
- One can imagine (but not document!) a spiral of health problems, hindered career, family problems, worsening health for oneself and family members, and so on. One can also imagine protection factors, some of them policy- based

Health-maintaining lifeskills as a policy issue that requires a lifecourse approach

- No aging society can afford to deal with health problems only as they happen, and using mainly expensive medical care
- Prevention, early detection of health problems, and the cooperation of individuals in the treatment of diseases heavily depends on
 - their lifeskills and their education, including lifelong learning
 - the cooperation of their families and of their support networks

A Longitudinal and Lifecourse Strategic Research Cluster

- SSHRC's transformation and our timeline
- Planning the future of longitudinal and lifecourse research in Canada
- Bringing all the threads together
 - The pieces of the lifecourse puzzle
 - The researchers, research users and social statisticians who will shape and exploit the research instruments
 - Furthering comparative international and interprovincial research

Surveys and other longitudinal approaches: towards an information system

- There are no substitutes for complex cohort or panel surveys
- But there are other, complementary and not substitutable, longitudinal approaches
 - Longitudinal administrative databases, operating with partial and uneven data, but at a relatively low cost
 - Micro-simulation models, very telling, but also very risky
 - Experimental policy research, in labs (realistic?) or full-scale (quite costly!)

Longitudinal Administrative Databases

- Data gathered for administrative purposes (health care, employment insurance, etc.)
- Possible matches:
 - between two or more LADs
 - between LADs and data from other sources
- Keeping track of individuals through many public programs and services
- Uneven data quality
- Low cost

Longitudinal Surveys

Cohort and Panel studies

- Cohort : group of individuals who experienced a notable event simultaneously (often birth cohorts)
- Household panel : systematically tracks over time all the members of an original set of households and their descendants, as they form new households through changes in marital unions, and because of children leaving their family of origin
- High cost
- High yield: detailed conditional probabilities

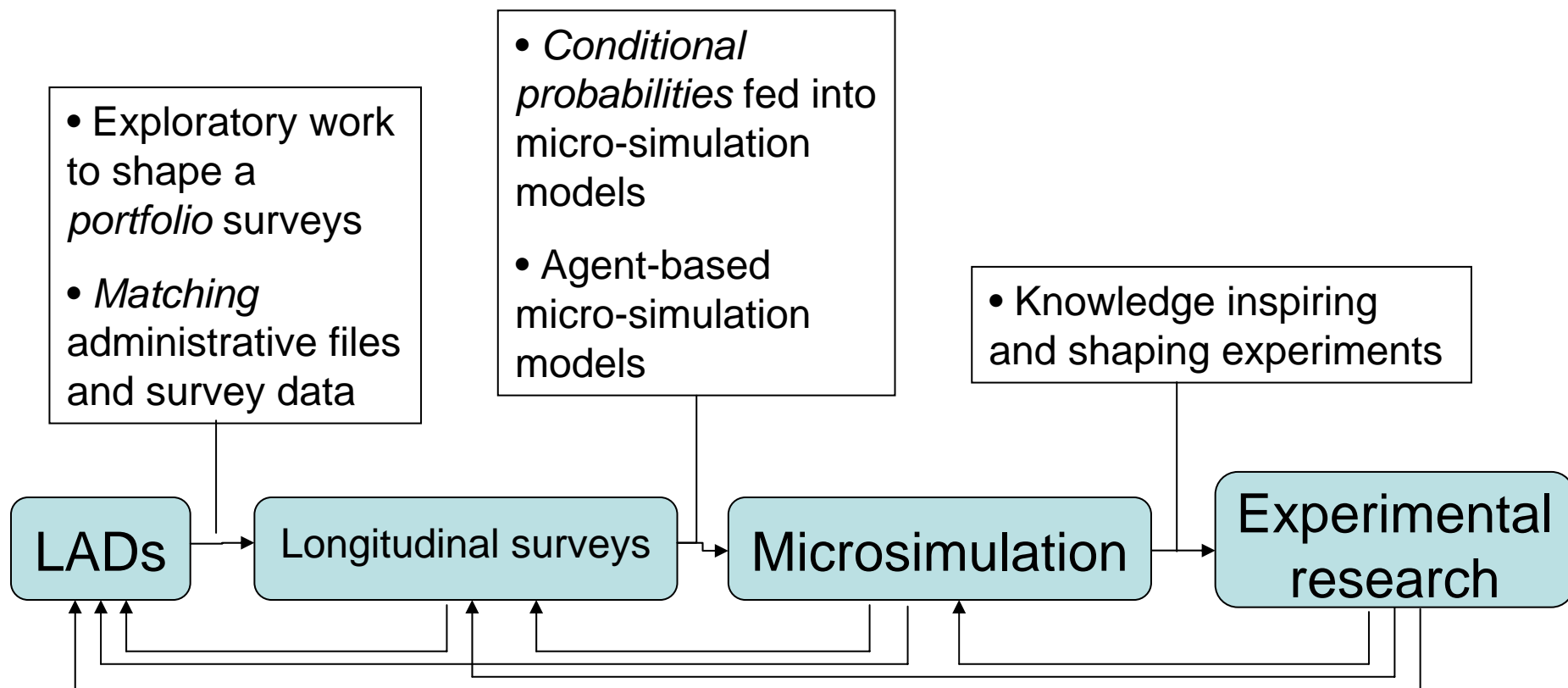
Micro-simulation programs

- Synthetic individuals whose characteristics replicate those of the population
- Events are generated according to probabilities
- For instance:
 - Age, work, education, etc. determine chances of having a child
 - Event: birth of a child
 - Child becomes part of the situation and is taken into account when calculating probabilities of subsequent event (e.g. having a second child)
- Low cost

Experimental research

- Control group and experimental group(s)
- Measuring the effect of the experimental variable(s)
- Laboratory (low cost) or real-life (high cost) experiments
- Canadian expertise at the Social Research and Demonstration Corporation

The longitudinal research cycle



Feedback loops:

- new findings
- new questions
- reshaping instruments

Planning the future of longitudinal and lifecourse research in Canada: a dynamic chart

Shape and reshape the dynamic chart using :
• documentary evidence
• dialog among researchers

Research abroad — Research in Canada — Research in provinces

If we can do such research:

- encourage to do
- compare
 - internationally
 - interprovincially
- discuss research
- debate policies

If we cannot do such research:

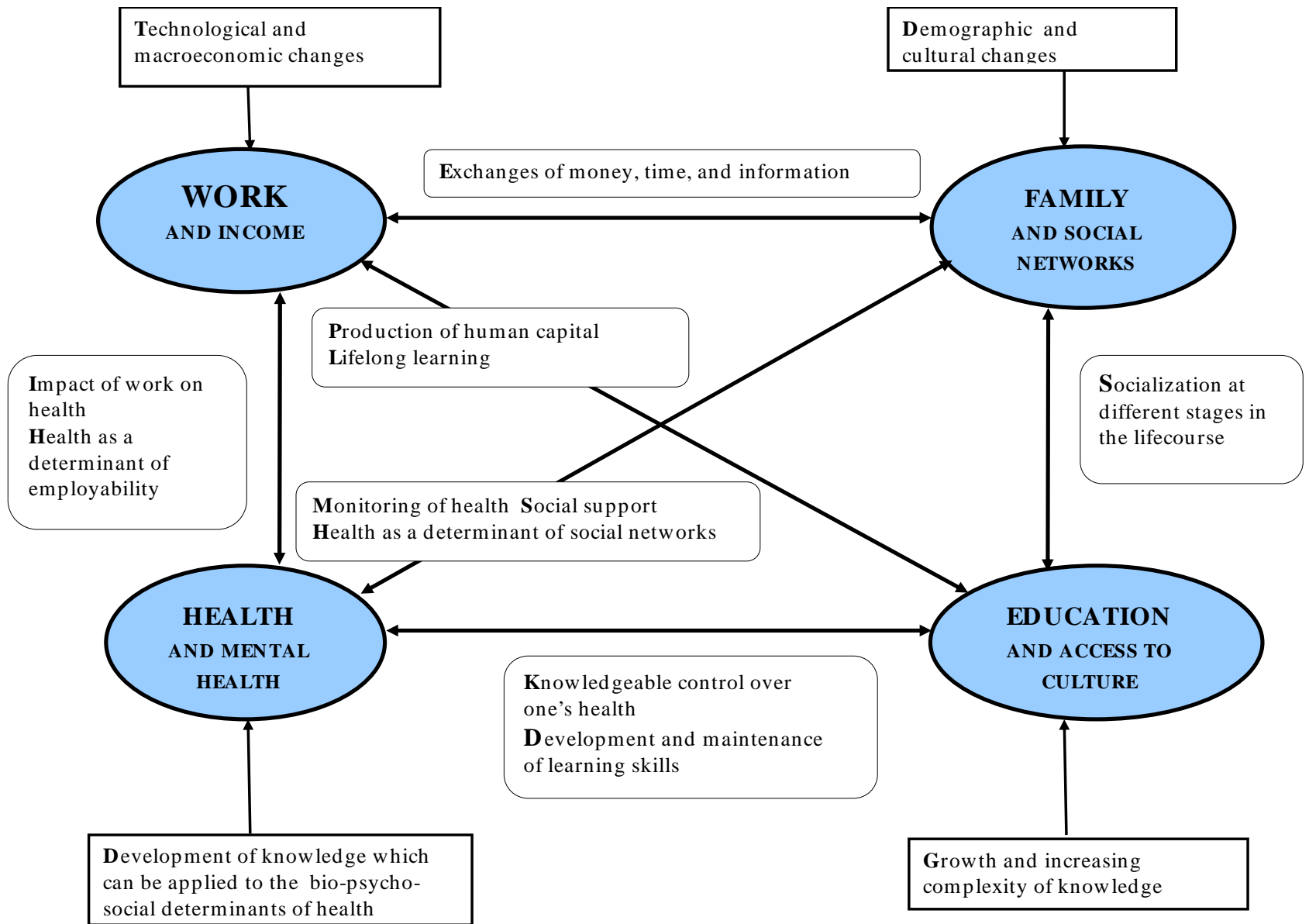
plan new instruments that are comparable **and** innovative

The Socioeconomic and Health Integrated Longitudinal Survey (SHILS)

- A household panel study, comparable to other long-term surveys in many advanced countries: the BHPS in Britain, the PSID in the USA, the LLS in Sweden, the GSOEP in Germany, HILDA in Australia, and plans for a European comparative survey.
- Taking inspiration from many of these surveys, especially the British Household Panel Study (BHPS), SHILS is an integrated survey, covering the interactions between health, work and income, family life and social networks, education. It rotates themes and questions over periods of one, two and four years.

The Socioeconomic and Health Integrated Longitudinal Survey (SHILS)

- It uses a standard sample design for a self-reproducing sample
- A sample size of 7 500 households is the standard...
- ...but there might be opportunities to link up with other planned surveys so as to increase sample size while maximising returns
 - Canadian Longitudinal Survey on Aging
 - Canadian Multigenerational Birth Cohort



Can the objectives of SHILS be achieved with existing surveys?

- Statistics Canada has a number of fine longitudinal surveys:
 - on the dynamics of labour and income (SLID)
 - on population health (NPHS)
 - on children and youth (NLSCY)
 - on the transition between school and work (YIT)
 - on the dynamic of workplaces and employees (WES)
 - and on immigration (NIS)
- Each one is designed to provide answers to fairly specialized questions within its own area; it provides surprisingly little information about the other elements of the situation of individuals and households. Moreover, some of these surveys cover relatively short periods (6 years for SLID, for instance) or specialized subpopulations.
- SHILS would not provide as much detail about each of the areas it covers, but it would represent the overall dynamics in ways that are beyond the reach of the existing surveys. It would fill an important data gap, but it is not meant to replace all existing longitudinal surveys. It is rather complementary to them.

Challenges and opportunities

- Reasonably precise hypotheses and policy questions... while planning for long term research capacity: the key role of the lifecourse framework
- A fantastic opportunity
 - for collaboration across departments in the public sector, across disciplines in academia, and across granting councils (SSHRC, CIHR, and CFI, now opening up to funding surveys)
 - for building an information system in view of enlightened public debate, a seamless environment where complementary longitudinal data sources are exploited
- The need to make sure we are productive in research and dissemination: using the experience from abroad