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Using Union Status or Marital Status to Study the Living Arrangements of Elderly People

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The authors reflect on the use of marital status to study the living arrangements of elderly people (aged 60 years and older) in a comparative perspective. Traditionally, relevant studies have differentiated by marital status and assumed that married people lived together and that unmarried people did not live with partners. However, marital status is a social construct, whereas union status is the residential one, and although marriage is universal, it is different in different places and at different times. Using fairly recent census data from nine countries around the world, the authors examined how well marital status helps indicate union status. They found reason to believe that marital status has been a good indicator of union status in some places at certain times but that it is not always so.

Keywords: *living arrangements; elders; international; marital status*

“We’re never going to get married—for what?” Vetter said. “You get married one year, and die the next.”

—MacPherson (2007)

This article addresses the use of marital status or union status to inform the study of living arrangements among elderly people (aged 60 years and older) around the world. The two statuses overlap but are conceptually distinct,

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with one a civil status reported in such places as population censuses and social surveys and the other an actual residential situation sometimes reported in household censuses or surveys. Both are important in the study of elderly people's living arrangements, but just as researchers are now quick to differentiate between the family and the household, they should also differentiate between marital status and union status. Because having the necessary information to do so is often not available, researchers still must often use marital status to indicate residence status. Doing so is usually reasonable and better than not considering union status at all, but not always.

Marital status is universal, but marriage itself is a culturally defined phenomenon that varies across societies (United Nations 1990). In this study, we looked at the relationship between marital status and union status in nine countries around the world that can be put in five broad cultural groups: the Czech Republic, France, and the United States in the West; Mexico, Colombia, and Brazil in Latin America; Turkey in the Middle East; Kenya in sub-Saharan Africa; and Vietnam in East Asia.

Background

Marital status is one of the most important characteristics to consider when studying living arrangements, because marriage forms a family, and a married couple remains a family after any children have grown and moved away. A married couple almost always intends to live together, and most societies accord special status to the conjugal unit. Researchers have thus traditionally categorized the living arrangements of elderly people in part according to the elders' marital status to good end. But marital status is a civil status, not a residential status, and it is not correct to equate the two.

An early quantification of elderly people's living arrangements was in the work of Ethel Shanas (1961) in the United States. She was quick to laud others as pioneers, but Shanas herself advanced into uncharted territory by developing social surveys of elders, first in the United States and then with colleagues in Denmark and Great Britain (Shanas et al. 1968). Later, she added other places to her portfolio, such as Israel, Yugoslavia, and Poland (Shanas 1973).

In all her forays, Shanas considered it important to examine the living arrangements of married and unmarried elderly people separately and to assess whether they lived independently or with kin who themselves were categorized as married or unmarried. She found that categorization was important in all the countries she studied because married elders were more

likely to live independently. They could care for each other, whereas a solitary unmarried elder would be on his or her own. Others found marital status important too. As historians digitized old census data, they used Shanas's schema to show that in the United States between 1900 and 1975, and later between 1880 and 1980, there was a huge rise in the independent living of married elderly people (Dahlin 1980; Ruggles 1996). There was a larger decline in the coresidence with children of married elders compared with unmarried elders, and there was a larger decline in the coresidence of elders with married children compared with unmarried children. The recent series of publications on the living arrangements of people aged 50 years and older in 15 countries¹ by the Population Activities Unit of the United Nations Economic Commission for Europe has continued to use marital status as a pivotal family feature (e.g., United Nations 2003).

Because Shanas's was a comparative schema, Palmore (1975) added figures for Japan to show that marital status made a much bigger difference for the living arrangements of elderly people in the United States than in Japan. De Vos and Holden (1988) added information for two Asian and six Latin American societies,² arguing that the situation there seemed intermediate to those in Japan and the United States but more similar to that in Japan. More recently, Himes, Hogan, and Eggebeen (1996) used a similar schema when examining the living arrangements of elderly people of different minority groups in the United States.

Underlying these views was the assumption that the social characteristic of marriage (or, more broadly, the conjugal unit) was fairly synonymous with the residential characteristic of union status. In fact, the U.S. census went to some lengths to equate marital and union status (Shyrock and Siegel 1973). And when consensual union is considered a type of marriage, that can make sense in Latin American too (De Vos 1999). But there are problems with this. One is that the residential meaning of being married seems different in Africa (Hammel 1984). The other is that nonmarital cohabitation among elderly people has been on the rise in societies in Europe and of European descent (Brown, Lee, and Roebuck 2006; Gaymu et al. 2006; Kiernan 2001).

In sub-Saharan Africa, including Kenya, marriage is polygamous, and people often live in compounds rather than households (e.g., Cattell 1989; Goody 1972; van de Walle 1968). Thus, multiple women married to the same man may occupy separate huts in a compound. Meanwhile, the man can be enumerated as residing with only one of his wives if the huts are considered separate households. The result is that many so-called households are headed by married women living alone.

In Europe, most of the research on cohabitation has focused on younger people, but the work of Gaymu et al. (2006) showed that many nonmarried European elders aged 75 years and older in 2000 resided with partners. In the United States, Chevan (1996) used an indirect estimation technique to trace the increase in cohabitation among people aged 65 years and older from virtually 0% in 1960 to 2.4% in 1990 and, finding it even more prevalent among younger adults, predicted that the number would keep increasing for some time. It was partly work such as this that encouraged the U.S. Census Bureau in 2000 to start enumerating unmarried partners of a household head, and Brown et al. (2006) were able to use census data to estimate that roughly 4.3% of the unmarried population 60 to 69 years of age cohabited in 2000.

Now that the separation between the social and residential characteristics of marital and union status has started to affect the very populations that first gave rise to the use of marital status as a key family characteristic in the study of elderly people's living arrangements, there is reason to revisit Hammel's (1984) concern. It may be time to treat the two items as separate, if overlapping, characteristics, similar to the way the household is used to help indicate the family, while recognizing that the household and family are not the same.

This Study

How valid is the assumption that marital status indicates union status? How important is it for censuses and surveys to inquire separately about marital status and union status? To address such questions, in this study, we used fairly recent census data from nine countries around the world: 1991 for the Czech Republic and 1990 for France in Europe; 2000 for the United States in North America; 2000 for Mexico, 1993 for Colombia, and 2000 for Brazil in Latin America; 1990 for Turkey in the Middle East; 1999 for Kenya in sub-Saharan Africa; and 1999 for Vietnam in East Asia.³ Marital status is a characteristic enumerated in the population parts of censuses. We estimated union status from information in the housing parts of censuses. Reported marital status was then juxtaposed with our estimates of union status.

A Diversity of Countries

Various characteristics of the samples and of the countries are shown in Table 1. For instance, the "youngest" of the populations aged 60 years and older was that of Turkey, where over 40% were aged 60 to 64 years. The

“oldest” was that of the United States, where over 19% were aged 80 years and older. There were more women than men aged 60 years and older in all the countries, but the gaps were smallest in Colombia and Turkey and greatest in the Czech Republic, France, and Vietnam. Finally, despite vastly different customs governing marriage, census categories for marital status tended to be the same everywhere: never married, married, legally separated or divorced, and widowed. In certain societies, being married can also be differentiated by whether the marriage is customary versus formal or polygamous versus monogamous.

Beside information about the sample populations, Table 1 contains several socioeconomic and demographic indicators: 2000 to 2005 life expectancy at birth, the sex ratio of the population aged 60 years and older, the proportion of the population aged 60 years and older in 2000, labor force participation of the population aged 65 years and older in 2000, percentage illiterate among people aged 60 to 64 years in 2000, and the 1990 per capita gross national income (pcGNI; reflecting consumption ability instead of production). A correlation matrix of some of those sample characteristics and country indicators is also shown.

The broad culture groups of Western, Latin American, Middle Eastern, sub-Saharan, and East Asian countries were correlated perfectly with their 1990 pcGNIs. The three Western nations had pcGNIs above \$10,000, the Latin American and Middle Eastern countries had pcGNIs roughly half that, and the African and East Asian countries had pcGNIs under \$1,500. However, broad culture is not the same as a particular cultural element. For example, the cultural indicator of percentage illiterate in 2000 among people aged 60 to 64 years was correlated with pcGNI at only $-.72$.⁴ Illiteracy was lower in the low-pcGNI country of Vietnam than in any of the middle-pcGNI countries.

Nor was pcGNI better correlated with the economic indicator of labor force participation among people aged 65 and older ($-.76$). Labor force participation in this age group was virtually the same in Vietnam (a lower-income country) as in Turkey (a middle-income country), at 33.1% and 32.5%, respectively. It was only third lowest in the highest income country (the United States).

The most telling of the demographic indicators was the proportion of the population aged 60 years and older. Its correlation with pcGNI was $.81$, while its correlations with labor force participation and illiteracy were $.83$ and $.81$. The proportion tended to be about the same or higher in the low-pcGNI country of Vietnam as in the middle-pcGNI countries.

Table 1
Descriptive Statistics for Study Countries

Variable	Brazil ^a	Colombia	Czech Republic ^a	France	Kenya	Mexico ^a	Turkey	United States ^a	Vietnam ^a
Census sample percentage distributions ^b									
Age (years)									
60 to 64	31.7	35.1	31.9	27.7	30.4	31.7	40.7	24.2	28.7
65 to 69	24.5	23.8	27.4	25.8	22.3	23.9	24.7	20.7	27.1
70 to 74	19.3	18.1	14.3	12.8	18.9	18.0	13.3	20.0	19.5
75 to 79	12.3	11.3	14.5	16.3	12.0	12.5	10.8	15.9	13.2
≥80+	12.3	11.7	11.9	17.5	16.4	13.9	10.4	19.1	11.4
Sex									
Male	44.8	47.8	40.2	41.9	46.6	46.8	47.9	43.1	41.8
Female	55.2	52.2	59.8	58.1	53.4	53.2	52.1	56.9	58.2
Marital status									
Single	5.4	10.5	3.6	6.9	5.1	5.5	1.2	4.2	0.8
Married: regular	50.3	42.8	54.7	60.0	52.3	54.1	70.5	57.8	61.1
Married: consensual/polygamous	6.6	12.2			20.0	5.8			
Divorced/separated	11.8	6.4	5.7	3.4	2.5	5.4	0.9	11.4	1.0
Widowed	25.7	27.0	35.9	29.6	19	29	27.4	26.6	36.9
Unknown		1.1	0.1		0.9	0.2			0.1
Sample size	338,818	223,268	728,489	428,985	66,223	777,455	185,762	460,075	180,873
Country indicators circa 2000									
Life expectancy: 2000 to 2005 ^c	68.3	71.9	75.4	79.0	49.3	73.0	70.5	77.5	69.2
Sex ratio (1): ≥60 years in 2000 ^c	80.5	81.1	67.6	73.2	88.4	84.6	86.5	75.6	87.6
% Population ≥60 years: 2000 ^c	7.8	6.9	18.4	20.5	4.2	6.9	8.4	16.1	7.5
LFP ≥65 years: 2000 ^c	15.9	16.8	7.6	1.5	55.9	29.8	32.5	9.9	33.1
Illiteracy 60 to 64 years: 2000 ^c	31.3	20.2			56.9	22.4	41.1		14.5
pcGNI: 1990 ^d	\$5,120	\$4,550	\$10,790	\$17,820	\$880	\$5,890	\$4,300	\$23,120	\$920

(continued)

Table 1 (continued)

Correlation matrix of selected variables	1	2	3	4	5	6	7	8	9
1. Life expectancy: 2000 to 2005 ^e	1								
2. Sex ratio (1): ≥60 years: 2000 ^e	-.7303	1							
3. % Population ≥60 years: 2000 ^e	.8727	-.8742	1						
4. LFP ≥65 years: 2000 ^e	-.7368	.9108	-.8284	1					
5. Illiteracy 60 to 64 years: 2000 ^e	-.8026	.7521	-.8065	.7111	1				
6. pcGNI: 1990 ^d	.8915	-.6863	.8182	-.7558	-.7169	1			
7. Sample age 60 to 64 years	-.5307	.3966	-.5020	.4891	.7863	-.6504	1		
8. Sample age ≥80 years	.8048	-.4493	.6310	-.6094	-.6621	.9172	-.7874	1	
9. Sample percentage female	.4361	-.6360	.7184	-.5178	-.7893	.4220	-.6710	.3304	1

Note: LFP = labor force participation; pcGNI = per capita gross national income. Percentages may not add to 100% because of rounding errors. Life expectancy is e^i in years; sex ratio is the number of male citizens per 100 female citizens; LFP is per 100 people; illiteracy is per 100 people; pcGNI is gross domestic product plus net receipts of primary income.

a. Weights were used for census estimates for Brazil, the Czech Republic, Mexico, the United States, and Vietnam.

b. From census microdata for Brazil in 2000, Colombia in 1993, the Czech Republic in 1991, France in 1990, Kenya in 1999, Mexico in 2000, Turkey in 1990, the United States in 2000, and Vietnam in 1999.

c. United Nations (2002).

d. U.S. Census Bureau (2007:Table 1324).

Estimating Union Status

Because modern censuses generally have both population and housing components, we were able to estimate union status from residential information using the following rules:

1. If a household contained a spouse or companion, the householder (or head) was in a union.
2. All spouses or companions of the householder (or head) were in unions.
3. If there were two other relatives of the opposite sex within 20 years of each other in a household, they were both estimated to be in a union.
4. If there were two nonrelatives of the opposite sex within 20 years of each other in a household, they both were estimated to be in a union.

We settled on a 20-year age gap going either way for relatives or nonrelatives of the opposite sex in the same household to be as liberal as possible in finding someone in a union while still generating reasonable figures.⁵ The procedure could only consider unmarried people of the opposite sex to be in a union, because otherwise, almost everyone who was unmarried but who lived with other people would have been estimated as in a union, and the exercise would have been meaningless.

Comparing Reported Marital Status and Estimated Union Status

How well does the social characteristic of marital status indicate union status derived from the household part of a census? We used the arbitrary standard that indication was good if the difference between the two was less than 5 percentage points, moderate if the difference was more than 5 but less than 10 percentage points, and not good if the difference was more than 10 percentage points. The relevant figures are shown in Table 2.

There was a low level of disjuncture between reports of being married and estimates of living in a union in four of the nine countries: Brazil, the Czech Republic, France, and the United States. There was a moderate level of disjuncture in two countries: Mexico and Vietnam. Finally, we find a high level of disjuncture in three countries: Colombia, Turkey, and Kenya (see Table 2).

Figures for Brazil and the United States are artificial in that the censuses used living-arrangement information to code marital status. In Brazil, the 2000 census recorded three different variables for marital status: (1) whether living with a spouse or companion, (2) the nature of the last union, and (3) current marital status. Table 2 shows information only for current living

Table 2
Marital Status by Estimated Union Status Among
People Aged 60 Years and Older

Country	Estimated (%)			Sample Size
	In Union	Not in Union	Total Percentage	
Brazil, 2000				
Married	98.63	1.37	100	141,268
Not married	0.26	99.74	100	197,550
Colombia, 1993				
Married	87.11	12.89	100	124,053
Not married	3.27	96.73	100	99,215
Czech Republic, 1991 ^a				
Married	96.11	3.89	100	399,008
Not married	2.44	97.56	100	329,481
France, 1990				
Married	97.21	2.79	100	257,346
Not married	6.28	93.72	100	171,639
Kenya, 1999				
Married	62.58	37.42	100	48,379
Not married	1.52	98.48	100	17,844
Mexico, 2000 ^a				
Married	94.39	5.61	100	466,722
Not married	3.17	96.83	100	310,733
Turkey, 1990				
Married	89.74	10.26	100	130,946
Not married	2.56	97.44	100	54,816
United States, 2000 ^a				
Married ^b	99.89	0.11	100	268,988
Not married	0.80	99.20	100	195,710
Vietnam, 1999 ^a				
Married	94.04	5.96	100	110,638
Not married	0.46	99.54	100	70,235

a. Weights were used in the Czech Republic, Mexico, United States, and Vietnam to make the samples nationally representative.

b. Married and living with spouse.

arrangement because the question on current marital status did not include consensual unions. Yet, as data for Colombia suggest, a disjuncture between being married and actually living with a partner can be rather high if one does not use information on current living arrangement. If, instead of using information on current living arrangement, one used a combination of current marital status and the “nature of the last union” variables to differentiate

“never married” singles from “consensually married” singles in Brazil, one would have derived a figure of 12%, similar to what we found in Colombia.

Likewise, the United States separates married people into categories depending on whether they currently live with their spouses. Figures in Table 2 reflect only those who currently lived with their spouses, and any disjuncture at all may reflect more on our procedure for estimating union status than anything else. If one used information that included all marriages, the figure would have been greater—3.7% married individuals living outside unions—but not much greater and still less than 5%, because most married elders currently lived with their spouses.

The rather high levels of disjuncture between being married and living in a union in the three culturally distinct countries of Colombia, Turkey, and Kenya probably have three very different explanations, but all point to the danger of equating marriage with living arrangements in an international context. The Colombian figures probably reflect the high level of consensual union there (Fussell and Palloni 2004) and are similar to what the Brazilian figures would have been if the Brazilian census had not additionally asked about union status. Although Turkey adopted the Swiss civil code in 1926, which included Western-style rules governing marriage, many village dwellers still follow the more traditional Islamic marriage customs (Hancioglu and Ergöçmen 1992; Nauck 2002; Rasuly-Paleczek 1996). According to those customs, it is not necessary for a man to divorce his wife to marry another woman (up to four wives are permitted), and our data suggest that many older married women no longer actually lived with their husbands. Finally, the Kenyan figures provide a clear example of the limitation of using marital status to help indicate residential status, as discussed earlier.

Even if it may not always be reasonable to assume that a married elder lives with a spouse, it may have seemed more reasonable to assume the opposite, that supposedly unmarried elders do not live in unions. The figures are consistent with that notion. In eight of nine cases, we found very little disjuncture between census reports of elders' being unmarried and our estimates of not being in unions (Table 2). Even in the United States, where cohabitation has become more prevalent, especially among younger people, there was an insignificant disjuncture between the census figures and our estimate of union status. But the 1990 French data do show a disjuncture that, as cohabitation increases, may be heralding more to come.

In France in 1990, more than 6% of people identified as unmarried in the census were estimated as living in unions (Table 2). The gap was more prevalent among younger than older people and more prevalent among men than among women.⁶ This finding was echoed by Gaymu et al. (2006) using

2000 data. The age situation appeared to be the case in the United States in 2000 as well, but we do not yet have trend data with which to assess change over time (Brown et al. 2006; also see Chevan 1996).⁷

Summary and Discussion

It is time to acknowledge that just as we now distinguish between the family and the household when studying living arrangements with census or survey data, we also need to distinguish between marital status and union status. Marital status has often been considered a key family characteristic determining living arrangements, the idea being that married people live together and care for each other, whereas unmarried people live without partners and are at greater risk for being poor and living alone. But marital status is a social characteristic, whereas union status is a residential characteristic, and the two are not necessarily the same.

In this study, we estimated union status from recent household census data and juxtaposed those estimates with marital status information from the population section of the same census. We looked at nine countries, divided into cultural groups: the Czech Republic, France, and the United States in the West; Brazil, Colombia, and Mexico in Latin America; Turkey in the Middle East; Kenya in sub-Saharan Africa; and Vietnam in East Asia.

We found that marital status tells us something important, but not the same thing everywhere and not, in some countries, the same thing over time. Using recent data, we found reason to accept the notion that being reported as married in the census has been fairly synonymous with living in a union in the United States, Brazil, the Czech Republic, and France; maybe in Mexico and Vietnam; probably not in Colombia and Turkey; and definitely not in Kenya. We found reason to accept the notion that being unmarried has been fairly synonymous with living without a partner in most places but that the situation could be changing. There were suggestions of such a change in the 1990 census data from France and in studies in the United States and various European countries.

Using marital status to study living arrangements in an international context has always posed problems, but we are now seeing that doing so may be problematic even in areas where it was first used. Populations in more developed countries are now experiencing a second demographic transition, in which there is a shift from the "golden age of marriage" to the dawn of cohabitation, and an increasing proportion of unmarried elders in those countries are living with partners (van de Kaa 1987). When possible, it now makes sense to use information on both marital status and union status, because doing so can add important information.

Notes

1. Bulgaria, Canada, the Czech Republic, Estonia, Finland, Hungary, Italy, Latvia, Lithuania, Romania, Russia, Switzerland, Turkey, the United Kingdom, and the United States.

2. South Korea, Sri Lanka, Mexico, Costa Rica, the Dominican Republic, Panama, Colombia, and Peru.

3. Data for Colombia, France, Kenya, Mexico, and Vietnam came from the University of Minnesota's Integrated Public Use Microdata Series International Project (<http://international.ipums.org/international/>). Data for the Czech Republic and Turkey came from the United Nations Economic Commission for Europe's Population Activities Unit (<http://www.unecce.org/pau/age/>). Data for Brazil and the United States came from the University of Wisconsin's Center for Demography and Ecology (<http://www.ssc.wisc.edu/cde>).

4. Illiteracy may have been so low in the three high-pcGNI countries that the figure was left blank in the recent United Nations (2002) fact book, but we assigned these countries a value of 0.1 to be able to make the correlation.

5. We looked at four different possible assumptions about the age gap between spouses: (1) up to a 20-year gap either way, (2) up to a 5-year gap either way, (3) the husband was up to 5 years older than the wife, or (4) the husband was up to 10 years older than the wife. Although all estimations procedures did well (data not shown), the general finding was that the 20-year assumption was the best, and the "husband up to 5 years older than the wife" assumption was the worst. For instance, the correlation between reported and estimated union status in Mexico was .874 for the 20-year assumption but .869 for the "husband up to 5 years older than the wife" assumption. Corresponding figures for Vietnam were .920 and .888. Any of these scenarios obviously risks estimating as in a union two people who are not. But the figures in Table 2 suggest that this did not pose a noticeable problem.

6. The following are the percentages of unmarried men and women in France in 1990, by age, who were estimated to be living with partners:

Age (Years)	Total	Male	Female
60 to 74	9.0	15.9	6.6
75 to 84	4.2	10.5	2.8
≥85	2.0	5.5	1.2
≥75	3.6	9.2	2.4

7. The U.S. Census Bureau started recording an "unmarried partner" of the head of a household as a household membership category in the 2000 census.

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