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**Support-exchange between adult children
and their old and very old parents**

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Support-Exchange Between Adult Children And Their Old And Very Old Parents

Abstract

The current discussion about intergenerational solidarity between adult children and their parents is based on the following assumptions. The first assumption is that due to socio-cultural and demographic changes (e.g. the increase of women's participation in the labor force, increasing divorce rates, and a decrease in birth rates) support from children for their elderly parents can no longer be expected. The second assumption is: In past times children felt obliged to take responsibility for their parents, whereas today support is based on voluntariness, mutual affection, and common interests. In order to discuss both hypotheses we will present data from two Berlin studies: First, a subsample of the Berlin Aging study (age 70 or older), in which old parents as well as their adult children reported about their respective feelings and support exchange. Second, data from another study (age 60 to 70), in which older adults were asked about their experiences, attitudes, and activities in retirement with special regard to caregiving sons.

The current discussion about intergenerational solidarity between adult children and their parents is based on the following assumptions. First, the claim is that due to socio-cultural and demographic changes children no longer support their parents and shove them off to old age homes. Second, it is argued that in the past, children felt obliged to take responsibility for their parents, whereas today support is based, akin to friendships, exclusively on voluntariness, mutual affection, and common interests. (Hess/Waring 1978, Montada 1981).

The first assumption can easily be refuted: Only 4 % of all individuals 65 years and older live in institutions in Germany. But it is not known how many of these are childless (Bäcker 1991). More precise information can be gathered from the Berlin Aging study¹. The Berlin Aging study comprises 516 individuals ages 70 to 103 years. Since the project was started before the unification of Germany it is unfortunately restricted to West-Berlin. The sample is drawn at random from the registry of West-Berlin and stratified by age and gender.

In our sample 13,8 % live in institutions. This percentage is higher than the 8,4 % reported by the West-Berlin census data. This difference is explained by the fact, that more old individuals who live in institutions were willing to participate in the study compared to the general population.

55,4 % of the institutionalized individuals in our study have no living children and from those who do have at least one child 45,5 % are aged 95 and older. This means that the children of these very old parents may need care themselves, instead of being able to care for their parents. Turning now to the second assumption that responsibility for old parents is voluntary as is the case with friendships, we can argue as follows: If this were the case, the total support which old parents receive from their children should be about equal to that received from friends. It should be noted that by "support" to parents we not only mean care-giving, but also other kinds of support, such as instrumental and emotional support.

I will now report on data from a subsample of the Berlin Aging Study, in which 83 parents, 45 fathers and 38 mothers ages 70 to 100 years (mean age 84,2 sd 8,8) and 115 of their children, that is, 41 sons and 74 daughters ages 29 to 71 years (mean age 54,2 sd 9,9) were asked about their mutual relationships and exchange of support.

Instrumental support was assessed via two questions: help with household chores, and help with shopping and other errands. Emotional support was also assessed by means of two questions, namely talk about personal problems, and being cheered up when sad.

A comparison between those 131 parents of the Berlin Aging study who gave us the addresses of their children, and those 121 who did not, showed that there were

¹ The research reported is part of the multidisciplinary Berlin Aging Study (BASE). BASE has been conducted by the Berlin Brandenburgische Academy of Sciences in Berlin in collaboration with the Free University Berlin and the Max-Planck-Institute for Human Development and Education, Berlin, and is financially supported by the Department of Research and Technology (13 TA 011 + TA = 11/A) and the Department of Family and Senior Citizens.

no differences between both groups of parents, neither with respect to emotional closeness with children, nor with respect to geographical distance to children.

86,6 % of the parents reported to have received support from a child and only 27 % had received support from a friend during the last three months. 62 % of the parents had changed hugs and kisses with a child, but only 20 % had such an exchange with a friend. 24 % of the parents expected care from a child in case of need, but there was only one person who expected care from a friend.

This results show unequivocally that support relationships between parents and children do not follow the same pattern as friendships, but that children provide much more support for their parents than friends.

I now turn to the support relationships as they are reported for sons and daughters and by daughters and sons themselves.

Table 1

	The View of the parents Support received from a child		The View of the parents Support provided for a child		
	sons	daughters	sons	daughters	
instrumen- tal support	17 %	47 %	instrumental support	5 %	12 %
emotional support	12 %	24 %	emotional support	8 %	18 %

	The View of the children Support received from a parent		The View of the children Support provided for a parent		
	sons	daughters	sons	daughters	
instrumen- tal support	64 %	72 %	instrumental support	15 %	22 %
emotional support	83 %	90 %	emotional support	42 %	65 %

The results are astonishing with respect to two points. First from the perspective of parents, children provide less support than children claim to have provided and second children report to have received more support from their parents than parents claim to have provided. This means that parents tend to underestimate the support exchange and children tend to overestimate it.

In other words, parents may associate, for example, with "talk about problems" or "help with household chores" only really remarkable events, while children may have in mind also tiny little actions. For example, a child interprets "watering the flowers" as "help with household chores", while the parent does not.

This leaves open two questions for support research. First, what kind of behavior is perceived as support, and second, does only perceived support have positive effects, or can we assume that also interactions which are not evaluated as supportive have this kind off effect?

I will now turn to the question of, whether support which children provide (at least in their view) results only from a positive emotional relationship, or whether feelings of obligation might also play a role. In order to answer this question first, we

examined if, there is an association between the quality of the relationship as it is remembered at age 10, and the amount of support currently provided. The quality of the relationship was indexed a 7 point scale, ranging from 1 (very good relationship) to 7 (very bad relationship). Results indicated no such relationship. Second, we tested the association between the quality of the relationship current and the amount of support provided to parents. The results show, that there is a statistical significant association ($r = -.3437$, $p < .001$) between the quality of the relationship and emotional support, but not with instrumental support. This effect accounts for 10 % of the variance. We can thus conclude that children feel obliged to provide instrumental support, independently of the quality of the relationship. Our next question concerns the association of the emotional relationship between parents and children with respect to preferred geographical distance. Children answered on a seven point Lickert type scale the question: At which geographical distance ideally would you like to live to your parent? An analysis of covariance showed that preferred geographical distance is a function of instrumental help, ($F(2,95) = 6.94$, $p < .01$) although the quality of the relationship is also a significant predictor of preferred distance (covariate $t = 2.2$, $p < .03$). Children who provide instrumental support, prefer to live at a larger distance, compared to those who do not.

This is different for sons ($x = 2,61$) and daughters ($x = 2.19$) since preferred distance is significant larger for sons ($F(1,63) = 4.1$, $p < .05$). From this, we may infer that perhaps sons feel more burdened by the help they extend to their parents than do daughters.

This, however, is a tentative interpretation. Betina Hollstein, who is one of the few researchers who talked to care-giving sons, can draw a more detailed picture in this regard.

Part II: Betina Hollstein

In the second part of our presentation I would like to take a look at the relationship between the support of parents and its respective burdens. In this regard, I would like to consider some other aspects in addition to the context just presented. Therefore I will limit myself to a particular group and type of support: namely sons who care for and support their older parents.

The situation concerning attending daughters is widely documented, both in its quantitative and qualitative aspects. Generally one can say: first, that supporting older parents is frequently associated with extreme burdens for caring daughters², and second that the daughters take on such tasks regardless of the quality of their emotional relationship with their parents. That is, a good emotional relationship is not required by daughters to take on the support and care of their parents.

The situation with care by sons, however, has seldom been investigated³ due to limited, in fact almost nonexistent number of cases⁴. There is a consensus that men are less attentive than women - even when they are the main source of support. (That is in regard to both the type of care and the time spent thereby.) Furthermore, the consensus is that sons are less burdened than daughters by such care (Horowitz 1985, Barber 1988). Sons seem to receive more support from their wives - both emotionally and practically - than daughters receive from their husbands when they attend to elderly parents. In addition, sons complain less about constraints in other aspects of their lives - for example those related to their careers or their social lives (Horowitz 1985).

It is unclear, however, why men are burdened less than women through caring for elderly parents. Even when the amount of care provided is identical, sons are less burdened than daughters (Horowitz 1985). One might assume that caring men receive more recognition than women, and such recognition accounts for their reduced sense of burden⁵.

Nursing and domestic chores are traditionally seen as so-called woman's work. Therefore, it comes as no surprise, that nursing and attending to elderly parents is

2 This is especially the case when the mother and daughter live in a household, or where limited support (emotional and material) is provided by others. A lack of recognition of the daughter's efforts and constraints impacting other aspects of life (such as employment or social life) may lead to similar results.

3 Cf. Barber 1988, Horowitz 1985, and Lambrecht/Bracker 1992. Caregiving by husbands were investigated by Zarit et al (1986), Fitting et al (1986) and Vinick (1984).

4 The representative distribution was selected according to the terms of the BMFUS of Infratest: 26% of all those requiring nursing aid and 23% of those requiring more general assistance were cared for by daughters. But only 3% of those requiring nursing aid and 6% of those requiring more general assistance are being cared for by sons. (Figures for daughters-in-law are 9% and 6% respectively.) Thus there seems to be a slight tendency to enlisting the efforts of women in more serious cases. Or women seem more prepared to get involved in such cases (Schneekloth/Potthoff 1993).

5 The lack of proper recognition of supporting daughters has been frequently stressed in the literature dealing with this subject as a source of feeling overburdened (e.g. Schmitdke 1987).

expected of sons far less than it is of women (daughters and daughters-in-law⁶). Under what conditions then, and for what reasons will men undertake such tasks? (1) Are they actually burdened to a lesser degree than is attributed to daughters? If we assume that social norms more strongly compel the decisions of women than those of men to care for elderly parents, then we may also assume, that such decisions by men are more voluntary. As an indicator of the degree of free will exhibited in these situations, we could simply take a look at the cases when men take on the care of parents although others would be available for such tasks. Or do they simply step in as a sort of substitute - that is, when no other female (relative) is available? This is what we call the "substitution thesis".(1a) On the other hand, even when men only act as substitute guardians, it is of course still possible, that they only do so when - for example - they have a special emotional relationship with the cared-for parent. A particularly close and positive attachment is meant here, and thus we call this the "attachment thesis".(1b) Thirdly what is the nature of the sense of burden associated with these circumstances? Do the motivations of guardian sons affect the sense of burden associated with giving care? (2)(cf. figure 1)

I would like to consider these questions more closely through a series of qualitative interviews with men who take care of their mothers. Three of the interviews have been taken from a larger research project about "Retirement Activities"⁷. In that project we investigated the types of activities pursued by retirees in qualitative case studies. Such activities included tending or nursing others at home. The basis of the study was interviews conducted with 60 to 70 year old, male and female retirees, who took care of feeble spouses, parents or friends⁸. In Germany at least, there had been only one other qualitative study (in Kassel) (Lambrecht/Bracker 1992), in which tending husbands were interviewed as well as three sons acting as

⁶ The results of the Berlin Aging Study (Schütze/Lang 1992), for example, indicate that parents are less likely to expect being cared for by their sons than by their daughters. In another study (Schmitdke 1987), daughters took on the role of guardian even when the sons had a far stronger relationship with their mother. On the other hand, in the study of Horowitz, 88% of the sons acting as guardians had no sister available as an alternative. (They had no sisters or they were the only child living near the mother.) Furthermore, such sons received much more support from their wives than daughters received from their husbands under similar circumstances.

⁷ The project was conducted in Berlin-Tempelhof between 1986 and 1991 under the direction of Martin Kohli, and was funded by the German Research Foundation (Ko 905/1-1). In addition to the representative postal questionnaire of 60-70 year old, male and female residents of the area (N=1783), we also conducted qualitative case studies of both men and women who were engaged in a variety of activities and occupations while retired (eg. domestic work, part time jobs, various hobbies and honorary social and political positions.) S. Kohli et. al. 1991.

⁸ A random sampling of the representative questionnaires was picked for the qualitative case studies in such a manner that - fortunately - hardly anyone in the sample take advantage of social services (through which interviewed parties are normally contacted). The sons questioned did not live together with their mothers (unlike those of the Kassel Study.) They were the principle sources of support, but they performed none of the basic nursing services required. According to the sons (like those of the Kassel Study) all of the mothers suffer from both physical ailments as well as mental impairments of various degrees.

guardians. In my analysis, I have also taken into account the cases documented in the Kassel study.

We may begin by looking more closely at the conditions under which care was undertaken and asking what alternatives there were to the sons' support. The nature of such alternatives and how they were considered shed light on the degree to which the care was voluntarily taken on.

It is important to note, that in each case the mothers more or less clearly expressed an unwillingness to move to a nursing home⁹. That is to say that the option of a nursing home was mutually tied to extreme emotional and material costs. Could no one else have undertaken the care, however? It is noteworthy that in all cases in which a man was the main source of care, no woman (that is no sister or wife) was considered for the task: none of the sons has sisters; two are single and one is divorced; the wife of one of the men is a career woman and that of the fifth man is sickly¹⁰.

In this regard and in every case considered, the very contours of the situation preclude the ability to speak of a truly voluntary undertaking. On the one hand there were the strong expectations of the mothers, and on the other hand there were no other women available. In this sense the sons are "substitute guardians".

Nonetheless, it is of course possible that the decision by these men to act as guardian resulted from intrinsic motives. That is, it may have been based on a very positive relationship with their mothers. How does this side of the situation look?

To begin with the reasons which the sons themselves gave for their undertaking, all answered that the care of their mothers was a foregone conclusion. But why do they hold the basis of their care as self-evident or foregone? Remarkably, the support of their mothers was in no case explained as the result of a positive emotional relationship, a strong attachment or common interests and values. The self-evidence of the matter was fueled above all by feelings of "appreciation". In this regard, one of the sons emphasized that he had the "chance" to give back some of the support he had received from his mother, whereas it was of primary importance to another son that he was "responsible for" even "obligated to" providing such help. A sense of responsibility was frequently expressed in the form of sympathy or compassion: "I haven't come this far just to leave her out in the cold."

None of the sons stressed on their own a strong attachment to their mothers. If we nonetheless look more closely at the mother-son relationship, circumstances reveal a very strong tie to the mother in every case in which men are the main guardian. The sons were either only-children or they were favorites. Some had

⁹ This can indeed be seen as the usual case. Even if the parents of the Berlin Aging Study did not say that they prefer their children to take care of them (Schütze/Lang 1992), this does not mean that they were not pleased with the fact.

¹⁰ In other words, this means that - at least in Germany - the man has yet to be found who is caring for his mother himself although a woman - a sister or wife - could relieve him of the responsibility. This supports the findings of Horowitz (1985) regarding available sisters (cf. note 6). Furthermore, it is well documented that the services of a daughter-in-law are enlisted before those of a favorite son (cf. note 4).

always lived together with the mother. In some cases, the father had died quite early, and the son had already taken over all support of the mother before she required nursing.

However - and this is an important finding contrary to our expectations - a strong tie to the mother does not necessarily imply an especially positive relationship. In fact, the terms of the relationship between the son and his mother were particularly bad in one case.

We found two very different types of attachment to the mothers (or patterns of relationship). On one hand these patterns are closely tied to the sense of burden elicited by the nursing role. On the other hand these types of attachment correspond to different types of motivations for caregiving (or types of meanings of care of elderly parents respectively). (2) (cf. figure 2)

In two of the cases one can truly speak of an "emotional entanglement" between the son and his mother. Severing from the mother has not been completed. To one son who took part in the Kassel Study caring for his mother is a sort of "quest for love." In the other case the role of guardian is seen as an "obligation". The son cannot reject a mother who wants to see no one else¹¹. Although physical distance is maintained - the mother resides in her own home - tending to her is an "unpleasant" and "difficult chore" in the son's eyes. He sees himself as "unsuited" for the task. He "would prefer to dedicate himself to another job and to perform other activities." He is clearly overtaxed and he himself suffers from ailing health (which he attributes to the burden of caring for his mother.) He hopes that the end is in sight, but he fears that "she will live to be 100."

It appears, then, that supporting an elderly parent may also be a considerable burden for men. In these cases it is especially a matter of physical overtaxing, insufficient outlets to relieve the burden (since the mothers allow no others to approach them) and far reaching constraints of other aspects of life. These burdens correspond, coincidentally, to those elaborated in the cases of guardian daughters.

In two other cases we may clearly speak of a sound set of "boundaries" established between the lives of the sons and their mothers. Nonetheless, other conditions come into play with the care of the parent. Also in these cases, nursing and support cannot simply be explained away by a mere sense of responsibility. In one case (in the Kassel study) the mother decisively supported her son after his divorce. The son reckons care of his mother as recompense, so to speak, for this debt to her, even as he receives assistance from others with the task. (This relationship may be described as one of a "concrete obligation" or "reciprocity.") The other son (Mr. S.), on the other hand, is quite involved in the situation emotionally. He terms himself a "social worker" in the professional sense of the term. He has built up for himself a new field of endeavor - what he calls a new "domain" - through attending to his mother (and two aunts). The "organization" of visits by friends and acquaintances of his charges and his thorough handling of legal and

¹¹ In this case, for example, a suicide attempt by the mother, led to more frequent visits by the son.

financial matters related to their care fall under his new field of activity. At the same time, he has a general interest in the elderly and conceives of work as a "learning process" and part of his personal growth. Nevertheless - and this is an expression of the establishment of the "boundaries" mentioned - his mother has spent the past few years in a nursing home¹², even though the son tends to her on a daily basis. To him providing such care is fulfilling. Above all else, the burden of the situation for him is the necessity of seeing his mother's suffering¹³.

The case of this Mr. S., reveals that it is possible to find aspects of the care of the parent which relate to occupational duties, and thus to experience such aspects positively. This has not been the case with daughters studied.

Allow me to close with a review of some possible reasons for the restricted burden of sons over daughters as seen in previous literature related to the topic at hand. In this regard, I would like to stress once more that such care may also be associated with considerable burdens in the case of nursing sons. The patterns corresponding to "emotional entanglement" are comparable to similar tendencies previously associated chiefly with women.

1) However, the last case described reveals the possibility that care of an elderly parent may admit positive self-regard. We may presume, that this has been more compatible with the circumstances of men rather than women. Such rewards are namely the links to occupational tasks.

2) A condition of such self-esteem is, the ability of the supporting guardian to set up emotional boundaries from the person being cared for. We assume that this is more often the case when men are involved since the ability to construct emotional boundaries depends on the behavior expected under the circumstances encountered. Due to time constraints, I was unable to develop this point here. It appears though, that the situation of men offers positive reinforcement which has not been seen in the case of women¹⁴. The guarding role actually does not seem to be a "foregone conclusion" in the case of men¹⁵. If this source of gratification were available to women in a guardian role, they would presumably suffer less in their

¹² Nevertheless, Mr. S. consciously allowed his mother to believe that she would return home again as soon as her health improved. I would like to clearly stress here that no argument is being made concerning the accommodation of the elderly in nursing homes. However, especially in the case of Mr. S. the dilemma in which both parties in such situations find themselves is evident. For Mr. S. positive self-regard was only possible in the context of nursing home accommodation.

¹³ He is incidentally the only subject here who could deal with the mental failings of his mother positively. In all other cases, this was one of the most serious problems encountered.

¹⁴ The men questioned received both appreciation from the cared for parent as well as recognition from third parties (even to the point of questioning the necessity of the undertaking.) Those who were not emotionally entangled found acceptance when boundaries could be constructed and other spheres of life could be adequately maintained.

¹⁵ The men themselves admit this. Unlike the women, none of the men spoke, for instance, of feelings of guilt due to a failure to help enough. Just the opposite is true: all three men of the Kassel Study imply that such chores are actually "woman's work" in their minds.

situation - and they would not necessarily have to "nurse themselves into their own sickbeds."

Figure 1

Questions

- (1) Under what conditions and for what reasons will men take care of their parents?
 - (a) Can we truly speak of unrestrained voluntariness, or are men only essential "substitute guardians"? ("substitution")
 - (b) To take on the care of their parents, is a close and positive relationship required, even when men only act as substitute guardians? ("attachment")
- (2) Do the motivations of guardian sons affect the sense of burden associated with giving care? ("burden")

Figure 2

Results

- (1a) There were no comparable available alternatives for caregiving (sisters or wives). In this sense the sons are "substitute guardians".
- (1b) All the men who were the main source of support had a very strong attachment towards their mothers. But this bond was not necessarily a positive one.
- (2) We found two different patterns of attachment to the mothers. These correspond to the sense of burden associated with caregiving:

type of attachment to the mother	subjective meaning of caregiving (or motivations for giving care)	burden associated with care
"emotional entanglement"	"obligation" "quest for love" (Kassel)	high
"boundaries"	"social work" "concrete reciprocity" (Kassel)	low

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