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Elder Care Expectations Among Hispanic Undergraduates:

Do Acculturation and or Gender Make a Difference?

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Abstract

As the number of Mexican American elders expands, policy makers need to understand how young Mexican Americans perceive their filial responsibility. A mixed method approach was used to increase culture specific knowledge with this group. Quantitative data was collected from 286 undergraduate Mexican Americans, and focus groups with an additional 20 undergraduates provided qualitative data. Gender and acculturation level were investigated in the quantitative data, and in-depth issues were identified with focus group discussions. Results indicate that gender role expectations and acculturation level both impact filial responsibility expectations. Females consistently endorsed filial responsibility expectations more than males. Results support a bidirectional and multidimensional view of acculturation. The author recommends interventions for policy makers addressing Mexican American elder care.

### Elder Care Expectations Among Hispanic Undergraduates:

#### Do Acculturation and or Gender Make a Difference?

Within the United States almost 15% of family members are 65 or older, and there are 10 times as many older adults now than 15 years ago (Older Americans, 2000). Across all ethnic groups the need for elder care will increase substantially. However, within Texas, and in Webb County in particular, the increase among Hispanics needing elder care will be dramatic as the elder Hispanic growth rate is 5 times as great as that of non-Hispanic Whites (Texas Health Facts, 2001). Who will care for these Hispanic elders? What are college attending younger Hispanics' expectations concerning being responsible for, and caring for their elders? Does acculturation, or gender influence their expectations?

The population in Webb County is approximately 202,000 people (2001). Persons of Hispanic origin make up slightly more than 94% of the population, and 31.2% of the county population live below the poverty level. While the current mean age for this population is relatively young, the number of elders is rapidly increasing, and health problems such as diabetes and cardiovascular disease are prevalent among Hispanic persons (Meyers & Rodriguez, 2003). The combination of these factors is likely to create additional stressors for younger Hispanics who are already pressed in terms of their time and money with the challenges of higher education. Given the strength of gender roles and the finding that most elder care is provided by females (Blieszner & Hamon, 1992), it is also worthwhile to investigate gender effects with college attending Hispanics, most of whom are female.

Familialism, “the cultural value of strong identification and attachment of individuals with their nuclear and extended families, and strong feelings of loyalty, reciprocity and solidarity of members of the same family” (Marin, 1993, p. 184), is assumed to be an important value of Hispanics. However acculturation may influence this value and thus impact filial responsibility expectations and behaviors. As more and more Webb County Hispanics pursue higher education, their filial responsibility expectations (the sense of personal obligation to assist with the maintenance of aging parents) have increased implications for elder care policy.

#### Research Methods & Procedures

A mixed method of investigation was used in this study. Both quantitative and qualitative data were gathered and analyzed. Archival data, the Hamon Filial Responsibility Scale, (Hamon & Blieszner, 1990), collected by the researcher during past academic semesters was input into SPSS and Excel and analyzed by the researcher and her assistant. Data from this source was quantitative. The scale contains 16 filial responsibility expectation items and asks respondents to respond along a five point likert scale, from strongly agree to strongly disagree. Responses to the categories agree and strongly agree were summed to identify endorsed filial responsibilities. The G test (Sokal & Rohlf, 2003) was performed comparing males and females where cell size was adequate for analysis. Another G test was run comparing endorsed filial responsibility expectations of first generation and second generation Hispanics. Acculturation status was measured via immigration/generational status of the respondent. Three acculturation statuses were possible. Students were asked to identify as 1) Born in Mexico & immigrated to the United States (immigrant status), Born in the United States, but one or

both parents born in Mexico (first generation status), Born in the United States and both parents born in the United States (second generation status). The second-generation respondents were considered the most acculturated and the immigrants least, with first generation respondents in the middle.

Data was kept in a secure computer file at the researcher's university office. Identities of participants were kept confidential via the use of a coding system. Institutional Review Board regulations were followed for data collection.

In addition to the above quantitative data collection two focus groups were conducted utilizing volunteer TAMU Hispanic undergraduates from which the qualitative data was generated. Meetings were held on campus for student convenience. To maximize recruitment of both day and evening students, one group was conducted in the evening and one during the day. Groups met for a maximum of 2 hours and the investigator used a semi structured interview format to engage participants in discussion. The use of this format and the time limit influenced the range and depth of topics discussed. The groups were held during summer session 1 of 2006 and were recorded with participant written permission.

Separately the researcher and her assistant generated major themes discussed in the two focus groups. Themes were then compared and a theme listing was developed after consensus was reached. The purpose of the focus groups was to augment and deepen the findings identified using the scales, and to solicit input from the students concerning elder care policy preferences and to identify desired and or needed elder care services.

## Results

### Sample

The sample consisted of 286 undergraduates, recruited from psychology undergraduate courses between 2004 and 2006. Participants volunteered to participate, but most received some extra credit for participation. Other opportunities for extra credit were also available. There were 101 males (36% of sample) and 185 females who submitted usable scales of their filial responsibility expectations. The average age of the female sample was 26.13, mode was 21 and median for females was 23. For males the mean age was 28.5, mode 21 and median 25. The age varied from 18 to 57 years. On average, females were slightly younger than males in the sample. The sample approximately reflects the typical undergraduate population at the university in terms of age. Females outnumber males at the university by approximately 3 to 1. Our sample deliberately solicited male students in order to conduct a valid gender comparison.

The sample consisted of 53 Hispanic immigrants (19%), 109 first-generation Hispanic undergraduates (38% of the sample), and 124 second-generation Hispanic undergraduates (43%). Most of the sample was either of immigrant or first-generation status. There were 15 male Hispanic immigrants and 38 female Hispanic immigrants. There were 68 female first generation Hispanics and 41 first generation males. There were 79-second generation Hispanic females and 45 second generation Hispanic males. In terms of generational status the sample roughly approximates the typical undergraduate population at the university.

Most of the sample was single, 209 of 286. One hundred twenty-nine females were single and 56 were married. Among males 80 were single and 21 were married. In terms of language spoken at home most respondents spoke Spanish (112) or Spanish and English at home (N=78). Ninety-six respondents reported they spoke only English at home.

### *Quantitative Findings*

#### Most & Least Endorsed Filial Responsibility Expectations

Table 1 lists filial responsibility expectations from highest to lowest for the entire sample. The most highly endorsed expectation was “Children and parents should be together on special occasions, like Christmas and weddings”. The second most highly endorsed expectation was “Parents should be able to talk to their children about matters of personal importance, which have influence on their lives”. The least endorsed expectation was ‘Children should adjust their work situation in order to help their parents, e.g., by working less overtime or temporarily working less hours’. The next least endorsed expectation was “Children should adjust their situation at home in order to help their parents, e.g., assign activities to others or put activities aside temporarily”.

#### Gender Differences in Filial Responsibility Expectations

Females’ percentage of endorsement for every filial responsibility expectation except one was higher than that of males. On the least endorsed expectation for the entire sample, “Children should adjust work situation to help parents, i.e. reduce work hours” 32% of females and 32% of males endorsed this expectation. Ranking of expectations by percent endorsed for males and females was consistent, though not a perfect match. Table 2 compares the percent of males and females endorsing each expectation and notes the

expectations that were significant at the .05 level or below. Differences between males and females reached significance on four expectations: “Children should monitor the level of care given their parents” ( $p=.000$ ). “Children should live close to their parents” ( $p=.001$ ) “Children should phone their parents on a regular basis” ( $p=.002$ ), and “Children should familiarize their parents with health care services” ( $p=.035$ ). Females endorsed these expectations significantly more than males.

#### Differences in Filial Responsibility Expectations by Acculturation Level

Table 3 lists the filial responsibility expectations that reached statistical significance for males or females by acculturation level. The sample was divided into three acculturation levels, low acculturation (Immigrants from Mexico), moderate acculturation, (first generation Mexican Americans) and higher acculturation (second generation Mexican Americans). Five filial responsibility expectation items reached significance for males, and two reached significance for females. Two of the same filial responsibility expectations reached statistical significance for both males and females. These expectations were “Children should live close to their parents” and “Children should monitor the quality of care given to their parents”. However, the differences were not consistent by acculturation status for these, or other filial expectations. For example, Female immigrants from Mexico endorsed the expectation that “Children should live close to their parents” more than second-generation Mexican American females, while second generation Mexican American males endorsed that expectation significantly more than did male immigrants from Mexico. Female second generation Mexican Americans endorsed the filial responsibility expectation of “Children should monitor the quality of care given their parents” significantly more than did female immigrants. For males, first



generation Mexican Americans endorsed this expectation significantly more than male immigrants from Mexico.

The one fairly typical trend in the differences was that most of the significant differences existed between Mexican immigrants and second generation Mexican Americans. However there were two significant differences between males of immigrant and first generation status.

### *Qualitative Findings*

#### Sample

Twenty Mexican American students participated in the two focus groups, 7 males and 13 females. Thus the gender distribution was similar to that within the quantitative data, and similar to the student population at the university. Given that the focus group purpose was to identify general themes or issues and the sample size was relatively small, no data was gathered on acculturation level of the participants.

#### Filial Responsibility Themes Identified

Table 4 lists the themes that were repeated in both focus groups. Important themes included financial pressures of children, deciding how a parent would be taken care of, sons and daughters as caregivers to parents, the importance of the unique relationships and personalities in determining elder care arrangements, and preferences for own care when respondents reached old age and needed care. A few excerpts from the focus groups are included below to give the reader a direct experience of the participants' filial responsibility expectations.

#### Sample Excerpts

*Excerpt 1: Impact of financial resources on decisions concerning care of elders*

“I think primarily would have to deal economically, I’m an only child, so I wouldn’t have to talk to any of my brothers and sisters before and so I think it would primarily deal with my economic status, at what point my... either of my parents needed to be taken care of. I think that’ll be the first thought process I’ll have to go through.”

*Excerpt 2: Deciding how a parent would be taken care*

“I’ll ask them first, cause I think both of my parents would have very, very sure answers of where they want to go, whether they want to be together or whether they want to be at home. Which one of the siblings they want to go to. I mean, I have 5 brothers and sisters, so...”

Interviewer: You would let them decide?

I would ask them I think first, I mean, my mother did that with her parents, my dad did that with his parents. They never said that to me, but...”

*Excerpts 3 & 4: Who gives the care? Sons or daughters?*

Student A: “In my family, it seems that everybody points out to the girls, but uh... so happens that in my family, the guys themselves volunteer and my mom always expect for the guys to volunteer or to take over.”

Student B: “I have a sister that she likes to do everything, so... (laughs) she just volunteers, that’s why I really haven’t really this topic or idea much talk cause uh... this one time my mom fell down and then uh... she told me to help her, here comes my sister (whoosh noise) move out of the way. I’m ok, it’s just like... let her concern. It’s not like, I love my mom and whatever, but you know it’s like haven’t given it much thought, don’t know any alternatives or stuff like that, so...”

*Excerpt 5: The role of unique family relationships and personalities in care of elderly parents*

“I don’t know, I don’t think is a question of gender, but a question of personality type, because I mean, depending on, I mean, we see her youngest daughter, you know, you would think that... I mean, my mom is the youngest daughter, you know, she doesn’t seem the type to want to take care of her parents, because she’s the youngest, she’s the spoiled one, you know, whatever, but sometimes it’s not... uh, ... sometimes the older male, you know but... and I’m the oldest and the youngest so... you know, it could be a question of (unintelligible), whether or not and old enough to, young enough to, so, I think is just a question of personality type and whether or not you’re willing, your place in the family, how you were brought up or like she said, she has a estranged, she has an estranged sister, a sister that needs all the attention, so yeah, situations vary.”

*Excerpt 6: Student preferences when they reach old age and need care*

“But the same thing I said, I would expect, I mean, I would hope that my child were to say, you know what mom, come ahead and go with me. I would leave it up to my child to do whatever they feel is right, but of course you do want to be with your family and like (unintelligible) you do want to, I mean family is what keeps you going, family is what has gotten you so far.”

## Discussion

The principle limitation of this study is its generalizability. Only one campus was surveyed, and the results may not apply to other Mexican Americans at different universities. The particular border location of the university is also unique, as Spanish is spoken as much or more than English, and roughly 95% of the population is Mexican American. It is possible that these contextual circumstances influence both gender role and acculturation processes, and thus may effect filial responsibility expectations.

The principle strength of the study is its contribution to culture specific knowledge of Mexican American college students and in particular their filial responsibility expectations. The mixed method of data collection and analysis was especially successful. Using focus groups provided detailed information and culture specific knowledge of Mexican American youth and their experiences of elder care and filial responsibility. Utilization of the Hamon Filial Responsibility Scale balanced the qualitative data with data generated by a standardized instrument that permits comparison with other studies. No one study can provide definitive answers to our study’s questions, but results from this study suggest that both gender and acculturation do effect filial responsibility expectations among Mexican American undergraduates, with acculturation seeming to particularly influence male undergraduates.

Within the United States, filial responsibility and related concepts such as filial piety and filial maturity have been studied with various cultural groups. Filial responsibility has been studied among African Americans (Groger & Mayberry, 2001; Hanson, Sauer & Seelbach, 1983) and Navajo (Barber, Cooke and Acherman, 1985) and among Korean Americans (Lee, Netzer, & Coward, 1994; Lee and Sung, 1998) and one study compared filial responsibility of African Americans and Hispanics (Burr & Mutchler, 1999). Consistent findings are difficult to locate, and studies have often collapsed various groups into a single category, such as Hispanic or Latino, further confounding valid comparisons.

One clear theme Blieszner and Hamon noted when reviewing filial responsibility findings was the lack of consistent gender differences in filial responsibility (1992). However their review contained only one study of Hispanics that collapsed many cultural groups under that rubric, and was conducted 15 years ago. The findings from this study suggest that Mexican American youth expect females to be the primary caregivers to elder parents, and that female Mexican American college students endorse filial responsibility expectations more than do their male counterparts. It is also noteworthy that male Mexican American college students seem to be more effected by acculturation processes than do their female counterparts. The author suggests that acculturating to the dominant culture within the United States places greater pressure on male Mexican American gender roles than on those of female Mexican Americans. Gender and gender role expectations play a major role for this sample, and probably for this border population.

Results from this study also support the point made by Blieszner and Hamon (1992) that enactment of filial responsibility is contextually bound. The emphasis in the focus groups on the role of unique family dynamics, and particular relationships and personalities between parents and children in care-giving underlines the contextual nature of enactment of filial responsibility.

Mexican Americans tend to earn less money than non-Hispanic Americans (Ramirez & de la Cruz, 2003) and this economic context clearly affected our respondents. Financial pressures were described as very influential in the decision making by focus group members, and the fact that only 32% of the Hamon respondents endorsed the expectation of adjusting work hours to help aged parents further attests to the importance of holding a job that may be the only financial support for several family members. Also noteworthy was the important role of the eldest in parental care for focus groups participants. One suspects this reflects some of the expectations involved in “familismo”, a strong value among Hispanic groups (Marin, 1993). The data collected in both the qualitative and quantitative methods support that acculturation is bi-directional and multidimensional. This finding is strongly supportive of John W. Berry’s conceptualization of acculturation processes (2003).

This study’s findings naturally lead to some recommendations for future research. It would be particularly valuable to study different generations of Mexican Americans and their filial responsibility expectations. Given the impact of acculturation on several filial responsibility expectations for college attending males, study of filial responsibility with Mexican American males not attending college, by varying levels of acculturation, is also recommended. This would help identify any cohort effects linked to

acculturation processes, filial responsibility expectations and elder care giving. It would also be instructive to survey filial responsibility expectations in Spanish and compare results with those collected in English using the same Mexican American group. This researcher is particularly interested in conducting a study in Mexico of filial responsibility expectations with both college attending and older Mexicans. One question that also interests this researcher is do personality traits influence filial responsibility expectations?

The findings of this study have policy implications for elder care in Southwest Texas. It appears that there is a need for *palomitas* to provide home health care rather than building more nursing homes. Mexican Americans surveyed see nursing home placement as a last resort and would clearly prefer to be able to keep family members in a more “home-like” environment. However, due to the need to retain employment and earnings, many Mexican Americans cannot provide the care for their elderly family members, but would use home health aids or *palomitas* if they were readily available. Having trained *palomitas* available could prevent family members from sacrificing critical income needed by the entire family. It is also recommended that free training be provided these *palomitas*. They are generally seen as “maids” and they identify with that role. *Palomitas* who received appropriate training, would make many valuable contributions to elder care. *Promotoras* have received such training, augmenting their value in the *colonias*. Training for *palomitas* would enhance their sense of pride and professionalism, and *palomitas* could certainly benefit from “CPR” courses, first aid and communication courses for example.

There also appears to be a need for a community education campaign to inform citizens of available options and programs to help with elder care. In the focus groups most participants indicated they were not aware of the alternative services they could use to help care for elderly parents. Lastly there is a need to educate employers about the stressors their employees face when caring for elders. It would be very helpful to engage employers in designing policies for leave, respite, and elder daycare services.

As the population ages the nation's economy and productivity will be influenced. This in turn will produce a ripple effect in the smaller unit of the family. As needs for elder care increase, the productivity, financial wellbeing and interpersonal dynamics of individual family units will be challenged. Participant reports from both focus groups suggest these stressors have the potential to make family units stronger or can weaken them, and even tear them apart. Public education campaigns could help inform and prepare families to face these challenges in the most adaptive way, for both the elderly person and his/her family.

If South Texas is to successfully meet the challenge of an expanding population of elder Mexican Americans requiring care, support is needed for both the elderly and for the children responsible for deciding on, and providing the care. Elder care needs to be offered in ways that maintain the dignity of the elderly, as well as that of the providers. This may be accomplished through support from larger societal units including those found in our governmental bodies.

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Table 1

## Percent Endorsement of Filial Responsibility Expectations; Hispanic Undergraduates

| Percentage | Expectation   |
|------------|---|
| 91         | Children & parents should be together on special occasions          |
| 91         | Parents should be able to talk to children about important matters  |
| 87         | Children should make room in their homes for parents in emergency   |
| 85         | Children should give parents emotional support                      |
| 83         | Children should familiarize parents with health care services       |
| 82         | Children should monitor quality of care given to their parents      |
| 79         | Children should take care of parents when they are sick             |
| 76         | Children should offer advice to parents                             |
| 74         | Children living close to parents should visit once a week           |
| 71         | Children should phone parents on a regular basis                    |
| 65         | Children should give up their free time for their parents           |
| 58         | Children should give their parents financial support                |
| 56         | Children should feel responsible for their parents                  |
| 53         | Children should live close to their parents                         |
| 47         | Children should adjust home situation to help parents               |
| 32         | Children should adjust work situation to help parents: (reduce hrs) |

Table 2

Percent of Respondents Endorsing Expectations by Gender

| Expectation Item   | Females<br>(n=186) | Male<br>(n=101) |
|--|--------------------|-----------------|
| Children & parents should be together on special occasions         | 92                 | 91              |
| Parents should be able to talk to children about important matters | 92                 | 88              |
| Children should make room in their homes for parents in emergency  | 90                 | 81              |
| Children should give parents emotional support                     | 88                 | 80              |
| Children should familiarize parents with health care services      | 86                 | 77              |
| Children should monitor quality of care given to their parents     | 88                 | 71              |
| Children should take care of parents when they are sick            | 81                 | 74              |
| Children should offer advice to parent.                            | 78                 | 72              |
| Children living close to parents should visit once a week          | 78                 | 68              |
| Children should phone parents on a regular basis                   | 78                 | 59              |

Table 2 (continued)

## Percent Endorsing Expectations by Gender

| Expectation Item   | Females<br>(n=186) | Male<br>(n=101) |
|--|--------------------|-----------------|
| Children should give up their free time for their parents          | 64                 | 62              |
| Children should give their parents financial support               | 58                 | 56              |
| Children should feel responsible for their parents                 | 59                 | 51              |
| Children should live close to their parents.                       | 58                 | 45              |
| Children should adjust home situation to help parent.              | 50                 | 43              |
| Children should adjust work situation to help parents (reduce hrs) | 32                 | 32              |

Table 3

Statistically Significant Differences in Endorsement: Expectation by Acculturation Level  
(Generational status) and Gender

| Expectation  | Gender | Generational Status<br>& % Endorsement |
|--|--------|--|
| Children should live close to their parents                    | Male   | 2 <sup>nd</sup> generation 38%         |
|  |        | immigrant 0%*                          |
| Children should live close to their parents                    | Female | immigrant 63%                          |
|  |        | 2 <sup>nd</sup> generation 47%**       |
| Children should monitor quality of care given<br>their parents | Male   | 1 <sup>st</sup> generation 67%         |
|  |        | immigrant 53%**                        |
| Children should monitor quality of care given<br>their parents | Female | 2 <sup>nd</sup> generation 89%         |
|  |        | immigrant 84%***                       |
| Children living nearby should visit parents weekly             | Male   | immigrants 60%                         |
|  |        | 2 <sup>nd</sup> generation 53%****     |
| Children should adjust work schedules to help<br>their parents | Male   | 1 <sup>st</sup> generation 31%         |
|  |        | immigrants 28%                         |
| Children should familiarize parents with health<br>services    | Male   | immigrants 53%                         |
|  |        | 1 <sup>st</sup> generation 39%^        |

\*p=.001, \*\*p=.01, \*\*\*p=.000, \*\*\*\* p=.005, ^p=.037

Table 4

## Filial Responsibility Themes Identified in Focus Groups

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 Themes
 

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Financial resources influence how elder care is provided, and by whom

Females are usually seen as the main care-givers, but eldest son or non-married son living with parents may become the primary care giver

Family relationships influence which adult child takes the lead in providing elder care

Most participants' parents had not specifically stated their expectations for care, though many modeled caring for their own elder parents, grandparents or aunts/uncles

Decision-making processes re: care of parents varies, but involving parents is common

Most respondents would prefer to have their own children care for them when they are elderly, though no respondent wanted to be a "burden" to his/her children

Most respondents lacked "up to date" information on alternative services available to help provide elder care

Focus group participation increased awareness of elder care expectations and prompted some participants to want to talk with parents and siblings about caring for parents

Most participants agreed to the use of supportive resources (SS, home health aid) to care for their loved ones in their home.