

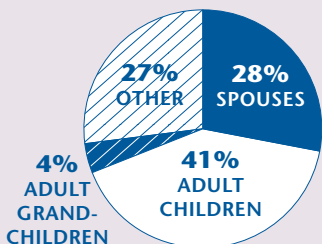


Caregiving

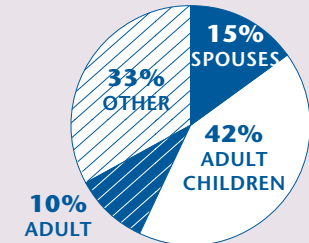
Helping the elderly with activity limitations

Two of five people over age 70 need help with one or more daily activities. Yet many do not receive the care they need. For example, more than one-third of elderly people who live in the community have unmet daily activities needs. The majority of the elderly who do receive help rely on family and friends. In 1997, unpaid caregivers provided care worth an estimated \$196 billion.

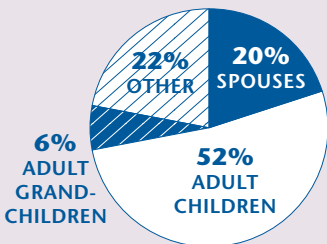
WHO PROVIDES CARE?



WHITE



BLACK



HISPANIC

SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of *Assets and Health Dynamics Among the Oldest Old*.

Some 8.5 million people over age 70 have limitations either in activities of daily living (ADLs) or instrumental activities of daily living (IADLs). Although they are not disabled to the extent that they need institutional care, they do need some help to function in the community. As the population ages, millions more will need care. By 2030, some 21 million elderly people may need help with activity limitations.

Adult children provide the majority of care

Family members constitute some 72 percent of paid and unpaid caregivers of the elderly with activity limitations. Adult children account for the largest proportion of caregivers—42 percent—followed by spouses—25 percent. There are differences in family caregiving relationships among racial and ethnic groups.

- Whites are more likely to receive help from a spouse. Spouses account for 28 percent of the helpers of white elderly, 20 percent of the helpers of Hispanics, and just 15 percent of the helpers of black elderly.
- Hispanics rely heavily on their adult children for help. Adult children account for over half—52 percent—of their helpers. Smaller proportions of black and white elderly, however, receive help from their adult children.
- Blacks are most dependent on people outside the family for care.

WHAT ARE ADL AND IADL LIMITATIONS?

Activities of daily living, or ADLs, include walking, dressing, eating, using the toilet, bathing, and getting into and out of bed. People who receive help, use equipment, or have difficulty with an ADL have ADL limitations. Instrumental activities of daily living, or IADLs, include meal preparation, grocery shopping, making phone calls, taking medications, and money management. People who need help or can't perform an IADL have IADL limitations.

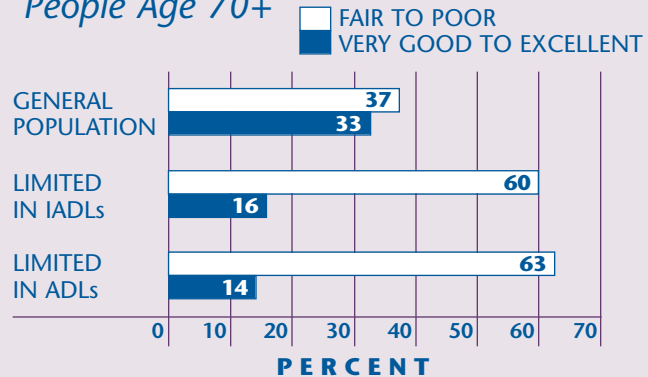
Two of five elderly people have daily activity limitations

Some 41 percent of the elderly have at least one ADL or IADL limitation. Walking is the most common activity limitation. About one-quarter of the elderly say they have difficulty walking. Limitations related to dressing and bathing are also fairly common. Difficulties with grocery shopping and money management are the most common IADL limitations (see Figure 1).

Activity limitations are highly associated with poor health

Limitations in ADLs and IADLs are often associated with a decline in physical health. Among the elderly, those with activity limitations are substantially less healthy than the general population. Well over half of the populations with an ADL or IADL limitation are in fair to poor physical health, compared to just over one-third—37 percent—of the general population (see Figure 2).

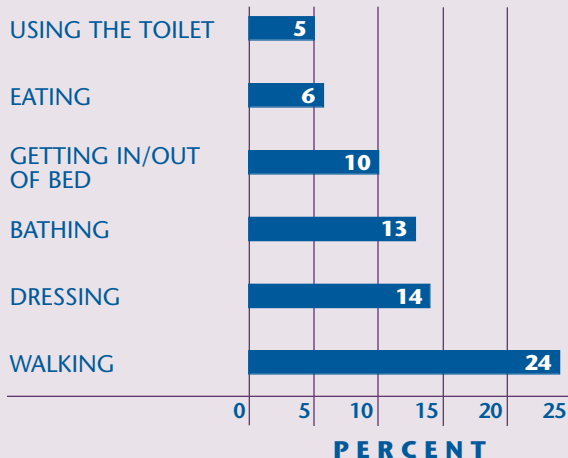
FIGURE 2
Self-Reported Physical Health Status, People Age 70+



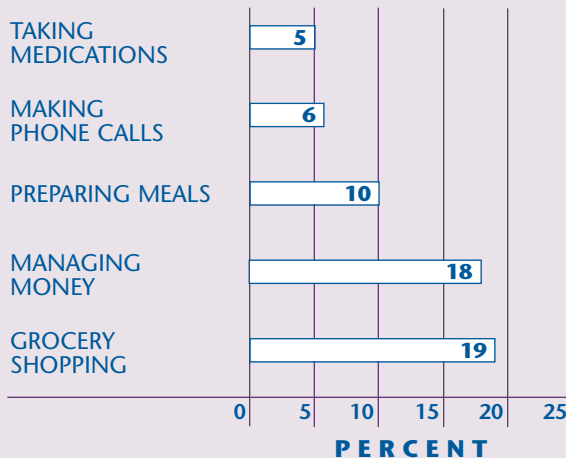
SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of Assets and Health Dynamics Among the Oldest Old.

FIGURE 1
Proportion of People Age 70+ with Activity Limitations

ADLs



IADLs



SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of Assets and Health Dynamics Among the Oldest Old.

More than one-third of the elderly have unmet needs

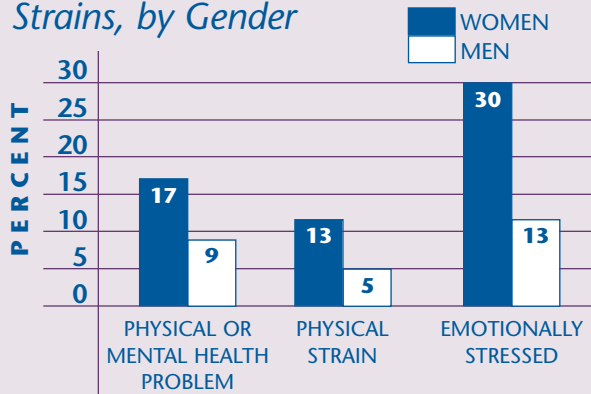
While some 62 percent of the elderly population with limitations receive paid or unpaid help, more than one-third of that population has unmet needs. Certain groups are less likely to receive care.

- Just under half—49 percent—of 70 to 74 year olds do not receive care, compared to less than one-quarter—23 percent—of people age 85 and older.
- Only 20 percent of the Hispanic elderly do not receive care, compared to 39 percent of the non-Hispanic elderly.
- Over half—51 percent—of the elderly who are divorced or separated do not receive care, compared to 40 percent of the married elderly.

Just over half of caregivers provide help daily

Some 51 percent of paid and unpaid caregivers provide help every day, and just over one-fifth—21 percent—provide help several times a week. Only 7 percent of the elderly living in the community receive care around the clock. The great majority of caregivers—80 percent—provide care from one to five hours per day (see Figure 3).

FIGURE 4
Proportion of Caregivers Experiencing Strains, by Gender

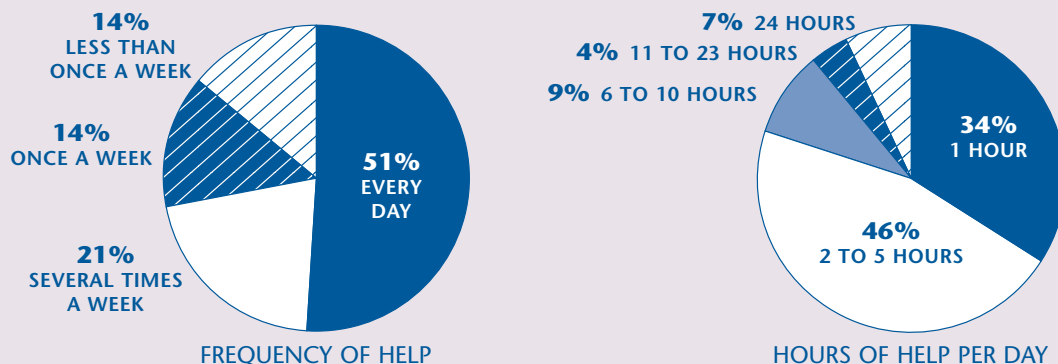


SOURCE: National Alliance for Caregiving and AARP (1997). *Family Caregiving in the U.S.*

Family caregivers are strained

Caregiving often affects the physical, mental, and emotional health of the caregivers. Among caregivers who provide unpaid care for a family member or friend age 50 or older, some 15 percent report that they have experienced a physical or mental health problem due to their caregiving duties. Some 44 percent of caregivers report that their caregiving activities cause physical strain, and one-quarter report that caregiving is emotionally stressful. Women are more likely than men to experience these strains (see Figure 4). The most common mechanisms used by caregivers to cope with such strains are prayer (74 percent) and talking with relatives and friends (66 percent).¹

FIGURE 3
Amount of Help for People 70+ with Activity Limitations



SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of Assets and Health Dynamics Among the Oldest Old.

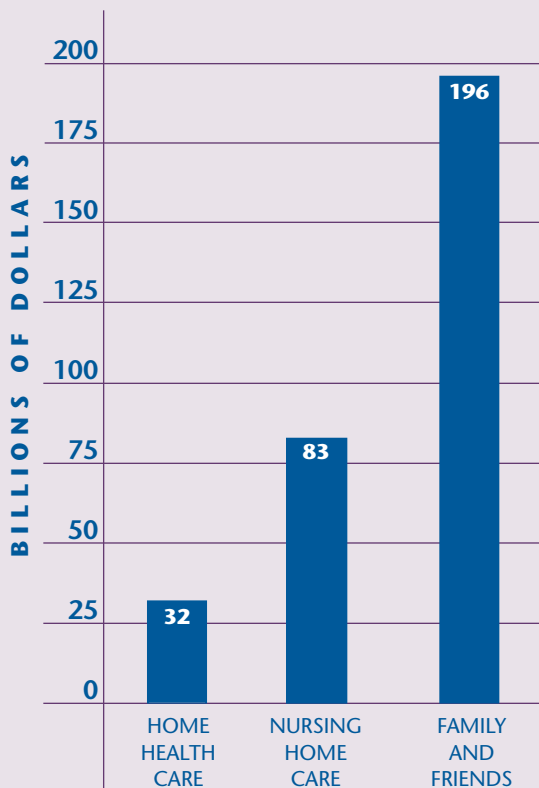
Most caregivers are unpaid

Over three-quarters—76 percent—of caregivers are unpaid. Those who are paid receive compensation from a variety of sources. Some 43 percent of paid caregivers receive payments from Medicaid or another form of insurance. About 37 percent of paid caregivers receive out-of-pocket payments from the elderly individuals for whom they work. The average monthly out-of-pocket payment from the elderly is \$491. Contributions from other family members also pay for care.

The value of care is high

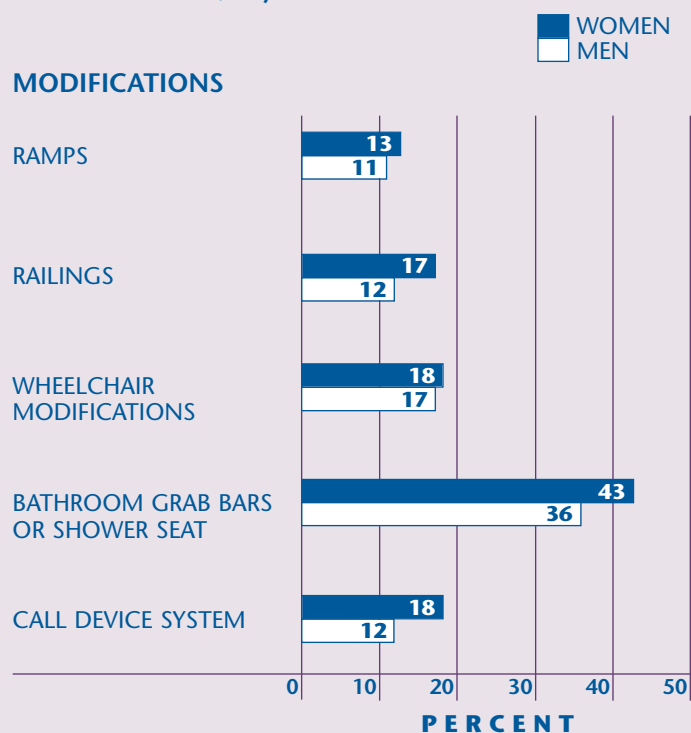
Care provided by family members and friends was estimated to have had an economic value of \$196 billion in 1997, an amount which far surpasses what was spent that year on home health care and nursing home care (see Figure 5).

FIGURE 5
The Value of Care



SOURCE: Arno, P., C. Levine, and M. Memmott (1999). "The Economic Value of Informal Caregiving." *Health Affairs* 18(2), 182–188.

FIGURE 6
Proportion of People Age 70+ with Home Modifications, by Gender



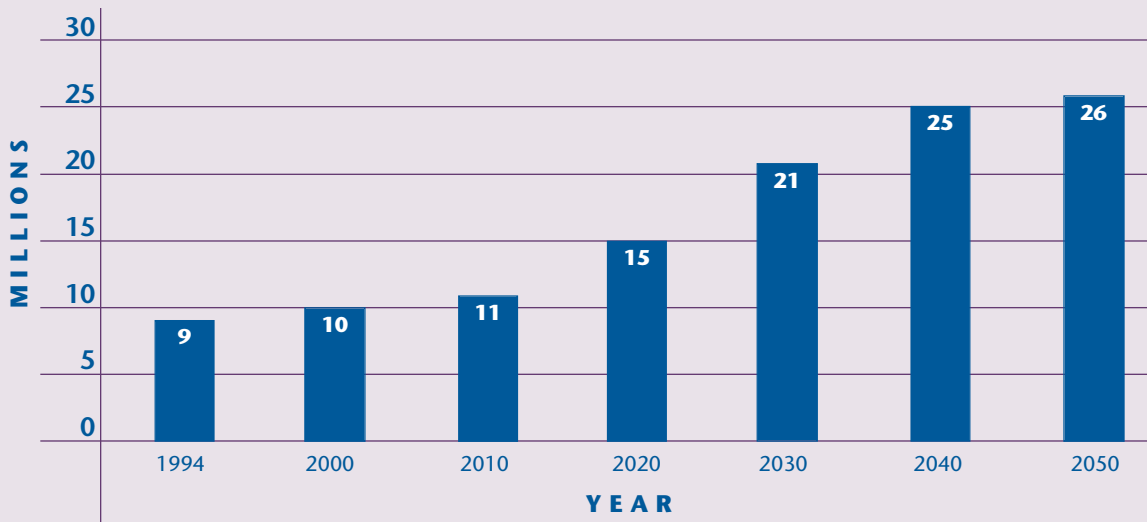
SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of Assets and Health Dynamics Among the Oldest Old.

Home modifications also help the elderly with ADL limitations

Over half—55 percent—of the elderly population with one or more ADL limitations have modified their homes. Home modifications include ramps, railings, wheelchair modifications, bathroom grab bars or a shower seat, and a call device system to summon help. The most common modification is the addition of grab bars or a shower seat. Some 41 percent of people with ADL limitations have made these modifications. A larger proportion of women than men has at least one home modification—38 percent and 28 percent respectively (see Figure 6).

FIGURE 7

Projected Number of People Age 70+ Needing Care



SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of Assets and Health Dynamics Among the Oldest Old and U.S. Census Bureau population projections (middle series).

Millions of elderly are projected to need care

The number of people age 70 and older with activity limitations is expected to increase substantially over the next several decades as the number of elderly increases. If the current rate of activity limitation remains unchanged, the number of elderly with activity limitations would increase more than twofold, from 8.5 million to 21 million by 2030. By 2050, over 25 million elderly will be limited in their activities and in need of care (see Figure 7).

The majority of people who do not have help now do not expect to have it in the future

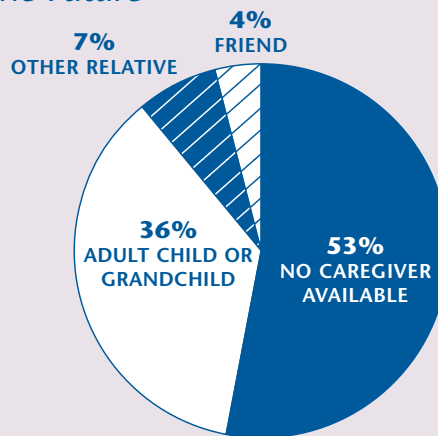
More than half—53 percent—of the elderly with activity limitations who do not currently receive help, either paid or unpaid, do not expect that relatives—other than spouses—or friends will be willing and able to help with future personal care needs. Among those who think that help from a family member or friend might be available in the future, adult children and

grandchildren are the largest category of potential caregivers (see Figure 8).

The proportions of blacks and Hispanics who would have a family member or friend available for future care needs are larger than the proportion of whites. Some 55 percent of blacks and 61 percent of Hispanics, for example, compared to 46 percent of whites, think they will have a caregiver available in the future.

FIGURE 8

Availability of Caregivers in the Future



SOURCE: National Academy on an Aging Society analysis of data from the 1993 study of Assets and Health Dynamics Among the Oldest Old.

FIGURE 9

Where do People Age 70+ with Limitations Expect to Live in the Next Five Years?

	GENDER		RACE	
	MEN (%)	WOMEN (%)	WHITE (%)	BLACK (%)
Would buy or rent	64	38	45	54
Another person's home	10	17	14	21
Nursing home	7	15	13	6
Retirement home/community	19	30	28	19

Expectations about care in the future vary by gender and race

Some 22 percent of the elderly with activity limitations report that they are likely to move in the next five years. Of that group, a higher proportion of men than women expects to buy or rent a residence. Women

are more likely to predict that they will live in a setting where care may be available, such as a retirement home or community, another person's home, or a nursing home.

A larger proportion of blacks than whites expects to buy or rent a home or to move to another person's home. The proportion of blacks that expects to move into a nursing home is less than half that of whites—6 percent and 13 percent respectively (see Figure 9). Blacks are also more likely to move in with or closer to an adult child than whites. Two-thirds of blacks would try to live with or closer to an adult child, compared to 52 percent of whites.

ABOUT THE PROFILES

This series, *Challenges for the 21st Century: Chronic and Disabling Conditions*, is supported by a grant from the Robert Wood Johnson Foundation. This *Profile* was written by Lee Shirey and Laura Summer. It is the seventh in the series. Previous *Profiles* include:

1. Chronic Conditions: A challenge for the 21st century
2. Hearing Loss: A growing problem that affects quality of life
3. Heart Disease: A disabling yet preventable condition
4. At Risk: Developing chronic conditions later in life
5. Arthritis: A leading cause of disability in the United States
6. Diabetes: A drain on U.S. resources

The National Academy on an Aging Society is a Washington-based nonpartisan policy institute of The Gerontological Society of America. The Academy studies the impact of demographic changes on public and private institutions and on the economic and health security of families and people of all ages.

1. National Alliance for Caregiving and AARP (1997). *Family Caregiving in the U.S.*

ABOUT THE DATA

Unless otherwise noted, the data presented in this *Profile* are from Wave 1 of the study of Assets and Health Dynamics Among the Oldest Old (AHEAD). The AHEAD data set provides information about respondents age 70 and older in 1993 and 1994. It is sponsored by the National Institute on Aging and conducted by the Institute for Social Research at the University of Michigan.



NATIONAL ACADEMY ON AN AGING SOCIETY

1030 15th Street NW, Suite 250, Washington, DC 20005

PHONE 202-408-3375 FAX 202-842-1150

E-MAIL info@agingsociety.org WEBSITE www.agingsociety.org

