

# 6 The impact of modernization on elder-care: The case of Taiwan

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## Introduction

The process of modernization, driven by industrialization, has produced tremendous economic, political, and social change throughout the world. The consequences of modernization—the development of industrial economies, advanced health technology, improved standards of living, etc.—have also contributed to increased life expectancies and a decline in mortality rates worldwide. This global demographic trend has resulted in more adults surviving to old age (age 65 or older), and that in turn causes an increase in the old-age dependency ratio. The old-age dependency ratio in the world has increased from 8.5 percent (i.e., 11 or 12 working people per older person) in 1950 to 10.0 percent (i.e., 10 working people per older person) in 1990. By the year 2030, a ratio of 16.7 (i.e., about 6 working people per older person) is expected (United Nations Secretariat, 1995). The number has grown more rapidly in industrialized countries than in developing ones (Hooymann and Kiyak, 1993).

The increasing older population places extraordinary demands on formal health and social care services, the social security system, and pension programs. At the same time, extensive research findings (eg. Sussman, 1985; Shanas, 1979) indicate that informal social supports are also important in older people's lives as changes take place in the health, cognitive, and emotional status of the older person. Among various informal networks such

as families, friends, neighbors, and even acquaintances, family is the basic unit of social relationships and is found to be the primary source of social support for older people (Hooymann and Kiyak, 1993: 267; Victor, 1991; Liu and Hsieh, 1995).

Taiwan, a newly industrialized country, has also experienced rapid economic growth, technological improvement, an upgraded standard of living, and so forth (Ho, 1978; Tsai, 1982; Weinstein et al., 1990; Hsiao, 1988). These changes have contributed to the shift from high to low birth and death rates of the population in Taiwan. The average life expectancy has been prolonged for both men and women. These demographic transitions have made the proportion of the population which is older grow from 2.6 percent in 1963 to 7.1 percent in 1993 (Directorate-General of Budget, Accounting and Statistics, 1994).

The majority of the population in Taiwan consists of the descendants of immigrants from China. They have been deeply influenced by the cultural heritage of Confucian doctrines for several centuries. Individuals are socialized to respect their parents beginning in childhood and to expect to assume the role of caregivers as their parents grow older. However, modern education and urban residence brought about by modernization after WW II have been found to discourage the elderly from living with their married children (Chang, 1994; Chu, 1994; Sun, 1991; Chen et al., 1989; Wang and Chen, 1988). The increasing aging population therefore makes the issue of elder-care more and more critical to the government and the society as well.

Inasmuch as family is the primary social support for older people, what roles do families play in elder-care in response to the global process of the aging population and the impact of modernization? What roles does the government play, on the other hand? In addition, given that family is the primary and most important agent of socialization, what values does a family transmit to its younger members and how does it socialize its older members for adapting to global change and consequently for becoming responsible global citizens? By discussing the case of Taiwan, the authors intend to find possible answers for these questions. Before we go any further, it is important to understand how the traditional value of filial piety affects the practice of elder-care in Chinese society and how modernization is changing the process.

### **Filial piety in traditional Chinese culture**

In pre-industrial societies such as pastoral or agrarian societies, older people become richer and more powerful through a life-long accumulation of material wealth from the land. The rich life further fosters respect for elders who also serve as guardians of traditional wisdom and ritual (Macionis, 1993: 387). This age hierarchy is undoubtedly well projected by Confucianism, the core of traditional Chinese culture. The emphasis on filial piety in

Confucian doctrines plays a key role in determining the order and relationships among members in a family. Practicing filial principles contributes to the stability of the society. The importance of filial piety can be clearly illustrated by what Mengzi (372BC - 298BC) said: "Ren ren chin chi chin, chang chi chang, erh tien shia ping," meaning, when everyone loves one's parents and takes care of one's elders, the peace of the world follows (cited in Chu, 1994: 2).

The primary realm where filial piety is taught and practiced is family. Children are taught to respect and care for their parents through various methods such as family disciplines or regulations, aphorisms, literature and so on. For example, "Chen hun ding xing" (meaning one should inquire after parents' health every morning and evening) has been an aphorism that is included in regulations of many families. The folk stories about twenty-four examples of filial persons who wholeheartedly care for their parents are also widely told as role models of filiality. In addition, the practice of family rituals such as ancestor worship is another important way of socialization. Through observation, children acquire the spirit of filial piety and learn how to practice it.

The Confucian moral principles about filial piety have generated norms of filial care for aged parents; every person is expected to assume this responsibility, especially when parents are sick. Adult sons, hence, are supposed to live with their aged parents after marriage, for that is believed to be the most direct way to fulfill filial responsibilities. Placing ailing parents in nursing homes instead of caring for them personally is deemed as one of the worst examples of misconduct (Huang, 1988). Women are also expected to assume filial responsibilities for their in-laws. Daughters-in-law are normally one of the most important caregivers for elderly parents in Chinese societies (Hu, 1995; Liu and Hsieh, 1995). Parents are accustomed to the idea of living with adult sons, a situation which is expected to bring good care, happiness, and fortune for the rest of their lives. This belief is reflected in a widely-shared old saying, "raising children is insurance against the insecurity of old age."

As industrialization and advanced medical technology gradually increase life expectancy, the same trends also erode the power and prestige of the elderly (Cowgill, 1986; Laslett, 1995). The prime source of wealth shifts from land (typically controlled by the oldest members of society) to factories and other new forms of production. Mass production by machines makes universal labor unnecessary. Consequently, the elderly often occupy nonproductive roles in the industrial society (Cohn, 1982). Moreover, with the steady growth in the old-age population and continuous decline in fertility rates, there is a growing concern among younger generations about the availability of workers to support retired persons (Hooyman and Kiyak, 1993).

A separation of work from home and the growth of a highly mobile work force associated with the industrial economy and urbanization weaken familial ties. Extended households become

less essential and economically less advantageous and are losing ground to nuclear family living arrangements. On the other hand, modern education allows younger generations to achieve higher occupational positions. Those generations place greater emphasis on self-fulfillment as individuals rather than on their responsibilities toward their kin (Cowgill, 1986). In addition, advanced technology accelerates social change that makes many of the skills, traditions, and life experiences of the old less relevant to the young (Cohn, 1982).

Altogether these changes relegate aged parents to a more peripheral role in the lives of their children in many countries. For instance, in their study, Palmore and Whittington (1971) use a series of socioeconomic measures and find that the status of the elderly generally declined in the United States from 1940 to 1969. Other research indicates that the elderly in the Philippines feel lonely, helpless, and worthless coupled with feelings of rejection and neglect by their families. Among Kenyans, a widely shared opinion is that the traditional family commitment of caring for the aged is slowly dying due to modern changes (Oriol, 1982).

### **Modernization and social change in Taiwan**

Taiwan has also experienced rapid modernization and tremendous social change after World War II. Residential segregation between the young and the old has been magnified by greater social and geographic mobility associated with an urban-industrial economy and extended modern education. These changes result in increasing autonomy of young people from their parental control (Thornton et al., 1987).

The rapid industrialization starting in the 1950s also has generated a huge number of chances for employment, which attracts a large number of women to join the paid labor market. Moreover, the extension of mandatory free education accompanied with the growth of vocational education provides more chances and various choices for women to get better education (Wu, 1985). Women's higher educational attainment and increasing employment outside the home improve their social status. Nonetheless, younger women's employment also has tremendous impact on elder-care, because daughters-in-law (and, to a lesser extent, daughters) are important caregivers for their elderly family members (Hu, 1995; Hsieh, 1985; Liu and Hsieh, 1995).

On the other hand, modern technology and a better standard of living have prolonged the life expectancy of the population in Taiwan. Meanwhile, government statistics show that the population fertility rate also declined to 1.7—below replacement level—by 1993 (Directorate-General of Budget, Accounting and Statistics, 1994). The ratio of young adults to elderly persons in the population has decreased over time as a result. With parents living longer and with children being economically dependent

longer, many middle-aged individuals have become the "sandwiched generation." They are facing the competing responsibilities of caring for aged parents and young children at the same time (Hermalin et al., 1990).

### Filial care for elders in modern Taiwan—persisting values with different practices

Based on the 1993 national survey data on social attitudes in Taiwan, the authors have found that half of the respondents (49.8 percent) still believe in the traditional filial value that "raising children is an insurance for old-age support" (Table 6.1). However, almost the entire other half (45.4 percent) of the respondents disagree or strongly disagree with this traditional filial value. This result signals that, although many people in Taiwan still accept the traditional value that elder care depends mainly on adult children (especially adult sons), its popularity has decreased to the point that almost half of the population does not agree with that value any more.

Results shown in Table 6.1 also indicate that over half of the respondents (55.0 percent) do not agree with the statement that "it is acceptable for children to send their parents to nursing or convalescent home when parents are sick and need long-term care." That is, most people in Taiwan still conform to one of the traditional Confucian filial doctrines that emphasizes that taking care of ill parents is children's filial responsibility. The alternative arrangement is not acceptable.

**Table 6.1**  
Frequency distribution of attitudes toward filial values and alternative arrangements about elder-care

<i>Attitudes</i>	<i>Filial Value</i> (Raising children is an insurance for old-age support.) (Agree=Traditional Attitudes)	<i>Alternative Arrangements</i> (It is acceptable to send a parent to a nursing home.) (Agree=Modern Attitudes)
<i>Strongly Agree</i>	183 (11.4%)	50 (3.1%)
<i>Agree</i>	619 (38.4%)	512 (31.8%)
<i>Disagree</i>	653 (40.6%)	706 (43.9%)
<i>Strongly Disagree</i>	77 (4.8%)	179 (11.1%)
<i>No Opinion</i>	57 (3.5%)	121 (7.5%)
<i>Others/Missing</i>	21 (1.3%)	42 (2.6%)
<i>Total</i>	1,610 (100.0%)	1,610 (100.0%)

Yet, even though the majority of people consider it to be serious misconduct, more than one third (34.9 percent) of the respondents agree or strongly agree with the idea of placing their parents in nursing homes where they will receive long-term care (see Table 6.1). This finding reveals that modernization has led some people to accept different forms of caring for chronically ill parents instead of following strictly the traditional filial norms.

Overall, the results of this study show that the traditional value of filial care for parents persists in modern Taiwan, but in a weakened form. Furthermore, people have changed their attitudes toward various issues about elder-care at different paces. The belief that children are the source of old-age support has been weakened faster than the increase in accepting alternative arrangements for long-term care of unhealthy parents.

In measures of behavior, the change in patterns of living arrangements reflects the research finding that half of the population in Taiwan no longer believes that children are insurance for old-age support. Prior research shows that actual co-residence and willingness to live with adult children are declining (eg., Chang, 1994; Chu, 1994; Sun, 1991; Chen et al., 1989; Wang and Chen, 1988). While 70.2 percent of the elderly in Taiwan lived with their adult children in 1986, the proportion had declined to 62.2 percent in 1993 (Directorate-General of Budget, Accounting and Statistics, 1994).

One implication of this change may be that staying with a married son and depending on him and his family does not guarantee good care for the elderly any more. Instead of young generations staying in their parents' home as in generations ago, the elderly move in with the younger family nowadays (Hu, 1995). With increasing numbers of women entering the labor force and with younger women's higher educational attainments, grandparents no longer enjoy the relatively higher family status in the young family that their predecessors did. They usually do a great deal of housekeeping and child care in the young households where they stay (Lo, 1987; Hsieh, 1985), and some have said they even have to endure the grimaces and shifting moods of their daughters-in-law sometimes (Hsieh, 1985). Therefore, more and more aged people would rather live independently with more autonomy and dignity if they can afford it (Moore, 1990; Chang, 1994).

The decline in attitudes supporting dependency on adult children for old-age support does not mean that the moral code of filial piety entirely faded away with modernization. Previous studies reveal that people who do not co-reside with their elderly parents do give money to their parents regularly (Sun, 1991; Chu, 1994; Weinstein et al., 1990; Chang, 1994) or pay frequent visits and offer help instead (Weinstein et al., 1990). This trend suggests that new forms of filial care for parents have emerged in Taiwan.

Additional evidence of the persisting value of filial piety is the fact that the majority of the respondents (55 percent) do not accept the idea of placing ill parents in a nursing home as an alternative

arrangement for long-term care instead of caring them personally. However, the traditional filial norm of care for parents emerges more often under this specified and critical situation, i.e. when parents are sick. This widely followed traditional filial norm may have contributed to the negative image of nursing and convalescent homes that has long prevailed in the society. Because Chinese culture has long emphasized filial care as a personal responsibility, nursing and convalescent home care is hence associated with those elders who are poor, disabled, without families, or whose children are not filial (Hu, 1995). (Moreover, this finding may also suggest that the quality of most nursing homes in Taiwan is not satisfactory.)

### **Family as provider of elder care in the era of aging population**

In reaction to the "graying of Taiwan," the government has proposed a plan which emphasizes the importance of the "three-generation-family" model (three generations living in the same household). The focus of the plan lies in promoting the traditional values and norms of filial care for elderly parents; it is fundamental in this plan that multiple generations live in the same household. Several programs are designed to encourage adult children to live with their parents by providing financial benefits such as tax reduction, lower mortgage rates, subsidy for house rent, and so forth (Hu, 1995).

Given that family is the basic unit of social relationships and provides important social support in older people's lives (Sussman, 1985; Shanas, 1979; Asher, 1984), it is important for elderly parents to have easy access to caregivers. Living with adult children makes it easier to reach that goal. Co-residence also may solve the problem of insufficient child care related to the increase in numbers of working mothers. Furthermore, co-residence may help to ease the financial burden of the governments by reducing social welfare costs, especially for those in poorer and less developed countries.

More importantly, living in the same household may generate more chances for intergenerational interactions through which children, both young and grown up, can closely observe the process of aging and understand better the problems that aged people usually encounter. Once children understand what the problems are and why they occur, they know better how to assist the elderly and smooth their daily lives. More knowledge and better understanding also can help younger generations to prepare for their own elderhood in the future.

### Three-generation families in close neighborhoods

As the 1993 national survey data reveal, the traditional values of filial piety and norms about how to practice filial care have changed. The data also show that co-residence does not guarantee older parents a comfortable life nowadays. Moreover, co-residence reinforces the helpless, dependent stereotype that is often associated with elderly people. At the same time, as the life-span of the world populations becomes longer and fertility rates decline, co-residence eventually will place a tremendous burden on the middle generation. This generation will face demands of their children on one hand and those of their aged parents on the other. Therefore, in contrast to the "three-generation-family" model proposed by the Taiwanese government, the authors support the idea of the "three-generation-family in close neighborhoods" (see Hu, 1995; Huang, 1995).

While the family is the primary source of social support for older people, living with extended kin under one roof increases the possibilities of friction and problems such as family members competing for resources, support, loyalty, and commitment (Bell, 1985). The in-law problem is especially notorious and commonly seen in Chinese families for centuries. However, separate housing may reduce the frequency and likelihood of these conflicts, especially those that often happen between mothers- and daughters-in-law.

On the other hand, separate housing but in close neighborhoods keeps frequent intergenerational interactions possible without the generations intruding on each other's privacy. Younger generations can easily consult with their grandparents who are "living dictionaries" regarding the precious experiences and knowledge they have had. Negative stereotypes toward the elderly consequently may be reduced. Moreover, having grandparents in close neighborhoods helps families adjust to modernization while maintaining values of filial piety. It provides chances for young children to internalize the importance of filial piety and learn how to practice it by observing the practice of familial rituals and how their parents provide daily care to grandparents. The intimacy among family members is maintained, even though at a certain distance (Rosenmayr, 1977).

In addition to the benefits above, the suggested housing arrangements may be more reasonable. With increased life expectancy combined with reduced fertility rates, the traditional arrangement of depending on children for old age support becomes impractical. Separate housing, then, provides chances for current elderly parents and younger generations to learn and to become at least partially accustomed to the idea of being self-reliant as people age. This arrangement may decrease the extent of old-age dependency, and that in turn enables elderly parents to maintain their own dignity and sense of autonomy. Meanwhile, multiple generations living in close neighborhoods provides an efficient way to resocialize elderly persons to adapt to rapid social change in

modern society. Through frequent interactions with younger generations, the elderly will not be isolated and will be better informed about what is happening in the changing world.

To facilitate this type of housing arrangement, the authors further suggest high-quality home-care and community-care services provided by the government. Sensitive and well-trained health care professionals can compensate for the possible labor shortage from adult children and, at the same time, care for childless elderly. The increase in women's employment inevitably will affect the availability of long-term caregivers. The demand for nursing and convalescent homes will consequently increase even though the traditional filial norm that emphasizes personal care for ill parents still persists. Therefore, it is also important to change the negative stereotypes of nursing and convalescent homes by improving their management and staff training as well as improving their physical environment.

### **Implications for global citizenship**

As industrialization and modernization bring demographic transitions, an aging population becomes a global phenomenon. At the same time, these forces challenge the power and prestige of the elderly. An increasing older population leads to a demand for elder care, which is a potential problem that is critical to policy makers, individual families, and the elderly themselves as well. Based on the previous discussion of "three-generation-family in close neighborhoods," the authors suggest that the solutions to this problem depend on every citizen of the society. That is, the elderly, their family members, and the government are all needed to share the responsibility of elder-care. It is a collective responsibility that needs the cooperation of the entire population to accomplish.

Shared responsibility does not reduce the significance of family in relation to elder care, however. In fact, in addition to being the primary and most important network of social support to the elderly, the family also functions as an essential agent of socialization to transmit cultural traditions as well as new values and norms to its members. On one hand, for example, the family socializes the young to value and to practice the unique cultural tradition of filial piety. In so doing, younger generations are educated to be responsible descendants. On the other hand, families socialize both the young and the old to adapt to rapid social change such as new filial norms and changes accompanying the increasing aging population. In turn, they learn how to manage their later lives better and to become more adaptive.

Aging is a process that we all experience after all. In response to this process, every person in the society carries some level of responsibility, whether as a responsible descendant or an independent elder. Of course, the help of government programs is also important. Families, as educators, play a critical and

essential role in educating their members to be responsible citizens. Only if each one of us is a responsible citizen in dealing with the increasing demand of elder care at local level, can we be responsible global citizens when facing the process of modernization and the increasing aging population at global level.

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