Understanding care of people with dementia in Spain: Cohabitation arrangements, rotation and rejection to long term care institution

Jesús Rivera1*, Felix Bermejo2, Manuel Franco3, José Manuel Morales-González4 and Julian Benito-León2

1Universidad de Salamanca, Departamento de Sociología y Comunicación, Facultad de Ciencias Sociales, Salamanca, Spain
212 de Octubre Hospital, Neurology, Madrid, Spain
3John Hopkins Bloomberg School of Public Health, Epidemiology, Baltimore, MD, USA
4Ministry of Labor and Social Affairs, Director of Research Department, Madrid, Spain

SUMMARY
Background Most people with dementia in Spain live at home with their families. Current changes in the family structure are transforming the care of people with dementia through new cohabitation arrangements and rotation practices.
Objective To describe the cohabitation arrangements of families of people with dementia in Spain and to understand the caregivers' characteristics related to rotation and the rejection of long term care institutions.
Methods A cross sectional study -NEDICES study- was conducted using both quantitative and qualitative methodologies. 150 caregivers of people with dementia from two communities from Madrid, Spain, were surveyed using a questionnaire designed to describe cohabitation arrangements and care. Qualitative methods included: 13 caregivers participating in focus groups, and 3 caregivers in Semi Structured Interviews aimed to understand rotation practices and rejection to long term care institution.
Results Characteristics related with rotation were: sex of persons with dementia, widowhood, socio-economic status, caregiver relationship and burden of the caregiver. The qualitative study showed that the use of the rotation was related to normative behaviors and with obligation feelings, along with a change in the role of women in the current Spanish family. The use of long term care institutions was related to geographical distance of the family.
Conclusions The results of this study suggest that rotation has appeared in Spain as a new mechanism of care for people with dementia, and its related to the rejection of long term care institutions. Copyright © 2008 John Wiley & Sons, Ltd.

KEY WORDS — dementia; long term care institutions; cohabitation arrangements; caregivers

INTRODUCTION
The care of people with dementia in Spain is mainly provided within the family. Nevertheless social changes in the last 30 years have altered the type of care and cohabitation arrangement of elderly people in general and particularly of people with dementia (Yanguas et al., 2000). Social changes such as larger numbers of elderly people living alone, changes in the women’s role at home and new ways of understanding and putting up with family relations (Alberdi, 1999; Garrido, 2000; Pérez-Díaz et al., 2001; INE, 2004) have translated in unprecedented cohabitation arrangements and have led to different types of dementia care such as, for example, to live alternatively in several homes—‘rotation’ (Rivera, 2001; de la Cuesta, 2005; Losada et al., 2006).

*Correspondence to: J. Rivera, Universidad de Salamanca, Departamento de Sociología y Comunicación, Facultad de Ciencias Sociales, Avda. Francisco Tomás y Valiente s/n. Campus Unamuno, Salamanca, Spain, 37007. E-mail: jrivera@usal.es

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We combined qualitative and quantitative approaches to describe the cohabitation arrangements of people with dementia in Spain and to explain the causes of rejection of long term care institution of persons with dementia by caregivers and the rotation.

Very few studies have addressed how people with dementia live in Spain and, to our knowledge, no studies have explained the cohabitation arrangements according to Latin and Mediterranean countries, e.g. rotation (Marrugat, 2005), and the causes of rejection of the use of long term care institutions in Spain (Rivera et al., 1999; Bermejo, 2004).

METHODS

Quantitative data for these analyses were derived from the Neurological Disorders in Central Spain (NEDICES) cohort study, a longitudinal population-based survey of the prevalence, incidence and determinants of older age-associated conditions of the elderly (Bermejo et al., 2001; Morales et al., 2004). Cross-sectional results from the NEDICES study have been already published elsewhere (Benito-León et al., 2004; De Toledo et al., 2004; Morales et al., 2004).

Qualitative data were based in a phenomenological approach (Becker, 1998; Mckeown et al., 2004). The goal of phenomenological research is to analyse how experience is built and communicated in the world of everydaylife (Holstein and Gubrium, 1998).

Focus groups (FG) were used in order to facilitate interactions between participants about their experiences (Krueger and Casey, 2000). Using FG, the researchers are also allowed to consider issues and questions which they may not have previously considered (Madriz, 2000).

Study design

This study was conducted as a combination of quantitative and qualitative methodologies. The quantitative section is based on the study of caregivers proceed from cohort study NEDICES. A sample of prevalent cases of dementia were selected and the caregivers of persons with dementia analyzed. The caregivers completed a questionnaire including the following variables: socio-demographics items, structured questions which analysed the care network, informal and formal care and standardized scales—Zarit burden Scale (Zarit et al., 1980), Katz Index (Katz et al., 1963), Pearlin Scale (Pearlin et al., 1990).

The section of the study using qualitative methodology consisted in two FG and three consecutive interviews. FG were composed of caregivers of people with dementia. Caregivers discussed what they thought about the care provided to their relatives (difficulties and needs as caregivers, consequences of care in daily life and their opinion about the use of long term care institution). According to the results obtained from the FG, three semi-structured interviews (SSI) were designed, complementing the discourses showed in the FG. The composition of the FG and SSI, as well as selection criteria of the participants are shown in Table 1 and Table 2.

The following inclusion criteria for caregivers of people with dementia were applied: Age—participants aged 18 and older; Dementia severity—caregivers with relatives diagnosed with any kind of dementia according to DSM-III (mild, moderate and intense) (WHO, 1988); Time of care—caregivers must have provided care to a person who had been diagnosed with dementia for at least 1 year; and at least 1 h of daily assistance in the last year.

Setting

The quantitative part of this study took place in two communities from central Spain: (1) Las Margaritas, a

<table>
<thead>
<tr>
<th>Table 1. Composition (and selection criteria) of FG</th>
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<tbody>
<tr>
<td>FG 1 Date: 02/06/2000</td>
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<tr>
<td>Medium-low social class</td>
</tr>
<tr>
<td>Females only</td>
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<tr>
<td>Daughters</td>
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<td>Different kinds of cohabitation arrangement: institution, family or living apart from family</td>
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<td>Different kinds of dementia intensity</td>
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<td>Seven participants</td>
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<th>Table 2. Composition (and selection criteria) of SSI</th>
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<tr>
<td>SSI 1 Date: 03/17/2000</td>
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<tr>
<td>Proceeding from informal contact</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Son</td>
</tr>
<tr>
<td>Medium-low social class</td>
</tr>
<tr>
<td>Living in several families alternatively</td>
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<tr>
<td>Intense dementia</td>
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working-class neighborhood in Getafe (Greater Madrid); and (2) Lista, a professional-class neighborhood in Salamanca district (Central Madrid).

FG and SSI were set up in Madrid at the Spanish Association of Sociologists, because this place was considered a neutral space, necessary to conduct FG (Morgan, 1998). Each session was convened by an experienced FG moderator: first author in the FG and a research assistant, who collaborated in this survey, was present as a recorder.

Participants and data collection

The cases in the quantitative section of this study come from the NEDICES study (Morales et al., 2004), that was originally designed with two phases. Phase 1 involved door-to-door screening of eligible people. The screening included the use of standardized questionnaires administered by lay interviewers. Phase 2 involved a neurologist’s examination of those individuals who screened positive in Phase 1. The estimated prevalence of dementia in the general study (Margarita and Lista) were near 6% (Benito-León et al., 2004; De Toledo et al., 2004). We used a sample of successive cases, once the previous diagnosis of dementia was confirmed by the study neurologist, the caregivers were interviewed. The first 150 caregivers of these persons diagnosed with dementia (belonging to the prevalent cases) that accepted the interview were included in the sample and were studied (43 cases were unreachable and could not be interviewed).

For the qualitative section of this study the members of the FG and SSI were selected from outpatient clinics, members of Alzheimer’s family organizations and informal contacts. People who had previously answered the applied questionnaire in the population study could not participate in FG or SSI, because their discourse would have been determined by the items from the quantitative questionnaire (Morgan, 1998). SSI were implemented only for male caregivers. Since men generally do not take on the role of caregiver, we did not consider it necessary to create a male caregivers FG; however, the individual trajectory of care in male caregivers was an interest and, therefore, was pertinent to perform SSI. The FG and interviews were performed in the winter and spring of 2000 and systematically recorded and analysed using the ‘MAXqda’ program. The quotation was literal, referring to the FG number and to the transcription page (e.g. 2FG, 5: 2; 2. p. 5); and in the case of interviews, the reference was also included in the transcription page (e.g. 3SI, 7; Semi-structured p. 3. 7).

RESULTS

Quantitative study

Main socio-demographics data (age, sex and marital status) from persons with dementia are presented in Table 3. In relation to the intensity of dementia (DSM-III-R) and etiology most of the cases presented severe dementia (60.6%) and Alzheimer’s disease as aetiology (74%).

The main features related to cohabitation arrangements are shown in Table 4. We highlighted the percentage of elderly people who lived in long term care institution (20%) and those who lived in several homes ‘rotating’ among several relatives (15.3%); if we compare the studied populations, only the persons with dementia in Margarita lived in several homes.

Features of primary caregivers are shown in Table 3. Women mainly assumed the role of primary care-
givers, with daughters of dementia patients being the caregiver in almost half of the cases.

Differential analyses between persons with dementia living alternatively in several homes and persons with dementia living in one home are shown in Table 5. Persons with dementia living in several homes were mainly women (almost 80%). All persons with dementia living in several homes were widows living in the Margaritas neighbourhood.

Qualitative study

Care and motivation for primary caregivers: causes of cohabitation arrangements. Care justification was argued from two axes: obligation (norms) and mother love (feelings); on the one hand, obligation imposed by social rules and tradition and, on the other hand, love determined by a reciprocal feeling based on the belief that parents took care of their children or them.
Sometimes even affective ties lead to gratification feelings in some caregivers.

‘My mother has helped me a lot when I am at work and she has helped me to raise my son, then, if I can, I am going to take care of her’. (FG 1, 10).

When sons were the primary caregivers they seemed to have less anguish since they normally had more support than daughters within their homes and even shared such care proportionally with the wife (persons with dementia’s daughter-in-law) and/or children (people with dementia’s grandchildren):

‘... there are people that due to their work or incompatibility of character between daughters and mothers or a father-in-law with his daughter-in-law and many times ... they think: I rather see her in a nursing home where she is taken care of, than having her here all day long fighting’. (FG 2, 35).

Married persons who took care of their spouses assumed this role. Although they did not need to argue about it, they thought it was an obligation (detached from marriage) and a love act coherent with ties made by a couple married for life.

During the last decades, social evolution has brought equality for women; nonetheless, most female caregivers wanted to go on taking care of their relatives, although with cooperation from the male part of the family in order that she can combine her role in public life with her role at home.

‘... because if there is a strong family network then you say, with a little help that every one puts, without involving too much, lightens a little, but on one person all the weight, it is very burdensome ...’. (FG2, 46).

‘Rotation’ and institutionalization: controversial cohabitation arrangement. ‘Rotation’ was used by caregivers participating in FG and SSI, and it was considered that the consequences for the persons with dementia could not be adequate, but it was the best option for caregivers before using a long term care institution. The use of the ‘rotation’ was related to normative behaviours and to obligation feelings, along with a change in ‘role’ of women in the Spanish family. Nevertheless the adoption of cohabitation developed into contradictions and guilty feelings, showing again the power of the tradition and social norms.

‘... It seemed like those in the family who were opposed to send her to a nursing home loved her more than the others, and then we decided care her two months every one ...’. (SSE1, 2).

‘... no, I speak the truth. this situation of going from hand to hand and that nobody want to stay with her, as the song says, I do not agree, but I also understand, you begin to think, and it is not logical, that is years and years taking care of her mother ...’ (2FG, 25–26).

Nursing homes for relatives were strongly rejected in the discourses or considered the last resource. The wrong image of long term care institution was related to family failure, and the long term care institution was identified with abandonment. There were two confronted mentalities, one traditional which identified long term care institutions with asylums where people lived with nothing or no one, and a modern one which perceived long care term institutions as a resource without negative connotations. Women felt guiltier than men when they talked about the possibility of their relatives living in a long term care institution. Caregivers, detractors of entrance in long term care institutions, connected the institutionalization with family distance and with no love feelings of relatives towards persons with dementia. These rejections were exclusively towards long term care institution, not towards day centres or to institutional respite care.

‘... Every elderly who has some relatives is being supported but if they have none, they must go to public long term care institutions, where nobody goes to visit them ... the situation is really sad ...’. (1FG, 7).

DISCUSSION

The aim of this study was to analyse cohabitation arrangements such as rotation and to study the causes that explain the rejection of institutionalization and rotation in Spain. Two different methodologies were used in this study.

Data about cohabitation arrangements showed, in general, percentages similar to data shown by other surveys (Fischer and Lieberman, 1999; Canadian Study of Health and Aging Working Group, 2002), except from the issues of ‘rotation’ and institutionalization:

‘Rotation’ or cohabitation arrangement of dementia patients in several homes is a care strategy that has only been mentioned and analysed in surveys that studied elderly people in general or disabled elderly (not exclusively dementia) (Rodrı´guez, 1994; Colectivo IOE/INSERSO/CIS/Instituto de la mujer, 1995; Rivera, 2001; de la Cuesta, 2006). In this survey,
‘rotation’ was used only in a medium-low socio-economic level urban area (Margaritas), and its main aim was to share the burden of care between family members. Three features of rotation stand out: (1) rotation took place in low socio-economic level places—Margaritas neighbourhood; (2) all caregivers belonged to second and third generation; (3) caregivers had a higher score in the Zarit scale.

Institutionalization of persons with dementia in our study sample was low if we compare these data to other studies outside of Spain (Grafstrom et al., 1992; Fisher and Lieberman, 1999; Canadian Study of Health and Aging Working Group, 2002). A possible explanation for this difference is that institutionalization of elderly people in Spain is very low (Fundación Encuentro, 2001). Nevertheless, in the higher income neighborhood of Lista, the elderly lived in nursing homes, indicating that, in Spain, more people with dementia from high socio-economic levels live in nursing homes than those from low socio-economic levels (García Navarro, 2000).

The data from caregivers who participated in the FG and SSI-, who rejected the idea of their relatives living in long term care institutions, had a profound sense of family participation (which included encouraging the patients to participate in self-care and occupational activities) (Vallone et al., 2002; Ho et al., 2003).

The use of nursing homes for people of medium class in Spain remains uncommon because of its high cost or because of being reserved for persons of extremely low resources, nevertheless we consider that the rejection of long care institutions is rooted primarily in cultural factors rather than economic factors as participants in the FG did not argue economic factors for not placing family members suffering from dementia in long term care institutions.

We need to acknowledge the main limitation in our study. It would have been desirable to have included two FGs: one composed of only women of medium-high social class and another one composed of women of medium-low class. This addition would have strengthened our results.

On the basis of our results we recommend two specific policies: diversification of aids to the families and people with dementia, and direct collaboration of voluntary organizations with the National Health System and the Ministry of Social Affairs.

In conclusion, the results of this study suggest that societal changes in Spain have translated into new strategies to cope with the care of people with dementia; we specifically describe ‘rotation’, as a new mechanism of care, which is directly related to the rejection of long term care institutions.

CONFLICT OF INTEREST

None known.

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