



# The Many Faces of Caregivers: A Close-Up Look at Caregiving and Its Impacts

*Regional Perspectives: California*

November 2017

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# Introduction to the Many Faces of Caregivers

Welcome to [Transamerica Institute's](#) inaugural survey of caregivers, [The Many Faces of Caregivers: A Close-Up Look at Caregiving and Its Impacts](#).

This national survey of 3,000+ non-professional caregivers examines their duties and the impact caregiving has on their personal health and well-being, employment, finances and retirement preparations. It also offers detailed findings about care recipients, including their health status and financial situation. The survey report comprises these chapters:

- *Primary vs. Non-Primary.* This chapter contains a portrait of today's caregivers based on 26 key indicators measuring caregiving's impacts on both the caregiver and care recipient.
- *Influences of Demographics on Caregiving.* These chapters are demographic segmentation analyses by voluntary status, employment status, gender, generations, household income, and ethnicity. Each chapter presents a concise set of 26 key measures for each demographic segment.

*Regional Perspectives: California* is supplemental report to [The Many Faces of Caregivers](#) that compares and contrasts California-based caregivers relative to the national population of caregivers.

We hope that you find this report to be a helpful source of caregiving research and survey data and encourage you to explore the additional material available at [www.transamericainstitute.org](http://www.transamericainstitute.org).

If you are seeking survey data that you do not find in these reports, please contact Transamerica Institute at [info@transamericacenter.org](mailto:info@transamericacenter.org) and we will do our best to assist you.

Thank you.

# About the Authors

[Catherine Collinson](#) serves as CEO and president of [Transamerica Institute](#)<sup>®</sup> and [Transamerica Center for Retirement Studies](#)<sup>®</sup>, and is a retirement and market trends expert and champion for Americans who are at risk of not achieving a financially secure retirement. Catherine oversees all research, publications and outreach initiatives, including the Annual Transamerica Retirement Survey. She also serves as executive director of the [Aegon Center for Longevity and Retirement](#).

With two decades of retirement services experience, Catherine has become a nationally recognized voice on retirement trends for the industry. She has testified before Congress on matters related to employer-sponsored retirement plans among small business, which featured the need to raise awareness of the [Saver's Credit](#) among those who would benefit most from the important tax credit. Catherine serves on the Advisory Board of the [Milken Institute's Center for the Future of Aging](#). In 2016, she was honored with a [Hero Award](#) from the [Women's Institute for a Secure Retirement \(WISER\)](#) for her tireless efforts in helping improve retirement security among women.

[Hector De La Torre](#) is the executive director of the [Transamerica Center for Health Studies](#)<sup>®</sup>, which is focused on empowering consumers and employers to achieve the best value and protection from their health coverage, as well as the best outcomes in their personal health and wellness. Hector served as a State Assemblymember for California's 50th District from 2004-2010. Among his accomplishments as an elected official were expanding access to doctors in underserved communities, consumer protections against retroactive cancellation of health insurance, and supporting facilities improvements at Children's Hospitals. Prior to that, he was Mayor and Councilmember in his hometown of South Gate.

Hector serves on the board of L.A. Care, the largest public health plan in the United States, a member of the Board of Trustees at Occidental College (his alma mater) in Los Angeles, and is a member of the California Air Resources Board (CARB) as a gubernatorial appointee.

# About Transamerica Institute

- Transamerica Institute® (TI) is a nonprofit, private foundation dedicated to identifying, researching and educating the public about retirement, health coverage, and other relevant financial issues facing Americans today. It is comprised of two research centers: [Transamerica Center for Retirement Studies®](#) (TCRS) and [Transamerica Center for Health Studies®](#) (TCHS). Its mission is to help educate and empower people to make informed decisions about important matters that can improve their health and wealth.
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# Methodology

- The analysis contained in report, *The Many Faces of Caregivers: A Close-Up Look at Caregiving and Its Impacts and Regional Perspectives: California*, was prepared internally by the research team at Transamerica Institute.
- The national online survey was conducted by Harris Poll between March 13 - April 21, 2017 among 3,074 non-professional caregivers.
- A comprehensive demographic profile of the target population of interest of all U.S. non-professional caregivers is not available. Therefore, in order to ensure that this sample is properly representative, U.S. adults age 18+ who were *not* caregivers were also screened and asked certain demographic questions. However, the full survey was only administered to non-professional caregivers.
- The *combined* data for non-professional U.S. caregivers plus all other age 18+ respondents were weighted to make them representative of the general U.S. age 18+ population.
  - Data were weighted by race/ethnic groups [Hispanic, Black/African American (not Hispanic), Asian (not Hispanic), All Other (not Hispanic)] to each group's U.S. Census Bureau population distributions of U.S. adults age 18+ for gender, education, household income, household size, marital status, and employment status.
  - The weighting also adjusts for attitudinal and behavioral differences between those who are online versus those who are not, those who join online panels versus those who do not, and those who responded to this survey versus those who did not.
- The caregiver respondents were then analyzed as a representative subgroup of the general population age 18+.
- Caregivers for this survey met the following criteria:
  - U.S. residents, age 18 or older
  - Non-professional caregivers (who may or may not receive compensation for caregiver role)
  - Provided care for a relative or friend with an episodic, permanent, or temporary condition who needs help taking care of themselves at any time in the preceding 12 months. The care recipient could be an adult or a child.
- The average survey length was 32 minutes. Respondents were given the option to complete the survey in Spanish, and 199 respondents did so, including 79 percent Hispanics and 21 percent non-Hispanics.
- Percentages are rounded to the nearest whole percent. Differences in the sums of combined categories/answers are due to rounding.
- Samples:
  - Caregivers who self-identified as living in California = 399
  - All caregivers including those in California ("National") = 3,074

# Terminology

*This report uses the following terminology:*

**Care Recipient:** *person for whom the caregiver provides care*

## Caregiver

- **Caregiver:** *18+ year old living in the U.S. who has provided care for a relative or friend at any time in the past 12 months*
- **Primary Caregivers:** *caregivers who self-identify as the primary caregiver*
- **Non-Primary Caregivers:** *caregivers who do not self-identify as the primary caregiver*

## Generation

- **Millennial:** *born 1979 – 2000*
- **Generation X:** *born 1965 – 1978*
- **Baby Boomer:** *born 1946 – 1964*
- **Mature:** *born prior to 1946*

# Executive Summary

Caregiving for a loved one often transcends fulfilling the tasks and duties laid out daily. Nine out of 10 non-professional family caregivers feel that it's important to provide a good quality of life for the person they care for, they like helping, and enjoy spending time with the care recipient. However, many caregivers are providing care at their own risk. Fifty-five percent say that their own health is taking a back seat to the health of their care recipient. Sixty-nine percent gave little or no consideration to their own financial situation when deciding to become a caregiver. These findings are part of [\*The Many Faces of Caregivers: A Close-Up Look at Caregiving and Its Impacts\*](#), a report by nonprofit [Transamerica Institute](#) (TI), a collaboration between its [Center for Retirement Studies](#) (TCRS) and [Center for Health Studies](#) (TCHS).

“Millions of Americans are serving as unpaid caregivers for relatives or friends who need help taking care of themselves. With people living longer, the high cost of long-term care, and the aging of the Baby Boomer generation, the number of unpaid caregivers is likely to increase,” said Catherine Collinson, CEO and president of TI and TCRS. “It’s time to raise awareness of the challenges faced by caregivers so that they can simultaneously care for their loved ones and protect their own long-term health and financial well-being.”

Transamerica Institute’s national survey of 3,000+ non-professional caregivers examines their duties and the impact caregiving has on their personal health and well-being, employment, finances and retirement preparations. It offers an in-depth analysis and demographic portraits of caregivers by employment status, gender, generation, household income, race/ethnicity, and whether they are the primary caregiver and became a caregiver voluntarily or not. The report also offers detailed findings about care recipients, including their health status and financial situation.

## *A Portrait of Today’s Caregivers in California*

“Caregivers are a highly diverse population that includes men and women of all ages, ethnicities, income levels and employment status. Amidst this diversity, caregivers share much in common in terms of their motivations for being a caregiver and the types of duties they perform,” said Hector De La Torre, executive director of TCHS.

Caregivers in California in many respects are similar to those nationally yet there are some noteworthy. In California, the majority of caregivers are men (54 percent), while nationally the majority are women (53 percent). Looking across generations, 39 percent of California-based caregivers are Millennials, compared to 34 percent nationally. The median age of caregivers is 45 years old in California which is slightly younger than those nationally (48 years old).

# Regional Perspectives: California

California caregivers are more likely than those nationally to be Hispanic (28 percent versus 15 percent) or Asian/Pacific Islander (12 percent versus 4 percent) – while California caregivers are less likely than those nationally to be White (54 percent versus 72 percent) or African American (4 percent versus 7 percent). It should be noted that these differences regarding race/ethnicity are relatively consistent between California’s general population and the national population.

## *Twenty-Six Facts About California-Based Caregivers*

- **Most Consider Themselves to Be the Primary Caregivers.** The majority of caregivers in California (72 percent) and nationally (68 percent) consider themselves to be the Primary caregiver of their care recipient.
- **The Majority of Caregivers Are Caring for a Family Member.** Almost nine out of 10 caregivers are caring for a family member, including 86 percent of caregivers in California and 87 percent of caregivers nationally. Parents are the most frequently cited recipients of care among caregivers in California (31 percent) and nationally (34 percent). Spouses/partners are the second most frequently cited recipients of care among caregivers in California and nationally (both 19 percent). Eleven percent of caregivers in California and 10 percent of national caregivers are caring for a child.
- **Reasons for Becoming a Caregiver.** When asked how they came to be a caregiver, caregivers in California (64 percent) and nationally (63 percent) most frequently cite a desire to care for their loved one. Other frequently cited reasons include having a close relationship to the care recipient (54 percent of caregivers in California and 58 percent nationally) and that they have the time and capacity to do so (45 percent of caregivers in California and 43 percent nationally).
- **Total Caregiving Hours per Month.** Caregivers in California and nationally dedicate 50 hours (median) per month to caregiving. California-based caregivers (34 percent) are slightly less likely than those nationally (36 percent) to spend 100 or more hours per month caregiving.
- **Caregiver Duties Performed.** Caregiving entails a broad range of duties. The most frequently cited type of caregiving duty performed for the care recipient is household-related for both caregivers in California (91 percent) and nationally (89 percent). Caregivers in California and those nationally are quite similar in the caregiving duties performed. California-based caregivers are somewhat more likely to assist with healthcare coordination (50 percent compared to 44 percent for caregivers nationally), while somewhat less likely to help with medical-related activities (45 percent compared to 49 percent for caregivers nationally).



# Regional Perspectives: California

- **Hours Spent Caregiving by Types of Duties.** Both caregivers in California and nationally spend the most time per month providing companionship to the care recipient, including 30 hours by California-based caregivers (median) and 33 hours by caregivers nationally (median). This is followed by meal preparation (median 17 hours for caregivers in California and 20 hours for caregivers nationally). In general, time spent on other caregiving duties (e.g., health-related, medical-related, household, and social/ communication duties) is relatively consistent between caregivers in California and nationally.
- **Sources of Information Relied on to Assist in Caregiving Duties.** California-based caregivers most frequently rely on medical professionals (51 percent) for information to assist with their caregiving duties, while caregivers nationally equally rely on medical professionals and family and friends (both 45 percent). Caregivers in California are slightly more likely than those nationally to rely on online sources, such as medical, Medicare, and Medicaid websites, for information to assist in their caregiving roles.
- **Sources for Learning About Medical/Nursing Tasks.** Among caregivers currently performing medical/nursing-related tasks, caregivers in California (59 percent) and nationally (54 percent) most frequently report using hospital or doctor's office personnel to learn how to perform medical/nursing tasks. Of note, California-based caregivers are somewhat more likely than those nationally to have learned from online videos (24 percent of caregivers in California; 13 percent for those nationally) and online discussion boards (17 percent of caregivers in California; 8 percent of those nationally).
- **Caregivers' Sentiments About Their Caregiving Duties.** Almost all caregivers in California (96 percent) and nationally (94 percent) share that it is important to them to provide a good quality of life for the care recipient. Caregivers in California and nationally indicate they like helping the care recipient (both 91 percent). However, many are experiencing challenges. More than half of caregivers in California (60 percent) and nationally (55 percent) say that their own health takes a backseat to the health of the care recipient. Many share that their caregiving duties leave them physically exhausted (61 percent in California, 55 percent nationally).
- **Employment Status of Caregivers.** Caregivers in California (57 percent) are somewhat more likely to be employed than caregivers nationally (52 percent). Eight percent of caregivers in both California and nationally are self-employed. Thirty-five percent of caregivers in California describe themselves as not employed, compared to 40 percent of caregivers nationally.

# Regional Perspectives: California

- **Disruptions to Employment as a Result of Caregiving:** Caregiving responsibilities can be disruptive to a caregiver's employment situation. Among caregivers who are employed or who have been employed during their time as a caregiver, 30 percent of caregivers in California and 26 percent of those nationally have reduced their hours, reduced job responsibilities, and/or switched to a less demanding job. Sixteen percent of California-based caregivers and 10 percent nationally have taken an unpaid leave of absence from their employer covered by the Family and Medical Leave Act. Additionally, 17 percent of caregivers in California and 14 percent of those nationally have either retired early and/or quit their job.
- **Informing Coworkers About Their Caregiving Duties.** Among employed caregivers, the majority have told their immediate supervisor that they are a caregiver, including 53 percent of caregivers in California and 57 percent nationally. California-based caregivers (27 percent) are somewhat more likely than those nationally (21 percent) to have told Human Resources about their caregiving role. On the other hand, caregivers nationally (31 percent) are somewhat more likely than caregivers in California (18 percent) to have shared that they are a caregiver with their other coworkers. A noteworthy 30 percent of California-based caregivers have not told anyone at work, compared to only 23 percent nationally.
- **Employer Support of Caregiving Duties:** Among employed caregivers, most say that their employers are either very or somewhat supportive of their caregiving responsibilities, including 69 percent of caregivers in California and 71 percent nationally. California-based caregivers (18 percent) and those nationally (16 percent) are similarly likely to say that their employer is not too supportive or not at all supportive. Thirteen percent of caregivers in California and nationally say they don't know whether their employers are supportive.
- **Adverse Actions Taken by Employers.** Caregiving duties may conflict with job responsibilities which, in turn, can lead to performance issues and adverse actions taken by employers. Adverse actions may include being given less attractive assignments, being discriminated against, or being passed over for a promotion, among countless others. Among caregivers who are employed or who have been employed during their time as caregivers, more California-based caregivers (37 percent) compared to those nationally (28 percent) say they have experienced adverse employment actions by a current or former employer as a result of their caregiving responsibilities.

# Regional Perspectives: California

- **Caregivers' Financial Well-Being.** The majority of caregivers describe their financial well-being as being excellent or good, including 58 percent of California-based caregivers and 56 percent nationally. In addition, caregivers in California (25 percent) are somewhat less likely than those nationally (29 percent) to self-report their financial well-being as fair. Seventeen percent of California-based caregivers describe their financial well-being as poor, compared to 15 percent nationally.
- **Financial Considerations Before Becoming Caregivers.** Most caregivers in California (62 percent) and nationally (69 percent) say that they gave little or no consideration to their own financial situation when deciding to become a caregiver. California-based caregivers (19 percent) are somewhat more likely than caregivers nationally (13 percent) to indicate they gave it a lot of consideration.
- **Change in Financial Situation as a Result of Caregiving.** Most caregivers say that their financial situation has stayed the same as a result of becoming a caregiver, including 63 percent of caregivers in California and 65 percent nationally. However, 16 percent of California-based caregivers say their financial situation has worsened as a result of becoming a caregiver, a finding that is slightly lower than for caregivers nationally (18 percent). Additionally, 16 percent of caregivers in California indicate that their financial situation has actually improved due to their caregiver role, compared to 13 percent nationally.
- **Monthly Personal Expenditures for Caregiving:** Caregivers often find themselves paying out-of-pocket expenses for the care recipient (e.g., groceries, over-the-counter medications, gas, parking). California-based caregivers spend more on these expenses at \$200 per month (median) than caregivers nationally who spend \$150 per month (median). Caregivers in California (11 percent) are somewhat more likely to spend \$1,000 or more per month on their care recipient than those nationally (9 percent).
- **Financial Assistance for Caregiving Duties.** Most California-based caregivers (71 percent) and caregivers nationally (75 percent) do not receive any form of financial assistance for their caregiving duties. However, caregivers in California (29 percent) are somewhat more likely than caregivers nationally (25 percent) to receive some financial assistance. Both caregivers in California and nationally most frequently received funding from the care recipient (14 percent of caregivers in California; 10 percent nationally) or from family members other than the care recipient (11 percent of caregivers in California; 8 percent nationally). Fewer than 10 percent of caregivers in California and nationally receive any funds from either government agencies or nonprofits.

# Regional Perspectives: California

- **Financial Priorities Among Caregivers.** Caregivers in California and nationally (48 and 49 percent, respectively) most frequently cite paying off some form of debt (i.e., credit card, consumer, student, and/or mortgage debt) as a current financial priority. Alarming, a sizeable minority of California-based caregivers (42 percent) and caregivers nationally (43 percent) identify “just getting by” as a current financial priority. Other frequently cited financial priorities include saving for retirement, paying for healthcare expenses, and supporting children.
- **Total Household Income Among Caregivers.** California-based caregivers have saved more in total household retirement savings at \$81,000 (estimated median) than caregivers nationally at \$68,000 (estimated median). An alarming 16 percent of caregivers in California and 15 percent nationally have no household retirement savings. Eleven percent of California-based caregivers have saved \$1 million or more in total household retirement accounts compared to 7 percent of caregivers nationally.
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- **Caregivers’ Self-Described General Health:** Most caregivers in California and nationally self-describe their general health as excellent or good, including 78 percent of California-based caregivers and 74 percent of those nationally. In contrast, caregivers nationally (26 percent) and somewhat more likely than caregivers in California (22 percent) to say they are in fair or poor health.
- **Changes in General Health Since Becoming a Caregiver:** Sixty-five percent of caregivers both in California and nationally say their general health has stayed the same since taking on their role as a caregiver. Additionally, 17 percent of both California-based caregivers and caregivers nationally indicate their general health has declined/gotten worse since becoming a caregiver. Similarly, 16 percent of caregivers in California and 15 percent nationally report their health has improved since becoming a caregiver.
- **Caregivers’ Health Insurance.** Most caregivers currently have health insurance, including 95 percent of caregivers in California and 90 percent nationally. Both California-based caregivers (43 percent) and those nationally (39 percent) most commonly receive health insurance through an employer, with Medicare being the second most frequently cited provider of health insurance benefits (18 percent of caregivers in California; 19 percent nationally).

# Regional Perspectives: California

- **Caregivers Would Like More Information to Help Them Personally.** The three most frequently requested topics among caregivers in California and nationally to help them personally with their caregiving responsibilities are: managing stress (43 percent of caregivers in California; 38 percent nationally), tips for coping with caregiving challenges (39 percent of caregivers in California; 37 percent nationally), and government benefits available for caregivers (39 percent of caregivers in California; 36 percent nationally). California-based caregivers (23 percent) are somewhat more likely than those nationally (15 percent) to desire additional information about employer-sponsored workplace benefits for caregivers.





## Regional Perspectives: California

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# A Portrait of Caregivers

Caregivers represent a diverse population in both California and nationally but with some noteworthy differences. In California, the majority of caregivers are men (54 percent), while nationally the majority are women (53 percent). Looking across generations, 39 percent of California-based caregivers are Millennials, compared to 34 percent nationally. The median age of caregivers is 45 years old in California which is slightly younger than those nationally (48 years old). California caregivers are more likely than those nationally to be Hispanic (28 percent versus 15 percent) or Asian/Pacific Islander (12 percent versus 4 percent) – while California caregivers are less likely than those nationally to be White (54 percent versus 72 percent) or African American (4 percent versus 7 percent). It should be noted that these differences regarding race/ethnicity are relatively consistent between California's general population and the national population.

## California

### Gender



### Generation

(Median Age: 45)



### Race/Ethnicity\*



## National

### Gender



### Generation

(Median Age: 48)



### Race/Ethnicity\*



- Men
- Women

- Millennials
- Generation X
- Baby Boomers
- Matures

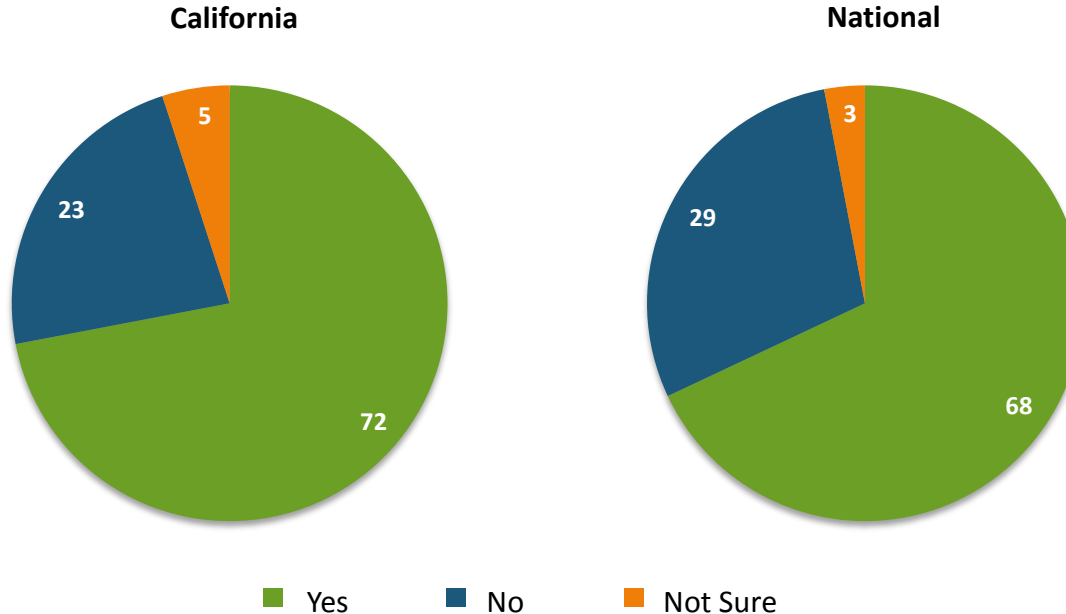
- White
- Hispanic
- Black/African American
- Asian/Pacific Islander

\*NOTE: Excludes Other and Decline to Answer.

# Most Consider Themselves to Be the Primary Caregivers

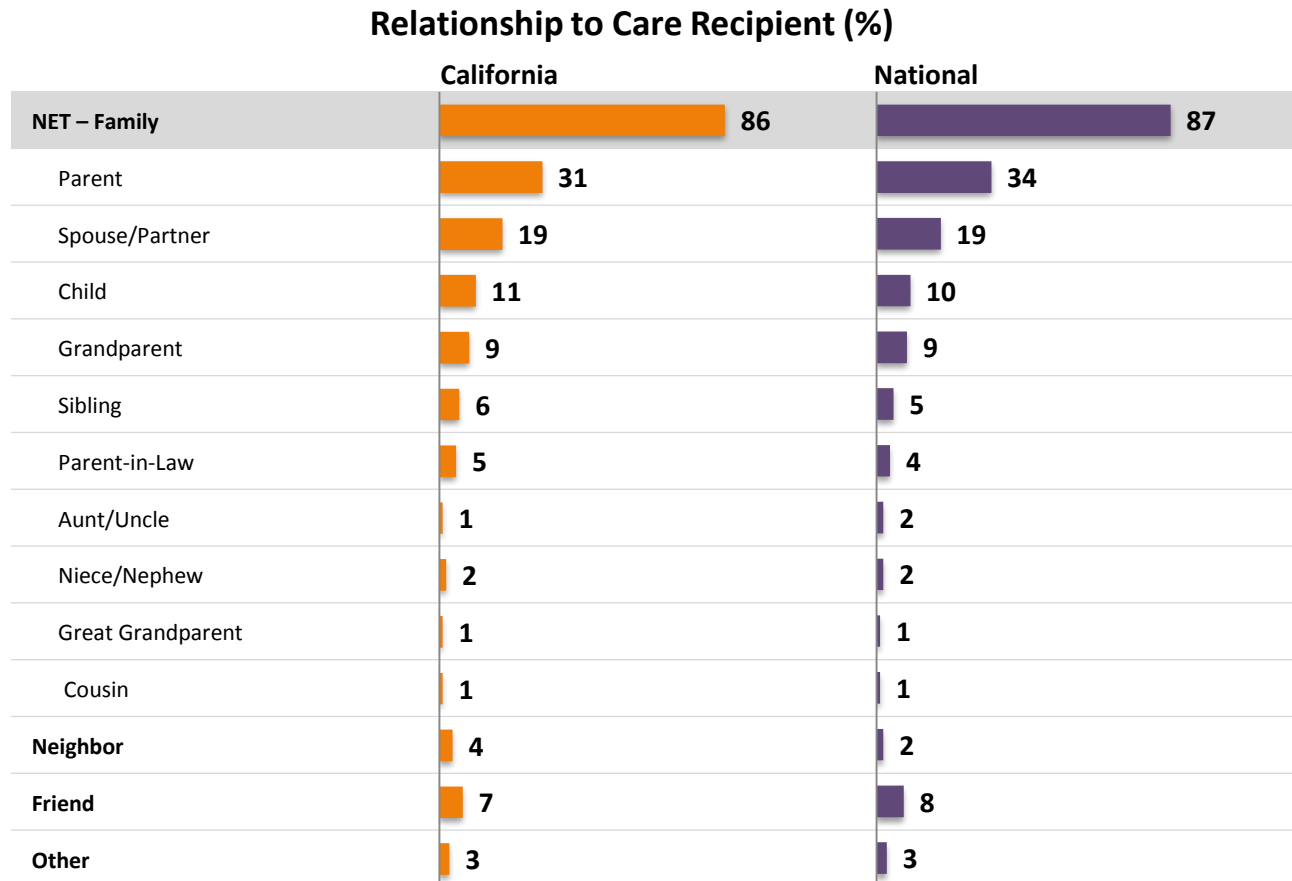
The majority of caregivers in California (72 percent) and nationally (68 percent) consider themselves to be the Primary caregiver of their care recipient.

**“Would you consider yourself to be the Primary caregiver?” (%)**



# The Majority of Caregivers Are Caring for a Family Member

Almost nine out of 10 caregivers are caring for a family member, including 86 percent of caregivers in California and 87 percent of caregivers nationally. Parents are the most frequently cited recipients of care among caregivers in California (31 percent) and nationally (34 percent). Spouses/partners are the second most frequently cited recipients of care among caregivers in California and nationally (both 19 percent). Eleven percent of caregivers in California and 10 percent of national caregivers are caring for a child. Eleven percent of caregivers in California and 10 percent of national caregivers are caring for a child. Eleven percent of caregivers in California and 10 percent of national caregivers are caring for a child.



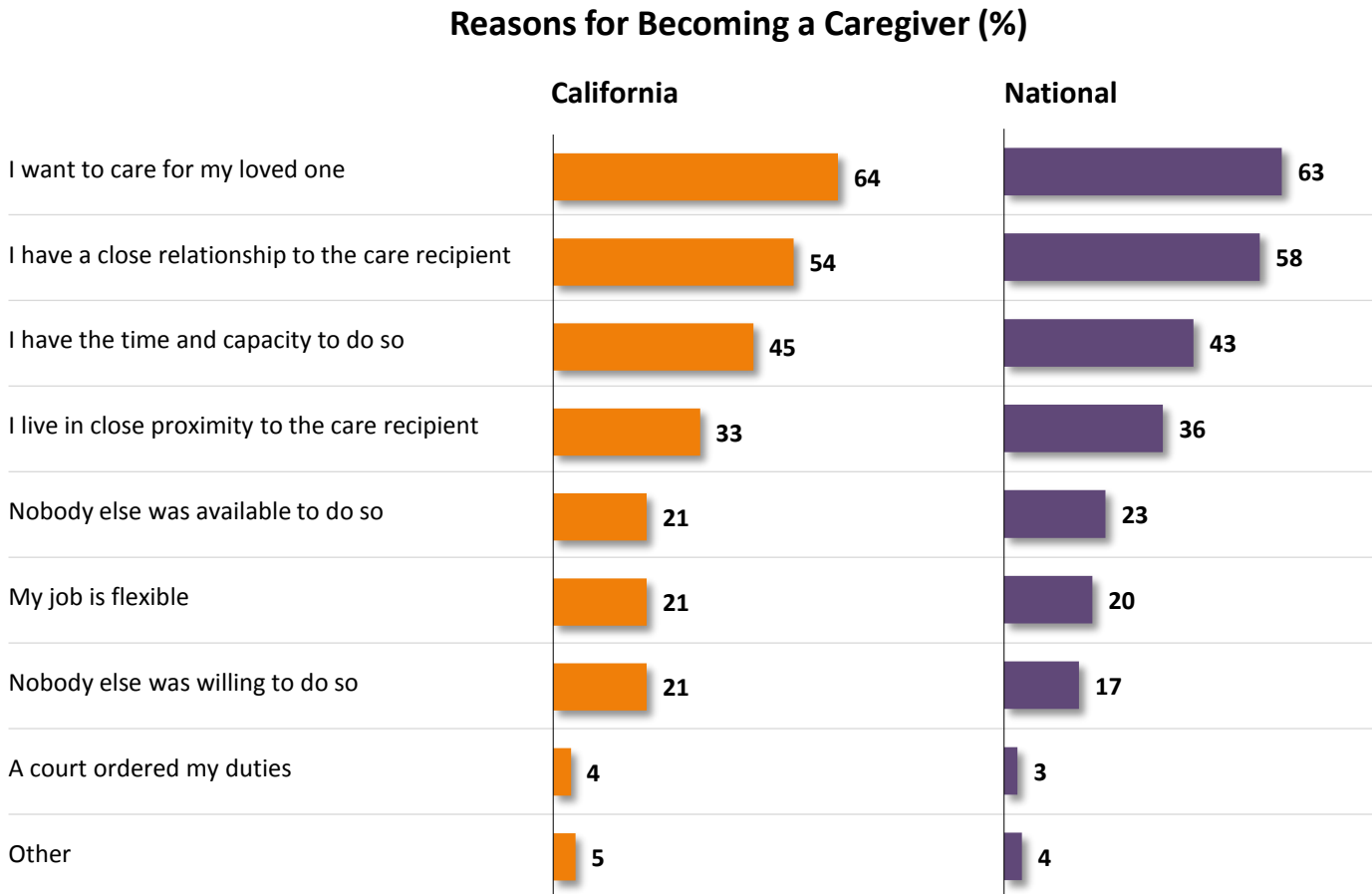
BASE: ALL QUALIFIED RESPONDENTS

Q700. You mentioned providing care for [INSERT ANSWER FROM Q610] individual(s).

Please let us know your relationship to the person, their age, and their gender.

# Reasons for Becoming a Caregiver

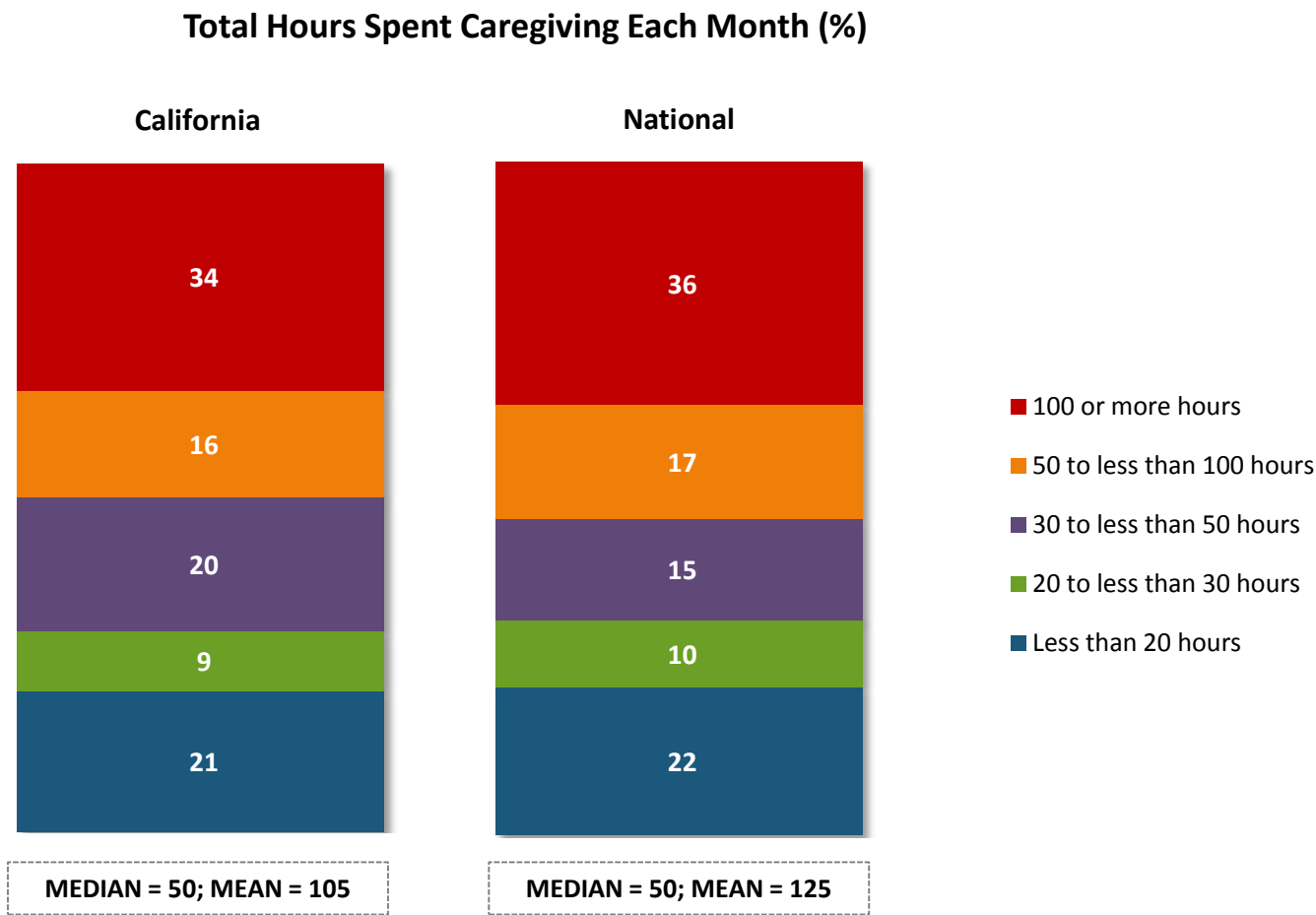
When asked how they came to be a caregiver, caregivers in California (64 percent) and nationally (63 percent) most frequently cite a desire to care for their loved one. Other frequently cited reasons include having a close relationship to the care recipient (54 percent of caregivers in California and 58 percent nationally) and that they have the time and capacity to do so (45 percent of caregivers in California and 43 percent nationally).





# Total Caregiving Hours per Month

Caregivers in California and nationally dedicate 50 hours (median) per month to caregiving. California-based caregivers (34 percent) are slightly less likely than those nationally (36 percent) to spend 100 or more hours per month caregiving.



*Note: The median is the midpoint of the range of responses. The mean is the average of all responses.*

# Caregiver Duties Performed

Caregiving entails a broad range of duties.

The most frequently cited type of caregiving duty performed for the care recipient is household-related for both caregivers in California (91 percent) and nationally (89 percent).

Caregivers in California and those nationally are quite similar in the caregiving duties performed. California-based caregivers are somewhat more likely to assist with healthcare coordination (50 percent compared to 44 percent for caregivers nationally), while somewhat less likely to help with medical-related activities (45 percent compared to 49 percent for caregivers nationally).

Types of Caregiving Duties Performed	California	National
<b>NET – Household</b>	<b>91%</b>	<b>89%</b>
Running errands	68%	68%
Housework	55%	60%
Meal preparation	58%	58%
Home repairs	23%	30%
Home modifications	20%	19%
<b>NET – Social/Communication</b>	<b>73%</b>	<b>72%</b>
Companionship	58%	61%
Basic communications	35%	31%
Language translation	11%	7%
<b>NET – Health-Related</b>	<b>72%</b>	<b>69%</b>
Accompanying to medical appointments	61%	61%
Healthcare coordination	50%	44%
Health insurance coordination	32%	30%
<b>NET – Personal Care</b>	<b>67%</b>	<b>62%</b>
Mobility	45%	39%
Personal care	31%	35%
Feeding	29%	27%
Incontinence care	11%	15%
<b>NET – Medical-Related</b>	<b>45%</b>	<b>49%</b>
Medication management	39%	45%
Medical treatment administration	16%	16%
<b>Paying bills/Managing finances</b>	<b>42%</b>	<b>43%</b>
<b>Other</b>	<b>4%</b>	<b>4%</b>

# Hours Spent Caregiving by Types of Duties

Both caregivers in California and nationally spend the most time per month providing companionship to the care recipient, including 30 hours by California-based caregivers (median) and 33 hours by caregivers nationally (median). This is followed by meal preparation (median 17 hours for caregivers in California and 20 hours for caregivers nationally).

In general, time spent on other caregiving duties (e.g., health-related, medical-related, household, and social/communication duties) is relatively consistent between caregivers in California and nationally.

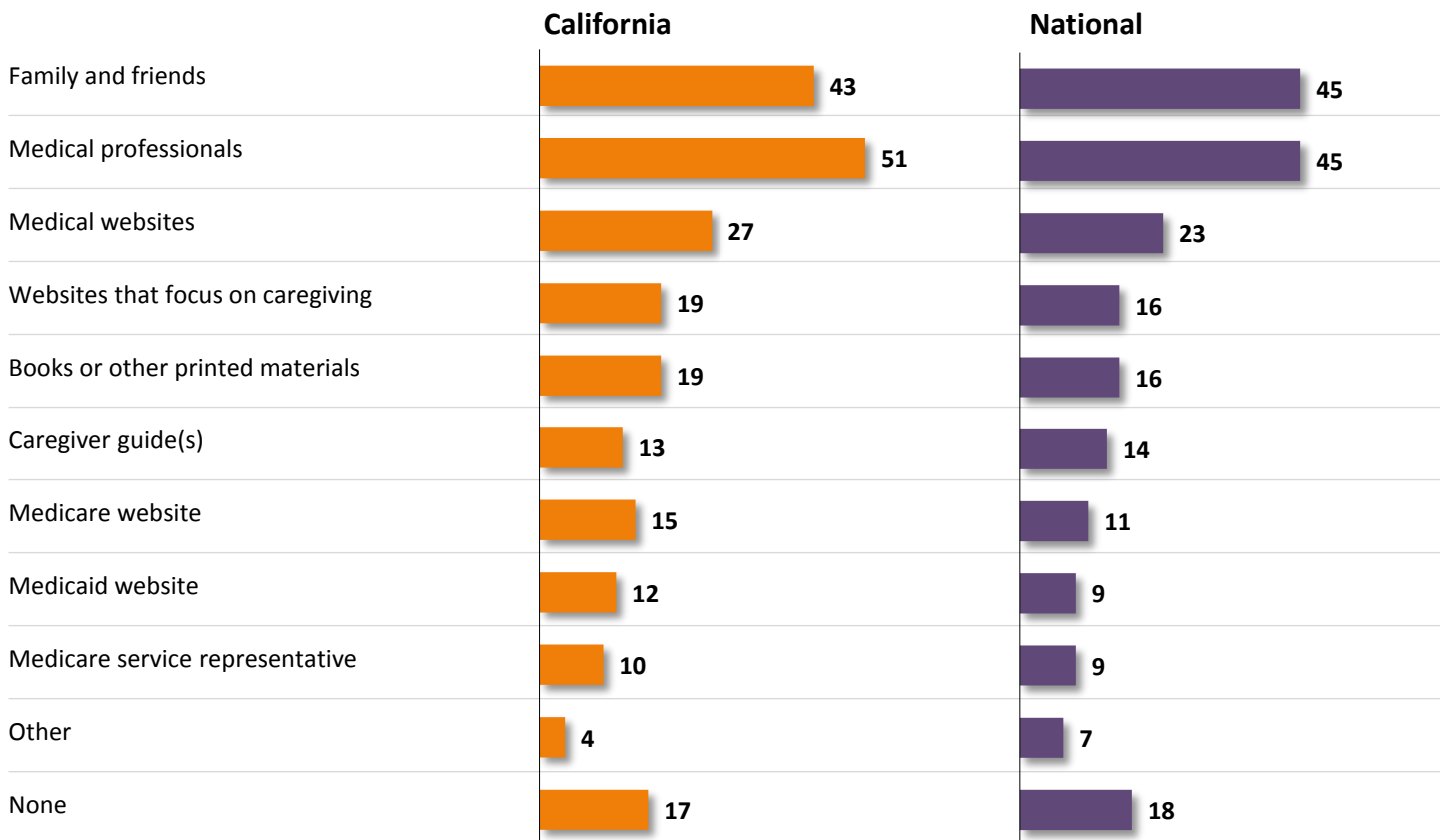
*Note: The median is the midpoint of the range of each response category. The mean is the average of all responses.*

Time Spent On Caregiving Duties Each Month (hours per month)	California		National	
	Median	Mean	Median	Mean
<b>Household</b>				
Running errands	8	14	8	18
Housework (e.g., cleaning, laundry)	10	25	10	28
Meal preparation	17	29	20	32
Home repairs	3	7	3	9
Home modifications	2	7	2	8
<b>Social/Communication</b>				
Companionship	30	76	33	92
Basic communications	8	39	10	46
Language translation	5	16	5	15
<b>Health-Related</b>				
Accompanying to medical appointments	5	8	4	11
Healthcare coordination	3	6	3	9
Health insurance coordination	2	5	2	9
<b>Personal Care</b>				
Mobility	8	19	10	23
Personal care	15	22	12	26
Feeding	10	25	12	34
Incontinence care	14	21	6	22
<b>Medical-Related</b>				
Medication management	5	10	5	16
Medical treatment administration	5	9	5	18
<b>Paying bills/Managing finances</b>	3	6	3	9
<b>Other</b>	10	9	5	63

# Sources of Information Relied on to Assist in Caregiving Duties

California-based caregivers most frequently rely on medical professionals (51 percent) for information to assist with their caregiving duties, while caregivers nationally equally rely on medical professionals and family and friends (both 45 percent). Caregivers in California are slightly more likely than those nationally to rely on online sources, such as medical, Medicare, and Medicaid websites, for information to assist in their caregiving roles.

**Sources of Information to Assist in Caregiving Duties (%)**



NOTE: Nine most commonly selected sources shown.

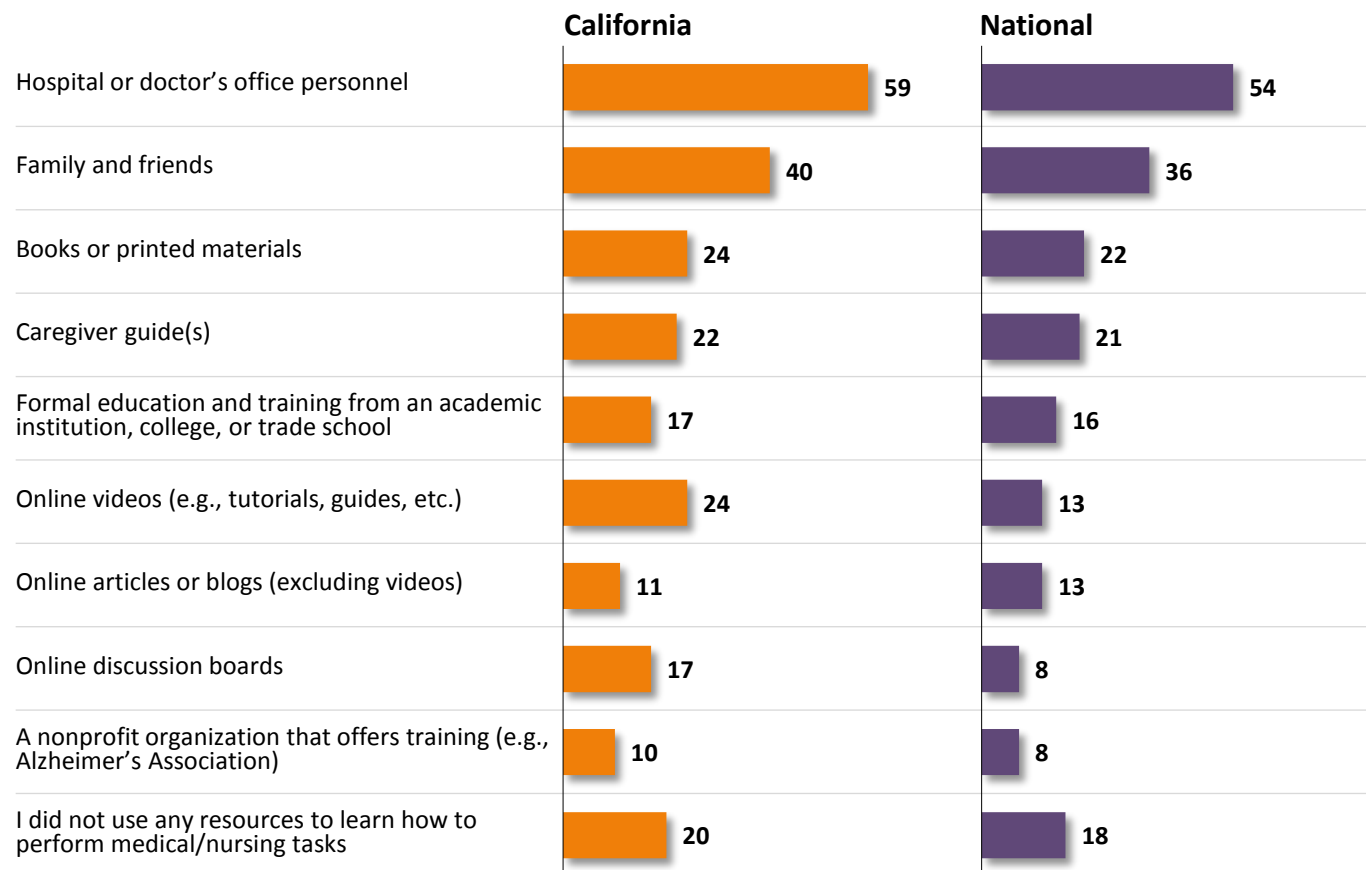
BASE: ALL QUALIFIED RESPONDENTS

Q840. Which of the following do you rely on as sources of information to assist in your caregiving duties? Select all.

# Sources for Learning About Medical/Nursing Tasks

Among caregivers currently performing medical/nursing-related tasks, caregivers in California (59 percent) and nationally (54 percent) most frequently report using hospital or doctor's office personnel to learn how to perform medical/nursing tasks. Of note, California-based caregivers are somewhat more likely than those nationally to have learned from online videos (24 percent of caregivers in California; 13 percent for those nationally) and online discussion boards (17 percent of caregivers in California; 8 percent of those nationally).

**Sources for Learning Medical/Nursing Tasks Related to Being a Caregiver (%)**



NOTE: Nine most commonly selected sources shown.

BASE: IF ADMINISTERING MEDICATIONS AND MEDICAL TREATMENTS

Q835. You mentioned you perform medication management or medical treatment administration for the care recipient. Where did you learn how to perform medical/nursing tasks related to being a caregiver? Select all.



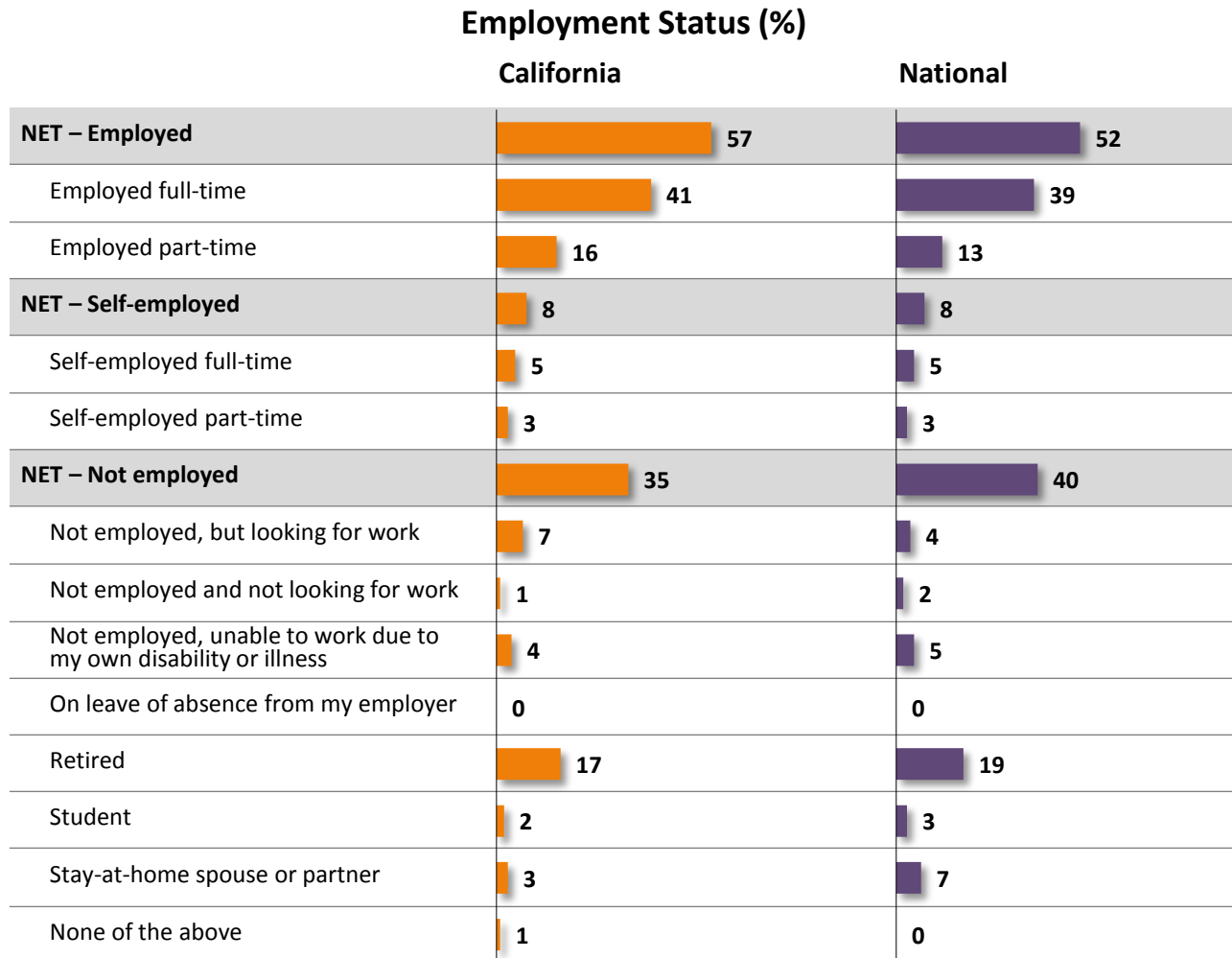
# Caregivers' Sentiments About Their Caregiving Duties

Almost all caregivers in California (96 percent) and nationally (94 percent) share that it is important to them to provide a good quality of life for the care recipient. Caregivers in California and nationally indicate they like helping the care recipient (both 91 percent). However, many are experiencing challenges. More than half of caregivers in California (60 percent) and nationally (55 percent) say that their own health takes a backseat to the health of the care recipient. Many share that their caregiving duties leave them physically exhausted (61 percent in California, 55 percent nationally).

Caregivers’ Sentiments About Their Caregiving Duties	California	National
	Strongly/Somewhat Agree (NET)	
Positive		
It’s important for me to provide a good quality of life for the care recipient	96%	94%
I like helping the care recipient	91%	91%
I enjoy spending time with the care recipient	89%	91%
Being a caregiver gives me a strong sense of purpose	82%	83%
Being a caregiver has led me to take better care of my own health	71%	70%
Being a caregiver has inspired me to document my own health and legal wishes	68%	66%
Negative		
My own health takes a backseat to the health of my care recipient	60%	55%
My caregiving duties leave me feeling physically exhausted	61%	55%
My caregiving duties leave me feeling emotionally exhausted	59%	55%
I need more help with my caregiving duties	54%	47%
With all of my caregiving duties, I barely have time for anything else	54%	45%
My caregiving duties leave me feeling completely overwhelmed	49%	44%

# Employment Status of Caregivers

Caregivers in California (57 percent) are somewhat more likely to be employed than caregivers nationally (52 percent). Eight percent of caregivers in both California and nationally are self-employed. Thirty-five percent of caregivers in California describe themselves as not employed, compared to 40 percent of caregivers nationally.



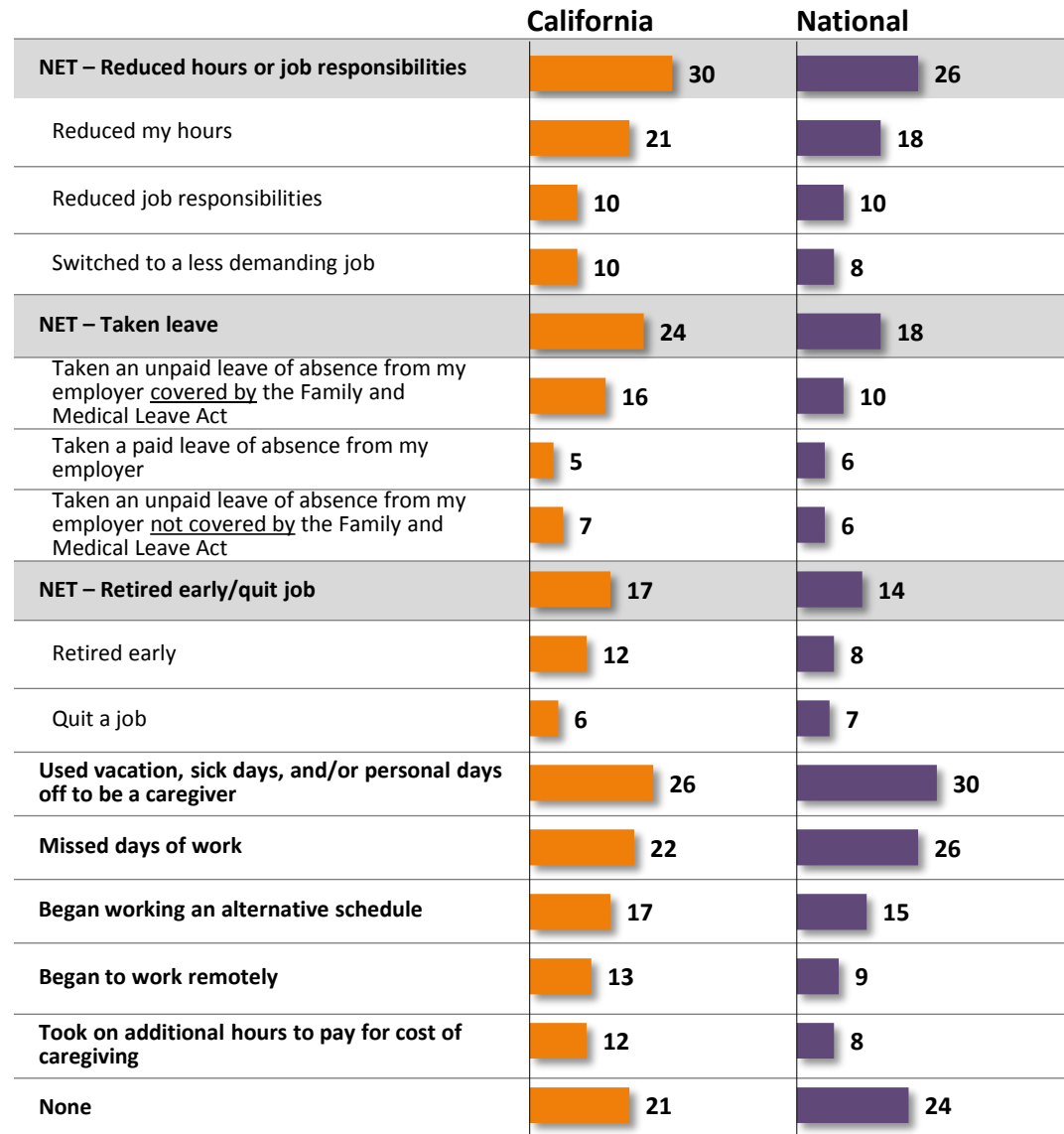
# Disruptions to Employment as a Result of Caregiving

Caregiving responsibilities can be disruptive to a caregiver's employment situation.

Among caregivers who are employed or who have been employed during their time as a caregiver, 30 percent of caregivers in California and 26 percent of those nationally have reduced their hours, reduced job responsibilities, and/or switched to a less demanding job.

Sixteen percent of California-based caregivers and 10 percent nationally have taken an unpaid leave of absence from their employer covered by the Family and Medical Leave Act. Additionally, 17 percent of caregivers in California and 14 percent of those nationally have either retired early and/or quit their job.

**"Which of the following have you done as a result of becoming a caregiver?" (%)**



NOTE: Thirteen most commonly selected sources shown.

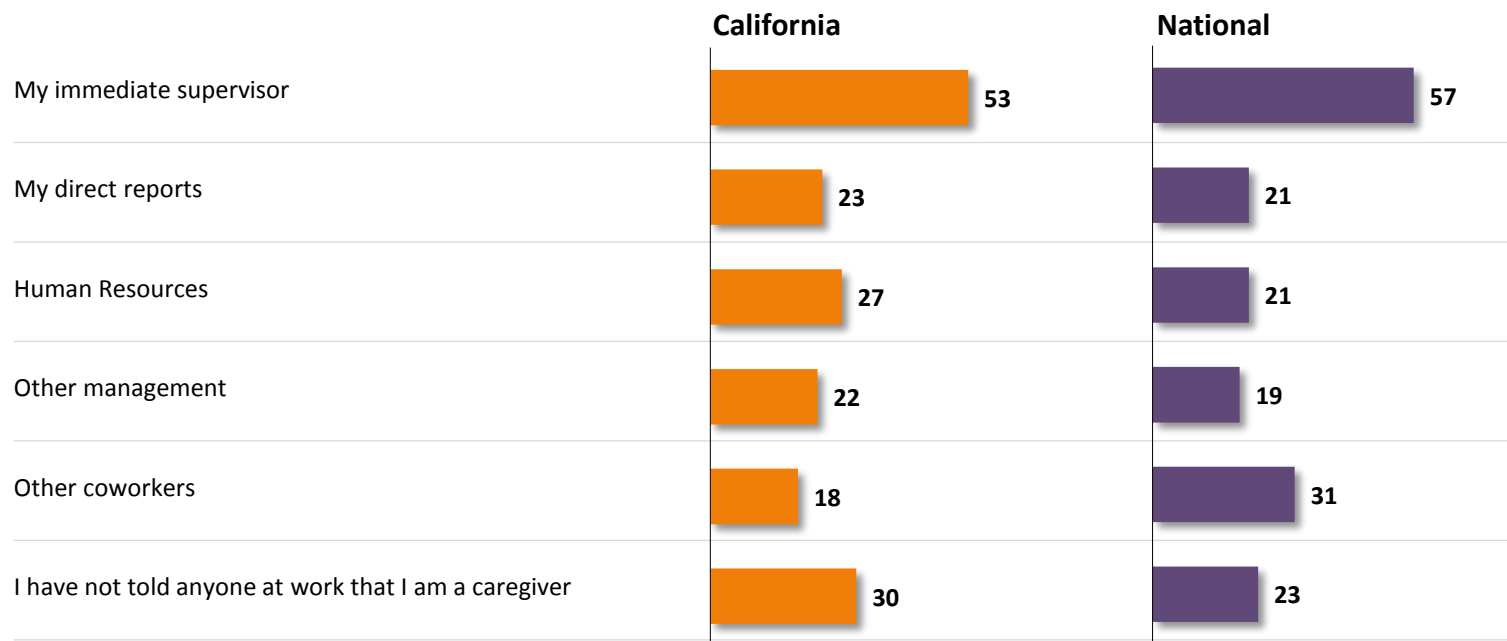
BASE: ALL EMPLOYED OR HAVE BEEN EMPLOYED DURING THEIR TIME AS A CAREGIVER

Q1025. Which of the following have you done as a result of becoming a caregiver? Select all.

# Informing Coworkers About Their Caregiving Duties

Among employed caregivers, the majority have told their immediate supervisor that they are a caregiver, including 53 percent of caregivers in California and 57 percent nationally. California-based caregivers (27 percent) are somewhat more likely than those nationally (21 percent) to have told Human Resources about their caregiving role. On the other hand, caregivers nationally (31 percent) are somewhat more likely than caregivers in California (18 percent) to have shared that they are a caregiver with their other coworkers. A noteworthy 30 percent of California-based caregivers have not told anyone at work, compared to only 23 percent nationally.

**“Which of the following people at work have you told that you are a caregiver?” (%)**



*NOTE: Self-employed and not employed were excluded from this question.*

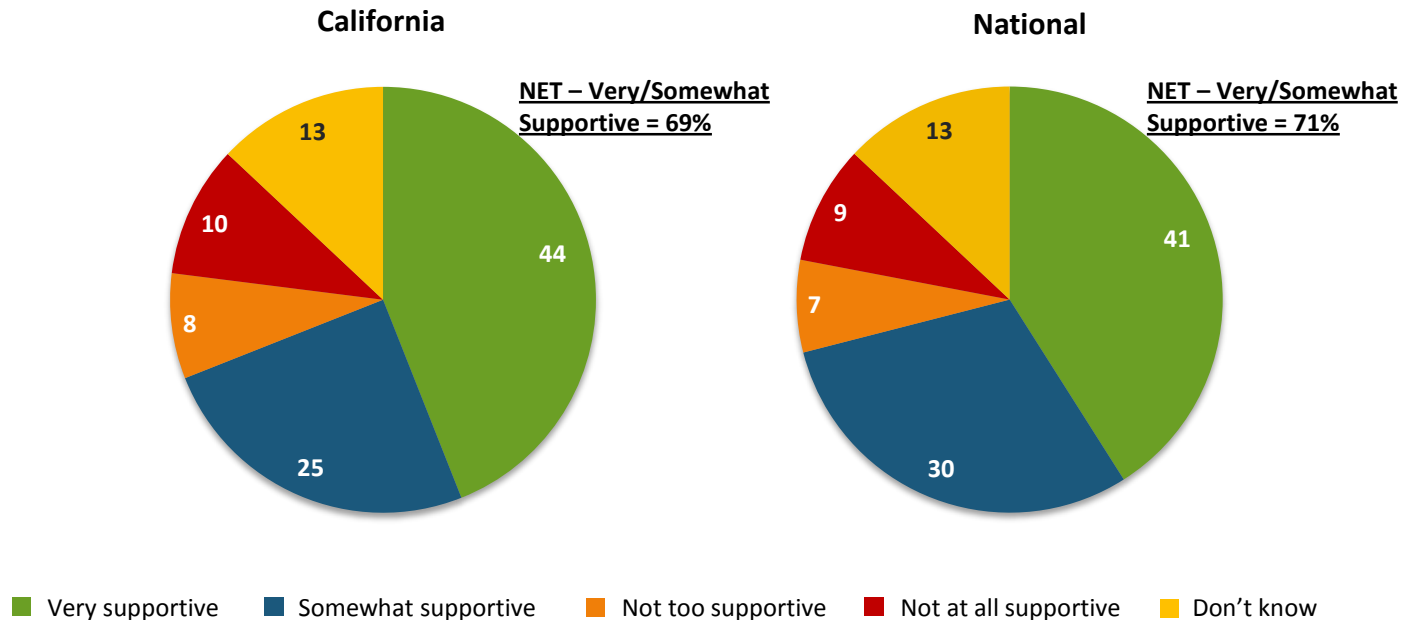
**BASE: EMPLOYED FULL-TIME OR PART-TIME**

**Q1035. Which of the following people at work have you told that you are a caregiver? Select all.**

# Employer Support of Caregiving Duties

Among employed caregivers, most say that their employers are either very or somewhat supportive of their caregiving responsibilities, including 69 percent of caregivers in California and 71 percent nationally. California-based caregivers (18 percent) and those nationally (16 percent) are similarly likely to say that their employer is not too supportive or not at all supportive. Thirteen percent of caregivers in California and nationally say they don't know whether their employers are supportive.

**“How supportive is your employer of your caregiving responsibilities?” (%)**



NOTE: Self-employed and not employed were excluded from this question.

BASE: EMPLOYED FULL-TIME OR PART-TIME

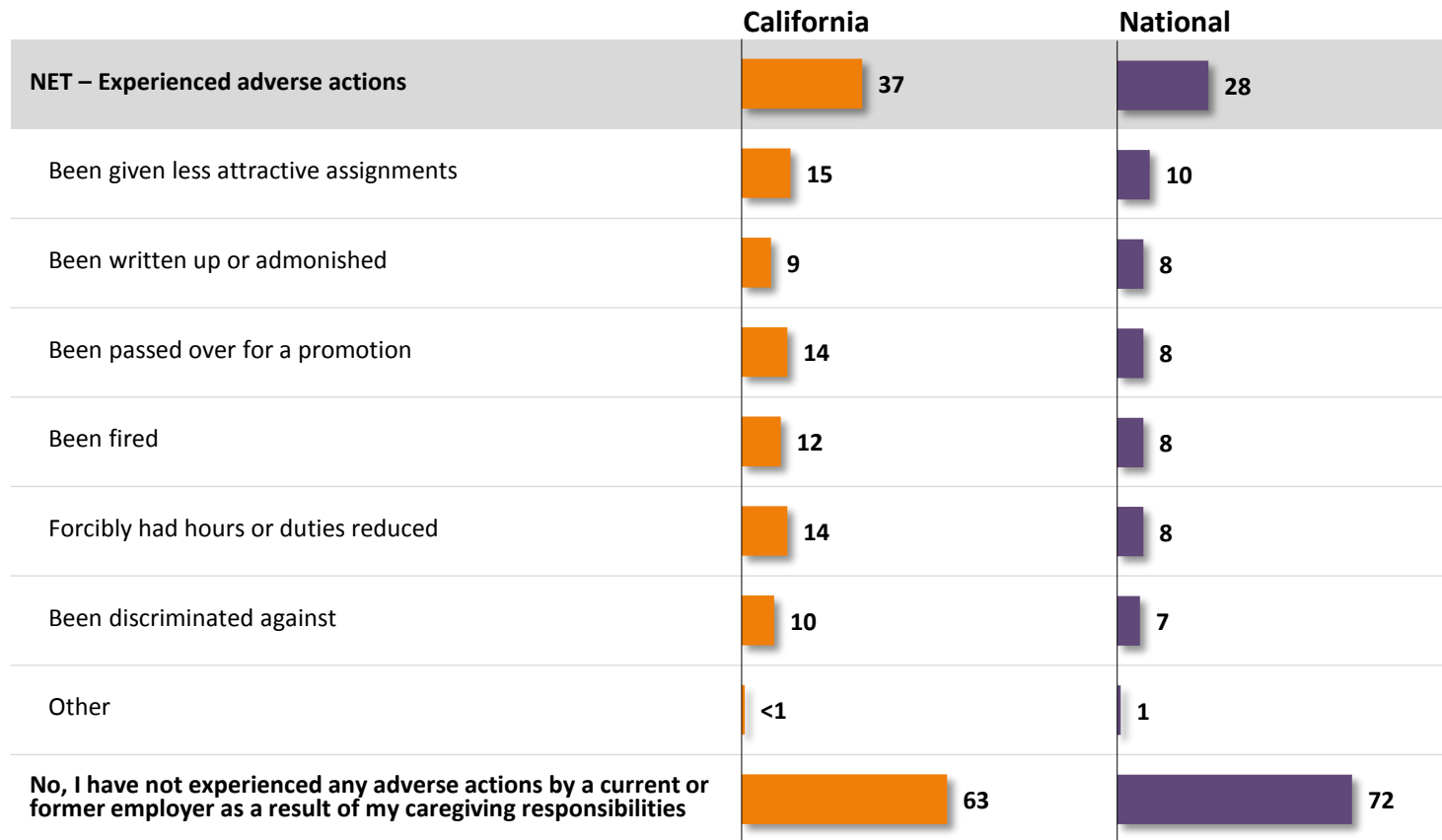
Q1045. How supportive is your employer of your caregiving responsibilities?



# Adverse Actions Taken by Employers

Caregiving duties may conflict with job responsibilities which, in turn, can lead to performance issues and adverse actions taken by employers. Adverse actions may include being given less attractive assignments, being discriminated against, or being passed over for a promotion, among countless others. Among caregivers who are employed or who have been employed during their time as caregivers, more California-based caregivers (37 percent) compared to those nationally (28 percent) say they have experienced adverse employment actions by a current or former employer as a result of their caregiving responsibilities.

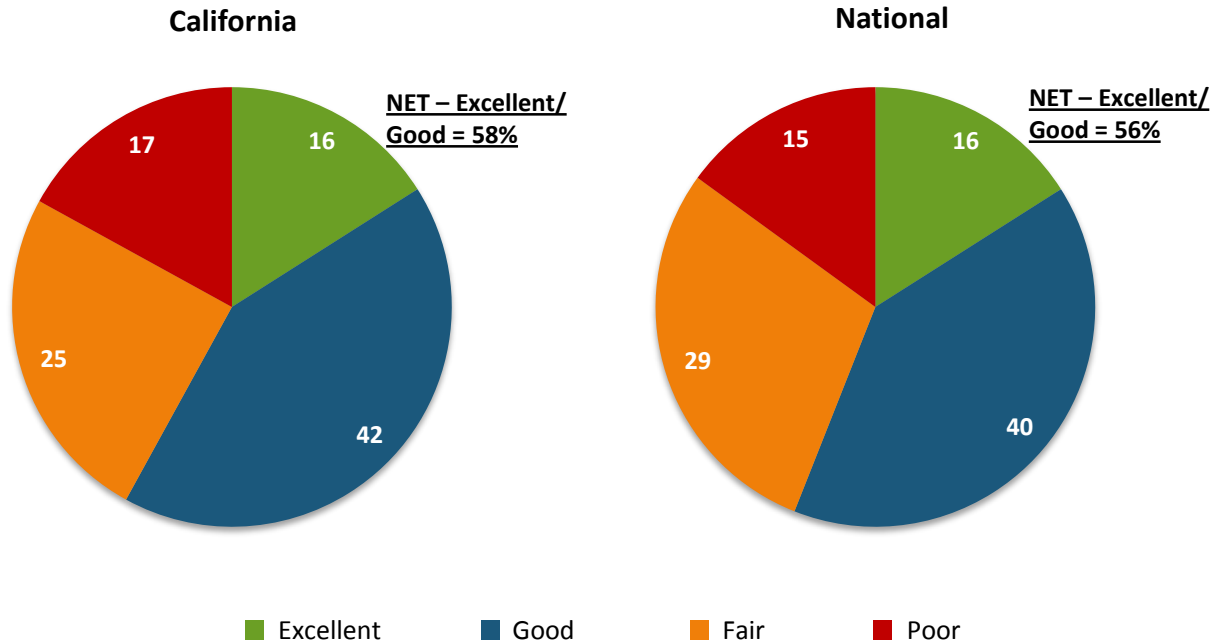
## Adverse Employment Actions Experienced as a Result of Caregiving Duties (%)



# Caregivers' Financial Well-Being

The majority of caregivers describe their financial well-being as being excellent or good, including 58 percent of California-based caregivers and 56 percent nationally. In addition, caregivers in California (25 percent) are somewhat less likely than those nationally (29 percent) to self-report their financial well-being as fair. Seventeen percent of California-based caregivers describe their financial well-being as poor, compared to 15 percent nationally.

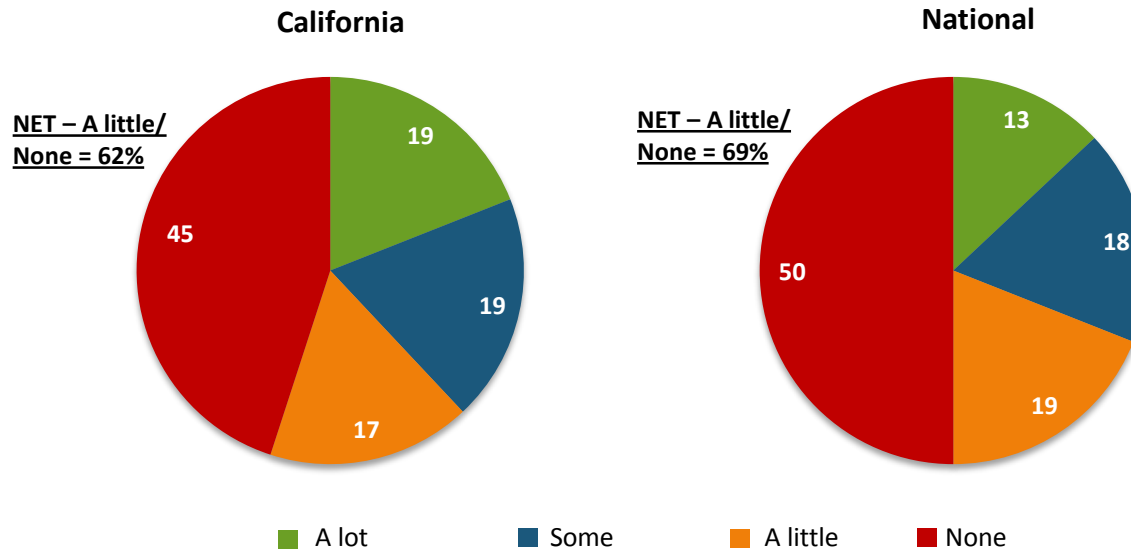
**“How would you describe your own financial well-being?” (%)**



# Financial Considerations Before Becoming Caregivers

Most caregivers in California (62 percent) and nationally (69 percent) say that they gave little or no consideration to their own financial situation when deciding to become a caregiver. California-based caregivers (19 percent) are somewhat more likely than caregivers nationally (13 percent) to indicate they gave it a lot of consideration.

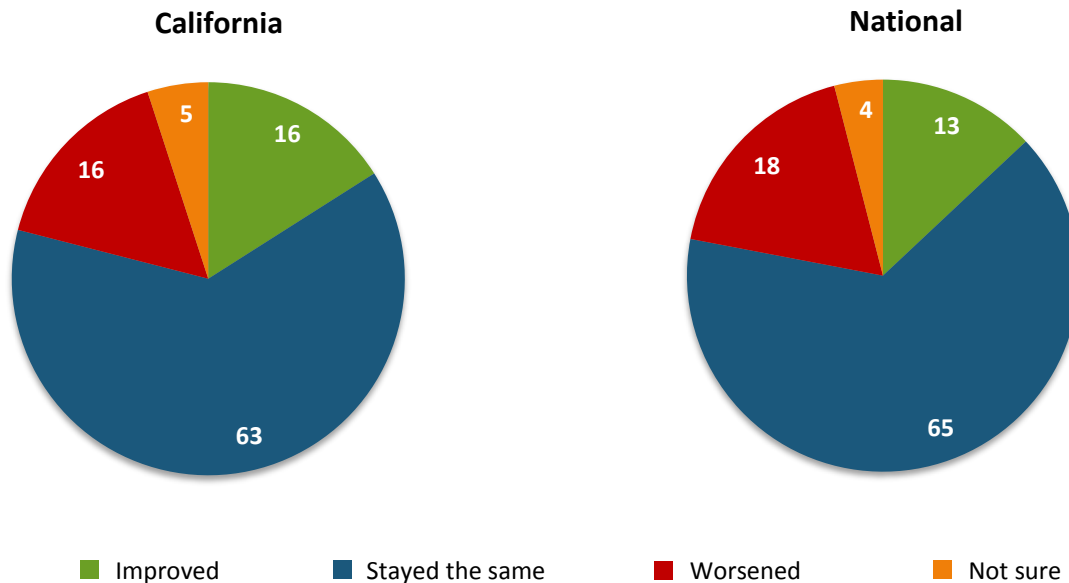
**“To what extent did you consider your own financial situation when deciding to become a caregiver?” (%)**



# Change in Financial Situation as a Result of Caregiving

Most caregivers say that their financial situation has stayed the same as a result of becoming a caregiver, including 63 percent of caregivers in California and 65 percent nationally. However, 16 percent of California-based caregivers say their financial situation has worsened as a result of becoming a caregiver, a finding that is slightly lower than for caregivers nationally (18 percent). Additionally, 16 percent of caregivers in California indicate that their financial situation has actually improved due to their caregiver role, compared to 13 percent nationally.

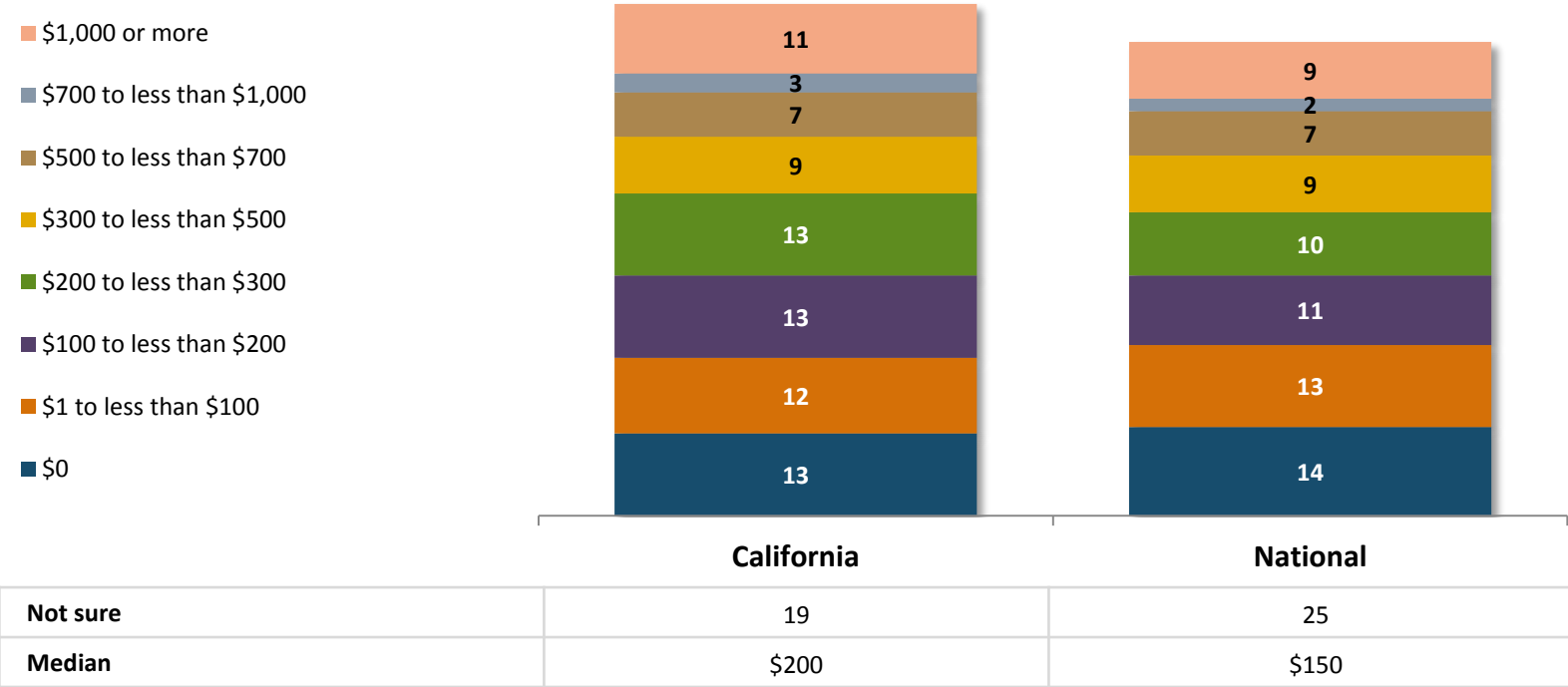
**“How has your financial situation changed as a result of becoming a caregiver?”**



# Monthly Personal Expenditures for Caregiving

Caregivers often find themselves paying out-of-pocket expenses for the care recipient (e.g., groceries, over-the-counter medications, gas, parking). California-based caregivers spend more on these expenses at \$200 per month (median) than caregivers nationally who spend \$150 per month (median). Caregivers in California (11 percent) are somewhat more likely to spend \$1,000 or more per month on their care recipient than those nationally (9 percent).

Monthly Personal Expenditures to Cover Expenses for Care Recipient (%)



Note: The median is the midpoint of the range of each response category. Non-responses are excluded from the estimate.

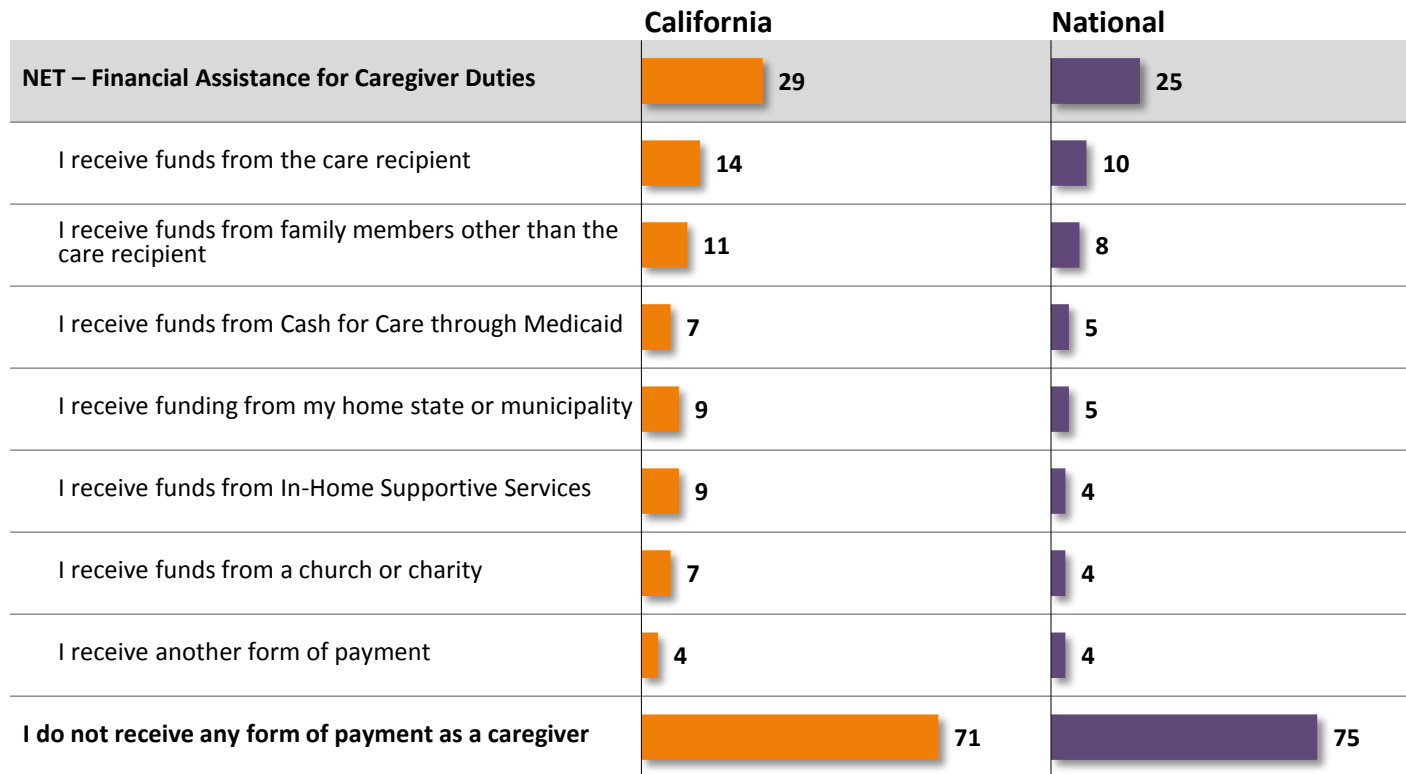
BASE: ALL QUALIFIED RESPONDENTS

Q1120. On average, approximately how much money do you spend each month paying out-of-pocket to cover expenses for the care recipient (e.g. for groceries, over-the-counter medications, gas, parking)?

# Financial Assistance for Caregiving Duties

Most California-based caregivers (71 percent) and caregivers nationally (75 percent) do not receive any form of financial assistance for their caregiving duties. However, caregivers in California (29 percent) are somewhat more likely than caregivers nationally (25 percent) to receive some financial assistance. Both caregivers in California and nationally most frequently receive funding from the care recipient (14 percent of caregivers in California; 10 percent nationally) or from family members other than the care recipient (11 percent of caregivers in California; 8 percent nationally). Fewer than 10 percent of caregivers in California and nationally receive any funds from either government agencies or nonprofits.

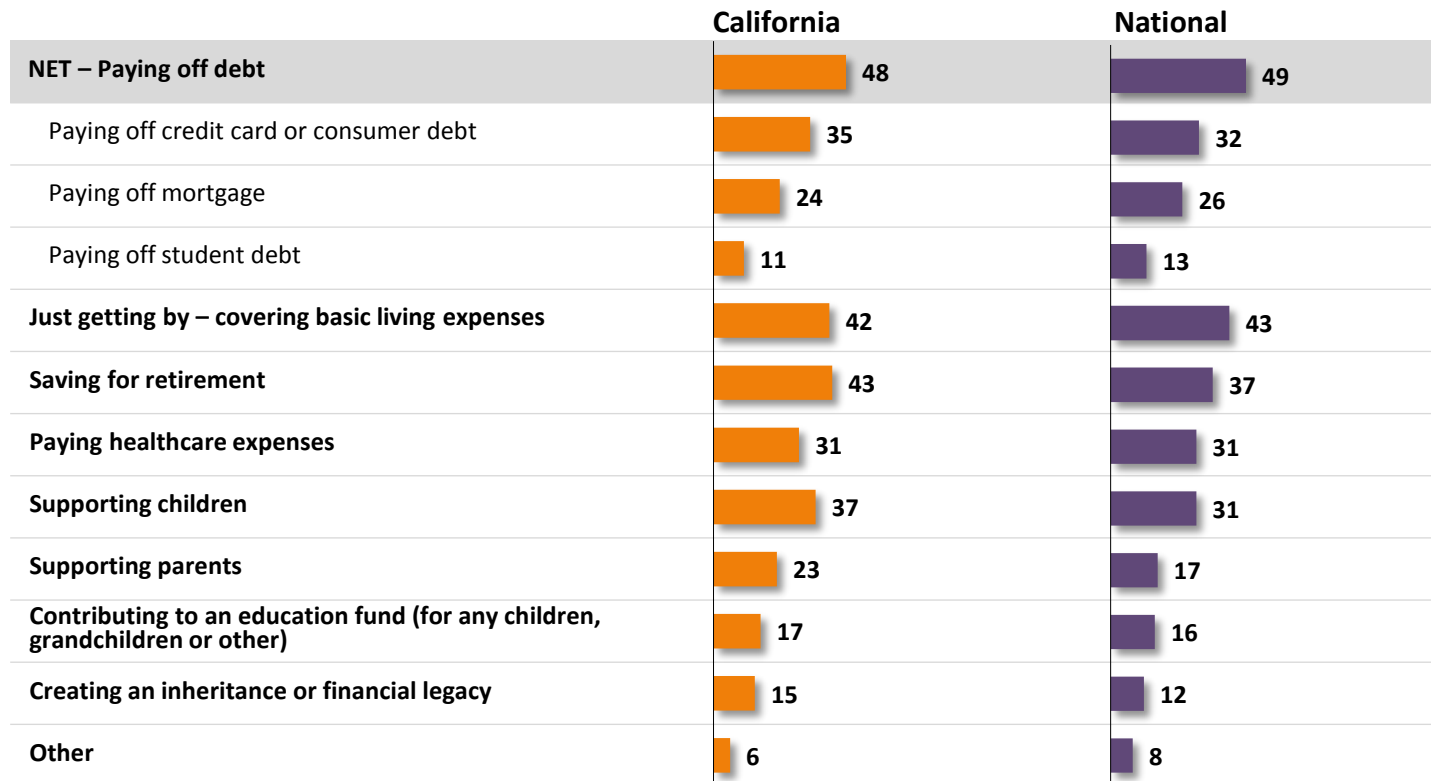
## Sources of Financial Assistance Received for Caregiving Duties, If Any (%)



# Financial Priorities Among Caregivers

Caregivers in California and nationally (48 and 49 percent, respectively) most frequently cite paying off some form of debt (i.e., credit card, consumer, student, and/or mortgage debt) as a current financial priority. Alarming, a sizeable minority of California-based caregivers (42 percent) and caregivers nationally (43 percent) identify “just getting by” as a current financial priority. Other frequently cited financial priorities include saving for retirement, paying for healthcare expenses, and supporting children.

## “Which of the following are your financial priorities right now?” (%)

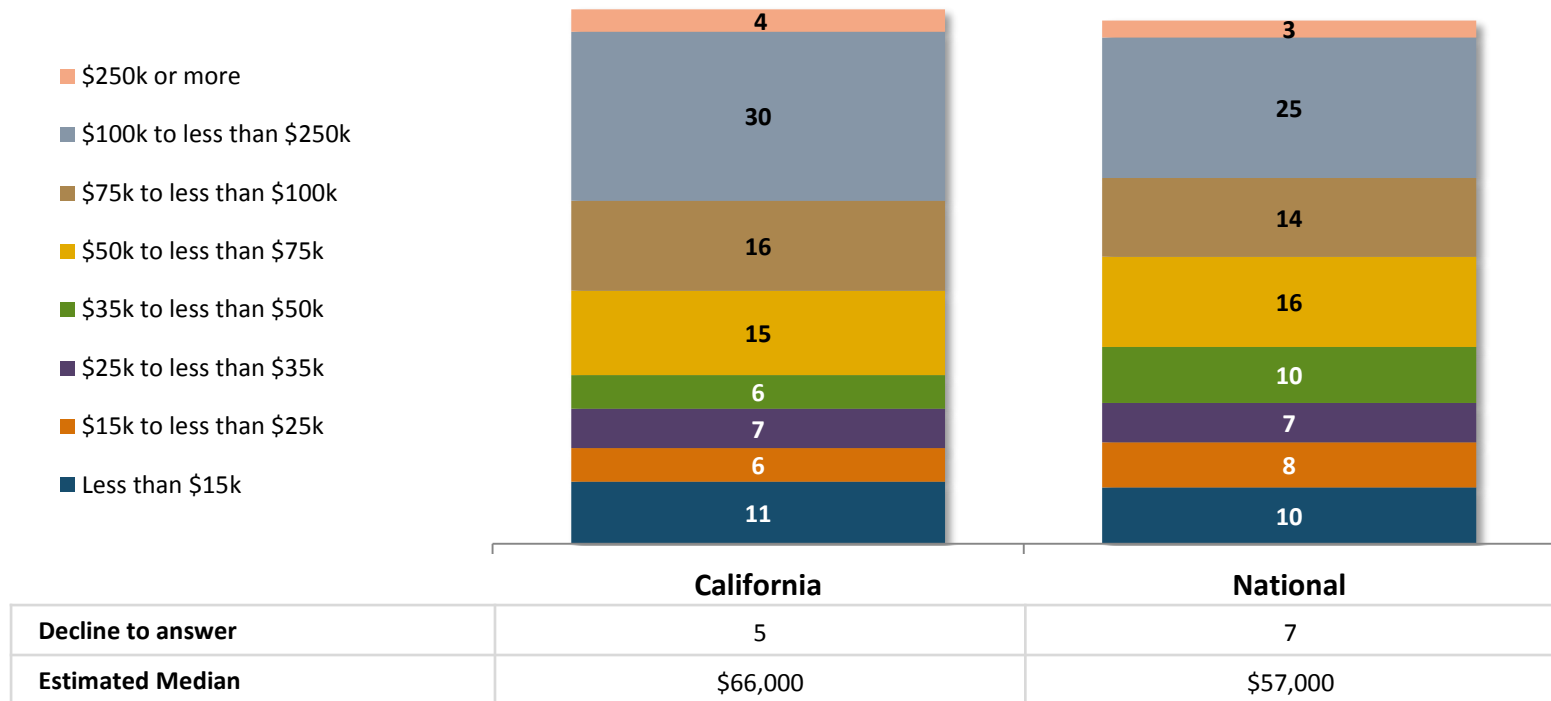




# Total Household Income Among Caregivers

Caregivers in California had a higher total household income (HHI) in 2016 at \$66,000 (estimated median) than caregivers nationally at \$57,000 (estimated median). Thirty-four percent of California-based caregivers have an HHI of \$100,000 or more, compared to 28 percent of those nationally. Thirty-five percent of caregivers nationally report an HHI of less than \$50,000 compared to 30 percent of caregivers in California.

**Total Household Income in 2016 (%)**

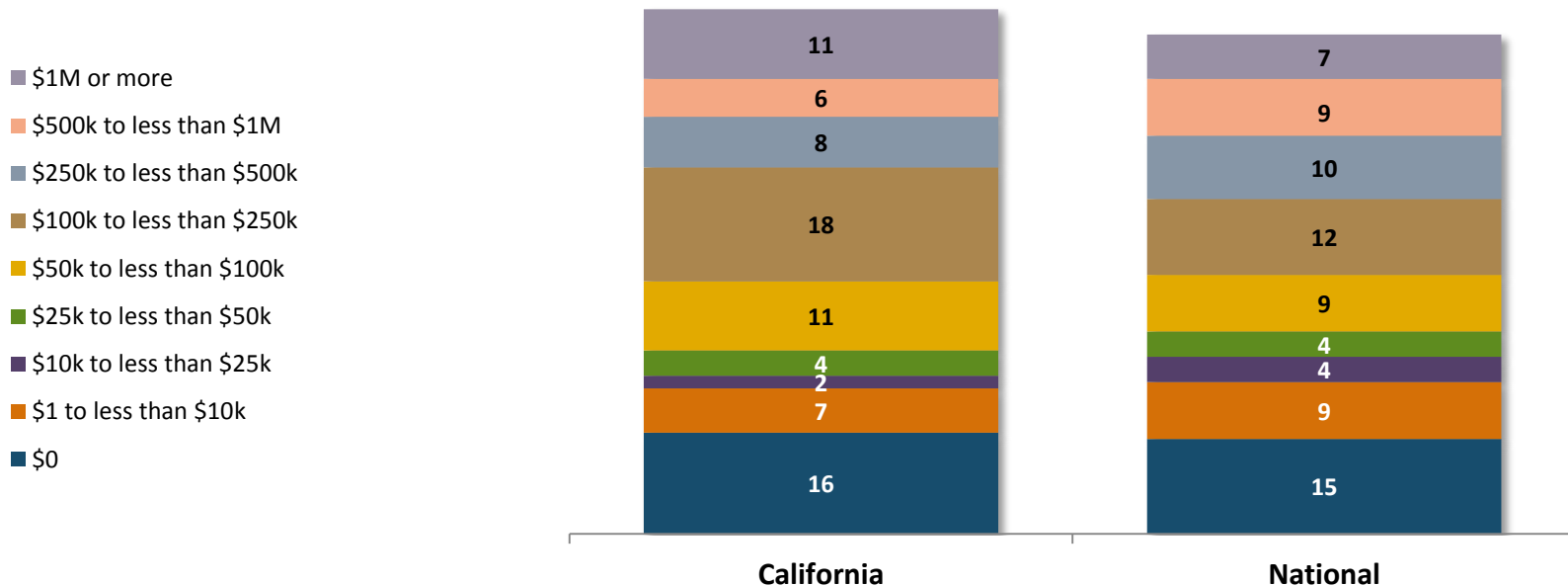


*Note: The median is estimated based on the approximate midpoint of the range of each response category. Non-responses are excluded from the estimate.*

# Total Household Retirement Savings Among Caregivers

California-based caregivers have saved more in total household retirement savings at \$81,000 (estimated median) than caregivers nationally at \$68,000 (estimated median). An alarming 16 percent of caregivers in California and 15 percent nationally have no household retirement savings. Eleven percent of caregivers in California and 15 percent nationally have no household retirement savings. Eleven percent of California-based caregivers have saved \$1 million or more in total household retirement accounts compared to 7 percent of caregivers nationally.

**Total Household Retirement Savings in All Accounts (%)**

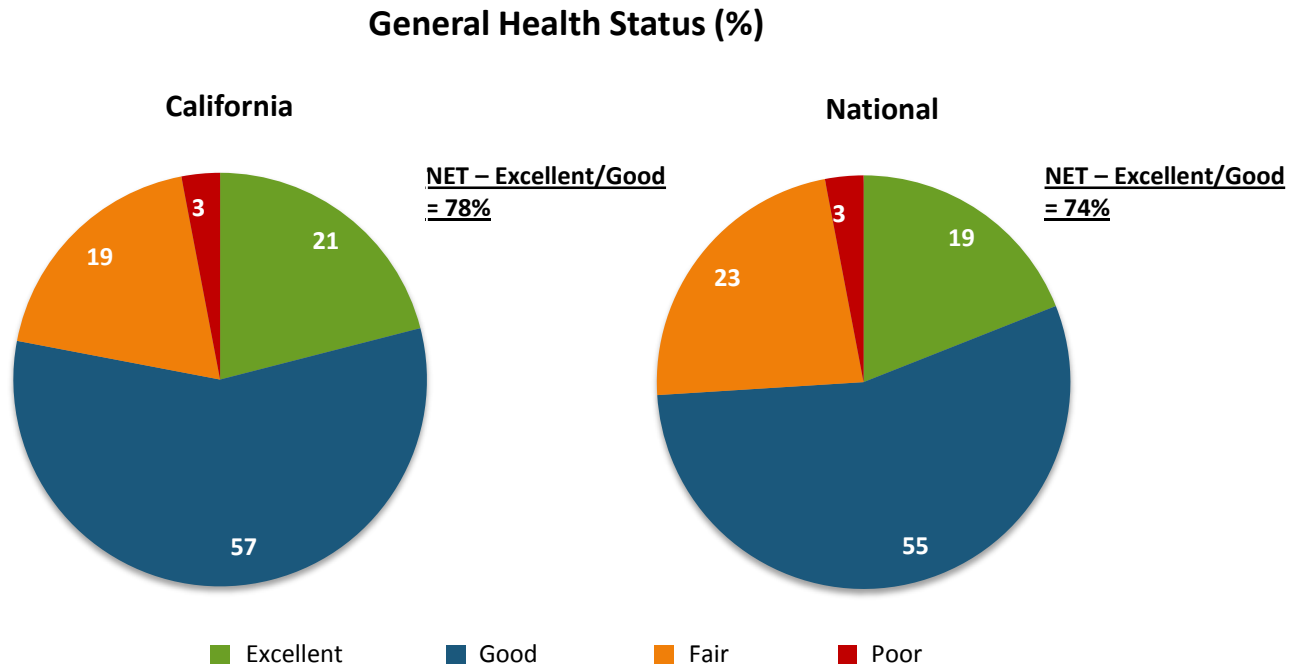


	California	National
Not sure	8	11
Decline to answer	9	10
Estimated Median	\$81,000	\$68,000

*Note: The median is estimated based on the approximate midpoint of the range of each response category. Non-responses are excluded from the estimate.*

# Caregivers' Self-Described General Health

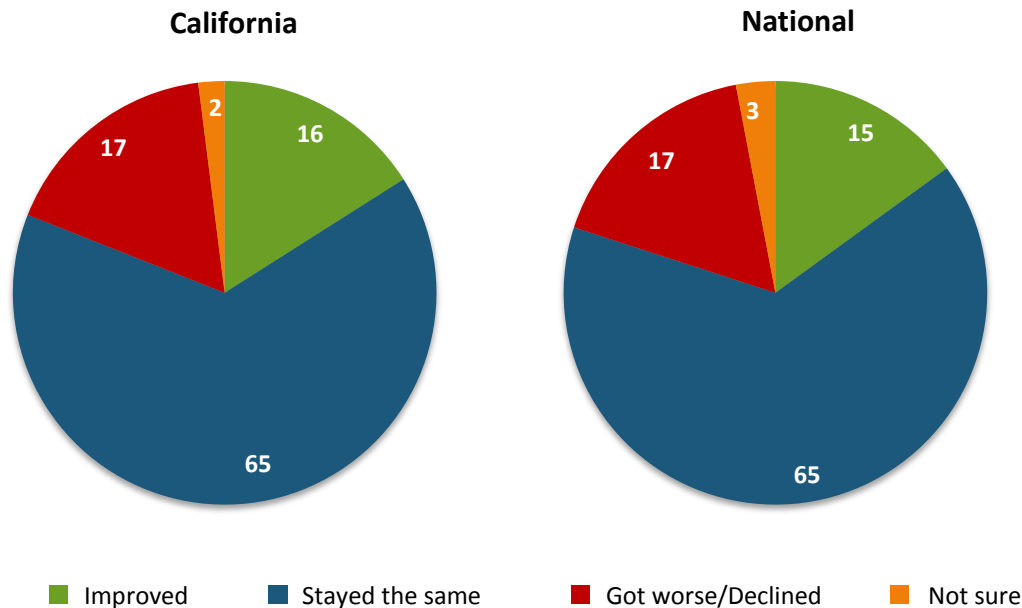
Most caregivers in California and nationally self-describe their general health as excellent or good, including 78 percent of California-based caregivers and 74 percent of those nationally. In contrast, caregivers nationally (26 percent) and somewhat more likely than caregivers in California (22 percent) to say they are in fair or poor health.



# Changes in General Health Since Becoming a Caregiver

Sixty-five percent of caregivers both in California and nationally say their general health has stayed the same since taking on their role as a caregiver. Additionally, 17 percent of both California-based caregivers and caregivers nationally indicate their general health has declined/gotten worse since becoming a caregiver. Similarly, 16 percent of caregivers in California and 15 percent nationally report their health has improved since becoming a caregiver.

**Changes in General Health Since Becoming a Caregiver (%)**

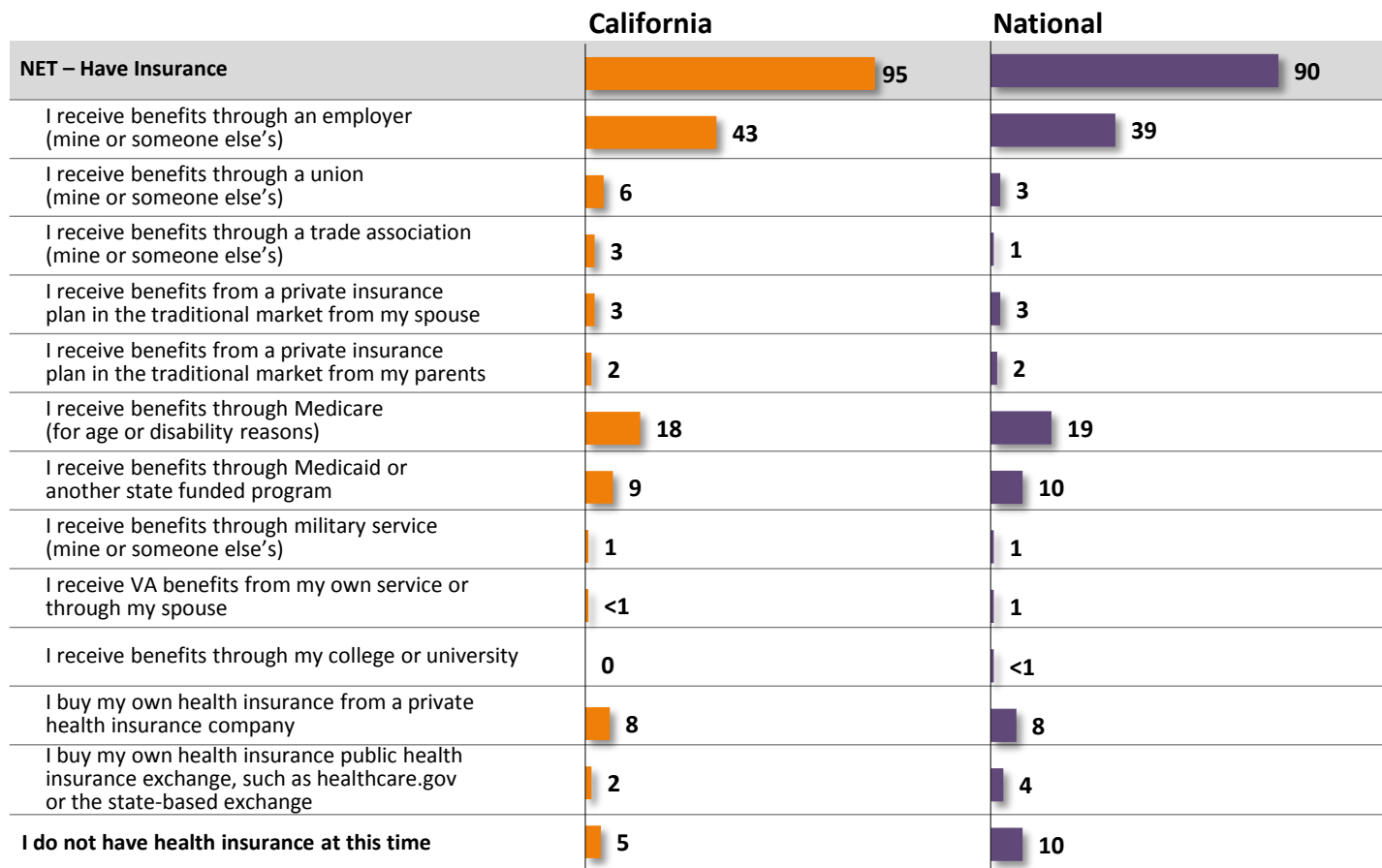


■ Improved ■ Stayed the same ■ Got worse/Declined ■ Not sure

# Caregivers' Health Insurance

Most caregivers currently have health insurance, including 95 percent of caregivers in California and 90 percent nationally. Both California-based caregivers (43 percent) and those nationally (39 percent) most commonly receive health insurance through an employer, with Medicare being the second most frequently cited provider of health insurance benefits (18 percent of caregivers in California; 19 percent nationally).

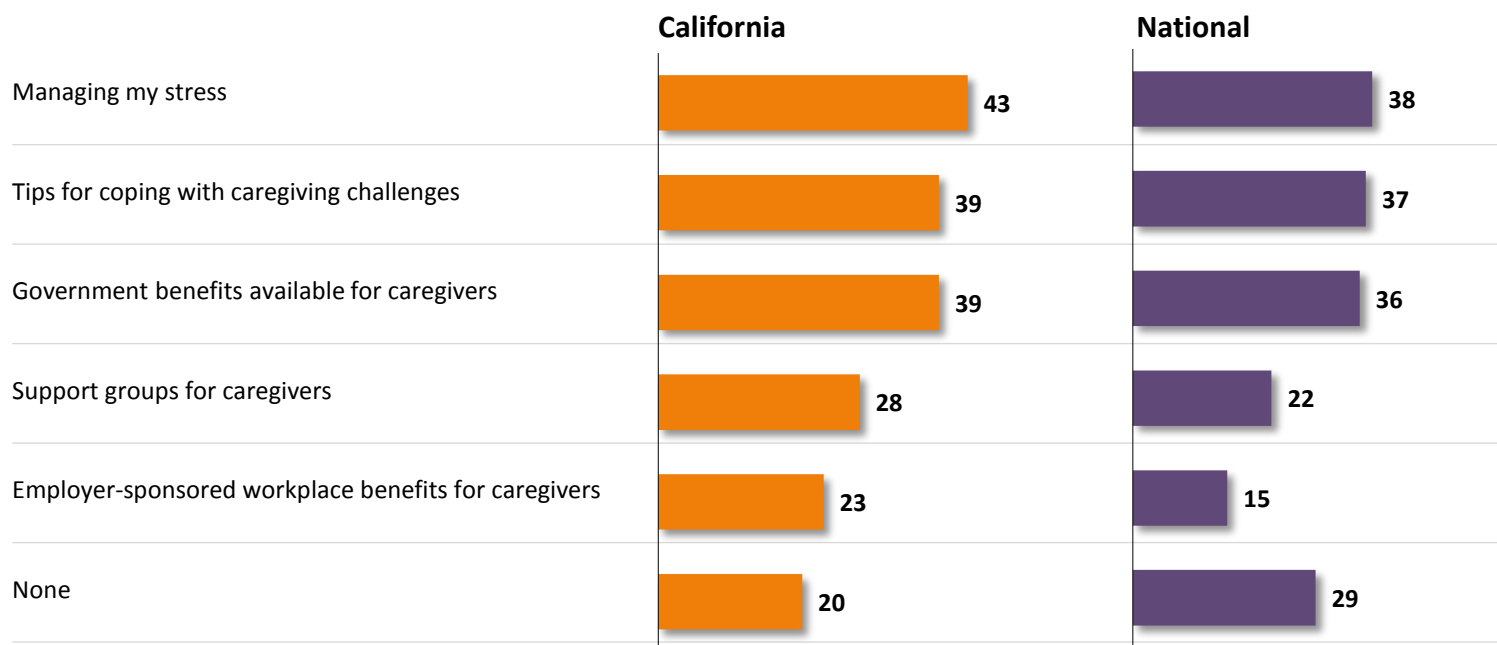
## “Which of the following best describes how you primarily receive health insurance?” (%)



# Caregivers Would Like More Information to Help Them Personally

The three most frequently requested topics among caregivers in California and nationally to help them personally with their caregiving responsibilities are: managing stress (43 percent of caregivers in California; 38 percent nationally), tips for coping with caregiving challenges (39 percent of caregivers in California; 37 percent nationally), and government benefits available for caregivers (39 percent of caregivers in California; 36 percent nationally). California-based caregivers (23 percent) are somewhat more likely than those nationally (15 percent) to desire additional information about employer-sponsored workplace benefits for caregivers.

**“Which of the following topics would you like more information to help you personally with your caregiving responsibilities?” (%)**



NOTE: Five most commonly selected sources shown.

BASE: ALL QUALIFIED RESPONDENTS

Q850. Which of the following topics would you like more information to help you personally with your caregiving responsibilities? I would like more information about... Select all.

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