FAMILY CAREGIVING IN VIRGINIA: A SURVEY OF REGISTERED VOTERS AGES 40 AND OLDER

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BACKGROUND AND KEY FINDINGS
Background

The demand for long-term care services will continue to increase as our population ages. It is estimated that 53 percent\(^1\) of adults who turned 65 in 2016 will need some form of long-term care services during their lifetime.

Family members are often the ones who provide care to their loved ones to help them through an illness or with chronic care. And that’s exactly what most voters 40-plus in Virginia would prefer – to receive care at home from a caregiver if they need help due to aging or illness.

In Virginia, it is estimated that there are more than 1 million caregivers\(^2\) who provide more than 950 million hours of unpaid care valued at over $11 billion each year. It is also estimated that family caregivers spend an average of nearly $7,000 each year on care for their loved ones.\(^3\)

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\(^1\)ASPE Issue Brief, HHS Office of the Assistant Secretary for Planning and Evaluation, Office of Disability, Aging and Long-Term Care Policy, Revised February 2016.


Key Findings

Forty-three percent of voters age 40-plus in Virginia, have experience as family caregivers, either by currently caring for an adult loved one (13%) or previously doing so (30%).

More than nine-in-ten help their loved ones by providing companionship (93%), shopping (92%), and transportation (91%). Others provide more complex care by managing medications (70%), performing medical or nursing tasks (53%), or bathing and dressing (52%).

Nearly two-in-three (64%) current and former caregivers have worked while they provided care, and more than six-in-ten (63%) have used their own money to provide care – most commonly on transportation, prescription drugs, assistive technology, or home modifications. Three-in-ten of these caregivers (who are not retired) have dipped into their retirement savings to pay for care.

Seven-in-ten (69%) current and former caregivers say they feel stressed emotionally due to their caregiving responsibilities, and seven-in-ten (70%) working caregivers say they feel stressed in balancing their work and their family.

While most caregivers say they always feel they are helping their loved one (67%) or their family (70%) by providing care, under half say that such caregiving always provides them with a sense of accomplishment (48%).
Key Findings (Cont.)

Voters 40-plus in Virginia overwhelmingly support (88%) the provision of a tax credit for family caregivers who incur expenses while providing care. And, eight-in-ten Virginia voters say they would support a candidate for state office who worked to pass a caregiver tax credit.

Virginia voters also support other caregiver support solutions including workplace flexibility for working family caregivers in terms of letting workers use their sick leave for caregiving (88%), ensuring employers cannot fire an employee for taking time off for caregiving (85%), and requiring employers to provide unpaid leave (82%) or some paid leave (77%) for family caregiving purposes.

The majority of Virginia voters 40-plus also support the provision of respite care (85%) to give family caregivers a break.
More than four-in-ten voters 40-plus in Virginia have experience as family caregivers.

In our survey, the typical family caregiver in Virginia, currently caring for an adult loved one, is a woman (56%), who is married (63%), is 60 years of age, owns her own home (78%), is in good health (73%), and lives in a household with income under $100,000 (52%).

- Typical current caregivers also ….
  - Are not likely to be currently working (40%), but more had worked at some point while caregiving (59%)
  - Are not likely to have children living at home (58%), but many do (31%)
  - Care for a parent who is 78 years of age
  - Are about as likely to have a college degree (47%) or not (42%)
  - Say they “always” vote in state elections for Governor and Legislators (53%)

Q1. A family caregiver is someone who provides UNPAID care for an adult loved one who is ill, frail, elderly, or has a physical, mental, or emotional disability. This unpaid care may include assisting with personal needs like bathing and dressing, household chores, meals, shopping, transportation, or managing finances or medical care. Are you currently a family caregiver providing UNPAID care to an adult loved one? Q17. Have you ever been a family caregiver who provided UNPAID care to an adult loved one? Donut Base: All Respondents Chart Base: Current Caregivers (other surveys questions are listed in the Appendix)
Most caregivers are caring for, or have cared for, their parents.

Six-in-ten current and former caregivers in Virginia are providing or have provided care for their parents – most likely their mother (38%). Nearly two-in-ten are caring for or have cared for their spouse or significant other; and fewer are caring for or have cared for other relatives such as grandparents, uncles, or aunts. Very few care for or have cared for children who are 18 and older, siblings, or non-relatives such as neighbors or friends.

63% -- Parents  
17% -- Spouse, companion, partner

3% -- Children  
10% -- Other relatives

5% -- Siblings  
2% -- Non-relatives

Q3. Who are you caring for?  
Q19. Who did you care for?  
Base: Current and former caregivers
Family caregivers help their loved ones with many activities of daily living.

More than nine-in-ten family caregivers surveyed (both current and former caregivers) help with transportation, shopping, and provide emotional support to their loved ones through companionship or social activities. About nine-in-ten help their loved ones with chores and meals. Three-in-four maintain property, and seven-in-ten oversee medications or manage finances.

- Providing companionship/social activities: 93%
- Taking them shopping or shopping for them: 92%
- Providing transportation to appointments: 91%
- Aiding with household chores: 88%
- Helping them with meals: 87%
- Maintaining or upkeep of property: 76%
- Helping them to manage finances: 70%
- Overseeing their medication management: 70%
- Responsible for other medical or nursing tasks: 53%
- Assisting with bathing or dressing: 52%

- A smaller, but noteworthy percentage of caregivers help with more complex tasks of caregiving, like bathing and dressing and medical and nursing tasks.
- More than half of current caregivers perform these tasks every day: meals (81%), bathing/dressing (70%), chores (68%), medications (65%), companionship (63%), and medical/nursing tasks (55%).

Q4. Still thinking about the person you are providing care to the most, which of the following activities are you providing? Are you …? Q20. Thinking about the person you most recently provided care to, which of the following activities did you provide? Did you …? Q5. How often do you …, is it? Chart Base: Current and Former Caregivers

2nd Bullet: Current Caregivers
Most caregivers have worked while providing care.

Nearly two-in-three family caregivers 40-plus held a job while providing care to their loved ones. And many of these caregivers needed to change how they worked as well. Three-in-four working caregivers adjusted their work schedules, either by going into work early or late, or taking time off to provide care – most needed to do so weekly (26%) or monthly (50%). One-in-three took a leave of absence to provide care. And nearly two-in-ten reduced their work hours to provide care or stopped working entirely.

Q6. Q21. Have you ever been employed either full- or part-time while providing care to your adult loved one? Q7. Now thinking again about the adult loved one you are currently providing care to, did you ever have to …? Q22. Now thinking again about the adult loved one you have most recently provided care to, did you ever have to …? Q8. Q23. You mentioned that you had to go into work early or late, or take time off to provide care to an adult loved one. How often would you say you had to take time away from work or adjust your work schedule to provide care for someone. Would you say …? Donut Base: Current and Former Caregivers. Chart Base: Current and Former Working Caregivers.
Caregivers spend their own money to provide care and change their homes.

More than six-in-ten current and former caregivers 40-plus in Virginia have used their own money to provide care to their loved ones. Two-in-five have modified their own homes, and one-in-seven has moved into another home.

Q9. Now thinking again about the adult loved one you are currently providing care to, did you ever have to …?

Q24. Now thinking again about the adult loved one you have most recently provided care to, while providing this care did you ever have to …?

Chart Base: Current and Former Caregivers
Transportation is the most common expense for caregivers.

Of those 63% of caregivers who have spent their own money to provide care to their loved ones, eight-in-ten caregivers have spent money on transportation for their loved ones. Six-in-ten spent money on prescription drugs, and about half have spent money modifying their homes or their loved ones' home, or on assistive technology. Fewer caregivers have spent money on other types of services or programs that could help them care for their loved ones.

Q10. As a caregiver, have you ever spent your own money to help care for your loved one for any of the following?  Q25. As a caregiver, did you ever spend your own money to help care for your loved one for any of the following?  Chart Base: Current and Former Caregivers Who Have Spent Money Providing Care
For many caregivers, spending money on their loved ones’ care affects them financially.

Three-in-ten working caregivers say they have used money set aside for their retirement to pay for the care of their loved ones. And, many caregivers say that spending their own money on the care of their loved ones affects their ability to save for retirement and have enough money to enjoy their life, much less go on vacation. And for some caregivers, spending money on the care of their loved ones affects their ability to buy everyday necessities for themselves or their families or pay their bills.

S5. Which of the following best describes your current employment status? Q11. Does spending your own money on your loved one’s care affect your ability to …? Q26. Did spending your own money on your loved one’s care affect your ability to …? Q12. Have you used any money you have set aside for retirement to pay for the care of your loved one? Q27. Did you use any money you set aside for retirement to pay for the care of your loved one? Base: Current and Former Working and Non-Working Caregivers Who Have Spent Money Providing Care
For today’s **current caregivers**, spending their own money on care appears to affect them more than those who provided care in the past.

Both current and former caregivers are equally likely to say that they have spent their own money to provide care; however, spending money seems to affect the lives of current caregivers a bit more. Current caregivers seem to have more issues monetarily – they are more likely to spend money on home modifications, assistive technology, and prescription drugs than former caregivers. Current caregivers are also more likely to say they are financially strained and that spending money on care affects their ability to buy necessities, enjoy life, pay bills, and go on vacations.

<table>
<thead>
<tr>
<th></th>
<th>Current Caregivers</th>
<th>Former Caregivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spent own money to provide care</td>
<td>59%</td>
<td>64%</td>
</tr>
<tr>
<td>Spent money on …</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-- making home modifications</td>
<td>57%</td>
<td>42%</td>
</tr>
<tr>
<td>-- buying assistive technology</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>-- buying prescription drugs/other medical expenses</td>
<td>70%</td>
<td>54%</td>
</tr>
<tr>
<td>Feel strained financially</td>
<td>38%</td>
<td>25%</td>
</tr>
<tr>
<td>Spending money affects ability to …</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-- buy everyday necessities</td>
<td>42%</td>
<td>21%</td>
</tr>
<tr>
<td>-- have enough money to enjoy life</td>
<td>54%</td>
<td>38%</td>
</tr>
<tr>
<td>-- pay bills</td>
<td>42%</td>
<td>20%</td>
</tr>
<tr>
<td>-- go on vacations</td>
<td>61%</td>
<td>43%</td>
</tr>
</tbody>
</table>
Most caregivers experience some form of stress while providing care.

More than eight-in-ten family caregivers (87%) have experienced at least one common stressor as a result of being a family caregiver. Seven-in-ten caregivers report feeling stressed out emotionally due to their caregiving responsibilities; and seven-in-ten working caregivers are stressed in trying to balance their job and family responsibilities.

<table>
<thead>
<tr>
<th>Current &amp; Former Caregivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feel stressed emotionally</td>
</tr>
<tr>
<td>Feel stressed in trying to balance job and family*</td>
</tr>
<tr>
<td>Find it difficult to get enough rest</td>
</tr>
<tr>
<td>Find it difficult to take care of household</td>
</tr>
<tr>
<td>Find it difficult to exercise regularly</td>
</tr>
<tr>
<td>Find it difficult to maintain a healthy diet</td>
</tr>
<tr>
<td>Experience problems with health</td>
</tr>
<tr>
<td>Feel strained financially</td>
</tr>
<tr>
<td>Find it difficult to find time to visit doctor</td>
</tr>
</tbody>
</table>

Q13. As a caregiver do you ever …?  Q28. As a caregiver did you ever …?  Chart Base: Current and Former Caregivers  *Asked of working caregivers
Without these caregivers, most of their loved ones would need institutionalized care.

More than half of current and former caregivers say that if they were no longer able to care for their loved ones, they would have to move their loved ones into an adult home or assisted living facility or into a nursing home. At least two-in-three caregivers feel that their loved ones appreciate the care they are providing, and that they are helping their loved one and their family by providing care.

Q15. If you were no longer able to provide care to your loved one, would your loved one …? Q30. If you had no longer been able to provide care to your loved one, would your loved one …? Q14. Q29. As a caregiver, how often do you feel that …? Would you say …? Base: Current and Former Caregivers
The majority of all registered voters 40-plus in Virginia say they are at least somewhat likely to be a caregiver in the future.

Likelihood of providing care in the future does vary by caregiver status. Not surprisingly, six-in-ten current caregivers say they are extremely or very likely to provide care in the future. Four-in-ten former caregivers and about a quarter of those who have never provided care, say they are extremely or very likely to be a caregiver in the future. Younger respondents (40-64) are more likely to say they will be providing care in the future (39%) than respondents 65-plus (26%).

<table>
<thead>
<tr>
<th>Current Caregivers</th>
<th>Former Caregivers</th>
<th>Never a Caregiver</th>
<th>All Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely/very likely</td>
<td>60%</td>
<td>39%</td>
<td>28%</td>
</tr>
<tr>
<td>Somewhat likely</td>
<td>10%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Not very/Not at all likely</td>
<td>25%</td>
<td>30%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Q16. Q31. Q32. How likely do you think it is that you will provide any caregiving or assistance on an unpaid basis for an adult loved one in the future? Is it …?
WHAT CAREGIVERS WANT
The majority of all voters 40-plus in Virginia say these key caregiver supports would be extremely, very, or somewhat helpful.

More than half of voters in Virginia would find assistance to recover their out-of-pocket expenses incurred while caring, information about community caregiving resources, and respite care extremely or very helpful. Nearly half would find assistance with transportation and with household chores helpful. About four-in-ten would find assistance with medication management and meals helpful. Just a third would find helpful connecting with other caregivers.

<table>
<thead>
<tr>
<th>Support</th>
<th>Extremely/very</th>
<th>Somewhat</th>
<th>Not very/Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistance to recover out-of-pocket caregiving expenses</td>
<td>55%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Information about available resources for caregivers in your community</td>
<td>54%</td>
<td>25%</td>
<td>16%</td>
</tr>
<tr>
<td>Respite care or breaks from caregiving responsibilities</td>
<td>53%</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>Providing transportation specifically to medical appointments</td>
<td>49%</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Providing transportation generally</td>
<td>48%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Assistance with household chores</td>
<td>47%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Providing meals</td>
<td>40%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Understanding how to manage medications</td>
<td>37%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>Connecting with other caregivers in similar situations</td>
<td>34%</td>
<td>34%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Q33. In your opinion, as a current caregiver, how helpful would the following types of caregiving support be to you? In your opinion, as a former caregiver, how helpful would the following types of caregiving support be to you? In your opinion, as someone who may provide care in the future, how helpful would the following types of caregiving support be to you? Chart Base: All Respondents.
Most voters prefer being cared for at home if they need help.

Three-in-four voters 40-plus say that if they or a family member needed help, they would prefer to receive that help at home with caregiver assistance. More than one-in-ten would prefer to receive help in an assisted living facility, and only three-in-one hundred would prefer a nursing home.

- Nearly nine-in-ten voters (88%) also say it is extremely or very important to have services that would allow them or their loved ones to live independently at home, if help was needed.

Q46. If you or a loved one needed help when the basic tasks of life become more difficult due to aging or illness, where would you prefer to receive that care or help for yourself or a loved one? Q47. If you or a loved one needed help to remain independent, how important would it be to have services that would allow you or a loved one to live independently at home for as long as possible? Base: All Respondents
FAMILY CAREGIVER INCOME TAX CREDIT
There is overwhelming support among Virginia voters 40-plus for a state income tax credit for family caregivers.

Nearly nine-in-ten voters support a state income tax credit for family caregivers who incur expenses while providing care to a family member living in Virginia. Support remains high across political parties. There is no difference in support for a tax credit between those who are or have been a caregiver and those who have not.

Q38. Do you support or oppose providing a state income tax credit to family caregivers who incur expenses for the care and support of a family member living in Virginia? Q39. Is that strongly or somewhat? D10.

Do you consider yourself to be a…?

Support by Political Party

<table>
<thead>
<tr>
<th></th>
<th>Republicans</th>
<th>Independents</th>
<th>Democrats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support</td>
<td>87%</td>
<td>89%</td>
<td>94%</td>
</tr>
<tr>
<td>Oppose</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Neither</td>
<td>5%</td>
<td>8%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Chart Base: All Respondents
Virginia voters 40-plus are also more likely to support a candidate for state office who worked to pass such a caregiver tax credit.

Exactly eight-in-ten voters say they would support a candidate for state office who worked to implement a caregiver tax credit for family caregivers who spend money caring for an adult loved one. The majority of voters in each political party are also more likely to support such a candidate.

Q40. When making your voting decisions for Virginia state elections, would you support or oppose a candidate for state office who worked to implement a state income tax credit for family caregivers who spend money caring for an adult loved one?  D10. Do you consider yourself to be a …?

Support by Political Party

- **Support**:
  - Republicans: 77%
  - Independents: 82%
  - Democrats: 89%

- **Neither support or oppose/Not sure**:
  - Republicans: 15%
  - Independents: 5%
  - Democrats: 5%

- **Oppose**:
  - Republicans: 15%
  - Independents: 5%
  - Democrats: 5%
OTHER CAREGIVER SUPPORT SOLUTIONS
The majority of Virginia voters 40-plus support workplace flexibility for family caregivers.

Nearly nine-in-ten voters support requiring employers to allow workers to use their employer-provided sick leave for family caregiving. Likewise, more than eight-in-ten support employers not being able to fire an employee for caregiving. About eight-in-ten support requirements that employers provide a limited amount of unpaid leave or some paid leave for family caregiving purposes. Support remains high for workplace flexibility across political parties. There is no difference in support for these measures between those who are or have been a caregiver and those who have not.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Support</th>
<th>Neither support or oppose/Not sure</th>
<th>Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requiring employers to let workers use their sick leave for caregiving</td>
<td>88%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Ensuring employers cannot fire an employee for taking time off for caregiving</td>
<td>85%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Requiring employers to provide a limited amount of unpaid leave</td>
<td>82%</td>
<td>6%</td>
<td>11%</td>
</tr>
<tr>
<td>Requiring employers to provide some paid leave</td>
<td>77%</td>
<td>7%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Support by Political Party

![Support by Political Party Chart]

Q34. Now I’m going to ask if you support or oppose some proposals that would provide help for working family caregivers. Do you support or oppose …? Q35. Is that strongly or somewhat? D10. Do you consider yourself to be a …? Chart Base: All Respondents
There is overwhelming support among Virginia voters 40-plus for the provision of respite care for family caregivers.

More than eight-in-ten voters 40-plus in Virginia support the provision of short-term help by a home health aide so family caregivers can take a break from their caregiving duties. Support remains high across political parties. There is no difference in support for respite care between those who are or have been a caregiver and those who have not.

Q36. Do you support or oppose providing short-term help from a home health aide so family caregivers can take a break from their caregiving duties? This help could be provided in-home by a trained health aide or volunteer or out-of-home through an adult day program. Q37. Is that strongly or somewhat? D10. Do you consider yourself to be a …? Chart Base: All Respondents
Implications

Family caregivers in Virginia need help.

Today's caregivers provide even more financial help to their loved ones, make more professional sacrifices, and they experience even more financial stress than former caregivers.

With overwhelming support across parties and regardless of whether they have been caregivers or not, candidates in Virginia would do well to address the needs of family caregivers.
Methodology

- **Objectives**: To explore the experiences and opinions of family caregivers aged 40-plus in Virginia. To measure support of various policies that support family caregivers.
- **Methodology**: Telephone survey (both landline and cell).
- **Qualifications**: Age 40 or older and registered to vote in the Commonwealth of Virginia.
- **Sample**: Registered voter list targeting ages 40 and older from Aristotle International (N=1,000). An oversample of voters who live in counties with a high percentage of rural residents.
- **Interviewing dates**: July 23 to August 14, 2019.
- **Weighting**: The data is weighted by age within gender and geography to reflect the 40-plus population of registered voters in Virginia.
- **Questionnaire length**: Interviews averaged 21 minutes in length. Full questionnaire is available upon request.
- **Confidence interval**: Total sample: ± 3.1%.
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Other Survey Questions

S1. Our study is interested in the opinions of people in certain age groups. Could you please tell me your age as of your last birthday?
S3. To ensure it is recorded accurately, could you please state your gender?
S5. Which of the following best describes your current employment status?
Q2. What is the age of the person you are providing care for? Q18. What was the age of the person who you most recently provided care to?
Q3. Who are you caring for? Q19. Who did you care for?
Q6. Have you ever been employed either full- or part-time while providing care to your adult loved one? Q21. Have you ever been employed either full or part-time while providing care to your adult loved one?
D1. What is your current marital status?
D3. In general, when compared to most people your age, how would you rate your health?
D4. Thinking about who lives in your household, do you currently …?
D5. Do you own or rent your primary residence?
D7. What is the highest level of education that you completed?
D9. Thinking about your state elections for Virginia Governor and Legislators in the last 10 years, which of the following best describes your voting behavior?
D15. We realize income is a private matter and so rather than ask you anything specific about your income, I'd like to ask you to please stop me when I get to the category that includes your household's income before taxes in 2018.
About AARP

AARP is the nation’s largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation’s largest circulation publications, AARP The Magazine and AARP Bulletin. To learn more, visit www.aarp.org or follow @AARP and @AARPadvocates on social media.
For questions about this survey or its methodology, please contact Terri Guengerich, tguengerich@aarp.org

For media inquiries, please contact AARPVA@aarp.org or call 804-344-3061

This research was designed and executed by AARP Research