



The Caregiver Journey: Latest Insights about Senior Care Searchers Online

Caring.com Digital Marketing Academy
May 10, 2018

Welcome



This presentation will be available within a few business days.

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Caring.com: How We Got Started

When caring for my mom during her losing battle with lung cancer in 2006, I had to make many important life decisions, but I didn't have much time. I didn't know where to go for help beyond friends and family, and I wasn't confident that the decisions I made were the right ones.

Andy Cohen

Caring.com Founder



Caring.com: The #1 Senior Care Resource

#1 for Senior Care Reviews

180,000+ consumer reviews

3 million monthly visitors

80,000 listings

3,000+ original articles

Dozens of online support groups

Partnered with thousands of
senior care businesses
nationwide



Assisted Living Home Care Caregiving Resources Dementia & Alzheimer's More Senior Living Options

Caring Star
Top Rated on Caring.com
2018

The Best Senior Care Providers of 2018
Introducing the Caring Stars of 2018 -- America's top-rated senior living communities and home care agencies nationwide.

 2017 Holiday Gift Guide for Seniors	 The Best Senior Care Providers of 2018	 Signs It Might Be Time for Assisted Living	 Nursing Home, Assisted Living or Independent Living?	 Looking for Senior Care? Toll-Free Help	 2017's Best and Worst States for Family Caregivers
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Senior Care Reviews & Resources

<p>Assisted Living</p>  <p>At a cost ranging from \$1,200 to \$8,000 per month or more, assisted living communities are a great choice for someone who needs help with activities of daily living, such as eating, grooming, and bathing. Many also offer respite care (short-term stays).</p> <p>Read Assisted Living reviews</p>	<p>Memory Care</p>  <p>Memory care communities are specially designed living environments for people with Alzheimer's or other dementias. You can expect that staff members have extra training to help people with memory loss. Costs are \$3,000 per month and up. Some provide respite care.</p> <p>Read Memory Care reviews</p>	<p>In-Home Care</p>  <p>For help with driving, getting around the house, meal preparation, companionship, and light housekeeping, hire a professional caregiver through an in-home care agency. Caregivers can be hired on a one-time basis or a regular monthly schedule. Rates usually range from \$10 to \$40 per hour.</p> <p>Read In-Home Care reviews</p>
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Today's Presenter: Denise Graab

- Joined Caring in Sept. 2010
 - 20+ years in communications
- Director of Industry Marketing
 - Prior: Director of Social Community
- Extensive social experience
 - Focus for last 10 years
 - Online reviews management, marketing
 - Caring Stars award co-creator



DENISE GRAAB

Agenda



- Survey Overview
- 4 Segments by Living Arrangements
 - How They Cope, Resources They Use, Attitudes, Move Prompts, and Reasons for Senior Living Selection
- The Male Caregiver
 - How His Experiences/Needs Differ
- Using the Data in “Marketing Personas”
- Q & A

Boomers, Older Adults Active Online

Americans age 65+ with annual income greater than \$75K:

87% online

- Majority use Internet daily
- 81% own smartphones
- 65% use tablets
- 57% use social networks (Facebook, Twitter)



What are they seeing about your business online?



The Caregiver Journey Survey:

Methodology, Respondent Demographics

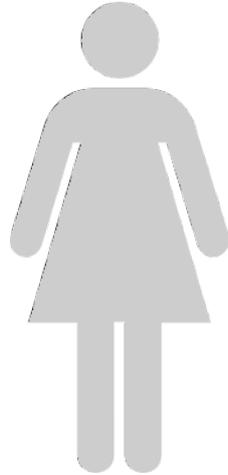
About The Caregiver Journey Survey

- Audience: Online senior care searchers and Caring users
- Flighted by third-party market research firm in August-September 2017
- **4,578 respondents** – *almost double than prior year!*
 - No incentive offered
 - Majority (67%) = current family caregivers of seniors
 - 22% = “caring for self” (older adults)
 - 11% = professional caregivers

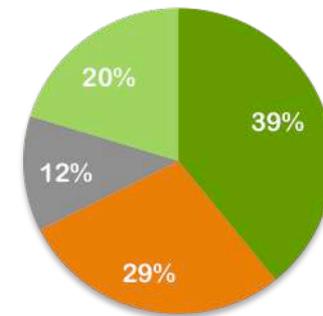
Family Caregivers: Who Are They?

Family Caregiver

- Female (75%)
- Age 50-70 (54%)



Caregiving Role



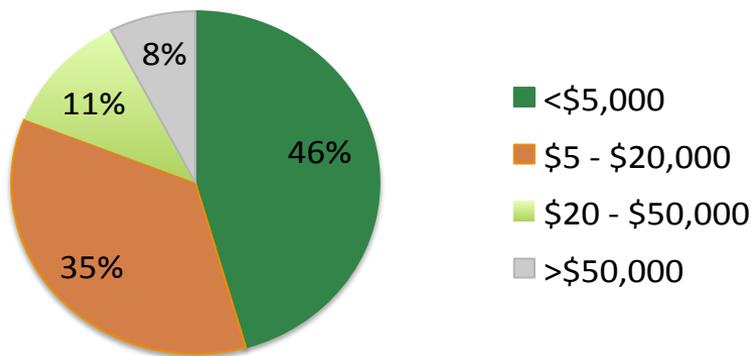
■ Adult Child ■ Spouse ■ Friend/other relative ■ Myself

Care Receiver: Age 80+ (60%) *Memory Loss*

- Alzheimer's or dementia - diagnosed (46%)
- Alzheimer's or dementia – suspected, but not diagnosed (13%)
- Age-related memory decline, but no dementia (27%)
- No sign of memory loss (13%)

Financial Impact of Caregiving

Annual Caregiving Spending

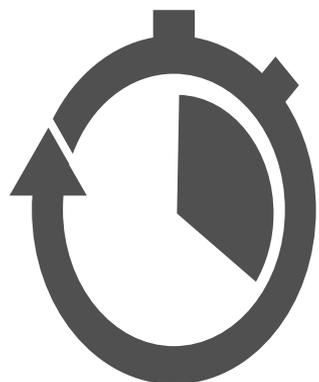


Top 10 Expenses	% of Respondents
Food and clothing	58%
Transportation	56%
Medications & medical costs	42%
Travel to care for loved one	29%
In-home care services	22%
Legal services	23%
Caregiving services like adult day care	13%
Cost of senior care facility	13%
Other (utilities, personal items)	13%
Caregiving tech	10%

**16% do not contribute financially to the care of their loved ones*

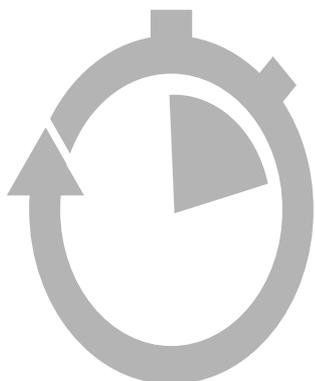
Caring for Others: How Much Time It Takes

Time Spent Per Week



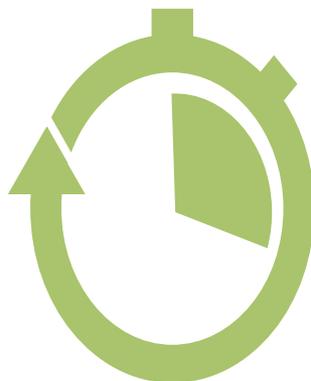
39%

**Over 30
Hours**



12%

**21 – 30
Hours**



18%

**11 – 20
Hours**



20%

**6 – 10
Hours**

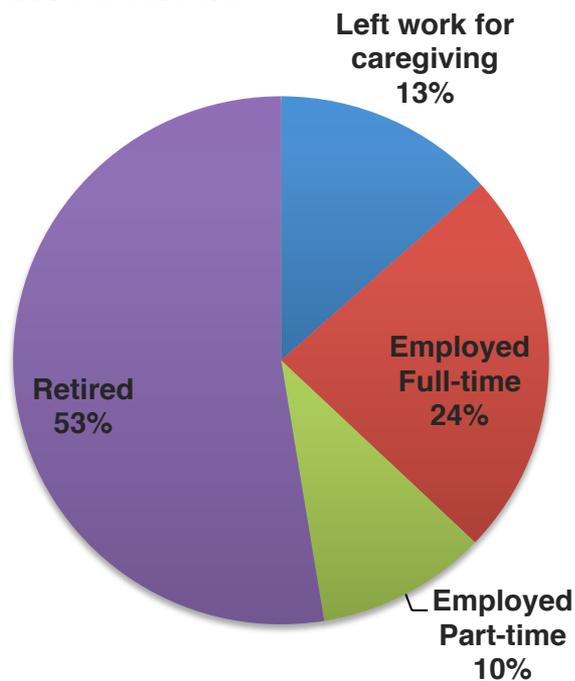


11%

**<5
Hours**

Caregiving and Career

Employment Status



- Had on-the-job distractions related to caregiving: **63%**
- Missed work due to caregiving: **41%**
- Missed more than 7 days of work: **55%**
- Frequently arrived late or left early: **31%**

Caring for Others: What They Do

Top 10 Caregiving Tasks	% of Respondents
Shopping for food and personal care items	84%
Attending medical appointments	83%
Managing finances or paying bills	81%
Transportation	78%
Communicating with friends/family about loved one's condition	73%
Laundry	66%
Administering and/or tracking medications	66%
Preparing meals	66%
House cleaning	62%
Yard work or other physical maintenance tasks	41%

**Respondents were able to choose all that apply*

Caring for Others: What They Want Help With

Most Want Help With...	% of Respondents	Loved One Most Willing to Accept this Help
Regular companionship	47%	39%
Light housework	32%	41%
Bathing or personal hygiene	31%	31%
Transportation	27%	34%
Errands (picking up prescriptions, mailing packages, etc.)	24%	30%
Preparing Meals	23%	37%

**Respondents were able to choose all that apply*



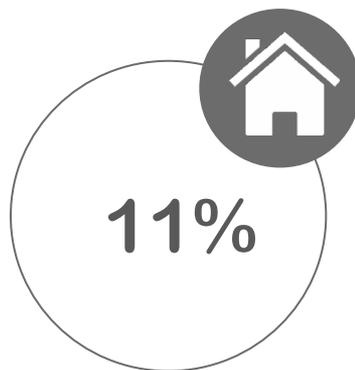
Caregiving Segments &

Living Arrangements Data

Four Segments for Analysis



Living Together



Care Recipient Living in His/Her Home



Elder at a Senior Living Community



Caring for Self



Among Family Caregiver Respondents

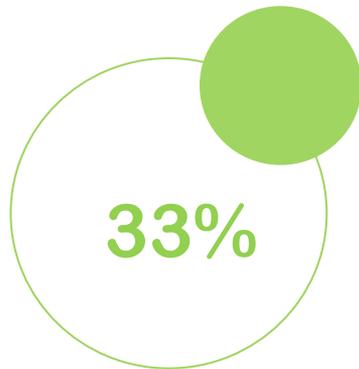


Segment #1: Live Together with Loved One

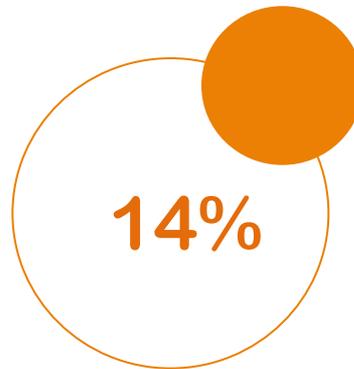


58%

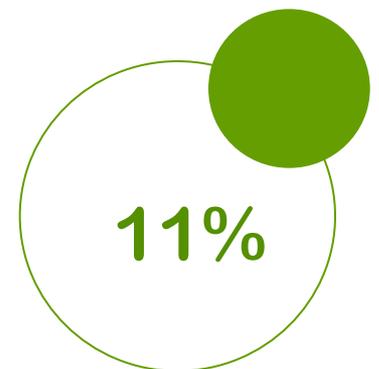
of those caring for others live with their care recipient



Are spouses



Moved loved one into their home



Moved into the loved one's home

Live Together: What Prompted Move?



Medical condition	61%
Safety concerns	59%
Financial considerations	29%
Living alone became more difficult for loved one	24%
Another relative could no longer care for him/her	20%
Death of spouse	19%
Bad experience with a senior housing facility	10%
Bad experience with an in-home care provider	5%

Live Together: How They Cope



Products & Services Making It Possible for Caregiving in Home

Paid assistance from a professional caregiver	28%
Unpaid part-time assistance from friends and family	19%
Physical modification of the home	19%
Personal emergency response system	10%
Advice from a senior care professional (GCM, elder law attorney, etc.)	8%
Adult day care	8%
Medication managers/reminders	4%
Hospice	6%
Government employee visits (social worker, VA, etc.)	5%
Volunteer visiting/meal services	4%
Internet delivery services for groceries or other supplies	4%
Remote health monitoring technology	2%

Segment #2: Loved Ones Independent



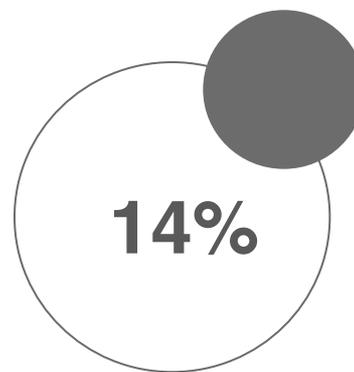
11%

of those caring for others had loved ones living independently

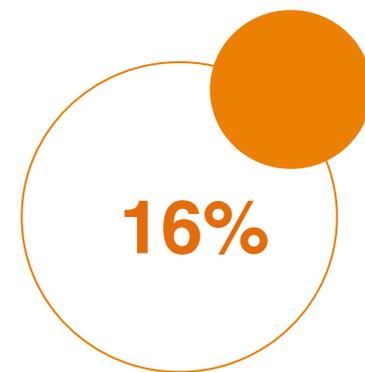
59%
**Employ paid
caregiving
assistance**



**Use a home
care agency**



**Employ private
caregivers**



**Pay a non-
professional**

Loved Ones Independent: How They Cope



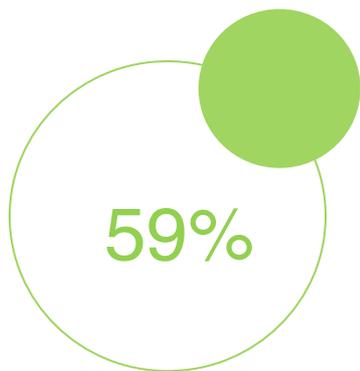
Unpaid part-time assistance from friends and family	56%
Paid assistance from a caregiving agency	41%
Personal emergency response system	26%
Physical modification of the home	16%
Transportation services	14%
Medication managers/reminders	11%
Volunteer visiting or meal services	12%
Internet delivery services for groceries or other supplies	7%
Visits from a government employee/social worker	6%
Advice from a senior care professional (GCM, elder law attorney, etc.)	5%
Adult day care	4%

Segment #3: Live in Senior Housing

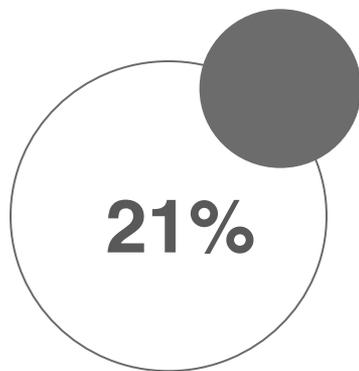


25%

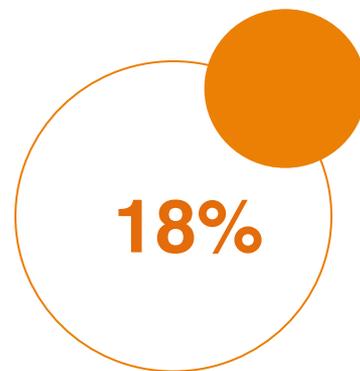
of those caring for others have a loved one in a senior community



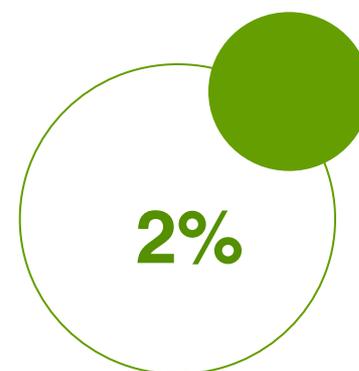
Lived independently in their own home prior to move



Lived with me, or with another relative



Moved from a different senior community



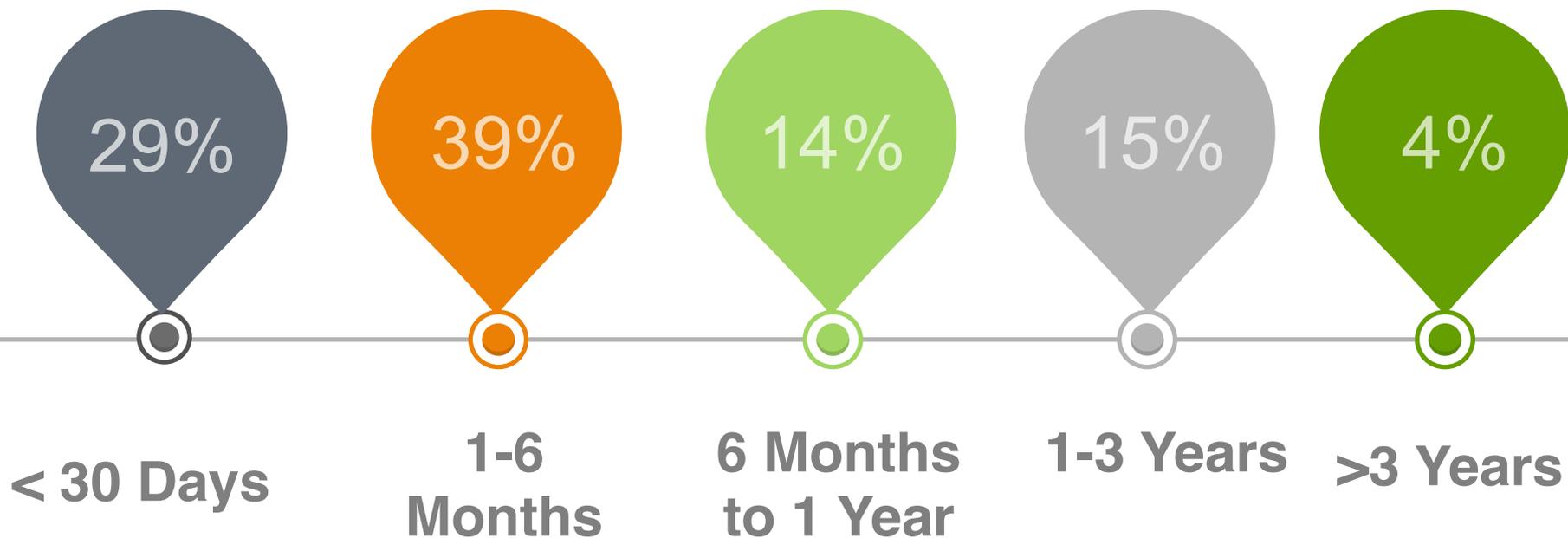
Moved from a hospital or a nursing home

What Prompted Move to Senior Housing



Medical concerns or diagnosis	66%
Safety concerns	66%
Transportation or mobility issues	33%
Family could no longer provide care	33%
Home maintenance or home upkeep challenges	31%
Planning for future care needs	19%
Loneliness	13%
Death of a spouse	12%
Financial considerations	10%
Wanted to be closer to family members	8%
Living alone became more and more difficult	8%
Wanted to downsize	6%

How Long The Decision Took



Tools & Resources Used to Select



My own local knowledge of communities in the area	44%
Recommendations from friends or family members	37%
Online directories such as Caring.com	19%
Recommendation from medical professional or discharge planner	19%
Consumer reviews	18%
The community's website	18%
This facility was our only option (financial, medical, geo constraints)	15%
Recommendation from a senior care expert	12%
My loved one knew this community and selected it him/herself	11%
State inspection records	7%
Recommendation from Caring Family Advisors	6%

Reasons Community Was Selected



Most Common Themes in Open-Ended Responses

Location (convenient/proximity, near family, stay same area)

Staff (friendly, caring, professional)

Recommendation / word-of-mouth / reviews

Friends or relatives already live there

Cost/affordable

Home style atmosphere (“felt like home”)

Appearance (“looks nice”)

Amenities/services provided

Memory care offered

Only option available/not my choice

Not in the top mentions: religious affiliation, salesperson, pets, food

Use of Home Care Services in Senior Housing

20%

Employ an outside agency to provide care in the senior housing community



Attitude Towards Living Situation



I'm pleased my loved one is safe and well cared for	57%
I feel sad or guilty that I cannot care for my loved one myself	35%
It's a great option for all of us	29%
My loved one is unhappy, but we had no other option	30%
I wish my loved one had moved sooner	19%
My loved one made this choice, and I supported it	11%

Segment #4: Caring for Self



22%

of those answering the survey are caring for themselves

34%

Live alone or with spouse with no assistance

6%

Pay for in-home care

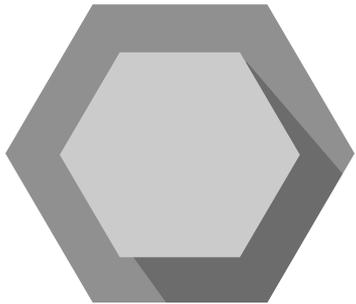
22%

Are starting to think about other options due to health or safety concerns

29%

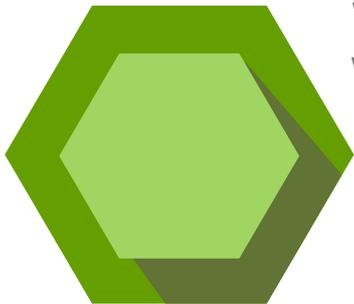
Feel stuck in their current living situation

Segment #4: Caring for Self



34% live in their own homes with no assistance

- 13% get unpaid assistance from family and friends
- 6% employ paid caregivers



58% not satisfied or only somewhat satisfied with current living situation

- 20% interested in a senior community for comfort, convenience, or companionship
- 22% are worried about their own health and safety
- 29% think they have no other choice than to live on their own

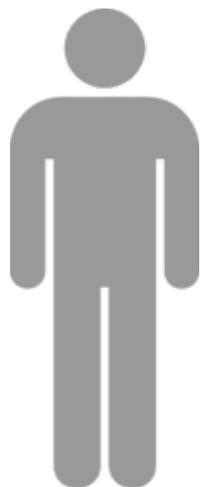


Count Him In: The Male Family Caregiver

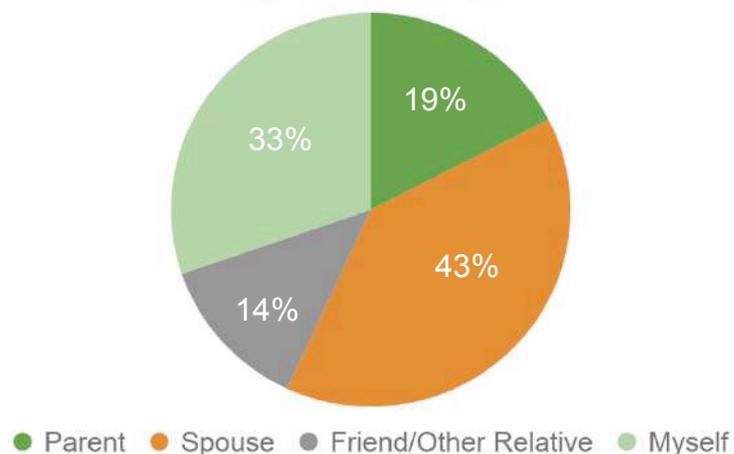
Male Family Caregivers

Male Respondents

- 25% of all family caregivers
- Age 60-89 (81%)



Caregiving Role



Care Receiver: Age 70+ (66%) *Memory Loss*

- Alzheimer's or dementia - diagnosed (48%)
- Alzheimer's or dementia – suspected, but not diagnosed (12%)
- Age-related memory decline, but no dementia (23%)
- No sign of memory loss (17%)

Employment Status & Living Situation

% Retired

66%

of Male Caregivers

vs

47%

of Female Caregivers

% Living Together

70%

of Male Caregivers

vs

54%

of Female Caregivers

Caregiver Stories



Tony S.

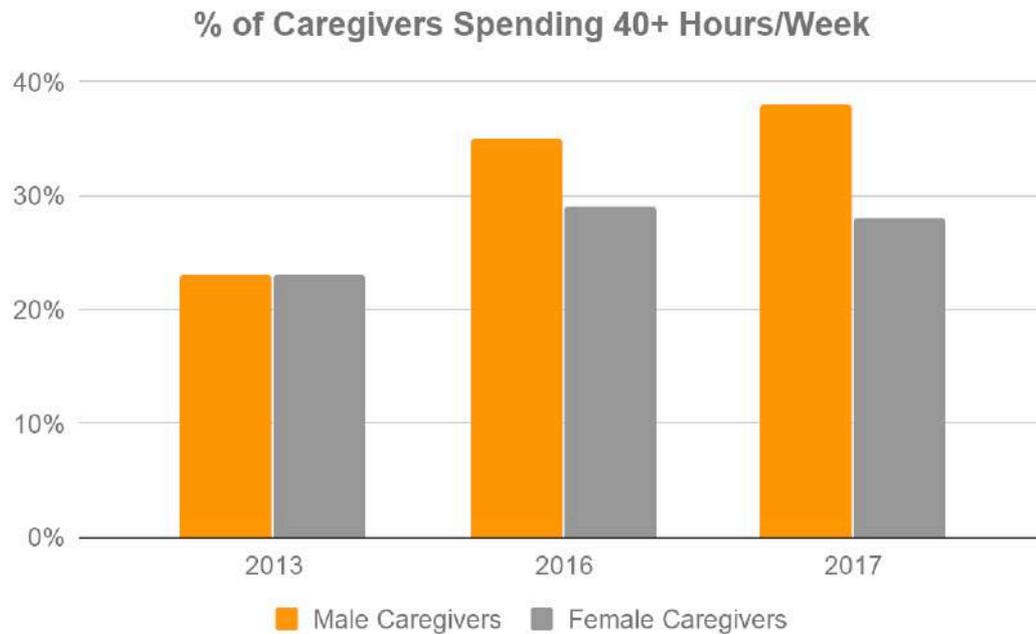
There's no way it can be done just like getting off work for an hour and going out and checking on your patient. There's no way you can do it part time. There has to be somebody there all the time.

Things got progressively worse until the point where I could no longer get to work without being called and asked, "Where are you?"



Edgardo D.

More Likely to Be Full-Time Caregivers

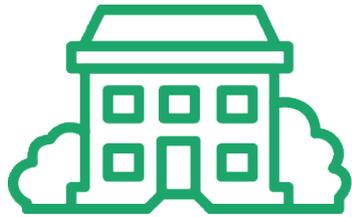


The part that is mostly strenuous is the fact that you have to continue doing what you were doing before but you had help. And now you have to share the burden all by yourself and carry it.

Paying for More Caregiving Expenses

	2017		2016	
	MALE	FEMALE	MALE	FEMALE
Food and clothing	60%	57%	71%	59%
Transportation	61%	55%	70%	57%
Medications and other medical costs	55%	38%	63%	39%
Travel to care for your loved one	28%	29%	24%	27%
In-home care for your loved one	30%	20%	36%	23%
Legal services	29%	21%	30%	20%
Caregiving services	17%	12%	18%	12%
Cost of a senior care facility	17%	12%	16%	10%
Caregiving technology (in-home monitoring, PERS)	13%	9%	11%	9%
Caregiving professional support	8%	4%	8%	4%
Other	9%	14%	8%	13%
Neither I nor other family members contribute financially to the care of my loved one	12%	17%	8%	17%

More Open to Making Changes to Living Situation



Senior Living

31%

of male caregivers

vs

19%

of female caregivers



Home Care

28%

of male caregivers

vs

22%

of female caregivers

We're so macho, we don't need help...I thought it was my responsibility to take care of my wife. It took her going out of control, falling and continually fighting me for me to understand.



Emory D.

#1 Caregiver Recommendation: Get Support



Masoud A.

The person who is giving care is always the one that forgets that they're existing too. They have to be very careful to not lose that feeling, that they have to talk about it. Communication with other people that are close to them is very important.

You've got to have a mental health specialist on your side, someone that can give you direction...and help with the emotional highs and lows.



Jim S.

Need Help With “Nurturing”



Tony S.

Find a real support group. One that will give you all the information that you're looking for and information that you have no idea existed... **Men by nature are not the nurturing kind.** They have to learn that completely from A to Z.



Masoud A.

I think training/education is number 1. Because [caring] is something new and [men are] not used to it. **It is more shocking for men compared with the women who have more experience in the past.** It is easier for them to handle it.

Cultural Barriers to Overcome



Maybe one spouse thinks that if the roles were reversed, then the spouse would do a great job... **There's this stigma that if you can't take care of your own family, there's something wrong with you.**



I think that men typically are ingrained with not having to lower ourselves to seek help. **Men typically are warriors. We like to conquer.** That's what we typically like to do and it's almost beneath us sometimes to seek out that type of help...



[Men] don't think that anybody can help and that's their job... They are convinced from early childhood until they're old: **if you fall, you have to get up, don't complain, don't cry, and to go on.**



From Data to Marketing Personas

Meet “Mary”



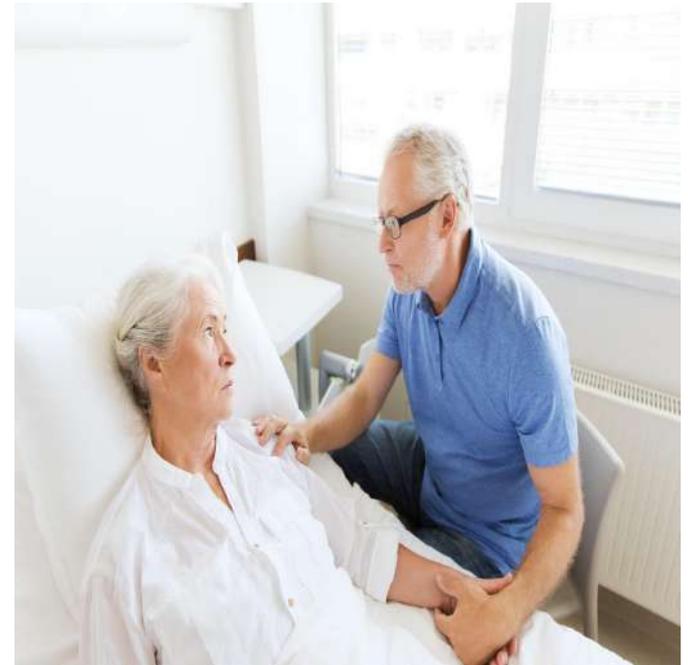
- Adult daughter
- Often still working – *and distracted on the job*
- Prompted by a medical situation or safety concerns – *stressed, confused, pressed for time*
- May or may not know local options
- Does her research before calling – *optimize your online presence to get into her consideration set*
- Reads reviews -- *your online reputation matters considerably*
- Chooses to fill out / submit an online inquiry (lead form)

Mary is a common Baby Boomer woman name. (Social Security Administration, Top Names of 1940s)

Meet “James”

Compared to “Mary”, James reports the following at higher rates:

- Retired & living with the care recipient
- Spending more time on caregiving
- Paying for caregiving expenses
- Considering making a change to loved one’s care situation
- Motivated by a desire to give back



James is a common Baby Boomer male name. (Social Security Administration, Top Names of 1940s)

Q&A

Have more questions about reviews post-webinar?
Please contact: community@caring.com



DIGITAL MARKETING ACADEMY

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Digital Marketing Academy - Upcoming Webcast

Making the Most of Your Senior Living Partnership with Caring.com

Tuesday, May 15, 2018

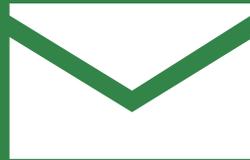
11:00 AM Pacific / 2:00 PM Eastern

Thank You!

We Welcome Your Feedback and Suggestions



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