

August 2017

CAREGIVING OMNIBUS STUDY

Emotional Aspects of Caregiving



You're In Charge®

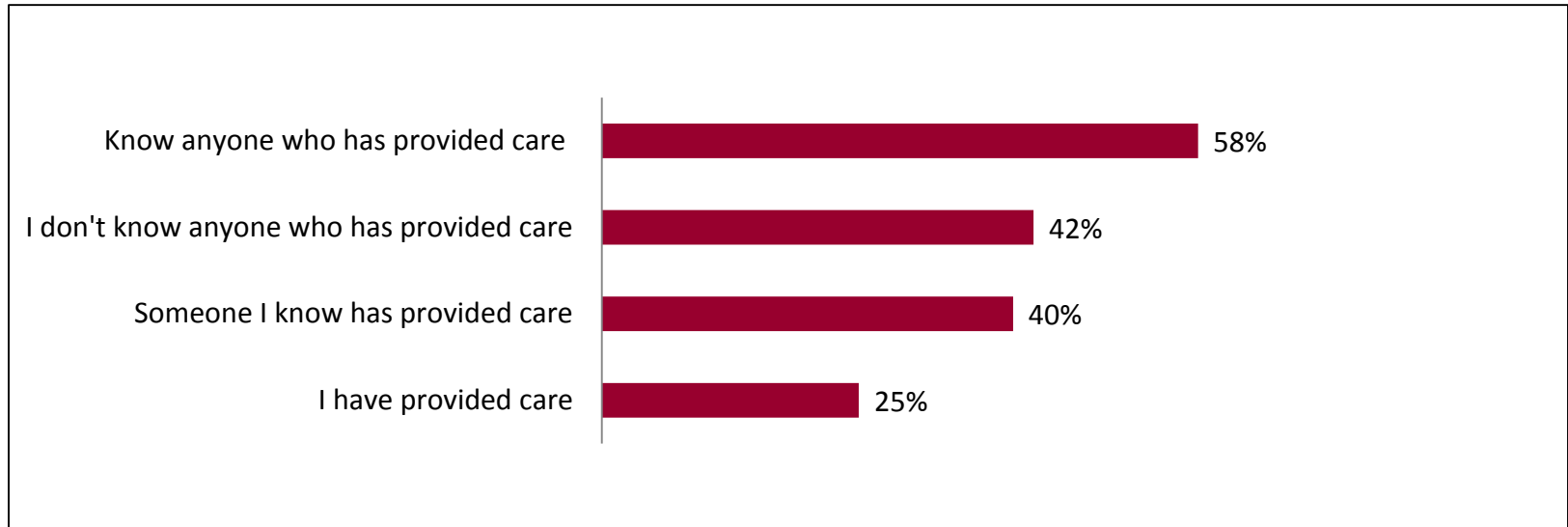
Methodology and demographics

Lincoln initiated an omnibus study with research firm ORC International in August 2017, to better understand the emotional aspects related to caregiving.

- The survey was completed by 1,015 general consumers ages 18+
- Included 4 closed-ended questions
- Gender distribution: 48% male, 52% female
- Age distribution of sample:
 - 34% Millennial (18-36)
 - 27% GenX (37-52)
 - 33% Boomer (53-71)
 - 6% Senior (72+)
- Distribution of assets among sample:
 - 40% < \$50k 36% \$50k-\$100k 24% > \$100k

Have you or someone you know provided any level of care to an elderly friend or relative?

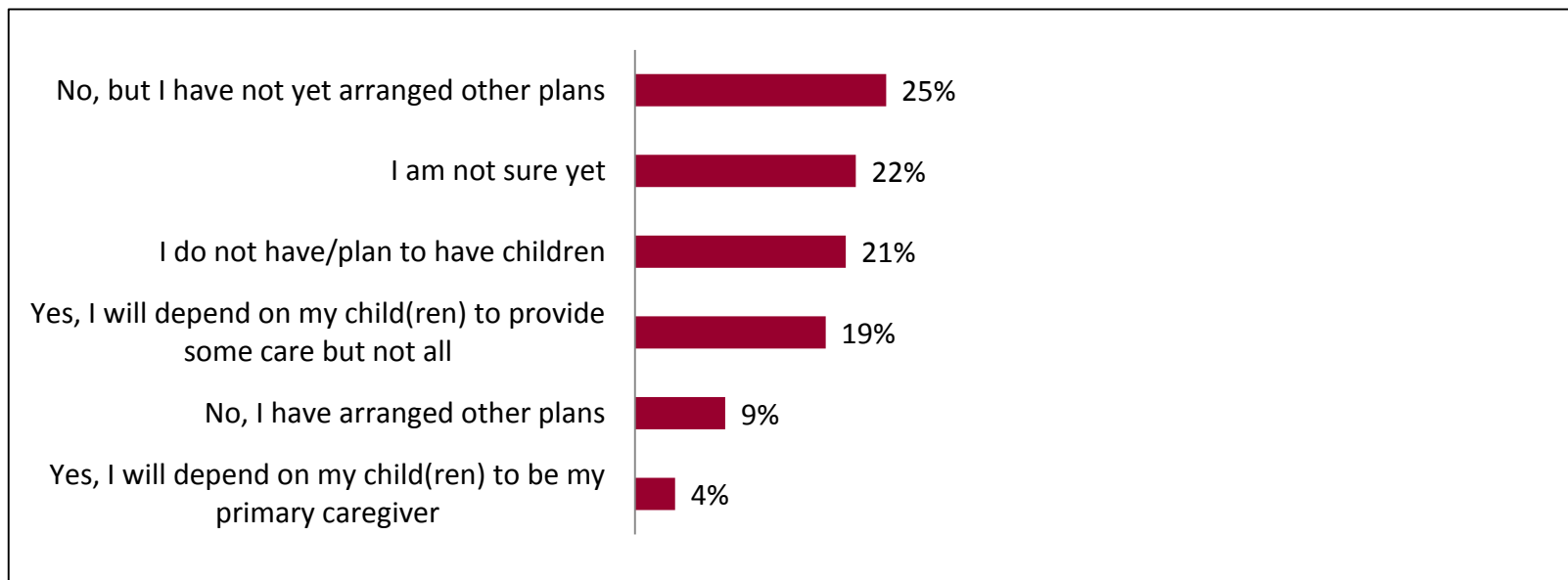
- 58% of people surveyed know someone who has or have personally provided elder care



- 3 in 10 women have personally provided elder care compared to 2 in 10 men

In the event of your own long term care needs, do you want your child providing your primary care?

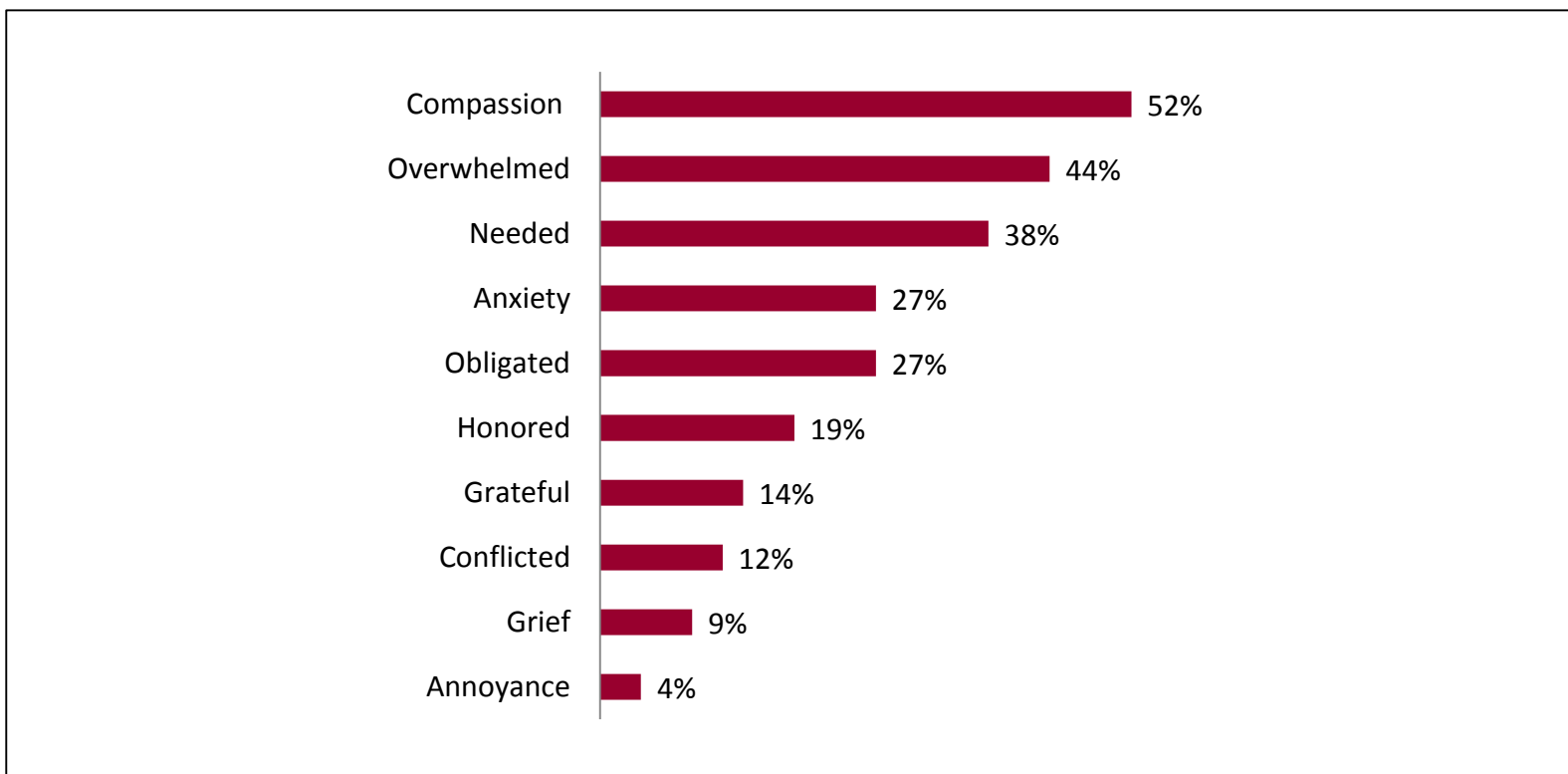
- Of those who have /plan to have children and have decided their preference of their child's involvement in their care, 59% do not want their children to be their primary caregiver



- Of those age 65+ with children: 30% do not want their children to be their primary caregiver, but have not arranged other plans; 20% are not sure of their plans

Which of the following emotions could you most identify with if you suddenly became a caregiver?

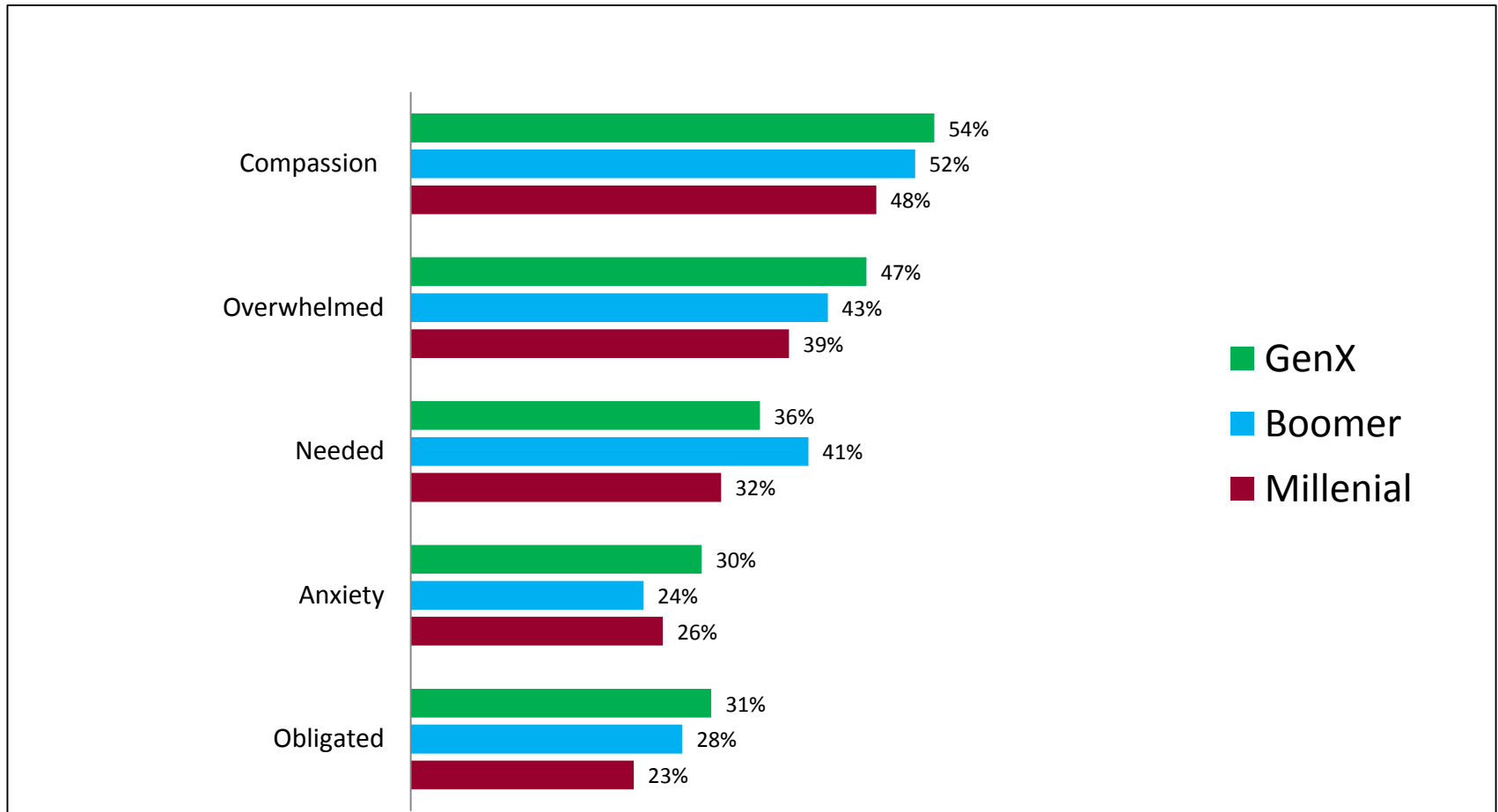
- People want to help their family members in need of care, but also recognize the associated challenges and sacrifices



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Which of the following emotions could you most identify with if you suddenly became a caregiver (by generation)

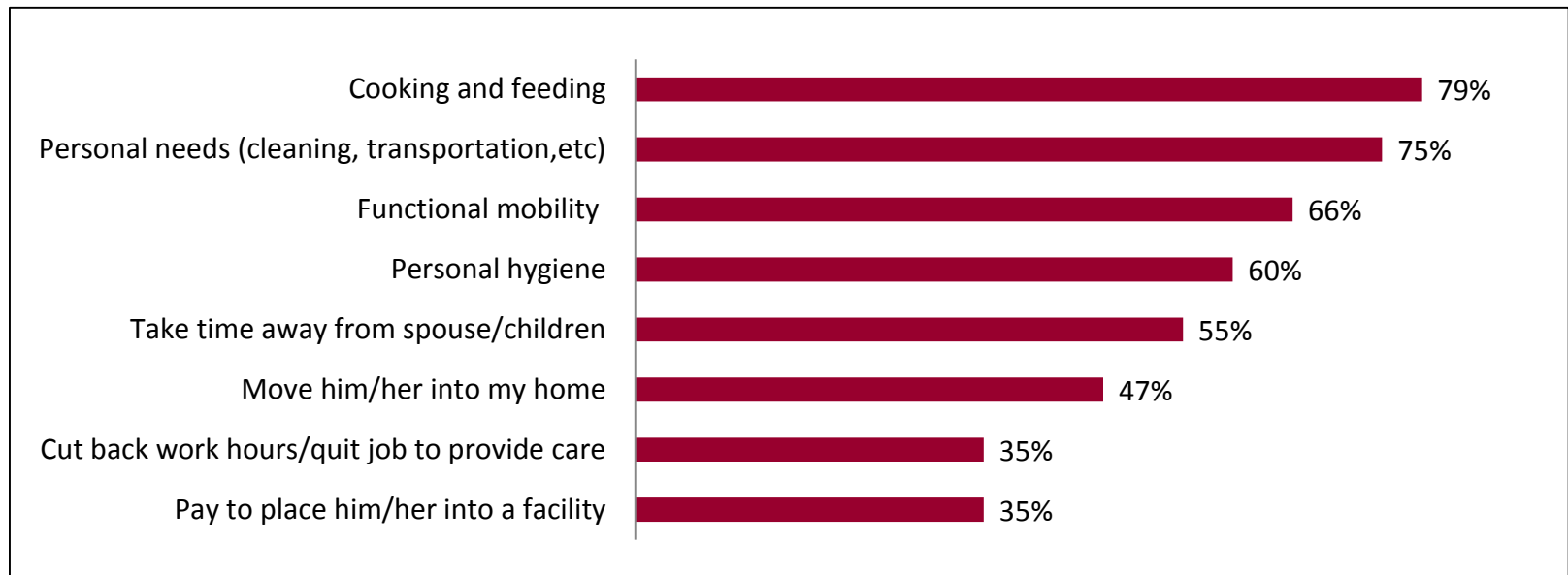
- Middle-aged Americans often face the predicament of multigenerational caregiving, 'sandwiched' between raising children and caring for aging parents



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How likely would you be to do each of the following for a close friend or relative in need of care?

- People are willing to help with personal needs and activities of daily living, but less comfortable with larger sacrifices like money and space



- Women are more likely to provide each of the levels of care compared to men
 - 40% of women would cut back/quit their job (30% men)
- Men are more likely (41%) than women (30%) to pay for facility care

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