



# The Modern Caregiver

## Background

Over the past few years, we've spent a lot of time thinking about caregiving. An aging population has kept this issue salient in many lives, and Millennials are rapidly becoming a "sandwich generation," balancing childcare and elder care simultaneously. Furthermore, the pandemic suddenly made many of us aware of healthcare inequities, the vulnerability of our elderly and the grueling nature of balancing children and work. And not only did we become more aware, the need also grew more acute. An estimated four million people (and counting) suffer from long COVID, which requires assistance from friends and family. One in three families struggles to secure childcare. It is getting to the point where almost every adult is a caregiver in some way, shape or form.

As this class of caregivers expands, it has become abundantly clear how little we understand this group and its needs. In order to help us better grasp the scope of the American caregiving audience and truly understand them as people, Starcom partnered with MESH in November 2022 to survey over 2200 people, including nearly 1200 caregivers. We explored:

1

### Misconceptions

**Society has made many, incorrect assumptions about caregiving.**

Our myths about the burden of caregiving are far from the more positive reality most caregivers live.

2

### Segmentation

**There are three main types of caregivers, made up of very different people.**

The Support System, Problem Solver and Helping Hand represent distinct approaches to caregiving.

3

### Brands

**We can and should improve resonance and relevance with this audience.**

Caregivers make up an increasingly large part of our population, and their needs dominate all industry categories.

This report is the second part in Starcom's four-part Identity series. It follows [Part 1 on Introversion](#).

# Nature of Care

## Myth:

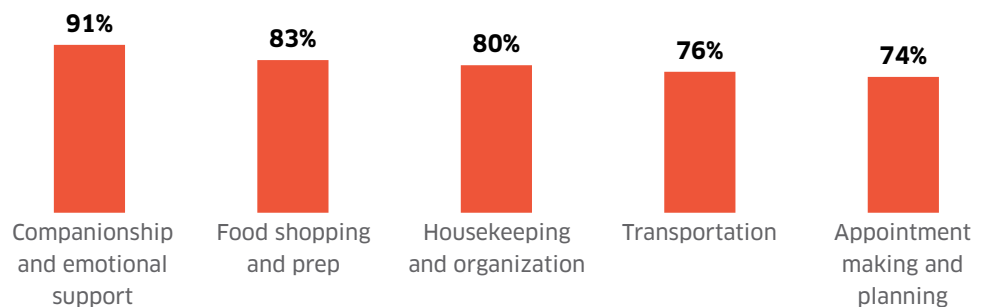
Caregivers primarily provide medical help.

## Reality:

Caregivers provide more emotional than medical support.

When we think of caregiving, we tend to think about full-time medical support. If we push ourselves, we might include parenting small children. The reality is, caregiving encompasses a broad array of activities. Even those who provide intense medical assistance describe this as only a fraction of the support they provide those in their care. Instead, companionship and emotional support are the most common types of support provided. For the younger caregivers in our survey, many of whom were taking care of parents, emotional support remained important, but a whole host of other coordinating activities also took up a lot of their time. And increasingly, providing tech support is one of those activities.  $\frac{3}{4}$  of Millennial caregivers said assistance with technology and financial planning is an important part of their role.

In fact, helping with medical care wasn't even in the top five caregiving activities our respondents cited:



One of the consequences of thinking about caregiving from a purely medical standpoint, is that we tend to assume it is a chronic duty. What we found instead was that for more than 1/3 of the caregivers in our survey, this was a temporary arrangement, lasting less than a year. Many were caring for people with an injury, a treatable illness, or a temporary gap in care.

## What This Means For Brands

Framing caregiving as just a medical pursuit, means we tend to only think about caregivers when it comes to healthcare and pharma brands. In actuality, caregivers are helping in every aspect of daily life, involving technology, transportation, food and beverage and even recreation.

**Brands in all categories should think about caregivers because almost every category is impacted by caregiving.**

# Identity

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## Myth:

People become caregivers only out of necessity.

## Reality:

Caregiving is a meaningful part of one's identity.

“Caring for others brings me happiness and satisfaction. It makes me feel good inside to know I can help others.”

-Female, Millennial

“It makes me feel fulfilled, making sure my family is taken care of.”

-Male, Boomer

“Feeling needed is really important to me, and the way I accomplish that is taking care of the people I love.”

-Female, Gen X

One of the problems of thinking about caregiving from a purely medical standpoint is we also assume it is a role you take on solely out of necessity. Maybe your parent has a sudden illness, your spouse is aging more rapidly than you or your child is diagnosed as neurodivergent. In all these cases, caregiving is forced upon a person—an assumption that can lead to us thinking negatively about caregiving and the resources it requires. And indeed, non-caregivers in our survey associated the endeavor with words like “necessity,” “tired,” “stress” and “hard.”

On the flip side, those actually in the trenches had a much more positive view, using words like “kindness,” “love,” “empathy” and “loyal.” For these people, caregiving gave them a lot of emotional fulfillment and a sense of purpose. Almost all caregivers in our survey described enjoying their role. Furthermore, caregivers cited caring for others as the most important part of their identity.

+46%

more likely to say caring for others is the most important part of their identity

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## What This Means for Brands

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Given that the majority of American adults take on at least some caretaking duties (e.g. have children), we are undoubtedly already reaching caregivers when we use other audience definitions for targeted media. Reach, however, is not enough. If brands are not speaking to them specifically as caregivers, they aren't fully relevant to these people at all.

**Catching caregivers through other audience definitions fundamentally misses true audience understanding.**

# Diversity

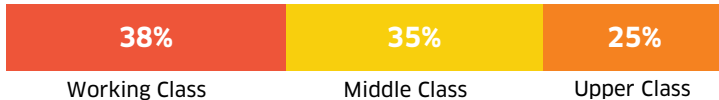
## Myth:

The caregiving experience is universal.

## Reality:

Race, ethnicity and gender have a massive impact.

### Socioeconomic Status of Caregiving Respondents



**86%** of caregivers said they watched someone in their life act as a caregiver earlier in their life.

### Race and Ethnicity

Your approach and attitude toward caregiving is largely dependent on your cultural background. Asian American respondents were the most likely to feel caregivers were vital to society, but also significantly more likely to say that they are well supported. This suggests caregiving is often baked into cultural expectations and norms for them. African Americans, on the other hand, were most likely to enjoy being a caregiver. Furthermore, in cultures where multigenerational living is more common—Asian American and Hispanic American households—we saw caretaking start at a younger age: Gen Z was heavily involved, with many looking after not just parents, but also grandparents.

When caregiving becomes part of someone's identity, their experience is also colored by other aspects of their identity. Wealthier people are, of course, more likely to be able to afford external caregiving assistance like assisted living facilities and professional caretakers. But caregiving is often inherited, and race, ethnicity and gender have a bigger impact on the caregiving experience than wealth.

### Gender

Women are much more likely to be caregivers, particularly when the person needing care is a family member. They are also likely to have a different experience of caregiving than men. In our survey, women described caregiving as a strain on their time and energy, whereas men were more likely to report its impact on their social life. This is likely because female caregivers spend, on average, more hours a week providing care than men. As a result of this imbalance, women engaged in more self-care activities than men to help counteract the stresses of providing care, and were more likely to reach out to friends and family for advice and emotional support.

## What This Means for Brands

A person's cultural background and gender have a big impact on not just whether or not they will become a caregiver, but also the kind of care they'll provide. Particularly when we seek to reach multicultural communities, we'll need to be sensitive to the differences in their caregiving realities.

**DEI initiatives need to be particularly sensitive to cultural nuances in caregiving.**

# Support

## Myth:

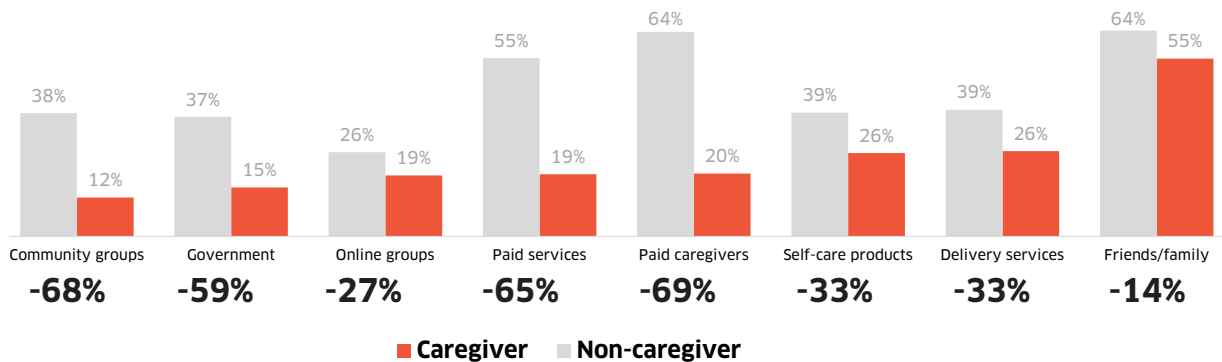
Caregivers need a lot more help.

## Reality:

Caregivers need more time, not necessarily more resources.

Although half of the caregivers in our survey felt society could do more to help support them, they disagreed with others about what kind of help they needed. Caregivers were less likely than non-caregivers to think any of the following would make caregiving easier on them:

Things you think would help/relieve the impact of caregiving



Instead, they want to find ways to devote more time for themselves, their social lives and their career. When they do get a moment to breathe, they prioritize the forms of self-care they need to recharge. For most, this means alone time and occasionally time out with friends.

“[Self care is] being able to be by myself for a time during the week just to recharge.”

-Female, Boomer

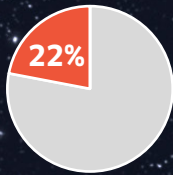
## What This Means for Brands

We seem to understand that caregivers need support, but not how to be supportive to them. Making access to clear, transparent information is a good place to start. Brands should focus on how they can help consumers save time and avoid stress, both in their products and in their full brand experience. This means rethinking owned channels in particular to make sure they reduce all points of friction and provide content that truly focuses on helping the consumer, not promoting themselves.

**Brands should create content that highlights how they can save consumers time and stress, and offer opportunities for self-care.**

# Types of Caregiving

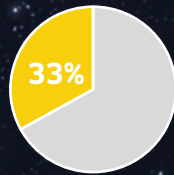
Using a combination of psychological research and cluster analysis, we identified three main types of caregivers, defined by their approach and attitude toward caregiving:



## The Support System

Look to find the best solution for everyone, and are continually seeking to improve themselves

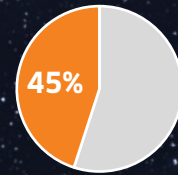
Average of **4h 5m** per week spent caregiving



## The Problem Solver

Seek external validation and admiration in their peer groups for being organized and capable

Average of **3h 40m** per week spent caregiving

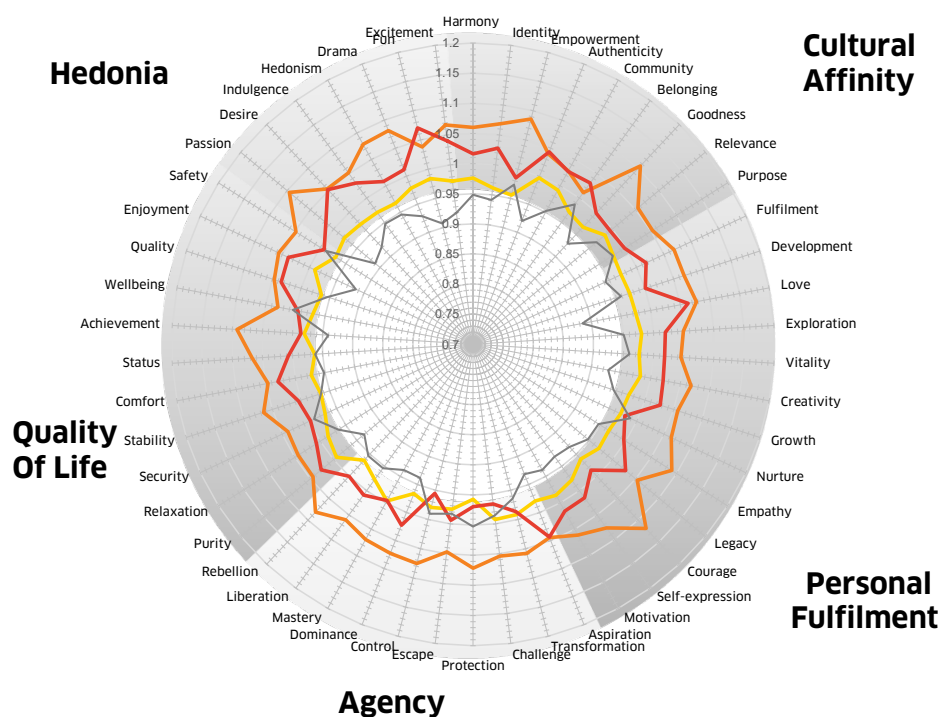


## The Helping Hand

Are driven by a desire to be a good person and serve as a guiding force to the people in their lives

Average of **5h 36m** per week spent caregiving

Starcom and MESH used proprietary AI-based technology to create these segments, and mapped them onto the motivations that drive each one of them:



### The Support System

Core need states driven by:

**Fun, Love, Desire**

### The Problem Solver

Core need states driven by:

**Goodness, Courage, Passion**

### The Helping Hand

Core need states driven by:

**Mastery, Authenticity, Purity**

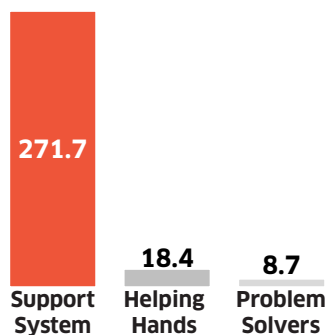
## The Support System

All of our caretaking respondents cited emotional support as a large part of the care they provide. For some, however, emotional labor is in fact the point. Support System caregivers want to provide those in their care the same level of comfort and stability that they themselves crave. Taking care of someone can be full of unexpected surprises, and Support System caregivers cope with the uncertainty by establishing routines and seeking out calming familiarity wherever possible.

### Social Media Engagement

(past 27 months, in 000s)

Source: Netbase



“I have almost no time for myself. Every waking moment is spent caregiving in one capacity or another.”

-Female, Older Gen Z



While Problem Solvers generated more net-new posts, engagement was highest with Support System posts. They look to learn from each other on platforms like TikTok, Instagram and Reddit, and turn to these spaces to vent and get the encouragement they need to stay afloat.

1/4 of them care for three or more people simultaneously. With 72% between the ages of 26 and 55, they are most likely to be in the “Sandwich Generation,” caring for both young children and aging parents simultaneously. This leaves little to no time for self care.

To alleviate stress, they turn to delivery and cleaning services to free up some of their time, and spiritual pursuits like religion and meditation to help with their mental health. They feel they have limited time to explore things outside the home, so they try to find inspiration from within it.

### Over-Extended

**+27%**

to say their career has taken a backseat to caregiving

### Diverse

**+87%**

to identify as Black or African American

### Tech Support

**+25%**

to provide tech assistance to those in their care

### Full Caretakers

**+40%**

to have completely dependent people in their care

### Industrious

**+100%**

to self-describe as a workaholic

## What This Means for Brands

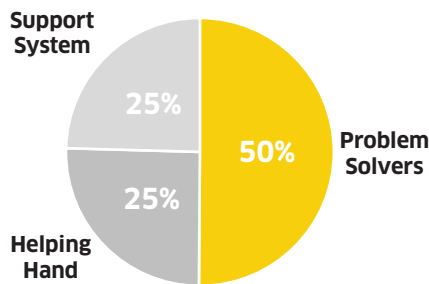
Support Systems are 45% more likely to say those in their care influence the brands they choose, and they are also more brand conscious in general. This means they’re balancing the needs and preferences of multiple generations whenever they make purchase decisions. When learning about brands, they are drawn toward social media content (particularly in video form), and genuinely enjoy ad content that is relevant to them. They are brand conscious but easily persuaded to try new things.



## The Problem Solver

Problem Solvers have a pragmatic approach to caretaking. While they still find emotional fulfillment in helping a loved one, they are driven by a desire to be useful. They want to be good caretakers for the sake of those in their care, but they are also motivated by a competitive spirit that leads them to seek out resources to be the best possible caretaker they can be. They care about how others—particularly on social media—see them, and want to be perceived as put together and confident.

**% of Social Media Volume**  
(past 27 months)  
Source: Netbase



“Caring for someone else takes away from my personal time [so] I maximize the time spent when caregiving.”

-Male, Younger Millennial



Despite being the smallest of the segments, Problem Solvers make up half of social mentions, indicating they are initiating the bulk of conversations about caregiving. TikTok and Snapchat were particularly popular for this group, though Meta was still their most used.

Because they like to look put together, they rely on services like professional cleaning more than others to keep their lives organized. They also like to feel like they are being as efficient as possible, making the most of every caretaking minute.

As a result of their efficiency, they spend an average of 3h 40m a week caregiving, significantly less than others. This might be because they are more likely to provide transportation and logistical assistance rather than ongoing emotional support and companionship.

**Young**

**+50%**

to be members of Gen Z

**Diverse**

**+35%**

to identify as Hispanic American or Asian American

**Insecure**

**-73%**

to feel confident despite wanting to seem like they are

**Trend Setting**

**+31%**

to be the first to try new things

**Independent**

**-27%**

to rely on friends and family for self-care support

### What This Means for Brands

Beyond their caretaking duties, they are also leaders in their families, making the bulk of household decisions. Because they are so independent, many Problem Solvers say they don't rely on any outside resources for caregiving info or support. When they do seek out information, though, they turn largely to the internet and are drawn toward brand messaging and content that is highly creative. Despite being active on social media, they are almost as likely to learn about brands from linear TV and VOD as they are from Instagram or Facebook.

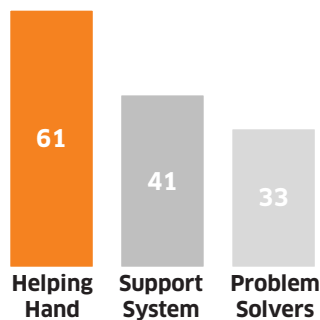
## The Helping Hand

Helping Hands believe in chipping in wherever help is needed. They view hard work as an honor, and that goes for caring for others, too. They see themselves as leaders in their households and their communities, and a source of wisdom and support for others, not just those directly under their care. While Problem Solvers look externally for validation, Helping Hands look inward: They strive to be better people and caregivers for their own personal fulfillment rather than to keep up appearances.

### Social Media Sentiment

(past 27 months)

Source: Netbase



“Helping my husband is gratifying...I vowed to honor and cherish through the good and bad times.”

-Female, Boomer



Posts from Helping Hands had the most positive tone. This mirrors what we saw in our survey where, despite being most impacted by the economy, they were 2.2x more likely to say they had enough support and resources to be good caregivers and 30% more likely to enjoy being one.

They are 2x more likely than the other two segments to be Boomers. As a result, many are caring for their spouse or partner rather than an older relative or young children.

They are proactive about managing their stress, prioritizing sleep and spending time with loved ones. Additionally, they are more likely than others to ask friends, family and neighbors for help with their caretaking duties when they feel overwhelmed.

**Female**

**2.3x**

more likely to be female

**Hands-Off**

**+34%**

to say the person in their care is mostly independent

**Leaders**

**+20%**

to see themselves as sources of advice for others

**Conservative**

**-71%**

to say they are the first to try new things

**Cautious**

**-48%**

to consider themselves to be spontaneous

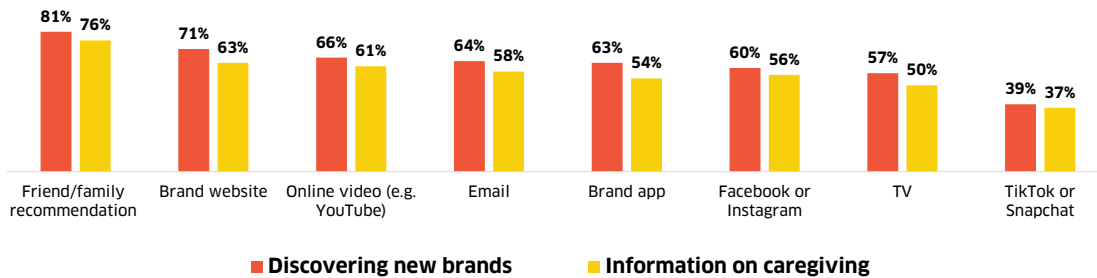
### What This Means for Brands

Given how cautious they are, Helping Hands prefer content that is transparent and informative. They are hesitant to try new brands and products, but look for empathy in brand messaging—a sign that a brand understands them and how important caregiving is to them. They prefer to go straight to the source for info, relying on brand websites and apps more than others, and soliciting word of mouth suggestions from trusted family and friends. Once converted, they like to pass on recommendations to others as well.

# Marketing to Caregivers

Regardless of the type of caregiver, friends and family are the main sources of brand discovery and information on caregiving:

**How caregivers get information and resources on brands and caregiving:**



Talking to each type of caregiver when, where and in the ways they want to be talked to, however, can help brands make more of an impact with them. A combination of psychographic and demographic signals combined with the following framework can help us reach caregivers more effectively:

	<b>The Support System</b>	<b>The Problem Solver</b>	<b>The Helping Hand</b>
<b>Biggest Challenge</b>	Finding me-time while juggling work, home and caretaking	Being seen as a successful leader by others	Emotionally caring for themselves AND their loved one(s)
<b>What They Want from Brands</b>	A sense of community	External validation and time-saving lifehacks	A familiar and reliable experience
<b>Categories of Interest</b>	Beauty, CPG, Personal Electronics	Travel, Fashion, Beauty, Fitness	Pharma, Financial Services, Beauty
<b>Products/Services</b>	Subscription services, delivery services, organizational apps	Delivery services, financial planning tools, organizational tools	Delivery services, mental health products
<b>Trusted Influencers</b>	Friends/family on social media	Social media influencers	Family/friends, medical professionals
<b>Brand Discovery</b>	Social media (Reddit, Instagram)	Social media (TikTok, Snapchat)	Brand apps, word of mouth

## Brand Outreach Thus Far

When you effectively reach, message to and create relationships with caregivers, the impact can be profound. But brands outside the healthcare and pharma space have thus far stayed largely silent when it comes to speaking to caregivers or depicting their experience in campaigns. Gillette and Amazon represent rare examples of brands within the last ten years that have reached out in unconventional ways.



Gillette created Treo, the first ever razor designed for caregivers. From ergonomics to shaving cream dispensing, it is completely designed to help with the kinds of functional tasks caregivers encounter daily.



Amazon Echo's "[Be Together More](#)" spot showcases their product's ability to help emotionally support aging parents, an often overlooked component of caregiving.

Newer market entrants and DTC brands have been slightly more engaged in this space. These companies already focus on delivery and subscription service models to reflect younger audiences' preferences. As their Millennial consumers take on more caregiving, though, they are increasingly framing these conveniences in a caregiving context.



## The Starcom Difference

One of the challenges in reaching a caregiving audience is that most of our existing targeting signals rely on behavioral data: purchase history, website engagement, etc. These signals are unable to tell us whether someone is doing these things for themselves or on behalf of someone in their care. Starcom's proprietary motivational research, however, helps us solve this problem. By giving us a glimpse into not just what people are buying, but why they are buying it, it helps us isolate categories, products and purchases that are more likely to have been purchased altruistically. This gives us greater accuracy not just in identifying caregivers in the wild, but targeting the three specific caregiving segments we defined in our research.

Additionally, when we ignore the impact of caregiving on categories outside the healthcare space, we are unable to accurately assess audiences sizes, category white space, or future growth potential for our clients. By layering our motivational data onto our custom growth models, Starcom is able to build more predictive forecasts that fully reflect the business opportunities caregivers can provide.

# Brand Takeaways

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1

## Nature of Care

Caregivers provide more emotional than medical support.

Brands in all categories should think about caregivers because almost every category is impacted by caregiving.

2

## Identity

Caregiving is a meaningful part of one's identity.

Catching caregivers through other audience definitions fundamentally misses true audience understanding.

3

## Diversity

Race, ethnicity and gender have a massive impact.

DEI initiatives need to be particularly sensitive to cultural nuances in caregiving.

4

## Support

Caregivers need more time, not necessarily more resources.

Brands should create content that highlights how they can save consumers time and stress, and offer opportunities for self-care.

5

## Segmentation

We identified three main types of caregivers.

Some caregivers are driven by an internal need to support loved ones in their lives, while others are driven by external validation.

6

## Brands

We can and should improve reach and relevance with this audience.

Different types of caregivers require different types of messaging in different channels.