



# BALANCING WORK, CHILDCARE AND ELDERCARE: A VIEW FROM THE TRENCHES

Prepared by **Linda Duxbury**, PhD, Professor, Sprott School of Business, Carleton University  
and **Christopher Higgins**, PhD, Professor, Ivey School of Business, University of Western Ontario  
in partnership with Desjardins Insurance.

# CONCLUSIONS AND IMPLICATIONS

In this document, we outline the main conclusions that can be drawn from the 2012 National Study on Work, Life and Caregiving as well as the implications of these findings for Canadian employers. It also includes a set of recommendations on how concerned employers can address the issues identified in this study.

## GENERALIZABILITY OF THE FINDINGS FROM THIS STUDY

Before summarizing our key conclusions, it is first necessary to put the study into context and examine the impact of the sample demographics on the generalizability of our findings. The data used in this report come from three sources: (1) the 25,021 employees who responded to a survey that was administered as part of the 2012 National Study on Work, Life and Caregiving, (2) the 7,966 employees who filled in a section in this survey devoted to the challenges faced by employed caregivers, and (3) the 111 employees who agreed to participate in an hour-long telephone interview designed to follow up on the survey findings and give us a deeper understanding of the circumstances surrounding employed caregiving in Canada. This last sample was stratified by gender, family type and caregiving intensity to allow us to identify similarities and differences in the caregiving experience associated with each of these contextual factors.

### Implications for employers

The sample is geographically representative but skewed with respect to job type and socio-economic status. The fact that most of the employed caregivers in this sample were highly educated managers and professionals working for larger (more than 500 employees) firms has two important implications with respect to the generalizability of the findings. First, findings from this study are of relevance to organizations interested in recruiting, retaining and engaging knowledge workers. Second, findings from this study are likely to represent a “best-case” scenario with respect to the relationship between employment and caregiving as employees in our sample can afford to purchase goods and services to help them manage their responsibilities outside of work. Job security is also less likely to be an issue for the individuals in our sample.

# 60%

*SIXTY PERCENT OF THE EMPLOYEES IN THE CAREGIVING SAMPLE HAD MULTI-GENERATIONAL CAREGIVING RESPONSIBILITIES (I.E. IN SANDWICH GENERATION) WHILE 40% WERE IN THE ELDERCARE GROUP.*

## PREVALENCE OF EMPLOYED CAREGIVERS IN CANADA

Two estimates of the pervasiveness of employed caregivers in Canada can be derived from this study. The first estimate, obtained by looking at our total sample of 25,021 Canadian employees who completed the 2012 National Survey, determined that 29% of the men in our sample had no dependent care, 45% had childcare, 17% were in the sandwich generation and 9% spent time each week in eldercare. By comparison, 29% of the women in the sample had no dependent care, 36% had childcare, 20% were in the sandwich generation and 15% spent time each week in eldercare. This would suggest that 25% to 35% of Canadian knowledge workers are presently balancing work, caregiving and/or childcare.

The second estimate was calculated using our sample of 7,966 employed caregivers. In this case, 60% of the employees in the caregiving sample had multi-generational caregiving responsibilities (i.e. in sandwich generation) while 40% were in the eldercare group.

In both samples, a higher proportion of employees were in the sandwich group of caregivers than the eldercare-only group – a finding that is consistent with the fact that Canadian employees in professional positions are delaying parenting and are hence more likely to have both older parents and younger children at home.

*FINDINGS FROM THIS STUDY ARE OF RELEVANCE TO ORGANIZATIONS INTERESTED IN RECRUITING, RETAINING AND ENGAGING KNOWLEDGE WORKERS.*

### Implications and recommendations for employers

These data have several implications for Canadian employers. First, the high percentage of knowledge workers with caregiving responsibilities reinforces the need for Canadian companies who wish to attract and retain talent in a “sellers” market for labour to address the concerns of the employees in this group. Second, the high number of employees with both childcare and eldercare reinforces the need for companies to move on this issue. Finally, the data from this study showing that many younger (i.e. Gen X) male employees are now involved in caregiving in the same numbers as younger women suggests that younger men and women have more egalitarian attitudes towards who does what at home than do older Canadians. In the future, we would expect that an even higher percent of males will be involved in caregiving due to the decline in family sizes in Canada (i.e. in one-child families, there will be no other family members available to care for aging parents).

As such we recommend that employers move beyond a “gendered” solution to this issue and recognize that balance is now an issue for all.



## EMPLOYED CAREGIVERS

The following conclusions with respect to the caregiving situation of the knowledge workers in this sample can be drawn from the data:

- Employees care for family members: The majority of the employees in this sample provided care for one of their parents (58% cared for their mother and 17% their father). Just under one in five (16%) cared for one of their in-laws or an extended family member (12% cared for an aunt, an uncle, an older sibling).
- There is a lot of variability with respect to the age of the care recipient. The mean age of the care recipient of the employees in this sample was 77.9 years of age (sd 9.3). One in four employees care for a family member who is over 86 years of age (what is typically referred to in the literature as “the fragile elderly”) while 13% care for someone under the age of 65.
- Caregiving is not a transitory activity. On average, the employees in this sample have spent an average of 6.3 years (sd 5.8) in caregiving.
- The majority of the employed caregivers in this sample feel “responsible” for the well-being of two or more dependents.
- While one in ten (11%) employees care for at least one elderly dependent who lives with them, the majority care for one or more dependents who live nearby (66%) or more than an hour away from their home (47%).

### Implications and recommendations for employers

In summary, the Canadian employees in this sample feel responsible for the care of multiple family members in their seventies who live within an hour’s drive of their home. Most have been caring for these dependents for 5 to 10 years. What does this imply for employers? First, the fact that most employees care for one or more older family members increases the likelihood that they will feel torn between the need to care for their elderly family members and their work. Second, those employees who are caring for older family members (26% of sample) can be expected to experience more challenges balancing work and caregiving given the research showing that caregiving intensity increases with the age of the care recipient. Third, the findings indicate that caregiving is not a transitory, end of life phenomenon but rather an activity that can impose challenges for a substantive period of time. Each of these caregiving situations is likely to come with its own set of challenges.

These data lead us to recommend that concerned employers develop a flexible set of policies for caregiving to reflect the diversity in caregiving situations in their workforce.

## WHY DO EMPLOYED CANADIANS TAKE ON THE CAREGIVER ROLE?

Why do employed Canadians take on the role of caregiver? The survey data (n = 7,966) indicate that they provide such care because:

- they feel it is a family responsibility (90% agree),
- they choose to take it on (83% agree),
- no one else was available to provide the care (42% agree),
- no one else was willing to take on this role (35% agree), and
- of a lack of homecare and appropriate health services (30%).

The interview data indicate that most employees take on the caregiver role:

- for pragmatic reasons (e.g. I am nearest, I am the only child, the only daughter, there is no one else),
- because they felt that they had no choice but to provide care (I have no choice, there is no one else, my partner cannot provide care, my siblings can’t or won’t provide care, the dependent cannot look after themselves).

Very few respondents (9% of the interview sample) stated that they wanted to take on this role (“it is payback for the care they provided to me when I was young”).

The likelihood that a respondent will mention any of these reasons is not strongly associated with either gender or family type.

### Implications and recommendations for employers

What do these findings mean for employers? The fact that, for many of the highly educated knowledge workers in this sample, caregiving is something that they both want to do and have to do suggests that employers have little choice but to address the issues faced by employees in this group if they want to recruit, retain and motivate employees in this group.

As such we recommend that employers view developing policies and practices that address the needs of the caregivers in their workforce as a business imperative.

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*WE RECOMMEND THAT EMPLOYERS VIEW DEVELOPING POLICIES AND PRACTICES THAT ADDRESS THE NEEDS OF THE CAREGIVERS IN THEIR WORKFORCE AS A BUSINESS IMPERATIVE.*

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## WHAT TYPES OF ACTIVITIES ARE UNDERTAKEN BY EMPLOYED CAREGIVERS?

“Caregiving” is a very general term pertaining to a variety of caregiving activities. While researchers in the area have identified five main groups of caregiving activities (emotional support, assistance with health and daily living, organizational support, nursing and personal care, financial support), only one in ten of the employees in our interview sample talked about providing nursing/physical care and financial support. The other groups of activities were, however, mentioned by many of the employees in the sample.

- Emotional support: The most common caregiving activity by far provided by the employees in this sample involves offering emotional (rather than instrumental) support to the aging family member. Emotional support can take many forms but most often involves the caregiver sitting and talking to the dependent. Caregivers who live at a distance provide similar support when they “touch base” with their dependent by phone. Phone calls are also made to reassure the caregiver that “everything is alright” with the dependent.
- Assistance with health and daily living: A substantive number of respondents engage in activities that involve “running around” such as taking the person they are caring for to appointments (mostly medical) and/or running errands for them (e.g. pick up medications, do grocery shopping). In most cases, this form of support is necessary because the dependent has either lost their driver’s license or is too frail (mentally or physically) to take public transit. Doing housework for the dependent is also a common form of caregiving. Most respondents who talked about doing housework said that they cooked, cleaned and put out the garbage.
- Organizational support: One in four support their family member by planning their medical appointments, organizing their meals, maintaining their calendar etc.

The findings from the survey (n = 7,966) mirrored these results. Virtually everyone in this sample said they provided emotional/moral support to the dependent (i.e. emotional care) as well as general care (e.g. ran errands, drove them around). Approximately two thirds of the employees in the sample said that they also helped with home and yard maintenance as well as household chores — activities that are commonly referred to as “instrumental activities of daily living (IADL).” Finally, approximately a third of the respondents stated that they provided personal care (toileting, feeding) and nursing care (medications, bed transfer).

Also of note are the data showing that the partners of these employees offer similar types of care but less often than the employees themselves.

Also of relevance to this discussion are the data from the survey study (n = 7,966) showing that, while many employees say they engage in a number of different caregiving activities, in most cases they do not find performance of the role to be demanding.

How demanding do employees find caregiving? According to our data, 40% of the sample indicate that the role of caregiver consumes very little of their energy, 42% say that it requires a moderate amount of energy, and 17% say that the role requires a high or very high amount of their energy.



## Implications and recommendations for employers

In summary, the most common form of care offered is emotional support, followed by activities to help the dependent with health and daily living. Only a minority of the caregivers in this sample provided physical care or financial support. Also important are the data showing that, while a plurality of the employees in this sample say the caregiving role requires a moderate amount of their energy, one in five say the role requires a very high amount of their energy and 40% indicate that this caregiving is not that taxing. Finally, the data also show that most of the employees in this sample also indicated that their partner supported them by also engaging in caregiving activities.

These findings have several important implications for employers. First, the group of employees who are attempting to balance work and caregiving is likely larger than our initial estimates as employed partners of caregivers also provide care. Second, the fact that many of the caregivers in our study help their family member by performing time-consuming activities that involve a lot of “running around” and home chores supports the idea that this group could benefit from more flexible work arrangements. Third, these findings support the idea that it is the mix of caregiving activities undertaken as well as the amount of energy one allocates to the role that is important in quantifying intensity — not just the likelihood that the employee will spend time in the task. These findings indicate that researchers should look beyond who does what with respect to caregiving to how much energy the caregiver perceives they spend in the role. Finally, it is important to note that increased flexibility will likely not help the majority of the employees in this sample who are providing emotional support to their family members. This type of emotionally draining activity is more likely to require empathy from managers and co-workers and the availability of generous EAP (Employee Assistance) and EFAP (Employee Family Assistance) programs.

The above data lead us to make the following recommendations with respect to addressing the needs of caregivers. First, employers should make sure that those with caregiving responsibilities have access to flexible work arrangements. Second, employers should expand their EAP offerings to include specific supports for employed caregivers (e.g. eldercare referral services, counselling). It may be useful to

consider moving from EAP to EFAP to recognize the changing needs of the workforce with respect to support. Third, employers should engage in educational efforts within the workplace to increase awareness of this issue in their management cadre.

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## HOW DOES EMPLOYMENT IMPACT THE TIME CAREGIVERS SPEND IN CAREGIVING?

There is conflicting evidence on how employment impacts the time people spend on caregiving to the elderly. This is especially apparent when discussing the impacts of employment according to gender. The self-report data on hours per week in child and/or eldercare and employment support the following conclusions on the demands faced by the caregivers in this sample:

- The amount of time parents and their partners spent in childcare is highly variable with peaks at 1 to 10 hours (parents of older children) and at more than 30 hours per week (parents of younger children) (n = 7,966).
- The amount of time employees and their partners spent in eldercare is highly variable but, in many cases, substantive. Employees in this sample spent an average of 10.7 (sd 13.6) hours per week in caregiving while partners spent an average of 5.6 (sd 7.1) hours per week (n = 7,966).
- The majority of respondents (over 80%) said that their partner also spent time each week in childcare and/or eldercare, a finding that suggests that caregiving is now a shared responsibility for most Canadian families (n = 7,966).
- Employed caregivers also devote a substantial amount of their time to their work role. Sixty percent of our sample of caregivers devoted more than 45 hours per week to paid employment (n = 25,021).
- More than half the employees in the sample bring work home to complete in the evening and on weekends (supplemental work at home - SWAH) (n = 25,021).

### Implications and recommendations for employers

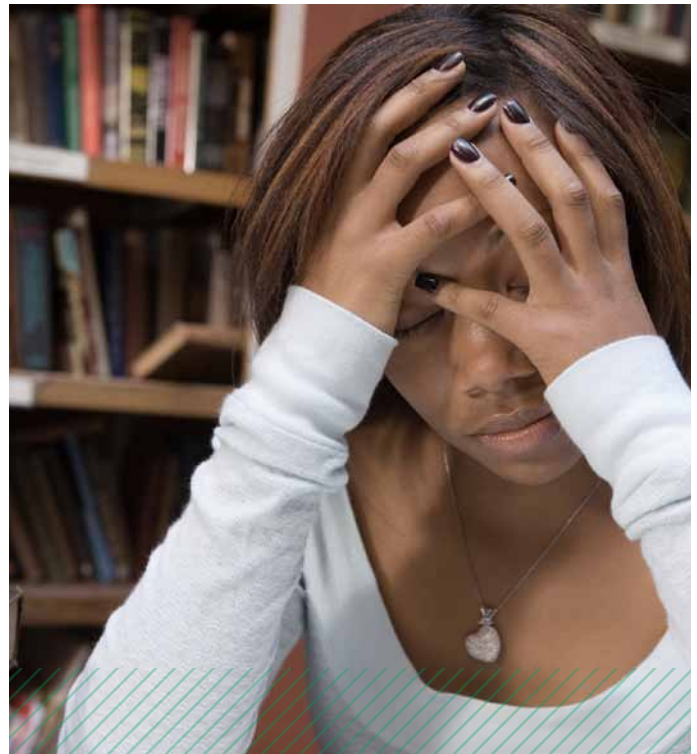
These data indicate that many employed caregivers try to do it all. They have added the demands associated with the caregiver role to the other demands they face at home (childcare) and work. Many cope by bringing work home to complete in the evening. Our study indicates that, for many knowledge workers, time for caregiving does not displace the time they devote to their work or their children. Rather, as we will note later in this section, these employees tend to give up on sleep, personal time and a social life. These demands, teamed with how they are coping, suggest that professionals with caregiving responsibilities are at higher risk for burnout and stress — a supposition that is also supported by the data. Employers who want to maintain the services of these employees need, therefore, to determine how best to support the work of employees in this situation.

The need to address this issue is reinforced by the data on role overload. Role overload is defined as “a type of role conflict that results from excessive demands on the time and energy supply of an individual such that satisfactory performance is improbable.” Analysis of our data has determined that overload is strongly linked to increased absenteeism, poorer physical and mental health, increased intent to turnover and higher benefits costs. Employees

*PROFESSIONALS WITH CAREGIVING RESPONSIBILITIES ARE AT HIGHER RISK FOR BURNOUT AND STRESS.*

who are overloaded are also less likely to agree to a promotion, attend career relevant training, and they often cut corners at work. Finally, employees who are time-crunched and whose demands are unremitting (e.g. no time to reflect, no downtime) are more likely to find these demands overwhelming. Forty percent of the 25,021 employees in our sample report high levels of total role

overload, 32% report high levels of work role overload and 26% are overloaded at home. Employees with caregiving responsibilities are more likely to report higher levels of all three forms of overload.



# 40%

FORTY PERCENT OF THE 25,021 EMPLOYEES IN OUR SAMPLE REPORT HIGH LEVELS OF TOTAL ROLE OVERLOAD.

JUST OVER ONE IN FIVE OF THE EMPLOYEES IN THIS SAMPLE STATED THAT THEY FIND ELDERCARE TO BE EMOTIONALLY OVERWHELMING ON EITHER A WEEKLY BASIS OR A DAILY BASIS.

## CAREGIVING AND EMOTIONAL STRAIN ARE HIGHLY LINKED

Caregiver strain is a multi-dimensional construct which is defined in terms of “burdens” or changes in a caregiver’s day-to-day life that can be attributed to the need to provide physical, financial, or emotional support to an elderly dependent. Research has linked high levels of caregiver strain to increased levels of depression, anxiety, fatigue, anger, family conflict, guilt, self-blame, emotional strain, and sleep loss.

The survey (n = 7,966) data paint the following picture of the prevalence of the various forms of caregiver strain for the knowledge workers in our sample:

- More employees report high levels of physical caregiver strain (29% report they experience this form of strain weekly or more) than report high levels of emotional or financial strain.
- Just over one in five of the employees in this sample stated that they find eldercare to be emotionally overwhelming on either a weekly basis or a daily basis.
- Only one in ten of the employees in this sample report high levels of financial caregiver strain. The relatively low incidence of this form of strain is likely due to the fact that the employees in this sample are relatively well-paid professionals.

During the interview, we asked employees how often caregiving caused them physical, financial and emotional strain. The majority of the respondents indicated that they rarely or never experienced physical strain (72%) or financial strain (78%) — findings that are consistent with what was observed in the survey data. By comparison, all of the caregivers in our interview sample reported experiencing emotional caregiver strain with just over a quarter stating that they experienced emotional strain daily — a much higher percent experiencing emotional strain than was observed with the survey data. The differences in emotional strain between these two samples can be explained by the fact that the interview sample was theoretically selected to include a much higher proportion of employees reporting high caregiving intensity (50%) than was found in the total sample (20%). These results suggest a strong link between caregiving intensity and caregiver emotional strain.



• Virtually everyone in the survey sample (n = 7,966) said they provided emotional/moral support to the dependent (i.e. emotional care).

• All of the caregivers in our interview sample reported experiencing emotional caregiver strain.

• Eighty percent of the individuals in the interview sample said that they found caregiving “overwhelming.” One in three said that they were overwhelmed on a daily basis. What makes caregivers feel overwhelmed? The most common reasons identified by the employees in this sample included: (1) their interactions with the person they were caring for (employees were frustrated that the person would not listen to them and was angry with them), (2) the emotional intensity of the situation (they felt powerless, the person was dying and they felt helpless, they had little control over the situation), (3) time and timing (it is unexpected, it is urgent, it requires a lot of my time), (4) demands (on their time, the amount of planning and work required), (5) emotional attachment (emotional intensity, concern for well-being of dependent), and (6) a lack of choice/control (feeling powerless, feeling trapped, only one available, it all fell on me). Very few respondents mentioned

**80%**  
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IN THE INTERVIEW  
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“OVERWHELMING.”

## CAREGIVING IS MORE ABOUT GIVING EMOTIONAL SUPPORT THAN “HELPING OUT”

Research suggests that the strain experienced by employed caregivers largely depends on the intensity of the caregiving situation. Most of the research in this area links intensity to the number of hours spent on caregiving and the types of tasks involved (longer caregiving hours, more years in caregiving, more time providing intensive basic care are all associated with greater strain). Our data show that it is not just time spent in the role that is important. Rather, we found a strong link between the emotional intensity of the situation and higher strain and stress. The following findings support this conclusion:

either distance or financial concerns as issues that made them feel overwhelmed.

• Caregiving appears to be associated with a number of negative emotions and feelings for the employees in our sample with almost half of the respondents (40%) indicating that their overriding feelings about the situation were anger and frustration. One in four felt worried/anxious (25%), guilty (22%), and overwhelmed/overloaded (22%). Others felt hopeless, powerless and trapped (15%) and concerned (13%). None of the respondents responded to this question by identifying a positive feeling (e.g. hopeful, useful). Also of note are our data showing that these frustrations often spilt over to how these employees interacted with colleagues and clients at work.

• All of the employees in our interview sample were able to identify ways in which the caregiving situation had impacted them personally. The most common response to this question related to the emotional aspect of caregiving (stress, anxiety, frustration). Others talked about how caregiving had/could negatively impact their health (less sleep, no downtime, negative impact on my health), their family (relationship with partner negatively

impacted, things in my life do not get done) or their career. What is striking is the fact that all talked about how caregiving had (or could) impact them negatively (no spontaneous discussion of benefits).

- Virtually all (94%) of the respondents said that high levels of caregiver strain came with emotional consequences. One in three said that the strain made them short-tempered and grumpy. Other emotional responses to strain mentioned by respondents included becoming drained, anxiety attacks, crying, depression, sadness, anger and frustration, feeling overwhelmed, and wanting to be alone.

### Implications and recommendations for employers

While increased flexibility in work hours might help the employee accomplish necessary caregiving activities, it is unlikely to help employees deal with the emotional consequences of caregiving. Unfortunately, our data determined that emotional caregiver strain was a much more important predictor of the various employee and organizational outcomes considered in this study than was time in eldercare per week and the types of care provided.

These findings lead us to recommend that employers who wish to ease this form of strain in their workforce consider the following types of assistance: EFAP, seminars on how to manage the emotional aspects of caregiving, lobbying for/taking responsibility for the provision of community centres in the communities where their employees live with activities and programs for seniors. If employers can offer support for daycare, they should also consider offering support for eldercare.

## THERE IS A COST TO ORGANIZATIONS WHEN EMPLOYEES CANNOT BALANCE WORK AND CAREGIVING

The data from this study support the idea that the inability to balance employment and caregiving will negatively impact the organization's bottom line and make it more difficult for companies to manage their human capital. The following data support these conclusions.

- The survey (n = 7,966) study determined that challenges balancing work and caregiving had contributed to a moderate/substantial increase in the likelihood that the knowledge workers in this sample would be absent from work (29%), use employee benefits (25%) and turn down a promotion (15%) as well as a moderate/substantial decrease in their work productivity (25%), and the number of hours they could devote to work (23%).
- Many organizations use absence from work as a measure of productivity (if workers are not on the job, the work is definitely not being done). Men and women in the sandwich group miss more days of work a year (13.4 for men and 19.4 for women) than employees with no dependent care (7.0 for men and 10.6 for women). It should also be noted that there is no difference

in absenteeism due to eldercare between those in the sandwich and eldercare stages of the life cycle when gender is taken into account.

- The majority of employees in the interview sample (60%) identified a number of ways in which their caregiving situation had negatively impacted either their productivity (e.g. less productive, distracted, not enough time, find it hard to focus at work) and/or their career (e.g. have to use vacation days to get time off, take sick days off work, fear that they will lose their job).
- The data from this study show that, while many employed caregivers in managerial and professional positions make every effort to minimize the impact of caregiving on their work, the strategies they use (e.g. calling in sick, using vacation days) may come at a personal cost in terms of exhaustion, stress etc.
- The knowledge workers in the interview sample identified a number of ways in which their work role conflicted with their caregiving role, the most common of which related to the heavy demands they faced at work, which became problematic when their employer made no concessions (e.g. did not adjust their workload, expected long hours, kept sending work-related emails to them at all hours and expecting an immediate reply) and when the timing of these demands conflicted with the demands associated with caregiving (e.g. could not get time off work to tend to the needs of their elderly dependent). In a related vein, many stated that this problem was exacerbated by the fact that their employer did not have any policies in place to allow employees time off for eldercare.
- Just under half the employed caregivers in the interview sample indicated that the challenges they faced with respect to caregiving had negatively spilt over into the work environment, either by having an adverse impact on how they deal with their work colleagues and clients and/or by reducing their productivity. More specifically, a plurality of the employees in the interview sample talked about how the emotional turmoil associated with caregiving had meant that they were less patient/social with their colleagues at work, inattentive to their work.
- A majority of this same group of employees saw a positive transference from the skills learned as a caregiver to the skills they needed to deal empathically, diplomatically and patiently with colleagues and clients at work. They also noted that the organizational and planning skills, crisis management skills and technical skills that they had acquired at work helped them fulfill their caregiving responsibilities. Also important is the fact that one in ten appreciated the fact that there was a social network in their workplace that had made them aware of the challenges posed by caregiving prior to their taking on the role, and had helped them cope with the challenges they faced.

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*THE CHALLENGES THEY FACED WITH RESPECT TO CAREGIVING HAD NEGATIVELY SPILT OVER INTO THE WORK ENVIRONMENT.*

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## Implications and recommendations for employers

The data from this study can be used by employers to make the business case for change in this area as they demonstrate how inattention to the caregiving needs of their workforce will impact their bottom line (e.g. increased absenteeism, increased use of the organization's benefit package, challenges with succession planning, declines in customer satisfaction, declines in productivity, increased conflict within the work group). They also point to a number of things that concerned employees can do to help balance their caregiving needs with the needs of the employer.

First, the employer needs to concretely recognize these challenges faced by caregivers by putting policies in place that address them including compassionate care leave, paid leave of absence and unpaid leave of absence. Second, it would appear from this study that employers who offer their employees technical, crisis management and project management training will not only create more skilled employees at work, but will also help caregivers manage their situation outside of work. Third, the data indicate that employers will benefit by facilitating the creation of caregiving support networks within their workplace.

This study indicates that organizations need to develop rules of etiquette for the use of email, especially outside regular work hours. Such rules are likely to benefit all employees, not just those with caregiving responsibilities.

## CAREGIVING NEGATIVELY IMPACTS THE HEALTH OF MANY EMPLOYED CAREGIVERS

The discussion above shows a strong direct link between caregiving and the organization's bottom line. Our data also indicate that caregiving can indirectly impact productivity by negatively impacting employees' physical and mental health. The following data support this assertion:

*Perceived stress* refers to the extent to which one perceives one's situation to be unpredictable, uncontrollable and burdensome. This study shows that both gender and life cycle stage are strongly associated with perceived stress. More specifically, (1) women report higher stress than men, regardless of life cycle stage, (2) dependent care (regardless of its form) is associated with an increase in stress, regardless of gender, and (3) men and women in the sandwich group report the highest levels of stress overall. For example, 68% of the women in the sandwich generation and 55% of the men report high levels of perceived stress — a higher percent with high stress than in the no dependent group (55% of women and 43% of men in this group report high stress), the childcare-only group (60% of women and 50% of men in this group report high stress), and the eldercare-only group (63% of women and 53% of men in this group report high stress).

*Depressed mood* is a state characterized by low energy and persistent feelings of helplessness and hopelessness. This study demonstrated the following links between gender, life cycle stage and depressed mood: (1) women report higher depressed mood than men, regardless of life cycle stage, (2) when gender is taken into account, childcare is not associated with depressed mood, (3) eldercare is associated with an increase in depressed mood for both men and women, and (4) men and women in the sandwich group report the highest levels of depressed mood overall. For example, 46% of the women in the sandwich group and 36% of the men report high levels of depressed mood — a higher percent with high depressed mood than in the no dependent group (35% of women and 27% of men in this group report high depressed mood), the childcare-only group (37% of women and 28% of men in this group report high depressed mood), and the eldercare-only group (43% of women and 33% of men in this group report high depressed mood),

Just under half (46%) of the 25,021 employees in our survey sample said that their health was very good to excellent. Our analysis shows that, while gender is not associated with perceived health, life cycle is. More specifically (1) dependent care, regardless of the type, is associated

with a decline in perceived health for both men and women, and (2) employees in the sandwich generation report the lowest levels of perceived health (only 39% of those in the sandwich group report that they are in good to excellent physical health, versus 54% in the no dependent care group, 47% in the childcare-only group and 43% in the eldercare-only group).

The interview data shed some light on the survey data. The majority (83%) of the interview respondents said that they experienced a number of physical consequences from caregiving, the most common of which (44%) was exhaustion and tiredness. Other complaints mentioned by a substantive number of respondents included headaches, nausea, insomnia, increase in blood pressure, aches and pains and tension in the shoulder and neck. Given this list of symptoms, it is not surprising that those with high levels of caregiver strain are absent from work more frequently and more likely to seek care from a physician.

Finally, the survey data (n = 7,966) determined that approximately one in three of the employed caregivers in this sample reported that caregiving had substantially reduced how much energy they had, the amount of time they spent in sleep and the amount of time they had for themselves. Again we note that those in the sandwich group were more likely to report all of these challenges than were their counterparts in the other three life cycle stages.

## Implications for employers

The above data reinforces the need for employers to address the needs of the employed caregivers in their workforce — particularly those in the sandwich group.

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# 83%

08 EIGHTY-THREE PERCENT OF THE INTERVIEW RESPONDENTS SAID THAT THEY EXPERIENCED A NUMBER OF PHYSICAL CONSEQUENCES FROM CAREGIVING.



## SUPPORT FROM EMPLOYERS: WHAT DO THEY DO? WHAT COULD THEY DO?

The data from this study suggests that very few employers are providing any form of support to the knowledge workers in their workforce with caregiving demands. A quarter of the interview respondents stated that they received no support whatsoever from their employer for the issues they faced balancing work and caregiving. Others noted a number of things that their employer did that they found helped them cope, including allowing the employee to take time off work/a leave of absence (35%) and use flextime or telework work schedules (18%). One in ten indicated that the EAP offered by their organization had really helped them cope with stress. When asked what the employer could do to help them manage this issue, the employees in this sample requested that their employer recognize eldercare as a legitimate work issue and allow them to take compassionate leave and/or work a four-day workweek.

### Implications and recommendations for employers

These data not only show that more needs to be done to support the needs of employed caregivers, but also concretely points to several things that might be helpful. Accordingly we recommend that employers who wish to address the needs of the employed caregivers in their workforce consider formal policies and practices for paid time off work for eldercare, formal leaves of absence for those experiencing high levels of caregiver strain, compassionate care leave, compressed workweeks, and enhanced EAP/EFAP. A formal policy framework in each of these areas will also communicate to management and staff that caregiving is a legitimate work issue. It should, however, be noted that the development of policies is, on its own, unlikely to make much of a difference. As such, we recommend that employers also focus on implementing these policies in a fair and transparent manner and link the use of these policies to managers' performance pay so that their use does not depend on job type or who one reports to.

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*VERY FEW EMPLOYERS ARE PROVIDING ANY FORM OF SUPPORT TO THE KNOWLEDGE WORKERS IN THEIR WORKFORCE WITH CAREGIVING DEMANDS.*

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## WOMEN ARE MORE LIKELY THAN MEN TO FIND THE ROLE OF EMPLOYED CAREGIVER VERY DEMANDING

There are a number of gender differences in these findings that are important to note:

- Women are more likely than men to be employed caregivers. More specifically, the female employees in the survey sample (n = 7,966) were twice as likely as the male employees to be in the sandwich generation and three times more likely to be in the eldercare-only group. This finding is particularly relevant given the fact that the men and women in the sample were approximately the same age.
- While the women in the sample (n = 7,966) spent more time per week in childcare than their male counterparts, gender was not related to the amount of time spent in eldercare.
- The men in the sample (n = 7,966) receive more caregiving support from their partners than their female counterparts, regardless of life cycle stage.
- While the men in the sample (n = 25,021) spent more hours per week in paid employment than their female counterparts, the average number of hours per week in paid employment was very high for both genders.
- The partners of the men in the sample spent fewer hours in paid employment per week than did the partners of the women in the sample (n = 25,021).
- The women in the sample (n = 7,966) took on more high-energy roles than the men, regardless of life cycle stage.
- Regardless of family type, the men in the interview sample were more likely than their female counterparts to engage in two types of caregiving: the provision of financial assistance and yard work — caregiving activities that are more typically done by men than women. They were also more likely to provide personal care and nursing care than their female counterparts — a finding that runs counter to what is reported in the literature.
- With one exception (home-yard maintenance) women were more likely than men to report they found all the caregiver roles examined in this study to be very demanding (n = 7,966). The gender difference with respect to the demands associated with the provision of emotional support is particularly large.
- The women in the sample (n = 25,021) reported higher levels of total role overload, family role overload, perceived stress and depressed mood than the men in the sample regardless of life cycle stage.
- Challenges in balancing employment and caregiving are more likely to have a negative impact on the women in the sample (less time for self, less time for sleep, loss of personal energy, reduction in their social life) than the men, regardless of life cycle stage (n = 7,966).
- Women are more likely than men to report that caregiving leaves them feeling fearful, guilty, strained and frustrated (n = 7,966).

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## IT IS MEN RATHER THAN WOMEN WHO ARE MORE LIKELY TO BE ABSENT FROM WORK DUE TO EMOTIONAL STRAIN AND FATIGUE... NEED TO PUT POLICIES AND PRACTICES IN PLACE THAT SUPPORT ALL EMPLOYEES — NOT JUST FEMALE CAREGIVERS.

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- Men with caregiving responsibilities (i.e. those in the sandwich and eldercare stages of the life cycle) are more likely than their female counterparts to be absent from work due to mental and emotional fatigue and report higher levels of work interferes with family (n = 25,021).

Finally it is important to note that, within family type, there were no gender differences in perceived physical health or work role overload. Nor were there any gender differences in the extent to which the caregivers in this sample stated that caregiving had negatively impacted the number of hours they spent in work or their productivity.

### Implications and recommendations for employers

The above data support the idea that female employees in Canada are more likely than their male counterparts to provide caregiving, a finding that is consistent with most of the research out there on the topic. In the past, when gender roles in society were strictly delineated, it seemed logical that women would do whatever was necessary to care for the family while men worked outside the home. Such is not the case today as Canada's workforce (and our sample of knowledge workers) is quite balanced with respect to gender. This would suggest that there has not been very much movement over time in how employees enact gender roles with respect to caregiving. That being said, it is also important to note that many of the men in the sample (particularly those men in the Gen X cohort) are experiencing serious challenges balancing employment and caregiving. In fact, the data showing that it is men rather than women who are more likely to be absent from work due to emotional strain and fatigue, and who report higher levels of work-life conflict, reinforce the need to put policies and practices in place that support all employees — not just female caregivers. This recommendation is important given the likelihood that the gender differences noted in this study will likely disappear altogether in the near future as many of the social and demographic changes mentioned earlier continue to take root and women in Canada continue to earn post-secondary degrees<sup>1</sup> at a faster rate than men.

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*ELDERCARE IS MORE LIKELY TO BE A FINANCIAL STRAIN IN FAMILIES WITH CHILDREN STILL LIVING IN THE HOME.*

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### EMPLOYEES WITH MULTI-GENERATIONAL CAREGIVING RESPONSIBILITIES ARE STRUGGLING

The high number of employees in our sample in both the sandwich and eldercare stages of the life cycle allow us to draw a number of important conclusions about the specific circumstances faced by knowledge workers with multi-generational caregiving responsibilities in Canada today. Key conclusions and observations are summarized below. Regardless of gender, employees in the sandwich generation:

- Were demographically distinct from the employees in the eldercare-only group. More specifically, employees in the sandwich generation were evenly split between the Gen X (40% are 30 to 45 years of age) and baby boomer (50% are over 45 years of age) cohorts. Most were married (88%), lived in dual-earner families and balanced the demands of parenting adolescents (5 to 12) and teenage children with often onerous eldercare demands. One in ten indicated that they had at least one elderly dependent living with them (11%) and a plurality (44%) had responsibility for three or more elderly dependents (41%).
  - Were more likely than those in the eldercare group to provide care for a parent and/or in-law who lived nearby. This finding might be attributed to the fact that either the respondent's parents and/or in-laws moved to live in the same community as their children, and/or the fact that the younger employees in this sample are more likely to live in the community where they grew up.
- Were more likely to say that money was tight in their family. This finding is particularly interesting given the data showing that, when gender is taken into account, employment income is not associated with family type. These findings suggest that taking on the role of eldercare is more likely to be a financial strain in families with children still living in the home.
- Were more likely than those in the eldercare group to say that they had assumed the role of caregiver because they lived near the dependent (pragmatic reasons) and because the dependent was experiencing health problems and needed care (no choice but to care).
- Engaged in a wider range of caregiving activities than those in the eldercare-only group. More specifically, they were more likely to provide emotional support, take their family member to appointments, shop and run errands for them, and do housework for them. Many of these activities are very time-consuming. There were no cases where those in the eldercare group were more likely than those in the sandwich generation to provide any of the types of caregiving examined in this study.

- Spent significantly more time overall in family activities than their counterparts in the eldercare group (approximately triple the amount of time) (n = 7,966).
- Were significantly more likely to take work home to complete in the evening and on weekends (supplemental work at home - SWAH) than their counterparts in the eldercare group (n = 25,021).
- Were more likely to be engaged in a higher number of high-energy roles than those in the eldercare group (n = 7,966).
- Were more likely than those in the eldercare group to spend time in the following caregiving demands: home/yard work, personal care and nursing care.
- Faced more challenges than their counterparts with only one caregiving role. More specifically they reported the highest levels of work, family and total role overload, the highest levels of stress and depressed mood, the highest incidence of both “work interferes with family” and “family interferes with work,” and the poorest levels of physical health in the total sample (n = 25,021). They are also more likely to be absent from work and to say that work-life balance issues had negatively impacted their productivity at work and increased their use of company benefits.
- Were more likely than those in the eldercare-only group to say that challenges with caregiving had led them to turn down a promotion and be absent more often from work.
- Miss more days of work a year than employees in the other three life cycle stages (women missed 19 days on average a year, men 13 days on average a year).
- Were more likely than any other group in the sample to say that their inability to balance work and family had resulted in a loss of time for sleep and social activities and a reduction in personal energy.
- Were more likely than those in the eldercare-only group to say that the time demands and the emotional intensity of the caregiving situation had left them feeling overwhelmed.
- Were 1.4 times more likely than those in the eldercare-only group to say that caregiving had negative implications for their career/job.
- Were 1.5 times more likely than those in the eldercare-only group to say that caregiving made them feel frustrated.
- More likely than those in the eldercare-only group to identify the following physical consequences of caregiving: tiredness, exhaustion, aches and pains and tension in the neck and shoulders.
- More likely than those in the eldercare-only group to talk about how caregiving had made them more short-tempered, grumpy, emotionally drained and avoid social contact.
- Were more likely to report that caregiving had negatively impacted their productivity at work — but also more likely to report positive spillover between the two roles.
- Were more likely than those in the eldercare-only group to say that the nature of their job (it is demanding, it never slows down, constant change, lots of deadlines) made it more difficult for them to balance work and caregiving.
- Were more likely than those in the eldercare-only group to say that their work demands conflicted with their personal demands in terms of timing and available energy.
- Were more likely than those in the eldercare-only group to say that it was difficult for them to get time off to deal with caregiving and that the “workplace policies are just not there.”
- Were more likely than those in the eldercare-only group to say that they either call in sick or use their vacation days to get the time off work that they needed to deal with the unpredictable challenges of caregiving.
- Were more likely than those in the eldercare-only group to experience emotional caregiver strain.
- Were more likely than those in the eldercare-only group to say that the stress of caregiving had meant that they were less patient with people at work (they also admit to being less patient at home).
- Were more likely than those in the eldercare-only group to ask their employer to introduce policies that recognize the needs of those with caregiving responsibilities. More specifically, they asked the company to make it possible for caregivers to take compassionate care leave and work a four-day workweek. Respondents who asked for a compressed workweek noted the value of having time during a weekday to do the running around required by the role (e.g. take parent to doctor, get groceries, get medication).

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*MORE LIKELY TO BE ABSENT FROM WORK AND TO SAY THAT WORK-LIFE BALANCE ISSUES HAD NEGATIVELY IMPACTED THEIR PRODUCTIVITY AT WORK AND INCREASED THEIR USE OF COMPANY BENEFITS.*

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*MORE LIKELY THAN THOSE IN THE ELDERCARE-ONLY GROUP TO SAY THAT THE STRESS OF CAREGIVING HAD MEANT THAT THEY WERE LESS PATIENT WITH PEOPLE AT WORK.*

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## OTHER CONCLUSIONS OF NOTE INCLUDE THE FOLLOWING:

- Regardless of the outcome being considered, people with no dependent care were “better off”, while those in the sandwich group were worse off.
- “Family interferes with work” appears to be more a function of childcare than eldercare (those in the childcare and sandwich stages of the life cycle are more likely to report this form of work-life conflict).
- Perceived stress appears to be more a function of childcare than eldercare (those in the childcare and sandwich stages of the life cycle are more likely to report high levels of perceived stress).
- Depressed mood appears to be more a function of eldercare than childcare (those in the eldercare and sandwich stages of the life cycle are more likely to report high levels of depressed mood).
- Employees in the childcare stage of the life cycle are more likely than their counterparts in the sandwich generation to miss work due to childcare. This difference might be due to the fact that these employees have younger children at home. Alternatively, it might be that elderly dependents are able to help employees deal with unexpected issues at home.

There were also a number of gender differences within the sandwich group that are worth noting. The women in the sandwich generation were:

- More likely than others in the sample to say that they took on the role of caregiver because of a lack of support services in their parents'/in-laws' community.
- Less likely than others in the sample to say that their partner spent time each week in eldercare, and more likely to have a partner who devoted long hours per week to paid employment — findings that are consistent with the data showing that these women are more likely to be part of a dual-career family.
- More likely than others in the sample to report very high levels of all three types of role overload. The high levels of family role overload experienced by the women in this group are particularly striking and probably account for the higher levels of total role overload experienced by this group of women. They are also consistent with the fact that the women in this group have higher total role sets, a partner who spends a lot of time in paid employment, higher work demands and receive less support from their partner for caregiving activities.
- More likely than others in the sample to say that caregiving had meant a moderate to substantial increase in their use of employee benefits and the amount they were absent from work.

- More likely than others in the sample to have sought care from their family physician — a finding that is consistent with the higher demands reported by these women.

Compared to the rest of the sample, the men in the sandwich generation, on the other hand:

- Were twice as likely to say that work-life challenges had caused them to turn down a promotion.
- Were more likely to be absent from work due to mental and emotional fatigue.
- Were more likely to report high levels of “work interferes with family.”

### Implications and recommendations for employers

The above findings support the idea that knowledge workers with younger children at home and elderly family members living nearby requiring care, who are also in their career ascendancy and working demanding jobs, will face more challenges balancing work and caregiving demands than older employees with perhaps more seniority and fewer demands on their time from children. The data also support the idea that employees in the sandwich generation are getting worn down by all the demands on their time and lack the resilience to emotionally separate the two domains. The fact that most do not perceive that their employer acknowledges this problem or has put strategies in place to address it exacerbates the situation for this group, many of whom attempt to cope by meeting

family and work role responsibilities at the expense of looking after themselves (e.g. getting enough sleep, socializing). This is unfortunate given the data from this study showing that trying to “do it all” will negatively impact sleep, energy levels, mental health and productivity levels.

These findings (which are summarized in Table 31) are a wake-up call to employers as the proportion of Canada’s workforce

with dual caregiving demands is likely to increase in the next decade as our population ages and knowledge workers continue to have their children in their thirties. The age distribution of the employees in our sample within the sandwich generation (half are younger employees in the Gen X cohort) also helps dispel the myth that older employees are the ones who are most likely to engage in caregiving activities. Taken together, these data emphasize the need for employers to deal with this issue in order to remain competitive. What can concerned employers do? Key recommendations arising from this comprehensive empirical study of employed caregivers are summarized on page 13.

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*THESE DATA EMPHASIZE THE NEED FOR EMPLOYERS TO DEAL WITH THIS ISSUE IN ORDER TO REMAIN COMPETITIVE.*

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## SUMMARY OF RECOMMENDATIONS ARISING FROM THIS STUDY

- 1 Employers who wish to address the needs of the employed caregivers in their workforce should consider creating formal policies and practices for paid time off work for eldercare, formal leaves of absence for those experiencing high levels of caregiver strain, compassionate care leave, compressed workweeks, and enhanced EAP/EFAP. A formal policy framework in each of these areas will also communicate to management and staff that caregiving is a legitimate work issue. It should, however, be noted that the development of policies is, on its own, unlikely to make much of a difference. As such, we recommend that employers also focus on implementing these policies in a fair and transparent manner and link the use of these policies to managers' performance pay so that their use does not depend on job type or who one reports to.
- 2 Employers should move beyond a "gendered" solution to this issue and recognize that balance is now an issue for all.
- 3 Employers should develop a flexible set of policies with respect to caregiving to reflect the diversity in caregiving situations in their workforce.
- 4 Employers should view developing policies and practices that address the needs of the caregivers in their workforce as a business imperative.
- 5 Employers should expand their EAP offerings to include specific supports for employed caregivers (e.g. eldercare referral services, counselling).
- 6 Employers should engage in educational efforts within the workplace to increase awareness of this issue in their management cadre.
- 7 Employers should offer seminars on how to manage the emotional aspects of caregiving within the workplace.
- 8 Employers should either lobby for/or take responsibility for the provision of community centres in areas where their employees live. These centres should offer activities and programs for seniors.
- 9 Employers should offer their employees technical, crisis management and project management training. Such training is likely to benefit all employees, not just those with caregiving responsibilities.
- 10 Employers should facilitate the creation of caregiving support networks in their workplace.
- 11 Employers should develop rules of etiquette for the use of email, especially outside regular work hours. Such rules are likely to benefit all employees, not just those with caregiving responsibilities.

Finally, our study revealed that virtually none of the employed caregivers that participated in the interview process could identify any type of government support (municipal, provincial or federal) offered to assist caregivers' efforts to support their elderly family members. This provides an opportunity for Canadian businesses to take ownership of an issue that is close to the heart of many Canadians — employed or retired. It is our hope that this report motivates Canadian businesses to add their voice to those who struggle to care for their elderly family members and help raise awareness of the issues faced by Canadian caregivers. Businesses can and should lead the charge for change in this area.



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*VIRTUALLY NONE OF THE EMPLOYED CAREGIVERS THAT PARTICIPATED IN THE INTERVIEW PROCESS COULD IDENTIFY ANY TYPE OF GOVERNMENT SUPPORT (MUNICIPAL, PROVINCIAL OR FEDERAL) OFFERED TO ASSIST CAREGIVERS' EFFORTS TO SUPPORT THEIR ELDERLY FAMILY MEMBERS.*

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**Table 31** IMPACT OF LIFE CYCLE STAGE (WHEN GENDER TAKES INTO ACCOUNT)

	No dependents
<b>Demographic Characteristics</b>	Predominately young (Gen Y and Gen X) single employees who live in larger cities
<b>Work Demands</b>	More likely to say that they wanted to work more hours for more money
<b>Family Demands</b>	Almost no time in family activities
<b>Total Roles</b>	Engaged in fewer roles
<b>Overload</b>	Lowest levels of work, family and total role overload
<b>Work-Life Conflict</b>	Lowest levels of “work interferes with family” and “family interferes with work”
<b>Employee Well-Being</b>	Employees in this group are in the best physical health
<b>Organizational Outcomes</b>	Employees in this group are less likely to miss work and less likely to report that work-life challenges had reduced productivity

KEY FACTORS TO TAKE INTO ACCOUNT)

Childcare	Sandwich	Eldercare
Predominately married employees in Gen X cohort with younger (under 5 and 5 to 12) children	Predominately married employees in Gen X/baby boomer cohort with adolescent (5 to 12)/teenage children More likely to be responsible for the care of three or more elderly dependents	Predominately single baby boomers who either have no children or have older children who do not live at home More likely to care for an elderly dependent in their home
	Spend more time in work-related activities More likely to perform SWAH More likely to say that email/office technology increased their stress and their workloads	
More time in dependent care	Most time in dependent care	Less time in dependent care
Engaged in a higher number of high-energy roles — spent the most energy in the parent role	Engaged in the highest number of high-energy roles	
Higher levels of family role overload	Highest levels of work, family and total role overload	
Highest levels of “family interferes with work”	Highest levels of “work interferes with family” and “family interferes with work”	
Higher levels of perceived stress	Highest levels of perceived stress and depressed mood and lowest levels of perceived health Most likely to have seen physician in last six months	Higher levels of depressed mood
Most likely to miss work due to childcare issues	Highest levels of absenteeism Most likely to report that work-life challenges had negatively impacted their productivity and increased their use of employee benefits	

# BALANCING WORK, CHILDCARE AND ELDERCARE: A VIEW FROM THE TRENCHES



Desjardins Insurance refers to Desjardins Financial Security Life Assurance Company