



July 2013

National Findings
Executive Summary Report

A stylized, light blue silhouette of a person with their arms raised in a 'V' shape, set against a darker blue background. The figure is centered and serves as a background element for the title.

Survey Overview

Methodology

- Penn Schoen Berland completed 4,000 telephone interviews among the following groups between April 4, 2013 and May 3, 2013:

Audience
General Population Samples 2013
National seniors 60+
National adults 18-59
Oversampled Audiences 2013
Low-income seniors 60+
Older seniors 80+
Seniors 60+ with 3+ chronic health conditions
Seniors 60+ in Birmingham, Ala.
Seniors 60+ in Indianapolis
Seniors 60+ in Los Angeles
Seniors 60+ in Orlando, Fla.
Seniors 60+ in San Antonio



Methodology

- This report is inclusive of the following audiences:

Audience	Definition	Sample Size	Margin of Error
General Population Samples			
National 60+ 2013	U.S. adults ages 60 and older	1,007	+/- 3.1%
National 60+ 2012	U.S. adults ages 60 and older from 2012 study	1,000	+/- 3.1%
National 18-59	U.S. adults ages 18-59	1,000	+/- 3.1%
Oversampled Audiences			
Low-income seniors	U.S. adults ages 60 and older with household income of <\$15,000	378	+/- 5.0%
Older seniors	U.S. adults ages 80 and older	441	+/- 4.7%
Seniors 3+ chronic health conditions	U.S. adults ages 60 and older with 3 or more chronic health conditions	685	+/- 3.7%



Methodology

- **Please note:**

- Data from general population samples, the regional oversampled audiences, and the oversampled audience of seniors ages 80 and older are weighted to U.S. Census Bureau data. The following demographics are weighted:
 - Age
 - Gender
 - Income
 - Marital status
 - Race
- Sample sizes under n=75 are not shown, as these sample sizes are too small to be statistically reliable
- All numbers in this report are percentages unless otherwise noted
- N/A indicates that the answer choice was not asked in the 2012 national 60+ survey



The background is a solid teal color. Overlaid on this is a large, faint, light-blue graphic. It depicts a person with their arms raised in a 'V' shape, and a large hand pointing downwards towards the center of the image. The text 'Key Themes' is centered over this graphic.

Key Themes

Key Themes

General Outlook

The 2013 survey finds that seniors have maintained a positive outlook on their future and the aging process

Health Preparedness

Most seniors express little concern about their current health status, and many are not investing in activities that are important to help manage their health for the long term

Financial Security

Most seniors are comfortable with their financial situation today, but express concerns about the financial impact of living longer

Community Support

Many seniors agree their community is responsive to the needs of seniors, yet less than half are confident in their community's preparedness for the growing senior population. Seniors also say that staying connected with family and friends is important to maintaining a high quality of life

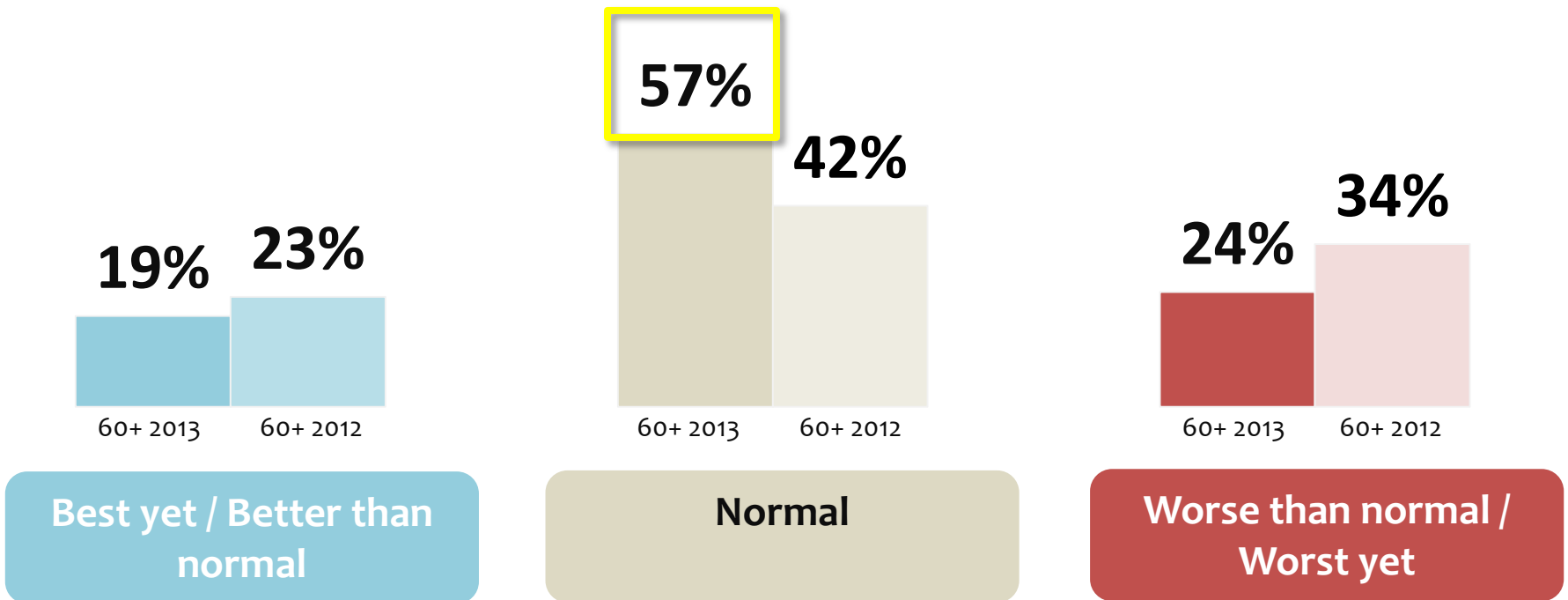


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General Outlook


A majority of seniors state that overall, the past year of their life has been “normal”

In general, would you say the past year of your life has been...?



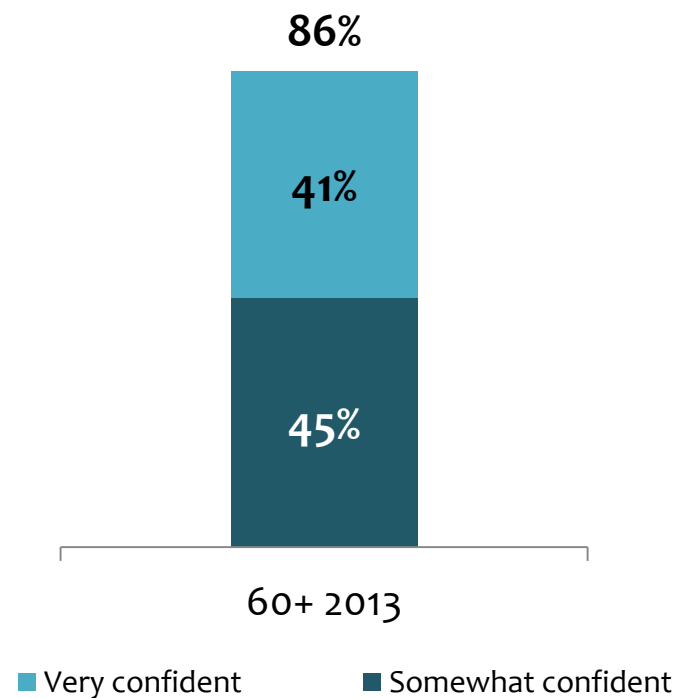
*Not showing “don’t know”
Q4 (For 60+ 2013). In general, would you say the past year of your life has been...? Among All.
Q5 (For 60+ 2013). In general, would you say the past year of your life has been...? Among All.

Seniors are confident about their ability to maintain a high quality of life



86% of seniors
are confident
about their ability
to maintain a high
quality of life

How confident are you in your ability to maintain a high quality of life throughout your senior years?



Seniors agree on several key points about growing older

Seniors ages 60 and older ...



83% state that it is very or somewhat important for seniors to use technology



67% say they have never felt isolated from others

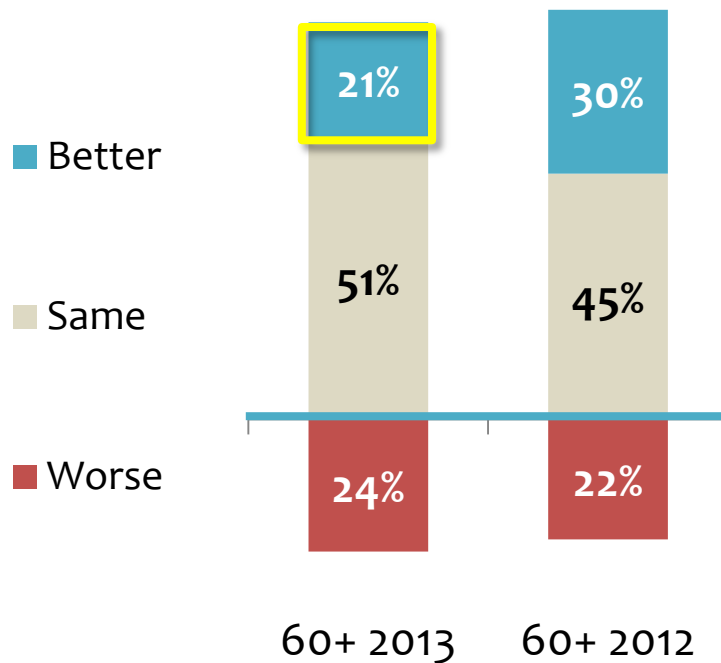


40% believe that staying connected to friends and family is most important to having a high quality of life

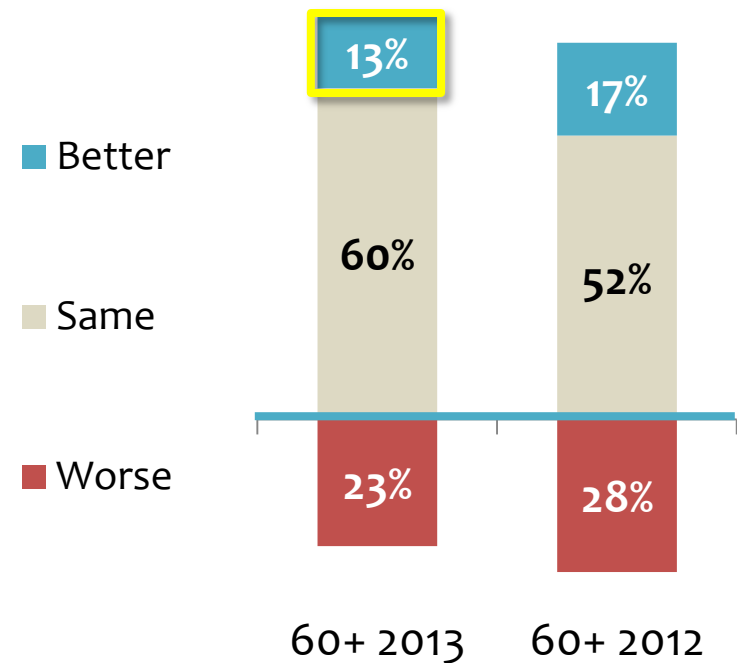


Fewer seniors believe their quality of life and health will improve in the next five to 10 years compared with 2012

When thinking about the next five to 10 years, do you expect your overall quality of life to get ...



When thinking about the next five to 10 years, do you expect your health to get ...



*Not showing "don't know"

Q5 (For 60+ 2013). When thinking about the next 5-10 years, do you expect your overall quality of life to get much better, somewhat better, stay about the same, get somewhat worse, or get much worse? Among All.
 Q6 (For 60+ 2013). When thinking about the next 5-10 years, do you expect your overall quality of life (including your financial well-being, mental and physical health, recreation and leisure time, and family situation) to get much better, somewhat better, stay about the same, get somewhat worse, or get much worse? Among All.
 Q7 (For 60+ 2013). When thinking about the next 5-10 years, do you expect your health to get much better, get somewhat better, stay about the same, get somewhat worse, or get much worse? Among All.
 Q8 (For 60+ 2013). When thinking about the next 5-10 years, do you expect your health to get much better, get somewhat better, stay about the same, get somewhat worse, or get much worse? Among All.

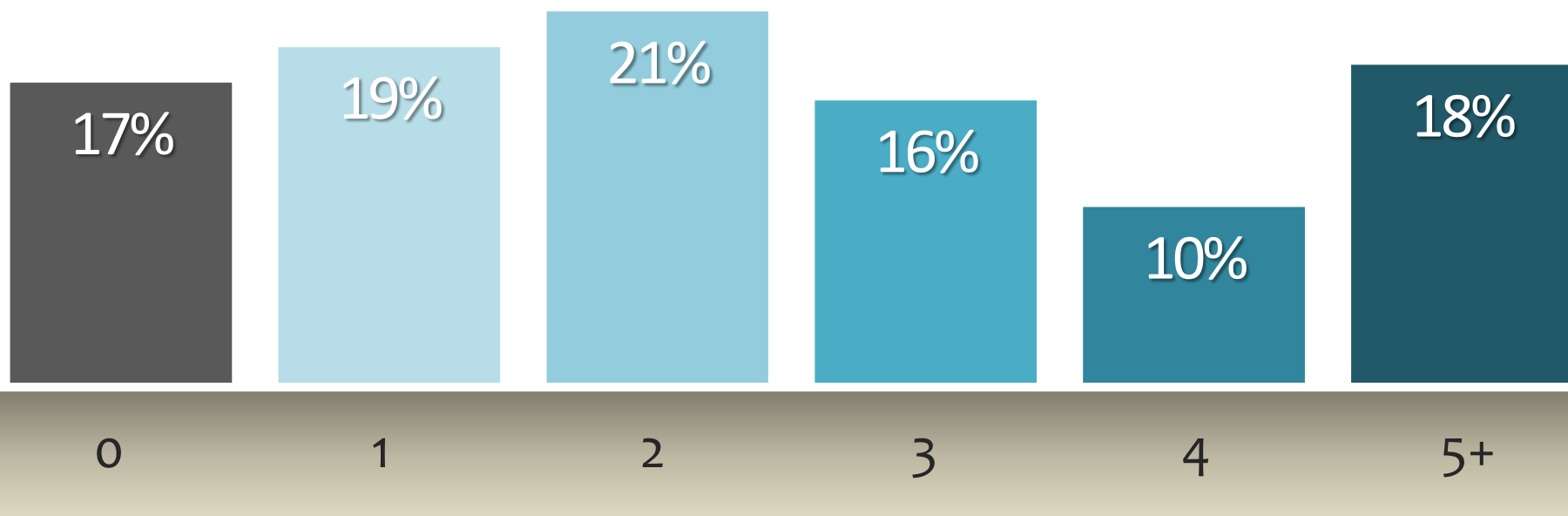
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Health Preparedness

Most seniors 60 and older report they have two or more chronic health conditions

Number of Chronic Health Conditions

65% report they have two or more chronic health conditions

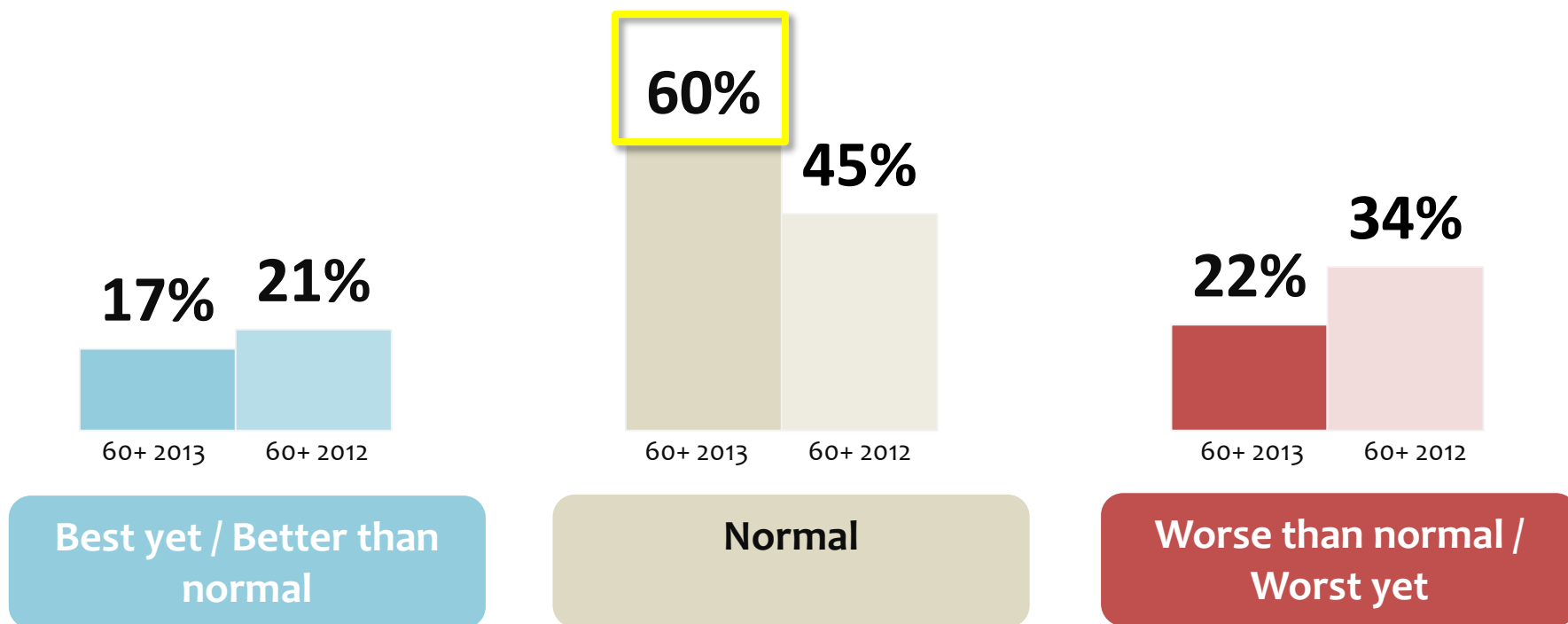


Among National 60+ 2013



Six out of 10 seniors say their health has been normal in the past year

With regard to your health, would you say the past year of your life has been...?



*Not showing "don't know"

Q6 (For 60+ 2013). With regard to your health, would you say the past year of your life has been... Among All.

Q7 (For 60+ 2013). With regard to your health, would you say the past year of your life has been... Among All.

Most seniors express little difficulty in performing regular living activities independently



84%

say it is **not very or not at all difficult** to perform regular activities independently

How difficult is performing regular independent living activities such as leaving your home or moving around the house freely without the assistance of any device or person?	National 60+ 2013
Not at all difficult	76%
Not very difficult	8%
Somewhat difficult	11%
Very difficult	4%



*Not showing “don’t know”

Q31 (For 60+ 2013). How difficult is performing regular independent living activities such as leaving your home or moving around the house freely without the assistance of any device or person? Among All.

Many seniors have not received help to develop an action plan to manage their health in the past 12 months

Seniors ages 60 and older ...

51% *have not set any specific goals to manage health in the past 12 months*



43% *have not taken any steps toward preventing falls*



19% *received help to develop an action plan to manage problems with health in the past 12 months*



18% *never exercise for 30 minutes or more*



Q32 (For 60+ 2013). In the past 12 months, which of the following have you done to reduce your chance of a fall? Among All.

Q33 (For 60+ 2013). How often do you typically exercise for 30 minutes or more? Among All.

Q34 (For 60+ 2013). In the past 12 months, did you set one or more specific goals to manage your health? Among All.

Q36 (For 60+ 2013). In the past 12 months, did you receive help to develop an action plan for how to manage problems with your health? Among All.

Seniors who are focused on taking care of their health are more optimistic about aging

National
60+ 2013

Optimistic
seniors*

47% vs.

64%

have set specific goals to manage their health in the past 12 months



19% vs.

27%

received **help to develop an action plan** to manage their health in the past 12 months



*Optimistic seniors are defined as seniors who expect their overall quality of life to improve in the next five to 10 years

Key demographics:

- Optimistic seniors over-index female (65% vs. 55% of national 60+ 2013)
- Optimistic seniors over-index African American (18% vs. 8% of national 60+ 2013)

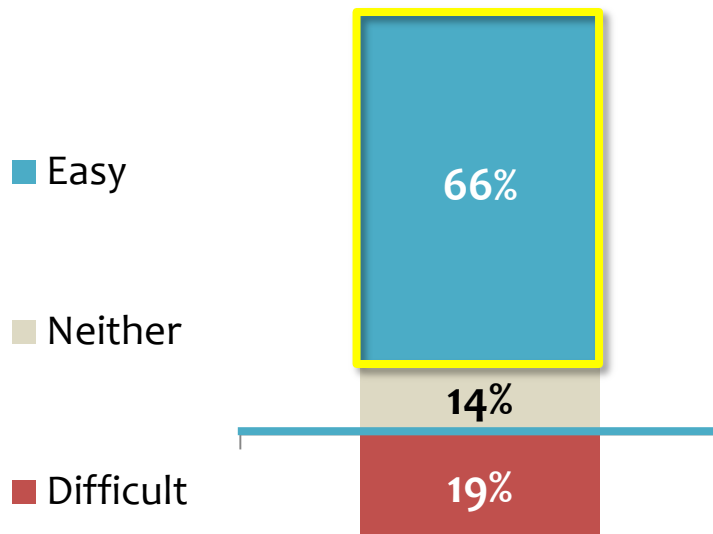


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Financial Security

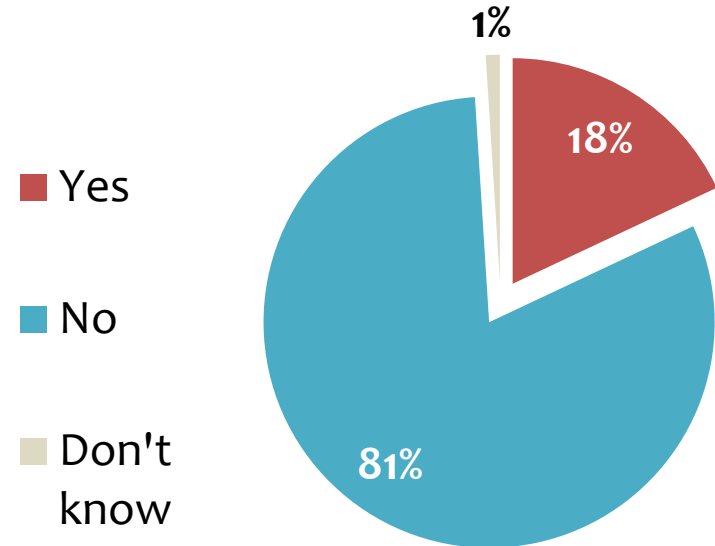
A majority of seniors say it is easy to pay monthly living expenses and most have not had to reduce spending to pay a monthly bill

In general, based on your current income and savings, how easy or difficult is it for you to pay your monthly living expenses?



60+ 2013




In the past year, did you have to reduce your regular spending to pay a regular monthly bill?



60+ 2013



Many seniors rely on Social Security as their primary source of retirement income, compared with adults ages 18-59 who plan to rely more on savings and investments

Primary Source of Retirement Income (Showing top 3)	Among retired seniors	Among not-retired seniors	Among not-retired adults 18-59
 Social Security	43%	41%	23%
 Company or government pension	32%	21%	19%
 Savings & investments	13%	30%	48%



Q24 (For 60+ 2013 and 18-59 2013). And of those, which will be your primary source of retirement income? Among those not retired + selecting more than 1 choice in Q23 (60+: N=288; 18-59: N=626).

Q26 (For 60+ 2013). And of those, which is your primary source of retirement income? Among those retired + selecting more than 1 choice in Q25 (60+: N=476).

More than half of seniors are concerned about whether their savings and income will be sufficient to last the rest of their life



53%

say they are
**concerned about
whether their
savings & income**
will be sufficient
to last for
the rest of their life

How concerned are you that your savings and income will be sufficient to last for the rest of your life? Are you...	National 60+ 2013
Very concerned	22%
Somewhat concerned	31%
Neutral	12%
Not very concerned	15%
Not at all concerned	18%





Community Support

Seniors agree their community is supportive, but many lack confidence in their community's preparedness to meet the future needs of the growing senior population



71% of seniors 60 and older feel their **community is responsive** to the needs of seniors

33% of seniors 60 and older do not believe their **community is doing enough to prepare** for the future needs of the growing senior population



Q58 (For 60+ 2013 and 18-59 2013). Do you feel your community – meaning the city/town you live in – is doing enough to prepare for the needs of a growing Senior population? Among All.

Q59 (For 60+ 2013). Do you feel your community is responsive to the needs of seniors? Among All.

Adults ages 18-59 are less likely to believe their community is prepared to meet the future needs of the growing senior population



33% of seniors 60 and older do not believe their **community is doing enough to prepare** for the future needs of the growing senior population

45% of adults 18-59 do not believe their **community is doing enough to prepare** for the future needs of the growing senior population



Seniors believe more investments should be made in transportation, health care and housing to support seniors

Seniors believe their city/town should invest more in ...

Transportation



26% say
“better transportation
options”

Health Care Services



23% say
“affordable health care
services”

Housing



23% say
“affordable housing”



For seniors, staying connected to family and friends is more important than having financial means in their senior years

Top 3 aspects to having a high quality of life in their senior years

Staying connected to friends and family **40%**

Having financial means **30%**

Staying mentally active **26%**

Top 3 aspects that excite them most about living a longer life

Seeing children and grandchildren grow up **41%**

Spending time with friends and family **20%**

Having time to do the things I enjoy **18%**



Q80 (For 60+ 2013). Of the following choices, which are most important to having a high quality of life in your senior years? Please tell me your top two choices. Among All.

Q83 (For 60+ 2013). And what excites you most about living to a longer life? Among All.

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Additional Insights

Opportunities for health improvement are greatest among low-income seniors

National
60+ 2013

Low-income
seniors

52%

vs.

74%

have a barrier in managing their health condition
(among those with 1+ chronic health conditions)



18%

vs.

27%

never exercise for 30 minutes or more



9%

vs.

20%

are not confident they can keep their health conditions from interfering with their lives
(among those with 1+ chronic health conditions)



3%

vs.

8%

have not seen any health care professionals in the past year



Q33 (For 60+ 2013). How often do you typically exercise for 30 minutes or more? Among All.

Q41 (For 60+ 2013). Which of the following types of health care professionals have you seen in the past year? Please tell me all that apply. Among All.

Q48 (For 60+ 2013) How confident are you that you can keep any other symptoms or health problems you have from interfering with the things you want to do. Among those with 1+ chronic condition (60+: N=842).

Q49 (For 60+ 2013). Which, if any, of the following barriers do you experience in managing your health conditions? Please tell me all that would apply. Among those with 1+ chronic condition (60+: N=842).



Older seniors, similar to seniors nationally, express little difficulty in performing regular living activities independently



78%

of older seniors
say it is **not very
or not at all**
difficult to perform
regular
activities
independently

How difficult is performing regular independent living activities such as leaving your home or moving around the house freely without the assistance of any device or person?	National 60+ 2013	Older seniors
Very difficult	4%	5%
Somewhat difficult	11%	17%
Not very difficult	8%	17%
Not at all difficult	76%	61%



*Not showing "don't know"

Q31 (For 60+ 2013). How difficult is performing regular independent living activities such as leaving your home or moving around the house freely without the assistance of any device or person? Among All.

Older seniors are less likely to report financial anxieties than seniors ages 60 and older

National 60+ 2013

Older seniors 80+



Saying they have **not had to reduce their regular spending** to pay a regular monthly bill

81%

84%

Saying they are **concerned about the sufficiency of their savings and income** to last for the rest of their life

53%

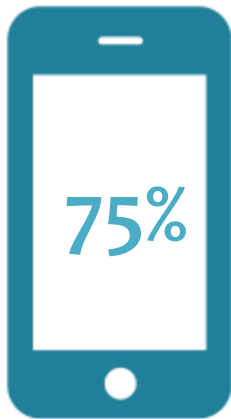
44%



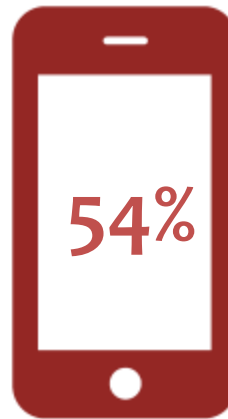
Low-income seniors and older seniors may be missing out on the connective power of technology

Which of the following technology do you use frequently?
Showing those saying “cell phones”

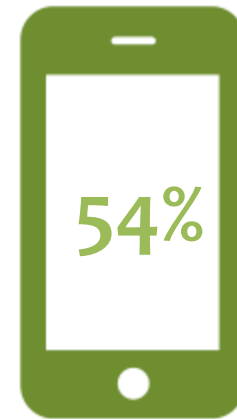
**National 60+
2013**



**Low-income
seniors**



**Older
seniors**



Among low-income seniors, the biggest barriers to using more technology are:

1. Not understanding how to use it (48 percent)
2. Cost (47 percent)

