

## **Needs Assessment**

ElderSource, the Northeast Florida Area Agency on Aging, contracted with the University of North Florida to conduct a Needs Assessment of three groups of stakeholders in their 7-county Planning and Service Area (PSA): Seniors, caregivers, and baby boomers. The PSA includes Baker, Clay, Duval, Flagler, Nassau, St. John's, and Volusia Counties. The needs assessment is critical to the planning process and will provide much-needed empirical data upon which to base the planning efforts of the agency.

# **A Needs Assessment of Seniors, Caregivers, and Baby Boomers in Northeast Florida, 2007**

**Prepared for ElderSource, The Northeast Florida Area Agency on  
Aging**

**By:**

**Adam D. Shapiro, Ph.D.  
Associate Professor of Sociology and Chair  
Department of Sociology & Anthropology  
University of North Florida**



4567 St. Johns Bluff Road, South  
Jacksonville, FL 32224  
(904) 620-1653  
ashapiro@unf.edu

## EXECUTIVE SUMMARY

An assessment of the needs of seniors, baby boomers, and caregivers in the 7-county PSA of Northeast Florida was undertaken by the University of North Florida. A representative telephone survey of 1,201 persons in the PSA was conducted along with two focus groups of caregivers and in-depth interviews of key informants in the field of aging services. The survey has a margin of error of +/- 4%. The survey consists of completed interviews with 601 baby boomers (those between the ages of 42 and 59), 600 seniors (age 60 and older). 190 caregivers were also identified within the age groups of respondents.

### Key Findings for Seniors

**Meeting seniors' physical and mental health needs is a key concern for seniors.** A sizeable number of seniors in Northeast Florida have experienced recent physical health problems, affordability of medications, and feelings of loneliness and depression. Overall, seniors in this sample were in relatively good health, but there was a sizeable incidence of falls. There is no evidence to suggest that affordability is a barrier to care. Thus, the concern here is that many seniors may be experiencing problems that negatively impact their quality of life.

**Nutritional needs do not appear to be dramatically unmet in this sample of seniors.** Very few seniors report not being able to regularly eat the kinds of foods that are nutritionally correct.

**The overall level of ADL limitations was low in this sample of seniors.** The most commonly problematic activities were those involving heavy housework, home repair, yard work, and housekeeping. The most resource-intensive ADL limitations (i.e., toileting, bathing, getting in and out of a chair) were limited to roughly 2-4% of seniors.

**Transportation problems affected roughly 10% of seniors.** According to respondents, common barriers to meeting the need for transportation include availability, having to rely on others, needing assistance getting to the transportation site or onto a car/van/bus, and being unable to be transported where seniors need to go.

**Seniors receive a great deal of both practical and social support, particularly from family and friends.** Support from family and friends plays a vital role in seniors' lives in Northeast Florida. To a lesser degree, seniors also receive quite a bit of support from church/spiritual groups, neighbors, clubs/social groups, and non-profit agencies.

**Seniors are active consumers of information.** Seniors report learning about services or activities for seniors from a variety of sources including newspapers, senior publications, television, and the internet. This suggests that there are active and effective channels to communicate with seniors about activities and services that might interest them.

**It is clear that seniors provide valuable contributions to their communities.** In particular, they are a vital segment of local economies and they serve as key resources for volunteerism.

**Despite these contributions, it is clear that many needs of seniors are not currently being met, particularly transportation and caregiving.** Transportation issues are problems in both urban and rural areas as a result of low funding levels, high demand, and complexity of the public transportation system. The major barriers to caregiving tend to be concentrated in the adequate training of caregivers and the respite needs of family caregivers.

**Rural communities have somewhat different problems than non-rural areas.** These differences stem mainly from increase per unit service costs and limitations of services.

**Many informants have a pessimistic outlook on the future of aging services in their area of the state.** They see baby boomers flooding the senior services system, funding levels remaining stagnant, quality of services deteriorating, and for-profit entities taking over.

**The issues of cultural sensitivity and diversity clearly need to be addressed in meeting the needs of seniors.** There was a sense among many informants that minority populations are increasing, but yet the distinct needs of these seniors are not being considered. Coupled with a climate of racism in some communities portends negative results, according to some informants.

#### Key Findings for Caregivers

**Nearly one-quarter of caregivers were providing care for two or more persons.** Considering the earlier findings from key informants that the respite is an underserved need, the implications of caring for more than one person can be severe. This underscores the importance of being attentive to the needs of caregivers given their difficult job.

**Relatedly, caregivers report a good deal of emotional and physical strain as a result of their caregiving duties.** This may be explain, in part, by the lack of familial support, interference with personal time, balancing work and family demands, all of which are reported by caregivers in this study.

**Caregivers report a great deal of difficulty with understanding the complex array of programs designed to help them and the care recipient.** Caregivers noted difficulty with understanding Medicare, Medicaid, and other programs, as well as legal issues. This underscores the need for policy makers to make the enactment of caregiving roles more “user friendly” and to help caregivers better navigate the terrain of eldercare.

**Overall, caregivers would like an organized central location that streamlines all services available to them.** The focus group participants feel that this would eliminate the current shuffle through the maze of services, allowing them access to all information at once. They also feel that this would organize and merge services together for a more efficient processing of documentation and could possibly eliminate the need for completing multiple forms.

**Being able to support each other was another reoccurring theme within both focus groups.** Caregivers seemed willing and wanting to talk about their experiences and felt that support groups would be a good resource for this emotional support. Having an outlet where caregivers

could come together and information to contact other caregivers would be very useful in developing caregiver support groups.

**Almost all focus group participants feel that respite care or “aid” is one of the most important services that they can receive.** This type of care gives them a break and allows them to tend to other tasks such as grocery shopping, bills and cleaning. This type of care is also important as caregivers find it difficult to bath and dress their elderly patients. Participants would like to have more of this care and for longer duration.

**Within Clay County, focus group participants mentioned transportation as an issue due to the rural aspect of the county, day care or elderly care centers are far away.**

### Key Findings for Baby Boomers

**Keys to successful aging for baby boomers include financial well-being, health care, transportation, affordable housing, recreational opportunities, and opportunities for social interaction, among others.** Least important were libraries, educational opportunities, and daily task help. It should be noted that there was little consensus on this issue. Baby boomers felt as though many things were important to helping them age well.

**Baby boomers were relatively health and were fairly confident that they would reach old age.** Boomers reported being physically active and had high self-rated health. These findings could suggest that indeed there is a strong likelihood of baby boomers living well into their 80s and 90s, perhaps with fewer chronic ailments than the generation who preceded them.

**Baby boomers were fairly confident that they would be financially solvent in old age, but many worry about the availability of Social Security and the cost of health insurance an long-term care.** Although most boomers did not believe they would need assistance from their family, many expressed concern about the solvency of Social Security and the cost of health care.

**Almost all baby boomers are retired or expect to retire.** Only 6% of baby boomers do not anticipate retirement. The average expected age of retirement is 65.

**Baby boomers have strong social support networks.** Nearly 88% of baby boomers in this study report receiving ‘a lot’ of social/emotional support from at least one source during the past year.

# **A Needs Assessment of Seniors, Caregivers, and Baby Boomers in Northeast Florida, 2007**

## **Background and Study Purpose**

ElderSource, the Northeast Florida Area Agency on Aging, contracted with the University of North Florida to conduct a needs assessment of three groups of stakeholders in their 7-county PSA: Seniors, caregivers, and baby boomers. The PSA includes Baker, Clay, Duval, Flagler, Nassau, St. John's, and Volusia Counties. The needs assessment is critical to the planning process and will provide much-needed empirical data upon which to base the planning efforts of the agency.

The target population for the needs assessment includes those individuals within the 7-county PSA who met the following characteristics:

- (A) Elders: Community-dwelling individuals ages 60 and over.
- (B) Baby Boomers: Community-dwelling individuals between the ages of 43 and 59.
- (C) Family Caregivers: Community-dwelling individuals who are informal providers of in-home and community care of elders.

## **Methodology**

The diversity of social and economic characteristics of residents in the PSA necessitates that a variety of assessment methodologies be employed. Because efficiency of data collection needed to be maximized, we selected methods that would maximize valid and reliable measurement in the most expeditious time frame. We conducted a representative telephone survey, key informant interviews, and focus groups as the primary means of data collection.

### **Telephone Survey**

Telephone surveys were selected to be utilized because this method provides for a large representative sample of a diverse population that can be completed in a relatively short period of time. In addition, given that much of the PSA is rural and that face-to-face assessment of rural populations is inefficient and impractical, the telephone survey method will ensure that those from rural counties will be sampled. To ensure adequate numbers of cases from underrepresented groups, we oversampled racial/ethnic minorities and rural dwellers (150 quota each) in order to provide a more reliable and generalizable portrait of the true demographic profile of the PSA.

The telephone survey was conducted by the Public Opinion Research Lab (PORL) at the University of North Florida, which is under the supervision of Dr. Matthew Corrigan. The project PI had full oversight of the project.

### *Data Collection Procedure*

A sample of the study population (referred to as the “Polling Universe”) was selected through the use of Random-Digit-Dialing (RDD) methodology. Using telephone exchanges and geographic regions, the Universe is separated into strata to ensure proportional geographic representation in the sample of the seven counties to be studied. Using population statistics from the 2000 Census, the required number of completions per stratum is calculated in order to achieve representation across the counties.

The survey was conducted through the use of Computer Assisted Telephone Interviewing (CATI), a software package that allows the researchers to maintain quality data collection by automatic data tabulation at a 27-station polling laboratory at the University of North Florida. For all non-refusals that were not completed (i.e. busy, not home, etc.) six attempts per household were made to gain interview completion. The survey was in the field from February 5, 2007 to February 26, 2007. The average completed interview time was 9 minutes.

The structure of the target population and corresponding completed interview quotas are as follows:

- Elders 60 and older: 600 completed interviews
- Baby Boomers: 601 completed interviews
- Caregivers: 150 completed interviews <sup>1</sup>

In addition, we oversampled the following sub-groups within each element of the target population in order to achieve greater representativeness:

- 150 minorities <sup>2</sup>
- 150 rural dwellers

### *Questionnaire Construction*

Prior to commencing data collection, an original questionnaire was designed. The questionnaire was designed to screen for the desired respondents (i.e elderly respondents and baby-boomers). The questionnaire was primarily closed-ended and was developed with the goal of ascertaining basic socio-demographic information as well as the assessment of an array of needs that respondents may have.

---

<sup>1</sup> The number of caregivers selected as a quota is smaller than the other population groups because the proportion of caregivers in the population is substantially smaller than the proportion of elders or boomers. It has been estimated that approximately 17% of U.S. households with a telephone have a caregiver (National Alliance for Caregiving and the American Association of Retired Persons. *Family Caregiving in the U.S.: Findings from a National Survey*, 1997.). Thus, the costs associated with significantly increasing the quota of caregivers – which would necessitate significantly higher number of attempts – does not necessarily produce significantly more statistically generalizable results.

<sup>2</sup> We employ Spanish speaking interviewers to ensure ethnic representation.

A first draft of the questionnaire was pre-tested by introducing the first draft to a small number of potential respondents. The interviewers were debriefed and patterns of responses were analyzed. Modifications to the instrument were made prior to commencing the final survey. The final questionnaires were formatted and programmed into a computer using Wincati assisted telephone software (a software package that allows us to maintain quality data collection by automatic data tabulation).

### *Generalizability of Results*

The statistical margin of error<sup>3</sup> of the results is +/- 4%. This margin of error is consistent with those of other large-scale scientific studies of large and diverse populations. For the oversample data, the margin of error will be slightly higher. The data presented in this report are unweighted.

### Key Informant Interviews

Key informant interviews were implemented to supplement the findings from the survey and centered on the needs of seniors. Key informant interviews rely on data collected from community experts – those who work with seniors on a regular basis. These persons can include public officials; directors, staff members or managers from social service organizations; or practitioners/clinicians. The interviews were open-ended, seeking to maximize the range of possible subjects covered. We attempted to contact several key informants from throughout the PSA to get a range of areas and service needs (i.e., rural vs. urban, high concentration of seniors vs. low concentration of seniors).

In total, five key informant interviews were conducted representing three different counties within the PSA. A key informant interview script was developed and was used as a guide (see Appendix). Interviews averaged approximately 30 minutes and were conducted by telephone.

### Focus Groups

Focus groups are a form of qualitative analysis. Focus groups are groups of 8-20 people who are recruited for discussion sessions based upon common characteristics. The group must be small enough for everyone to provide insights while at the same time large enough to provide a diversity of perceptions. Focus groups can be used in conjunction with public opinion surveys or other systematic analyses. The advantage of focus groups is that the moderator is allowed to probe beyond the restrictions of short survey questions. The focus groups for this project concentrated on the needs of caregivers in Northeast Florida.

The moderator will move from the general to the specific. The moderator should not dominate the discussions but allow the group to address most of the topics on the discussion list. The moderator is present to guide the discussion and attempt to include all participants in each of the topics. Participants also sign a form stating that they understand that these sessions are being recorded by hand. Subjects were recruited from a list provided by ElderSource. Persons on this

---

<sup>3</sup> The margin of error can be defined as the measurement discrepancy between the values of a characteristic in the population and a characteristic of a sample.

list were currently caring for people enrolled for services either through the state general revenue program or the Older Americans Act Title 3E.

#### Focus Group Locations:

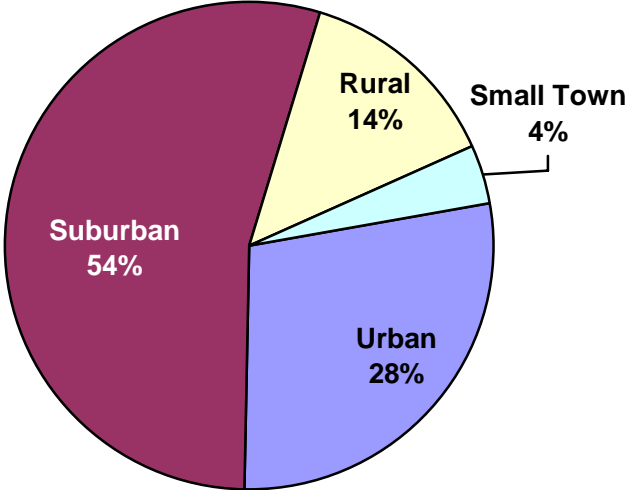
1. Duval County Caregivers  
COAS Conference Room--University of North Florida, Jacksonville Florida
2. Clay County Caregivers  
Meeting Room—Headquarters Library, Orange Park Florida

Two focus groups in two different areas were chosen for geographical representation within both rural and urban areas. Participants were identified by ElderSource as caregivers and contacted for participation by the University of North Florida. Each focus group was conducted systematically using the following 4 procedures:

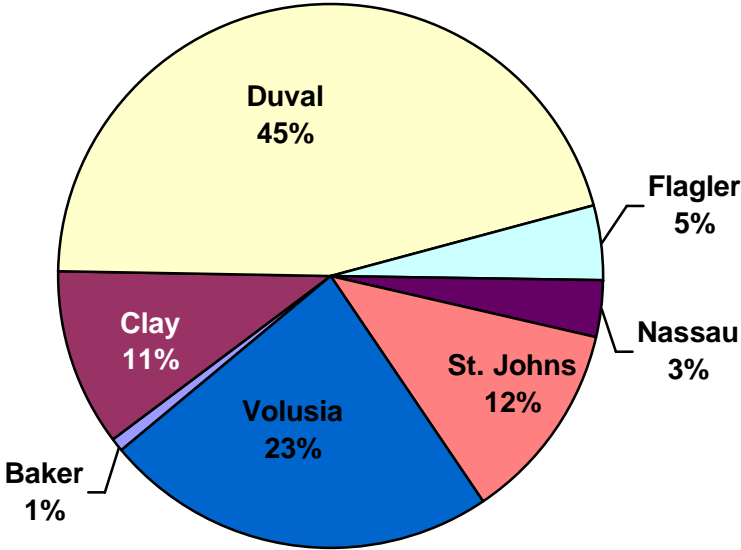
1. Participants were told the overall topic of the focus group, that their responses will be kept confidential (never associated with their name) and asked to sign an “informed consent form” that outlined the focus group procedures and their rights as participants under the IRB (Institutional Review Board) of the University of North Florida.
2. Participants were also asked to sign a “pledge of confidentiality form,” assuring that they would never associated responses or identify any participants after the focus group has ended.
3. After all legal documents were signed, participants were asked to complete a short demographic survey collecting information such as age, race, gender etc.
4. A discussion list was then followed to guide the discussion and gain an understanding of the main issues that caregivers are facing. This report reflects information from 2 focus groups: One conducted within Duval County that consisted of 12 participants, and another within Clay County that consisted of 6 participants.

**Geographic Profile of the Sample**

**Figure 1: Rural-Urban Comparisons of the Sample (n=1186)**



**Figure 2: Distribution of Respondents by County (n=1201)**



## **Study Findings: Seniors**

### **Part I: Telephone Survey**

#### **Profile of Seniors in Northeast Florida**

- ❖ Most seniors (54%) live in suburban areas. Another 15% report that they live in small towns or rural areas. Nearly one-third (30%) live in urban areas.
- ❖ 11% of seniors are non-whites.
- ❖ Nearly three-quarters (74%) live in single family homes.
- ❖ Most seniors (87%) own their own homes.
- ❖ Slightly more than one-third (36%) of seniors live alone. Nearly half (49%) live with one other person.
- ❖ More than half (54%) of seniors are married. Nearly one-third (30%) are widowed.
- ❖ More than one-third (39%) graduated from college. Only 4% did not graduate from high school. Slightly more than one-quarter (28%) were high school graduates without any college.
- ❖ The median age of seniors in this sample was 69 years. Nearly one in five (18%) respondents was 75 years of age or older. The oldest respondent was 99.
- ❖ Most respondents (56.4%) reported annual income of less than \$50,000. Slightly more than fifteen percent reported income of less than \$20,000 (16%) and income of more than \$100,000 (17%) respectively. Nearly one-third of respondents refused to provide information on their income.
- ❖ Nearly two-thirds (61%) of seniors were female.

#### **Problems Faced by Seniors**

Respondents were presented with a list of 14 issues that seniors might face and were asked to indicate whether or not these issues were a problem for them in the past 12 months.

*Physical health* was cited as the most problematic issue for respondents, with 33% indicating that it had been a problem for them in the past 12 months. The next most commonly cited problems for seniors were affording needed medications (15%), health care (14%), feeling sad, lonely, or depressed (13%), everyday activities (13%), and providing care to another person (10%).

No more than one in ten respondents reported problems with transportation (8%), housing (9%), having enough food to eat (7%), financial problems (9%), emotional or physical abuse (1%), legal issues (5%), criminal victimization (3%), or financial exploitation (4%).

### Nutrition

Overall, there were few respondents who reported nutritional problems. More specifically:

- ❖ Few respondents reported not being able to afford enough food to eat (5%).
- ❖ Few respondents reported not being able to eat three meals per day (6%).
- ❖ Nearly one in five seniors reported that they need a special diet. Of those, less than 1 in 10 (7%) reported difficulty obtaining these special foods.
- ❖ Almost all seniors (90%) reported that they frequently ate meals consisting of a variety of fruits, vegetables, and meat.

### Health

Overall, the seniors in the sample were relatively healthy. More specifically:

- ❖ More than half (55%) of seniors reported that their health was “excellent” or “very good”. Less than 1 in 5 (18%) reported that their health was “fair” or “poor”.
- ❖ More than three-quarters of seniors had not been in the hospital during the past year (79%). An additional 10% were hospitalized between 1 and 3 days.
- ❖ There were very few seniors who reported spending time in a nursing home during the past year (2%). In all but two cases, these seniors spent fewer than 60 days in a nursing home.
- ❖ Very few seniors reported spending time in a rehab facility (5%). Of those who spent time in a rehab facility all spent fewer than 120 days in this type of facility.
- ❖ Nearly 1 in 10 seniors reported falling and being seriously injured during the past year.
- ❖ 7% of seniors reported experiencing visual impairment
- ❖ 12% of seniors reported hearing impairment
- ❖ 1 in 10 seniors reported having a physical condition that limited their daily activities
- ❖ 2% of seniors reported a mental or emotional condition that limited their daily activities.

- ❖ Most seniors reported having some form of health insurance: 68% had Medicare, 8% had Medicaid, 57% reported private insurance, and 2% reported no insurance.
- ❖ Few respondents indicated that they could not afford basic health care items. The most frequently cited items that were unaffordable were eyeglasses and prescription medications (5% each).

### Activities of Daily Living

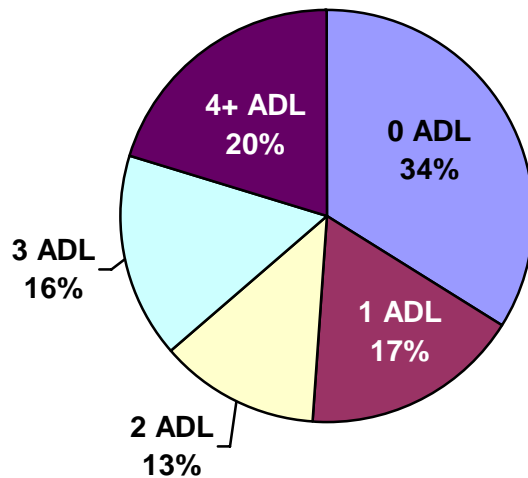
Respondents were presented with a list of 16 activities of daily living (ADL) and were asked to indicate the degree to which they needed assistance, if at all, with each activity. The response categories were ‘without any help’, ‘with some help’, or ‘cannot do it at all.’ The sixteen ADL items were aggregated to compute a composite measure of ADL limitations. For the purposes of this report, an ADL limitation involves either needing assistance in performing an activity or not being able to perform the activity at all.

*The overall level of ADL limitation was low.* As seen in the figure below, more than one-third (34%) of seniors had no ADL limitations, 17% had 1 ADL limitation, 13% had 2 ADL limitations, 16% had 3 ADL limitations, and 20% had four or more ADL limitations.

The ADLs that respondents most commonly cited as either being unable to do or being able to do with some help were household-related tasks such as light housekeeping (15%), heavy housework like moving furniture or washing windows (49%), doing home repairs (54%), and yard work (41%). Other areas of ADL limitation were walking (13%) and using transportation (10%).

No more than one in ten respondents indicated problems with preparing meals (5%), shopping (8%), managing medications (3%), managing money (5%), using a telephone (1%), eating (1%), dressing (2%), bathing (3%), getting in and out of a chair (4%), and toileting (2%).

**Figure 3: Number of Total ADL Limitations Among Seniors (N=600)**



Transportation

- ❖ Ten percent of seniors reported needing some assistance with arranging or getting transportation in the past year.
- ❖ Of those who reported difficulty with transportation
  - Having to rely on others (51%)
  - It's not available when they need it (16%)
  - Can't afford it (5%)
  - Unfamiliar with transportation options (2%)
  - Car does not work (2%)
  - Have trouble getting around without someone to help (19%)
  - Do not know who to call (2%)
  - Not available in my community (4%)
  - Transportation does not go where I need it to go (12%)
  - Too sick (14%)
  - Difficulty walking (2%)
- ❖ Respondents who use transportation use it for the following:
  - Grocery shopping (83%)
  - Leisure activities (65%)
  - Work (21%)
  - Restaurants or bars (74%)
  - Other (54%)
- ❖ Respondents also indicated that they would like to go to the following places but cannot due to a lack of transportation:
  - Out of town vacation (5%)
  - Community events (1%)
  - Shopping or chores (1%)

- Local travel (1%)

### Practical and Social Support

Respondents were asked to consider the amount of practical and social support they received from a variety of sources. Practical support refers to instrumental activities performed by others such as help with transportation, shopping, etc. Social support refers to being cared for, loved, listened to and/or respected by others. Respondents were queried as to the sources of these types of support. These sources include family, friends, neighbors, church or spiritual group, club or social group, and non-profit/community agency.

*Family members were an important source of support for seniors, providing ‘a lot’ of practical support to 24% and ‘a lot’ of social support to 78% of seniors. Overall, 49% of seniors reported at least some practical support and 93% reported receiving social support from family members.*

*Friends also provided a great deal of support to seniors, providing ‘a lot’ of practical support to 15% of seniors and ‘a lot of’ social support to 62% of seniors. Overall, 42% of seniors reported receiving at least some practical support and 88% reported receiving social support from friends.*

Neighbors provided some support to seniors. In total, nearly 33% of seniors reported that they received at least some practical support from neighbors and 72% reported that they received at least some social support from neighbors.

Churches or spiritual groups also provided seniors with support. 30% of respondents reported receiving at least some practical support from churches or spiritual groups. 61% reported receiving at least some social support from churches or spiritual groups.

Clubs and social groups provided 21% of seniors with at least some practical support and 42% of seniors with at least some social support.

Seniors received the least support from non-profit or community agencies. 9% of seniors reported receiving at least some practical support from these groups, while 14% of seniors reported receiving at least some social support from these groups.

### Sources of Information about Services or Activities

- ❖ More than half (59.8%) of respondents reported that they frequently read the newspaper. One in five seniors did not read the newspaper.
- ❖ Almost one-third (31.8%) of respondents reported that they do not use the radio as an information source.
- ❖ More than 9 in 10 respondents (91.5%) watched television for information about services or activities.

- ❖ Nearly half of respondents (46.2%) did not use the library as an information source. 17.8% reported that they frequently used the library to learn about activities and services.
- ❖ Seniors were equally as likely to report frequent ( 40%) use and no use (40.8%) of the internet to learn about activities and services.
- ❖ A significant proportion of seniors (87.3%) learned about activities and services by word of mouth.
- ❖ Almost half (44.3%) of seniors reported that they never used senior publications to learn about activities and services. Nearly twenty percent (19.7%) reported frequent use of senior publications.

## SUMMARY OF SURVEY FINDINGS

**Meeting seniors’ physical and mental health needs is a key concern for seniors.** A sizeable number of seniors in Northeast Florida have experienced recent physical health problems, affordability of medications, and feelings of loneliness and depression. Overall, seniors in this sample were in relatively good health, but there was a sizeable incidence of falls. There is no evidence to suggest that affordability is a barrier to care. Thus, the concern here is that many seniors may be experiencing problems that negatively impact their quality of life.

**Nutritional needs do not appear to be dramatically unmet in this sample of seniors.** Very few seniors report not being able to regularly eat the kinds of foods that are nutritionally correct.

**The overall level of ADL limitations was low in this sample of seniors.** The most commonly problematic activities were those involving heavy housework, home repair, yard work, and housekeeping. The most resource-intensive ADL limitations (i.e., toileting, bathing, getting in and out of a chair) were limited to roughly 2-4% of seniors.

**Transportation problems affected roughly 10% of seniors.** According to respondents, common barriers to meeting the need for transportation include availability, having to rely on others, needing assistance getting to the transportation site or onto a car/van/bus, and being unable to be transported where seniors need to go.

**Seniors receive a great deal of both practical and social support, particularly from family and friends.** Support from family and friends plays a vital role in seniors’ lives in Northeast Florida. To a lesser degree, seniors also receive quite a bit of support from church/spiritual groups, neighbors, clubs/social groups, and non-profit agencies.

**Seniors are active consumers of information.** Seniors report learning about services or activities for seniors from a variety of sources including newspapers, senior publications, television, and the internet. This suggests that there are active and effective channels to communicate with seniors about activities and services that might interest them.

## Part II: Key Informant Interviews

### Primary Contributions of Seniors

Key informants identified several primary contributions of seniors to their communities. The two primary contributions mentioned by informants were *time* and *money*. Seniors provided a great deal of volunteer time in their community. Seniors were also significant contributors to the economy in their community.

Key informants also identified several services/activities that could be implemented to assist in the contributions that seniors make to their communities. These suggestions include accessible transportation, active recruitment of seniors for work, and a greater focus of OAA programs on flexibility that would include the well elderly.

### Greatest Areas of Need for Seniors

Several areas of greatest need were identified by the key informants. The most common area of need was transportation and mobility choices. Other needs include affordable housing and assisted living/adult day care in rural areas.

Informants were also asked to assess the severity of a series of problems that older adults may face in their area of the state.

### *Getting Health Care*

Only 1 of the key informants felt that this was a ‘major’ problem for seniors. The informant cited that the problem was particularly acute for African-American seniors as they heavily relied on folk cures to address their health problems rather than seeking conventional medical care. Other informants cited the complexity and fragmentation of health care services as a problem. One informant suggested that medical facilitators be made available to aid with this problem. Finally, one informant who has many rural clients, cited a good array of basic medical services in their community. However, all specialists were located in the major cities and had difficulty transporting seniors to these appointments.

### *Transportation*

All but one of the key informants cited inadequate transportation as a major problem for seniors. Components of the problem were getting correct telephone numbers for transportation providers to seniors and an excessive focus of transportation services on medical appointments. Barriers to meeting the transportation needs of seniors include limited funding, disincentives for non-profit agencies, and prohibition of using volunteers.

### *Nutrition*

None of the key informants cited “having enough food to eat” as a major problem. The consensus among key informants was that hunger and nutritional problems is highly concentrated but not widespread. Suggested barriers to meeting the food needs of seniors include superstition, mobility, and illiteracy.

### *Performing Activities of Daily Living*

About half of key informants responded that ADL performance was a ‘major problem.’ However, like the case of nutrition, it is highly concentrated, particularly among those seniors who live alone. Rural seniors face particular barriers to meeting the ADL needs, according to one informant, because rural areas lack sufficient assisted living facilities.

### *Caregiving*

All but one key informant cited caregiving as a major problem in their area of the state. Many informants cited caregiving as a primary contributor to ‘aging well’ and to keeping seniors out of nursing homes. Many informants suggested that there was limited funding for caregiver programs. Two informants suggested that attention should be paid to caring for caregivers themselves, who are often exhausted by their work. In fact, one informant claimed that giving priority to those without caregivers was incorrect logic.

Other informants suggested that finding qualified, trained, and well-paid in-home care workers was tremendously difficult. One informant claimed that paying \$7-9 per hour does not attract very good caregivers. Another informant also suggested that many family caregivers were not prepared to handle the task of caregiving – the caregivers themselves are often dependent upon the care recipient in some way.

### Programs and Services that Work Well

Informants offered several programs and services that were working well in their area of the state, including CCE, volunteer programs, senior centers, adult day treatment for Alzheimer’s patients, in-home services (homemaking, deep cleaning, etc.). There was no consensus among informants, however. One possible explanation for this finding, according to informants, is that each county’s senior population is different, and each county serves the needs of those seniors in different ways.

### Key Challenges for Rural Dwelling Seniors

The overwhelming consensus among key informants is that the key challenges to providing for the needs of rural seniors are service costs. Service costs per unit are increased by the greater travel costs. Other informants indicated that fragmentation and limited services were also key challenges for rural seniors.

### 5-Year and 10-Year Outlook

Informants were asked about what they saw happening in their area of the state over the next five to ten years. Most informants expected demand to increase while resources remain stagnant. Many informants also expressed a concern that senior services will likely be outsourced to for-profit entities, particularly those who reside outside the immediate service area. One respondent adamantly claimed that it was important to ensure that service providers are community-based and not brought in from outside the area.

### Ideas to Facilitate Seniors' Use of Services

Several ideas to facilitate the use of senior services were mentioned.

- Marketing to seniors.
- Seniors *do* know about services – just check the wait lists.
- Spend more time with the consumers of services.

### Ideas to Reach Underserved Seniors

Several ideas for improving access to underserved seniors were developed by key informants. These include:

- Be more visible in the community
- Hire people from the community
- Hire more Spanish speakers
- Cultural sensitivity
- Increase funding

### Ideas to Enable AAAs, the State, and Service Providers to Work Together More Effectively

Several ideas for enabling AAAs, the State, and service providers to work together more effectively. These include:

- Increasing collaboration between groups is helpful to producing a good product.
- More local networking opportunities and conferences.
- Elimination of “turf guarding.”

### Other Issues

- Racism and ageism are rampant
- Diversity of the senior population -- not a “1 size fits all” scenario
- Need to attract younger retirees to more rural areas of the state
- Coordination of services as opposed to fragmentation

## **Summary of Key Informant Interviews**

**It is clear that seniors provide valuable contributions to their communities.** In particular, they are a vital segment of local economies and they serve as key resources for volunteerism.

**Despite these contributions, it is clear that many needs of seniors are not currently being met, particularly transportation and caregiving.** Transportation issues are problems in both urban and rural areas as a result of low funding levels, high demand, and complexity of the public transportation system. The major barriers to caregiving tend to be concentrated in the adequate training of caregivers and the respite needs of family caregivers.

**Rural communities have somewhat different problems than non-rural areas.** These differences stem mainly from increase per unit service costs and limitations of services.

**Many informants have a pessimistic outlook on the future of aging services in their area of the state.** They see baby boomers flooding the senior services system, funding levels remaining stagnant, quality of services deteriorating, and for-profit entities taking over.

**The issues of cultural sensitivity and diversity clearly need to be addressed in meeting the needs of seniors.** There was a sense among many informants that minority populations are increasing, but yet the distinct needs of these seniors are not being considered. Coupled with a climate of racism in some communities portends negative results, according to some informants.

**Study Findings: Caregivers**

**Part I: Telephone Survey**

Profile of Caregivers in Northeast Florida

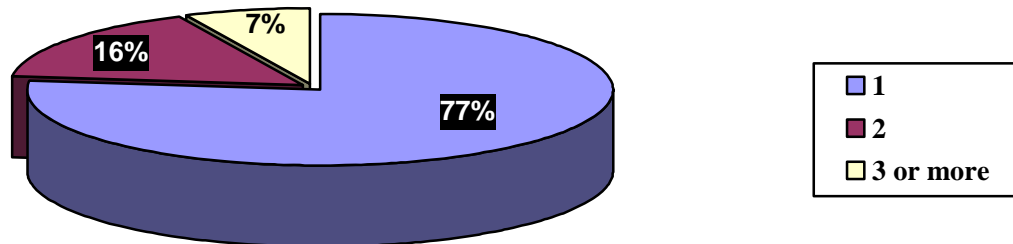
**Table 1: Demographic Profile of Caregivers in Northeast Florida (n=150)**

	%
Male	34.7
Female	65.3
Own home	89.5
Lives alone	9.5
Lives with 2 people	55.3
Lives with 3+ people	35.3
Married	73.2
College graduate	44.2
No college	23.2
Median age	59 years
<\$20,000 income	8.7
\$20,000-\$50,000	34.7
>\$50,000	56.7
Rural/Small Town	19.4
Non-White	16.0

Characteristics of Caregivers

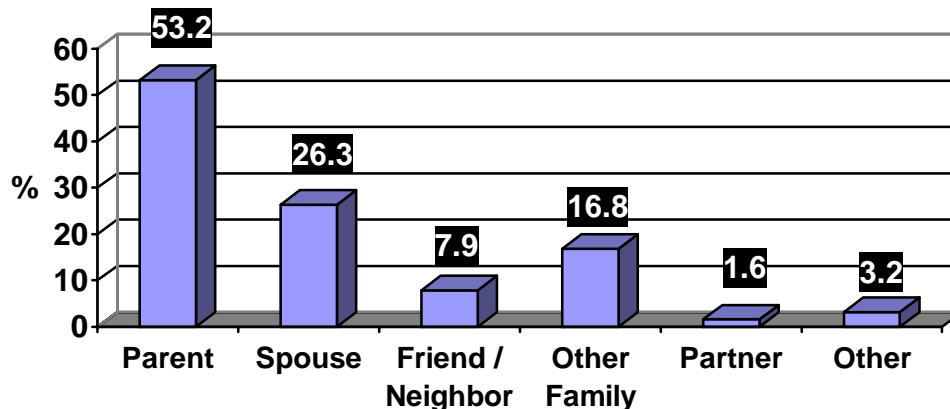
Most caregivers (77%) were responsible for one recipient. Nearly one-quarter (23%) of the caregivers were caring for two or more persons.

**Figure 4: Number of Care Recipients per Caregiver (n=190)**



The majority of caregivers (53%) reported providing care to a parent, followed by spouses (26%). Nearly 1 in 10 (8%) provided care to a friend or neighbor.

**Figure 5: Relationship of Recipients to Caregivers**



Caregivers report spending a significant amount of time performing caregiving duties. Nearly half (45%) caregivers reported spending 20 or more hours per week providing care. Another 10% of caregivers spent 11-19 hours, 18% spent 6-10 hours, and 27% spent fewer than 6 hours per week providing care.

Caregivers were asked about the types of caregiving duties that they performed. The most commonly cited duties were housework tasks such as cooking, cleaning, and laundry (74%), providing emotional reassurance (74%), transportation (72%), managing financial affairs (52%), arranging and monitoring outside help or resources (52%), home maintenance and repair (46%), administering medications (44%), direct financial support (44%), and feeding, bathing, toileting, or dressing (34%). The least cited duty was as an interpreter (17%).

#### Problems Experienced by Caregivers

Respondents were read a list of problems that people who are caregivers sometimes experience as a result of their care giving activities. For each one, respondents were asked to rate it is a major problem, a minor problem, or no problem.

As seen in the table below, the most common problem that caregivers perceived was understanding government programs such as Medicare, Medicaid, SSI or in-home supportive services (28% reported it as a major problem). Other prevalent problems for caregivers included finding out about legal options (47% major or minor problem), getting cooperation and assistance from other family members (44% major or minor problem), and meeting personal needs such as personal time or exercise (46% major or minor problem). For most other issues, between roughly 25% and 40% report no problem.

**Table 2: Distribution of Caregivers' Perceived Problems (N=190)**

	<i>Major Problem</i>	<i>Minor Problem</i>	<i>No Problem</i>
Understanding government programs such as Medicare, Medicaid, SSI, or in-home supportive services	28.3%	27.3%	44.4%
Finding out about legal options	15.4%	31.4%	53.2%
Getting cooperation and assistance from other family members	16.3%	27.4%	56.3%
Ensuring the care recipient's safety	8.9%	23.7%	67.4%
Identifying available transportation resources	9.6%	16.5%	73.9%
Communicating with service providers	12.2%	22.3%	65.4%
Balancing other family responsibilities such as children	13.8%	17.5%	68.8%
Dealing with dangerous unwanted or difficult behaviors of the care recipient	5.3%	18.4%	76.3%
Involvement in decisions about the care recipient's medical treatment requirements	13.2%	20.1%	66.7%
Adjusting your work schedule and meeting work responsibilities	12.2%	24.9%	63%
Meeting your personal needs such as personal time or exercise	17.9%	27.9%	54.2%

Respondents were also asked to indicate if they experienced a number of conditions as a result of their caregiving duties.

*The most commonly reported symptoms among caregivers were physical and emotional strain. Feeling emotionally upset was experienced by the largest proportion of caregivers (45%) and 34% of caregivers reported feeling physical strain or fatigue.*

Other problems reported by caregivers include lack of cooperation from other family members (26%), not having enough money to pay for care (17%), interference with family relationships (19%), and finding caregiver support programs (21%).

### **Summary of Survey Findings: Caregivers**

**Nearly one-quarter of caregivers were providing care for two or more persons.** Considering the earlier findings from key informants that the respite is an underserved need, the implications of caring for more than one person can be severe. This underscores the importance of being attentive to the needs of caregivers given their difficult job.

**Relatedly, caregivers report a good deal of emotional and physical strain as a result of their caregiving duties.** This may be explain, in part, by the lack of familial support, interference with personal time, balancing work and family demands, all of which are reported by caregivers in this study.

**Caregivers report a great deal of difficulty with understanding the complex array of programs designed to help them and the care recipient.** Caregivers noted difficulty with understanding Medicare, Medicaid, and other programs, as well as legal issues. This underscores the need for policy makers to make the enactment of caregiving roles more “user friendly” and to help caregivers better navigate the terrain of eldercare.

## Part II: Focus Groups

### Summary of Duval County Group

**1. Most participants wanted information to be streamlined.** The majority of focus group participants were in consensus regarding the maze of information, programs, and services available. Medicaid, Medicare, prescription cards, in-home care, hospital care, medical supplies/products, support groups, and Care Centers all were said to involve many documents and a run-around system of obtaining information and the services.

“It’s hard to get a real person over the phone and I have to call many different places to search for information.” “It’s left to the caregiver to find information and obtain services, this is very time consuming and difficult.” Several participants also mentioned that some providers were rude to them when they asked simple questions. In regards to the federal programs, Medicaid was the federal program that was most difficult to access.

The participants suggested a central clearinghouse for information and services— much like the Children’s Commission in Duval County for children’s services.

**2. Participants highlighted a need for emotional support and social outlets.** Many participants mentioned the need for emotional support. The stress, time, and in some cases, the role reversal of taking care of a parent, spouse, relative or friend was said to be difficult and affected their ability to provide better care and to manage daily activities. The participant wanted more information on support groups. They also suggested a “Caregiver Appreciation Day.”

**3. The Three Services used the Most Were: a. “Daycare” Senior Centers b. Respite Care c. Bathing and other Relief Care.** Urban Jax was the agency that provided most of these services.

**4. Respite Care for longer hours and additional help with bathing.** Over half of the participants currently receive respite care. Of those who receive respite care, a consistent theme was for more help and longer hours. Participants mentioned not having enough time to accomplish tasks outside of the home due to short hourly visits. Participants mentioned that on occasion they would be willing to incur less visits if it meant they could have longer visits. Also mentioned was the difficulty to bath and dress the elderly patients.

**5. Participants mentioned the need for more financial support.** Most of the participants had concerns with the current financial support being provided to them. Of the two that were satisfied with their current level of financial support, they mentioned the benefit of having many siblings to assist with care or additional insurance or income. One participant said, “We’ve been blessed with the fortune of having two insurance policies—I don’t know how I would manage it otherwise.” Most caregivers find it difficult financially to support themselves and pay for the services/care needed for their elderly care recipient. “I had to take a leave of absence from work to care for my mother-in-law.”

## Summary of Clay County Group

### **1. All participants mentioned that available services within the county are disjointed.**

Participants mentioned that services such as aid, sitters, and daycare are disconnected and therefore hard to coordinate, gain information on, and obtain. They feel that this may be due to Clay County being so spread out and currently lacking the volume of caregivers compared to larger counties. One participant mentioned, "Duval County has a much bigger operation for seniors and Clay County does not get the resources compared to Duval County." There's a concern for this problem getting worse as they feel the elderly population is growing and the resources for caregivers are not keeping up with this growth.

**2. All participants felt a need to have one central location to obtain all services.** Participants mentioned the difficulty in obtaining information on the available services, and the difficulty in understanding the process of how to obtain these services. One central location, as mentioned within the Duval County focus group, would help to streamline information and the process of obtaining services.

**3. The Three Services used the Most Were: a. Day Care/Senior Centers b. "Aid" or Respite Care c. "Sitter Service" or other Relief Care.** The Council on Aging was the agency that provided most of these services. One participant mentioned using meals on wheels and getting excellent service from them.

**4. Participants mentioned that transportation was an issue.** Several participants mentioned the difficulty getting their elderly patient to certain locations due to the area being so spread out.

**5. All participants mentioned the need for financial support.** As mentioned with the Duval County group, the need for financial support is an issue. Caregivers mentioned having to reduce work hours and having to spend additional money for products and services.

**6. All participants mentioned a need for emotional support.** Better information and resources to bring other caregivers together is much needed for emotional support. One participant mentioned a support group of people who are caring for the elderly with Alzheimer's, but not for caregivers in general. "I'm just exhausted--I have no time to myself and it wears me down," mentioned one participant.

### **7. Participants feel there's a large gap between what Medicare and Medicaid covers.**

Several caregivers mentioned that everything is complicated when it comes to filing for assistance and that there's a large gap between what Medicaid and Medicare covers. Because of income limits, Medicaid can be difficult to qualify for aid. If the elderly patient doesn't qualify

for Medicaid, many times that leaves a gap compared to what Medicare will cover. Again, this highlights the income issue and the need for financial support regarding medical needs.

**8. A theme throughout the group involved time.** Participants mentioned the difficulty to have time for themselves and time to maintain their house because they were so busy giving care. One caregiver mentioned, “By the time I take care of my parent all day, my house is a wreck.” “I just do not have time to keep up the house.”

Focus Group Short Survey Results

Q1 For whom do you provide care?

	N=16
Parent	75.0%
Spouse	18.8%
In-law	6.3%

Q2 What is the biggest challenge you face as a caregiver?

	N=16
Being an only child	6.3%
Constant work	6.3%
Emotional issues with impending death of care recipient	6.3%
Financial issues	6.3%
Hygiene issues	18.8%
Difficulty making recipient happy	6.3%
Memory	6.3%
Patience	6.3%
Unwanted behavior from care recipient	6.3%
Difficulty finding sitters	6.3%
Having time for myself	18.8%
Tired	6.3%

Q3. If there was one service that could be provided to you to help your care giving responsibilities, what would that service be?

	N=16
Any	12.5%
Education on available resources	18.8%
Household help	18.8%
Medicare equipment	6.3%

Respite care	37.5%
None	6.3%

#### DEMOGRAPHICS FOR THE ENTIRE SAMPLE

On what side of town do you live?

	N=16
Northside	43.8%
Westside	6.3%
Mandarin/Southside	18.8%
Other	6.3%
Clay County	25.0%

What is your racial or ethnic background?

	N=16
White	50.0%
Black or African American	31.3%
Hispanic	12.5%
No response	6.3%

What is the highest grade in school or year of college you have completed?

	N=16
Grade school	6.3%
High school graduate	18.8%
Some college	37.5%
College graduate	31.3%
Post graduate degree	6.3%

Gender

	N=16
Male	18.8%
Female	75.0%
No response	6.3%

What was your total household income in 2006?

	N=16
Less than \$25,000	12.5%
\$25,000 to \$50,000	43.8%
\$50,000 to \$75,000	31.3%
\$75,000 to \$100,000	6.3%
No response	6.3%

### Summary Analysis

Overall, caregivers would like an organized central location that streamlines all services available to them. The focus group participants feel that this would eliminate the current shuffle through the maze of services, allowing them access to all information at once. They also feel that this would organize and merge services together for a more efficient processing of documentation and could possibly eliminate the need for completing multiple forms.

Being able to support each other was another reoccurring theme within both focus groups. Caregivers seemed willing and wanting to talk about their experiences and felt that support groups would be a good resource for this emotional support. Having an outlet where caregivers could come together and information to contact other caregivers would be very useful in developing caregiver support groups.

Almost all focus group participants feel that respite care or “aid” is one of the most important services that they can receive. This type of care gives them a break and allows them to tend to other tasks such as grocery shopping, bills and cleaning. This type of care is also important as caregivers find it difficult to bath and dress their elderly patients. Participants would like to have more of this care and for longer duration.

Within Clay County, focus group participants mentioned transportation as an issue due to the rural aspect of the county, day care or elderly care centers are far away.

## Study Findings: Baby Boomers

### **Part I: Telephone Survey**

Baby boomers are those adults born between the years 1946 and 1965, or those between the ages of 42 and 59 for the purposes of this study. Those aged 60 and older are considered “seniors” and not baby boomers since the service population for ElderSource is 60 and older.

The baby boomer survey was designed to ascertain the prospective needs of baby boomers as they age into later adulthood.

#### Profile of Baby Boomers in Northeast Florida

**Table 3: Demographic Profile of Baby Boomers in Northeast Florida (n=601)**

	<b>%</b>
Male	35.6
Female	64.4
Own home	84.7
Lives alone	14.8
Lives with 2 people	42.3
Lives with 3+ people	42.9
Married	67.4
College graduate	45.9
No college	23.6
Median age	50 years
<\$20,000 income	6.9
\$20,000-\$50,000	25.7
>\$50,000	67.3
Rural/Small Town	19.7
Non-White	18.3

#### Importance of Needs for Retirement and Later Life

Respondents were asked to consider the kinds of things that they believe they will need as they reach retirement age and grow older. Using a scale of 1 to 5--where 1 means it is not at all important and 5 means it is very important, how important are each of the following to help you age successfully?

**Figure 6: Importance of Needs for Retirement and Later Life Among Baby Boomers (n=601)**

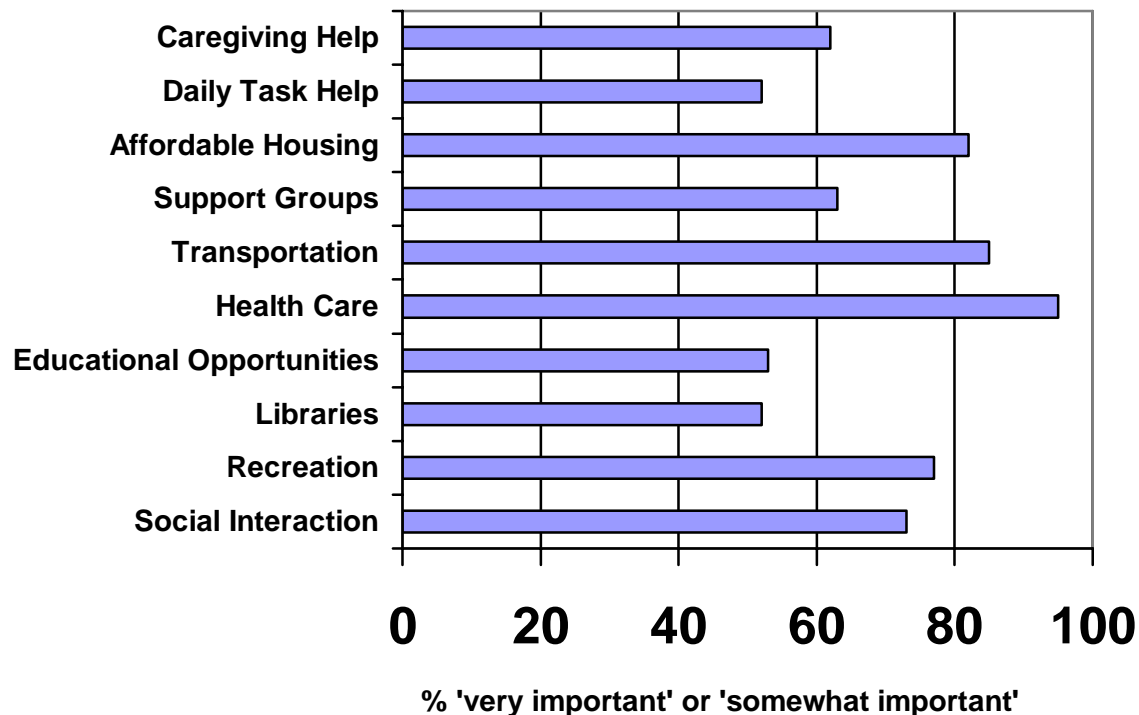


Figure 6 displays the distribution of baby boomers who reported that various needs for retirement and later life were either very important or somewhat important. Overall, more than 50% of all baby boomer respondents reported that all issues presented were either very important or somewhat important. Baby boomers report that health care is most important, followed by transportation and affordable housing. Somewhat less important were recreation, social interaction, support groups, and caregiving help. The least important needs were help with daily tasks such as shopping, meal preparation or housework, educational opportunities, and libraries.

In addition to these fixed choice responses, baby boomers were also asked if they had any other needs that were not identified. These needs are presented in the table below.

**Table 4: Open-Ended Responses – Baby Boomer’s Needs for Retirement and Later Life**

	%
Finances or money	25.7
Health care or Medicare	5.1
Religion	1.4

Social Security	1.7
Companionship and family	1.5
Diet	1.2
Community resources	0.8
Legal issues	0.2
Specific surgical needs	0.5
Exercise/Maintaining healthy lifestyle	3.7
Job opportunities	1.0

### Expectations about Retirement and Getting Older

Respondents were also asked about their expectations of retirement and getting older. Respondents were read the following: I am going to read you some statements people have made about retirement and getting older. Thinking about your own situation, I'd like you to consider whether these statements apply to you personally. Using a scale from 1 to 5--where 1 means you "completely disagree" and 5 means you "completely agree," I'd like you to consider each statement.

#### *Life Expectancy*

Overall, baby boomers expressed a great deal of confidence that would to live to reach old age. More than one-third (34%) were 100% confident that they would live to be 75 while fewer than one-quarter (22%) thought that their chances of living to 75 were 50% or less. Similarly, 18% of baby boomers were 100% confident that they would live to 85. 39% of respondents assigned a 50-50 chance of living to 85.

#### *Future Income Security*

Overall, baby boomers were somewhat optimistic about their future income security. Almost one-third of baby boomers reported a likelihood of 0% that they would need financial assistance from their family after age 65. Only 17% of respondents reported a 50% chance or greater that they would need financial assistance from family after age 65.

Respondents were somewhat split on the chances that medical expenses would use up all of their savings after age 65. Slightly more than half (51%) of baby boomers reported that their chances medical expenses would use up all of their savings after age 65 was 50% or greater. 15.6% felt that their chances were 0% and 12.2% felt that their chances were 100%.

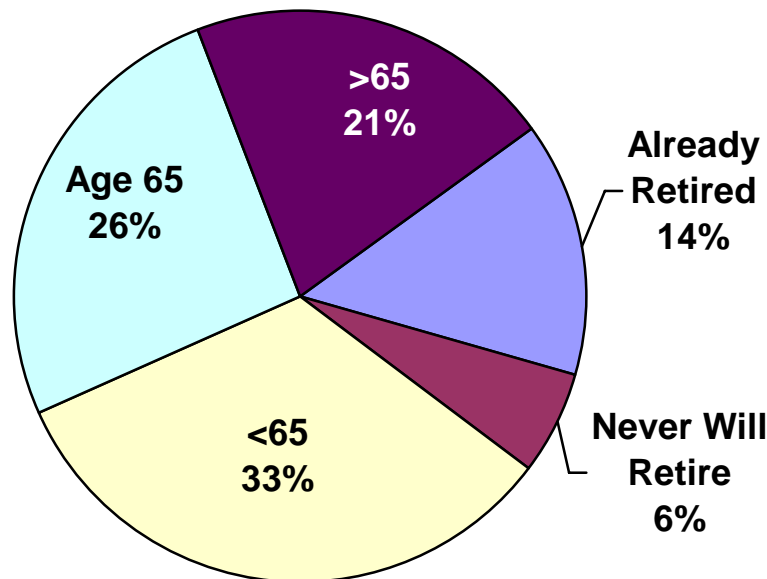
#### *Future Needs for Assistance*

Respondents were asked to rate the chances that they will need assistance from their family for everyday activities after age 65. Overall, baby boomers were not highly likely to estimate a future need for assistance. Slightly more than one-quarter of baby boomers (27%) rated their chances of needing assistance at 50% or more. A similar proportion of baby boomers (22%) estimated the likelihood of needing assistance at 0.

## Retirement Age

Baby boomers were asked to estimate at what age they expected to retire. Overall, the overwhelming majority of baby boomers expect to retire (only 6% expect to never retire). In fact, 14% of baby boomers in the study had already retired. One-third of baby boomers estimated that they will retire before the age of 65, another 26% at age 65, and another 21% after age 65.

**Figure 7: Estimated Retirement Age of Baby Boomers (n=579)**



Among those who will never retire, respondents gave several reasons why they do not expect to retire. Roughly one-third (35%) say they will not retire due to financial concerns; another one-quarter (27%) say they will not retire because they enjoy working; 16% will not retire because they believe in staying active; 11% will not retire because they are small business owners and claim they have no insurance; 11% provided no additional rationale.

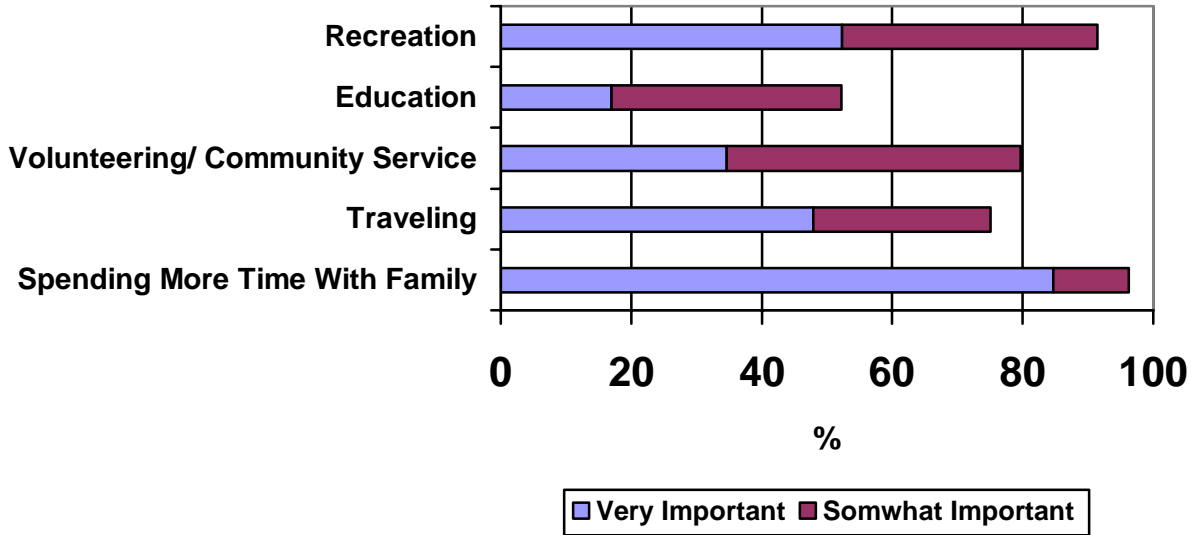
### Post-Retirement Plans of Baby Boomers:

Baby boomers were asked about the importance of several activities following their retirement. The following question was asked: “Thinking about retirement, how important are the following to you after you retire? Would you say they are very important, somewhat important, not very important, or not important at all?”

As seen in the figure below, baby boomers were most interested in spending more time with family following retirement, recreation, and volunteering/community service. For all these activities, 80% or more indicated that they were very important or somewhat important. To a

lesser extent, they were interested in traveling (48% ‘very important’) and education (17% ‘very important’).

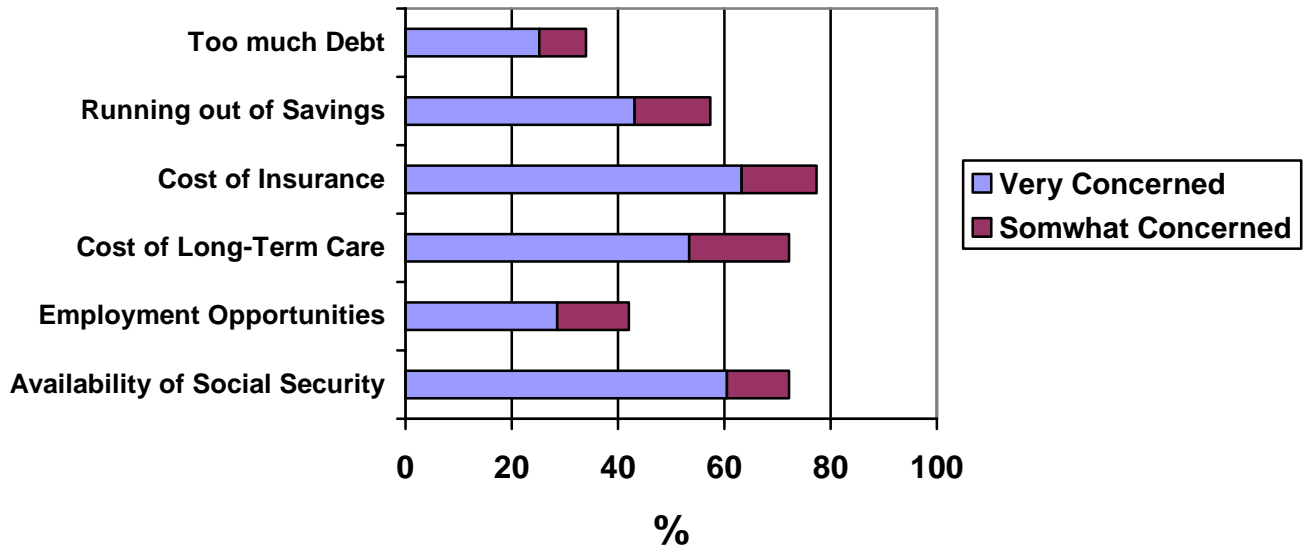
**Figure 8: Post-Retirement Plans of Baby Boomers  
(n=601)**



Financial Concerns of Baby Boomers

Respondents were asked the following question: “I will now read a list of financial concerns that people may have as they grow older. Thinking about your own situation, I'd like you to consider whether these concerns apply to you personally. Using a scale from 1 to 5 where 1 means you are ‘not concerned’ and 5 means you are ‘very concerned’, I'd like you to consider the following issues.”

**Figure 9: Baby Boomer's Financial Concerns (n=601)**



Overall, baby boomers appear to have many financial concerns in their future. Their most pressing concerns center on the cost of health and long-term care insurance, the cost of long-term care, and the availability of Social Security. For each of these issues, more than 75% of boomers were either very concerned or somewhat concerned. Boomers were somewhat less concerned about having too much debt and declining employment opportunities.

Baby Boomers' Health

Our sample of baby boomers in Northeast Florida appears to be in good health. When asked to indicate their overall level of health, *two-thirds* of baby boomers reported that their health was 'excellent' or 'very good'. Similarly, nearly two-thirds (63%) of baby boomers exercise every day or several times per week.

Practical and Social Support

Respondents were asked to indicate the amount of social support that they received from a variety of sources, including family, friends, neighbors, religious groups, clubs or social groups, and non-profit/community agencies in the past 12 months.

**Table 5: Baby Boomers' Reported Levels of Social Support (n=601)**

	<i>A Lot</i>	<i>Some</i>	<i>A Little</i>	<i>None</i>
Family	75.6%	14.2%	5.0%	5.2%
Friends	60.7%	26.3%	7.0%	6.0%
Neighbors	22.4%	29.8%	19.3%	28.5%
Church/Spiritual Group	38.9%	21.2%	9.1%	30.8%

Club/Social Group	13.8%	15.6%	12.2%	58.4%
Non-profit/Community agency	7.3%	9.1%	10.8%	72.8%

The most likely source of social support is family members, and nearly all baby boomers report receiving social support from their family members. To a somewhat lesser extent, friends were a significant source of social support to baby boomers, with 61% reporting receiving ‘a lot’ of support. Neighbors and churches/spiritual groups were somewhat less significant sources of social support; however, more than 70% of baby boomers reported receiving at least ‘a little’ social support from these sources. Clubs/social groups and non-profit/community agencies were much less significant sources of social support to baby boomers.

When all sources of social support are aggregated together, the picture of social support among baby boomers appears to be positive. *Nearly 88% of baby boomers report receiving ‘a lot’ of social support from at least one source during the past year.* Moreover, 95% of baby boomers report receiving ‘a lot’ or ‘some’ social support from at least one source during the past year.

### Summary of Survey Findings: Baby Boomers

**Keys to successful aging for baby boomers include financial well-being, health care, transportation, affordable housing, recreational opportunities, and opportunities for social interaction, among others.** Least important were libraries, educational opportunities, and daily task help. It should be noted that there was little consensus on this issue. Baby boomers felt as though many things were important to helping them age well.

**Baby boomers were relatively health and were fairly confident that they would reach old age.** Boomers reported being physically active and had high self-rated health. These findings could suggest that indeed there is a strong likelihood of baby boomers living well into their 80s and 90s, perhaps with fewer chronic ailments than the generation who preceded them.

**Baby boomers were fairly confident that they would be financially solvent in old age, but many worry about the availability of Social Security and the cost of health insurance an long-term care.** Although most boomers did not believe they would need assistance from their family, many expressed concern about the solvency of Social Security and the cost of health care.

**Almost all baby boomers are retired or expect to retire.** Only 6% of baby boomers do not anticipate retirement. The average expected age of retirement is 65.

**Baby boomers have strong social support networks.** Nearly 88% of baby boomers in this study report receiving ‘a lot’ of social/emotional support from at least one source during the past year.

## Appendix I Survey Instrument

**Introduction:**

Hello, my name is \_\_\_\_\_, and I am a student calling from the University of North Florida in Jacksonville. This is not a sales call. We're calling to get people's opinions on some issues facing baby boomers and people who are aged 60 or older. May I speak to someone in your home who was born on or before (today's date) in 1965?

Thank you for your time! Before I begin I need to let you know about a few things. As I said, this survey is being conducted by UNF in Jacksonville. We're calling on behalf of ElderSource, which is the Northeast Florida Agency on Aging. All of your answers will be kept confidential. This survey should take around 10 minutes, and you can stop at any time. We don't know your name, and all of your responses will be reported in group form only.

### SCREENING QUESTIONS

Q1 First, I need to ask you a few questions to make sure we're getting a fair sample.

How would you describe the area in which you live? Would you say it is:

	Frequency	Percent
Urban	333	27.7%
Suburban	647	53.9%
Rural	161	13.4%
Small town	45	3.7%
Do not know	15	1.2%

Q2 What is your racial or ethnic background? Is it:

	Frequency	Percent
White	1010	84.1%
Black or African American	105	8.7%
Hispanic	22	1.8%
Asian	4	0.3%
Other	40	3.3%
Refused	20	1.7%

Q3 Which of the following age categories best describes you?

	Frequency	Percent
42-49	269	22.4%
50-59	332	27.6%
60 or older	600	50.0%

## BABY BOOMERS QUESTIONS

B1 We would like you to consider what you believe you will need as you reach retirement age and grow older. Using a scale of 1 to 5--where 1 means it is not at all important and 5 means it is very important, how important are each of the following to help you age successfully?

Having opportunities for social interaction

	Frequency	Percent
1—not at all important	21	3.5%
2	35	5.8%
3	109	18.1%
4	114	19.0%
5—very important	321	53.4%
Do not know	1	0.2%

B3 Recreation

	Frequency	Percent
1—not at all important	13	2.2%
2	26	4.3%
3	102	17.0%
4	158	26.3%
5—very important	300	49.9%
Do not know	2	0.3%

B4 Libraries

	Frequency	Percent
1—not at all important	53	8.8%
2	80	13.3%
3	158	26.3%
4	117	19.5%
5—very important	193	32.1%

Do not know	0	0.0%
-------------	---	------

#### B5 Educational opportunities

	Frequency	Percent
1—not at all important	60	10.0%
2	69	11.5%
3	155	25.8%
4	126	21.0%
5—very important	191	31.8%
Do not know	0	0.0%

#### B6 Health care availability

	Frequency	Percent
1—not at all important	5	0.8%
2	3	0.5%
3	18	3.0%
4	41	6.8%
5—very important	534	88.9%
Do not know	0	0.0%

#### B7 Transportation

	Frequency	Percent
1—not at all important	15	2.5%
2	22	3.7%
3	53	8.8%
4	115	19.1%
5—very important	396	65.9%
Do not know	0	0.0%

#### B8 Support groups

	Frequency	Percent
1—not at all important	57	9.5%
2	71	11.8%
3	155	25.8%
4	140	23.3%
5—very important	176	29.3%
Do not know	2	0.3%

B9 Affordable housing

	Frequency	Percent
1—not at all important	26	4.3%
2	27	4.5%
3	58	9.7%
4	85	14.1%
5—very important	405	67.4%
Do not know	0	0.0%

B10 Help with daily tasks like shopping, meal preparation, or housework

	Frequency	Percent
1—not at all important	68	11.3%
2	83	13.8%
3	135	22.5%
4	120	20.0%
5—very important	191	31.8%
Do not know	4	0.7%

B11 Help with caring for family members

	Frequency	Percent
1—not at all important	68	11.3%
2	54	9.0%
3	103	17.1%
4	112	18.6%
5—very important	260	43.3%
Do not know	3	0.5%
Refused	1	0.2%

B12 Are there any other things that you believe you will need to age well? If so, what are they?

	Frequency	Percent
No other issues	323	53.7%
Finances or money	152	25.3%
Health care or Medicare	30	5.0%
Religion	8	1.3%
Social Security	10	1.7%
Companionship and family	9	1.5%
Healthy Diet	7	1.2%
Community resources	5	0.8%
Legal help	1	0.2%
Specific Surgical needs	3	0.5%
Other	16	2.7%
Exercise and maintaining a healthy lifestyle	22	3.7%
Job opportunities	6	1.0%
Do not know	9	1.5%

B12b In general, would you say your health is:

	Frequency	Percent
Excellent	179	29.8%
Very good	217	36.1%
Good	126	21.0%
Fair	58	9.7%
Poor	20	3.3%
Refused	1	0.2%

B13a I am going to read you some statements people have made about retirement and getting older. Thinking about your own situation, I'd like you to consider whether these statements apply to you personally. Using a scale from 1 to 5--where 1 means you "completely disagree" and 5 means you "completely agree," I'd like you to consider each statement.

You expect to have an aging parent or parent-in-law living in your home at some time during your retirement

	Frequency	Percent
1—completely disagree	312	51.9%
2	47	7.8%
3	76	12.6%
4	43	7.2%
5—completely agree	122	20.3%
Do not know	1	0.2%

B13b You expect to have to scale back your lifestyle during retirement

	Frequency	Percent
1—completely disagree	151	25.1%
2	70	11.6%
3	142	23.6%
4	101	16.8%
5—completely agree	136	22.6%
Do not know	1	0.2%

B13c You'll have to struggle to make ends meet

	Frequency	Percent
1—completely disagree	222	36.9%
2	98	16.3%
3	119	19.8%
4	73	12.1%
5—completely agree	89	14.8%
Do not know	0	0.0%

B13d You expect to rely upon Social Security for all or most of your income

	Frequency	Percent
1—completely disagree	306	50.9%
2	104	17.3%
3	76	12.6%
4	40	6.7%
5—completely agree	74	12.3%
Do not know	1	0.2%

B13e You expect to have some serious health problems

	Frequency	Percent
1—completely disagree	224	37.3%
2	115	19.1%
3	130	21.6%
4	62	10.3%
5—completely agree	65	10.8%
Do not know	5	0.8%

B13f You expect Medicare to cover most of your health care needs during your retirement years

	Frequency	Percent
1—completely disagree	180	30.0%
2	98	16.3%
3	118	19.6%
4	67	11.1%
5—completely agree	136	22.6%
Do not know	2	0.3%

B13g You expect to live near at least one of your children

	Frequency	Percent
1—completely disagree	162	27.0%
2	25	4.2%
3	85	14.1%
4	67	11.1%
5—completely agree	245	40.8%
Do not know	11	1.8%
Refused	6	1.0%

B13h You won't be able to afford to retire

	Frequency	Percent
1—completely disagree	291	48.4%
2	67	11.1%
3	81	13.5%
4	54	9.0%
5—completely agree	102	17.0%
Do not know	4	0.7%
Refused	2	0.3%

B13i You'll have plenty of time for recreation

	Frequency	Percent
1—completely disagree	48	8.0%
2	37	6.2%
3	119	19.8%
4	118	19.6%
5—completely agree	278	46.3%
Do not know	1	0.2%

B13j You expect to move away from this area to another

	Frequency	Percent
1—completely disagree	304	50.6%
2	54	9.0%
3	105	17.5%
4	41	6.8%
5—completely agree	96	16.0%
Do not know	1	0.2%

B13l You expect to be living alone for most of your retirement years

	Frequency	Percent
1—completely disagree	347	57.7%
2	70	11.6%
3	72	12.0%
4	38	6.3%
5—completely agree	71	11.8%
Do not know	3	0.5%

B13m You expect to have to provide financially for your elderly parents or in-laws

	Frequency	Percent
1—completely disagree	380	63.2%
2	70	11.6%
3	63	10.5%
4	28	4.7%
5—completely agree	55	9.2%
Do not know	2	0.3%
Refused	3	0.5%

B13n You expect to have health insurance coverage that will meet your needs

	Frequency	Percent
1—completely disagree	72	12.0%
2	44	7.3%
3	109	18.1%
4	122	20.3%
5—completely agree	253	42.1%
Do not know	1	0.2%

B13p You won't want to stop working

	Frequency	Percent
1—completely disagree	242	40.3%
2	55	9.2%
3	129	21.5%
4	75	12.5%
5—completely agree	92	15.3%
Do not know	4	0.7%
Refused	4	0.7%

B13q You know you're not doing enough now to maintain your health

	Frequency	Percent
1—completely disagree	223	37.1%
2	97	16.1%
3	120	20.0%
4	80	13.3%
5—completely agree	81	13.5%
Do not know	0	0.0%

B15 Next, we'd like to ask your opinion about how likely you think various events might be as you grow older. When I ask a , I'd like for you to give me a number from 0 to 100, where "0" means that you think there is no chance that it will happen, and "100" means that you think the event is absolutely sure to happen.

What do you think the chances are that you will live to be 75?

	Frequency	Percent
0	12	2.0%
1	4	0.7%
2	1	0.2%
5	1	0.2%
10	8	1.3%
20	8	1.3%
25	3	0.5%
30	3	0.5%
35	1	0.2%
40	7	1.2%
45	1	0.2%
50	81	13.5%
60	13	2.2%
64	1	0.2%
65	9	1.5%
70	17	2.8%
75	61	10.1%
80	71	11.8%
85	17	2.8%
88	1	0.2%
90	49	8.2%
95	14	2.3%
97	1	0.2%
98	2	0.3%
99	7	1.2%
100	203	33.8%
Do not know	4	0.7%
Refused	1	0.2%

B16 What do you think the chances are that you will live to be 85?

	Frequency	Percent
0	37	6.2%
1	8	1.3%
2	3	0.5%
5	6	1.0%
10	14	2.3%
15	3	0.5%
17	1	0.2%
20	16	2.7%
25	13	2.2%
30	21	3.5%
35	5	0.8%
40	25	4.2%
45	1	0.2%
50	79	13.1%
55	3	0.5%
60	33	5.5%
64	1	0.2%
65	9	1.5%
70	34	5.7%
75	67	11.1%
77	1	0.2%
80	36	6.0%
82	2	0.3%
85	21	3.5%
90	33	5.5%
95	7	1.2%
96	2	0.3%
98	1	0.2%
99	4	0.7%
100	107	17.8%
Do not know	7	1.2%
Refused	1	0.2%

B17 What do you think are the chances that medical expenses will use up all of your savings after age 65

	Frequency	Percent
0	92	15.3%
1	11	1.8%
2	7	1.2%
3	2	0.3%
4	2	0.3%
5	6	1.0%
10	35	5.8%
15	5	0.8%
16	1	0.2%
20	35	5.8%
25	36	6.0%
30	29	4.8%
35	5	0.8%
40	20	3.3%
45	2	0.3%
50	109	18.1%
55	2	0.3%
60	20	3.3%
65	4	0.7%
70	13	2.2%
75	27	4.5%
80	24	4.0%
85	5	0.8%
90	12	2.0%
95	10	1.7%
99	5	0.8%
100	72	12.0%
Do not know	10	1.7%

B18 What do you think the chances are that you will need financial assistance from your family after age 65?

	Frequency	Percent
0	180	30.0%
1	29	4.8%
2	7	1.2%
5	13	2.2%
10	46	7.7%
12	1	0.2%
15	5	0.8%
20	57	9.5%
25	34	5.7%
30	30	5.0%
35	3	0.5%
40	26	4.3%
45	1	0.2%
50	68	11.3%
60	13	2.2%
65	4	0.7%
70	10	1.7%
75	22	3.7%
79	1	0.2%
80	5	0.8%
90	9	1.5%
95	2	0.3%
99	3	0.5%
100	28	4.7%
Do not know	3	0.5%
Refused	1	0.2%

B18b What do you think the chances are that you will need assistance from your family for every day activities after age 65

	Frequency	Percent
0	131	21.8%
1	26	4.3%
2	5	0.8%
3	2	0.3%
4	1	0.2%
5	8	1.3%
6	1	0.2%
10	74	12.3%
15	4	0.7%
20	70	11.6%
23	1	0.2%
25	53	8.8%
29	1	0.2%
30	33	5.5%
35	8	1.3%
40	17	2.8%
45	2	0.3%
50	79	13.1%
55	1	0.2%
60	14	2.3%
65	3	0.5%
70	5	0.8%
75	15	2.5%
78	1	0.2%
80	7	1.2%
85	5	0.8%
90	10	1.7%
95	1	0.2%
98	1	0.2%
99	2	0.3%
100	15	2.5%
Do not know	4	0.7%
Refused	1	0.2%

B19 At what age do you expect to retire and not work for pay at all?

	Frequency	Percent
Already retired	93	15.5%
43	1	0.2%
48	1	0.2%
50	10	1.7%
54	1	0.2%
55	19	3.2%
57	1	0.2%
58	8	1.3%
59	10	1.7%
60	60	10.0%
62	44	7.3%
63	8	1.3%
64	3	0.5%
65	131	21.8%
66	11	1.8%
67	20	3.3%
68	8	1.3%
69	2	0.3%
70	82	13.6%
72	4	0.7%
75	18	3.0%
80	2	0.3%
85	5	0.8%
Do not plan to retire	37	6.2%
Do not know	21	3.5%
Refused	1	0.2%

B19b Why don't you plan to retire?

	Frequency	Percent
Financial concerns	13	35.1%
Enjoy working	10	27.0%
Important to stay active	6	16.2%
Owns a business	4	10.8%
Other	4	10.8%

B21 Thinking about retirement, how important are the following to you after you retire? Would you say they are very important, somewhat important, not very important, or not important at all?

Spending more time with family

	Frequency	Percent
Very important	509	84.7%
Somewhat important	70	11.6%
Not very important	13	2.2%
Not important at all	9	1.5%

B22 Traveling

	Frequency	Percent
Very important	287	47.8%
Somewhat important	205	34.1%
Not very important	69	11.5%
Not important at all	38	6.3%
Do not know	2	0.3%

B23 Volunteering or community service

	Frequency	Percent
Very important	208	34.6%
Somewhat important	271	45.1%
Not very important	85	14.1%
Not important at all	37	6.2%

B26 Taking courses or pursuing educational goals

	Frequency	Percent
Very important	102	17.0%
Somewhat important	211	35.1%
Not very important	164	27.3%
Not important at all	123	20.5%
Do not know	1	0.2%

B27 Participating in recreational activities

	Frequency	Percent
Very important	314	52.2%
Somewhat important	235	39.1%
Not very important	35	5.8%
Not important at all	16	2.7%
Do not know	1	0.2%

B28 I will now read a list of financial concerns that people may have as they grow older. Thinking about your own situation, I'd like you to consider whether these concerns apply to you personally. Using a scale from 1 to 5 where 1 means you are "not concerned" and 5 means you are "very concerned, I'd like you to consider the following issues

The availability of social security benefits

	Frequency	Percent
1—Not concerned	65	10.8%
2	44	7.3%
3	58	9.7%
4	70	11.6%
5—Very concerned	363	60.4%
Refused	1	0.2%

B29 Declining employment opportunities

	Frequency	Percent
1—Not concerned	170	28.3%
2	75	12.5%
3	102	17.0%
4	81	13.5%
5—Very concerned	171	28.5%
Do not know	1	0.2%
Refused	1	0.2%

B30 Cost of long-term care

	Frequency	Percent
1—Not concerned	50	8.3%
2	32	5.3%
3	85	14.1%
4	113	18.8%
5—Very concerned	321	53.4%

B31 Cost of health insurance or long term care insurance

	Frequency	Percent
1—Not concerned	36	6.0%
2	22	3.7%
3	78	13.0%
4	85	14.1%
5—Very concerned	380	63.2%

B32 Running out of savings

	Frequency	Percent
1—Not concerned	82	13.6%
2	71	11.8%
3	103	17.1%
4	85	14.1%
5—Very concerned	258	42.9%
Do not know	1	0.2%
Refused	1	0.2%

B33 Having too much debt

	Frequency	Percent
1—Not concerned	194	32.3%
2	98	16.3%
3	103	17.1%
4	53	8.8%
5—Very concerned	151	25.1%
Do not know	2	0.3%

B34 About how often would you say that you exercise? Would you say:

	Frequency	Percent
Every day	176	29.3%
Several times a week	202	33.6%
Once or twice a week	115	19.1%
Several times a month	36	6.0%
Once or twice a month	26	4.3%
A few times a year	18	3.0%
Never	26	4.3%
Do not know	1	0.2%
Refused	1	0.2%

B35 How satisfied are you with the amount of money you are putting aside for your retirement? Are you:

	Frequency	Percent
Completely satisfied	104	17.3%
Somewhat satisfied	278	46.3%
Not very satisfied	113	18.8%
Not at all satisfied	96	16.0%
Do not know	2	0.3%
Refused	8	1.3%

B36 How much SOCIAL support do you receive from the following sources? Social support includes being cared for, loved, listened to, and respected.

How about from your family?

	Frequency	Percent
A lot	453	75.4%
Some	85	14.1%
A little	30	5.0%
None at all	31	5.2%
Do not know	1	0.2%
Refused	1	0.2%

B37 How much social support do you receive from your friends?

	Frequency	Percent
A lot	363	60.4%
Some	157	26.1%
A little	42	7.0%
None at all	36	6.0%
Do not know	2	0.3%
Refused	1	0.2%

B38 Your neighbors

	Frequency	Percent
A lot	134	22.3%
Some	178	29.6%
A little	115	19.1%
None at all	170	28.3%
Do not know	3	0.5%
Refused	1	0.2%

B39 A church or spiritual group

	Frequency	Percent
A lot	231	38.4%
Some	126	21.0%
A little	54	9.0%
None at all	183	30.4%
Do not know	2	0.3%
Refused	5	0.8%

B40 A club or social group

	Frequency	Percent
A lot	82	13.6%
Some	93	15.5%
A little	73	12.1%
None at all	348	57.9%
Do not know	2	0.3%
Refused	3	0.5%

B41 A non-profit or community agency

	Frequency	Percent
A lot	43	7.2%
Some	54	9.0%
A little	64	10.6%
None at all	431	71.7%
Do not know	6	1.0%
Refused	3	0.5%

**ELDERLY QUESTIONS**

E1 First, I'd like to ask you some s about your quality of life.

Thinking back over the last 12 months, have any of the following things been a problem for you?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said "yes" to the questions.*

	Frequency	Percent
Your physical health	200	33.3%
Having housing suited to your needs	52	8.7%
Health care	85	14.2%
Transportation	48	8.0%
Feeling lonely, sad or depressed	80	13.3%
Having enough food to eat	39	6.5%
Affording the medications you need	87	14.5%
Having financial problems	55	9.2%
Being physically or emotionally abused	7	1.2%
Being financially exploited	21	3.5%
Being a victim of crime	17	2.8%
Dealing with legal issues	27	4.5%
Everyday activities like walking, bathing, or getting in and out of a chair	78	13.0%
Providing care for another person	61	10.2%
None of the above	255	42.5%
Refused	2	0.3%

E2 The following are statements people have made about the food in their household. Please tell me how often each statement has been true for you in the last 30 days. Would you say each one has been true frequently, sometimes, or never in the last 30 days?

We were not able to afford enough food to eat

	Frequency	Percent
Frequently	17	2.8%
Sometimes	14	2.3%
Never	566	94.3%
Do not know	1	0.2%
Refused	2	0.3%

E3 You were able to eat three meals per day

	Frequency	Percent
Frequently	563	93.8%
Sometimes	17	2.8%
Never	19	3.2%
Do not know	0.0%	0
Refused	1	0.2%

E4 Your meals consisted of a variety of foods, including fruits, vegetables, and meat

	Frequency	Percent
Frequently	542	90.3%
Sometimes	44	7.3%
Never	13	2.2%
Do not know	0	0.0%
Refused	1	0.2%

E4b Do you need a special diet in order to meet your nutritional needs?

	Frequency	Percent
Yes	119	19.8%
No	481	80.2%

E4c Are you able to obtain foods that meet your special dietary requirements?  
*Asked only to those respondents who answered "yes" to question E4b.*

	Frequency	Percent
Yes	111	93.3%
No	8	6.7%

E5 In general, would you say that your health is excellent, very good, good, fair, or poor?

	Frequency	Percent
Excellent	125	20.8%
Very good	202	33.7%
Good	163	27.2%
Fair	82	13.7%
Poor	28	4.7%

E6 Thinking back over the past 12 months, can you tell me how many days you were in the hospital?

	Frequency	Percent
0	475	79.2%
1	31	5.2%
2	16	2.7%
3	12	2.0%
4	8	1.3%
5	6	1.0%
6	5	0.8%
7	9	1.5%
8	3	0.5%
9	2	0.3%
10	6	1.0%
11	2	0.3%
12	2	0.3%
14	4	0.7%
15	2	0.3%
19	1	0.2%
20	2	0.3%
21	1	0.2%
22	1	0.2%
24	1	0.2%
25	1	0.2%
30	1	0.2%
60	1	0.2%
84	1	0.2%
90	1	0.2%
93	1	0.2%
120	1	0.2%
180	1	0.2%
200	1	0.2%
Do not know	2	0.3%

E7 In the last 12 months, how many days were in you a nursing home?

	Frequency	Percent
0	589	98.2%
10	1	0.2%
20	1	0.2%
30	1	0.2%
60	2	0.3%
365	4	0.7%
Do not know	2	0.3%

E8 In the last 12 months, how many days were you in a rehabilitation facility?

	Frequency	Percent
0	570	95.0%
1	3	0.5%
2	1	0.2%
3	3	0.5%
5	2	0.3%
7	1	0.2%
10	1	0.2%
14	1	0.2%
15	1	0.2%
18	1	0.2%
20	1	0.2%
28	1	0.2%
30	4	0.7%
32	1	0.2%
40	2	0.3%
45	1	0.2%
60	3	0.5%
120	2	0.3%
Refused	1	0.2%

E9 Thinking back over the past 12 months, how many times have you fallen and injured yourself seriously enough to need medical attention? Would you say:

	Frequency	Percent
None	545	90.8%
Once or twice	47	7.8%
Three to five times	4	0.7%
More than 5 times	3	0.5%
Do not know	1	0.2%

E10 Do you have any of the following conditions?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said “yes” to the questions.*

	Frequency	Percent
Blindness or severe vision impairment	41	6.8%
Significant hearing loss	69	11.5%
Condition that limits daily activities such as walking or climbing stairs	120	20.0%
An emotional or mental illness that limits your daily activities	8	1.3%
None of the above	410	68.3%
Refused	1	0.2%

E11 Which of the following kinds of health insurance do you have?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said “yes” to the questions.*

	Frequency	Percent
Medicaid	48	8.0%
Medicare	408	68.0%
Private insurer	344	57.3%
Other insurance	138	23.0%
None of the above	13	2.2%
Refused	2	0.3%

E12 Have you recently needed any of the following, but could not afford them?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said "yes" to the questions.*

	Frequency	Percent
Eyeglasses	29	4.8%
Hearing aids	19	3.2%
Walkers	1	0.2%
Wheelchairs	2	0.3%
Canes	3	0.5%
Dentures	18	3.0%
Prescription medications	30	5.0%
None of the above	524	87.3%
Refused	3	0.5%

E13 Now I will read you a list, and I'd like you to tell me if you need help doing each task. Please tell me if you can do each of the activities without any help, with some help, or if you cannot do it at all. The first one is:

Preparing your meals

	Frequency	Percent
Without any help	568	94.7%
With some help	22	3.7%
Cannot do it at all	9	1.5%
Do not know	1	0.2%
Refused	0	0.0%

E14 Shopping for personal items

	Frequency	Percent
Without any help	549	91.5%
With some help	41	6.8%
Cannot do it at all	10	1.7%
Do not know	0	0.0%
Refused	0	0.0%

### E15 Managing your medications

	Frequency	Percent
Without any help	574	95.7%
With some help	18	3.0%
Cannot do it at all	1	0.2%
Do not know	6	1.0%
Refused	1	0.2%

### E16 Managing your money

	Frequency	Percent
Without any help	568	94.7%
With some help	26	4.3%
Cannot do it at all	4	0.7%
Do not know	1	0.2%
Refused	1	0.2%

### E17 Using a telephone

	Frequency	Percent
Without any help	592	98.7%
With some help	7	1.2%
Cannot do it at all	1	0.2%
Do not know	0	0.0%
Refused	0	0.0%

### E18 Doing light housework like dusting or vacuuming

	Frequency	Percent
Without any help	509	84.8%
With some help	61	10.2%
Cannot do it at all	27	4.5%
Do not know	1	0.2%
Refused	2	0.3%

### E19 Doing heavy housework like moving furniture, or washing windows

	Frequency	Percent
Without any help	302	50.3%
With some help	171	28.5%
Cannot do it at all	123	20.5%
Do not know	4	0.7%
Refused	0	0.0%

E20 Using transportation like a car, van, bus, etc.

	Frequency	Percent
Without any help	538	89.7%
With some help	32	5.3%
Cannot do it at all	30	5.0%
Do not know	0	0.0%
Refused	0	0.0%

E21 Doing interior or exterior home repairs

	Frequency	Percent
Without any help	269	44.8%
With some help	172	28.7%
Cannot do it at all	146	24.3%
Do not know	10	1.7%
Refused	3	0.5%

E22 Doing yard work

	Frequency	Percent
Without any help	340	56.7%
With some help	114	19.0%
Cannot do it at all	123	20.5%
Do not know	15	2.5%
Refused	8	1.3%

E23 Walking

	Frequency	Percent
Without any help	522	87.0%
With some help	68	11.3%
Cannot do it at all	10	1.7%
Do not know	0	0.0%
Refused	0	0.0%

E24 Eating

	Frequency	Percent
Without any help	593	98.8%
With some help	3	0.5%
Cannot do it at all	4	0.7%
Do not know	0	0.0%
Refused	0	0.0%

E25 Dressing yourself

	Frequency	Percent
Without any help	588	98.0%
With some help	7	1.2%
Cannot do it at all	5	0.8%
Do not know	0	0.0%
Refused	0	0.0%

E26 Bathing

	Frequency	Percent
Without any help	580	96.7%
With some help	14	2.3%
Cannot do it at all	5	0.8%
Do not know	0	0.0%
Refused	1	0.2%

E27 Using the toilet

	Frequency	Percent
Without any help	589	98.2%
With some help	5	0.8%
Cannot do it at all	5	0.8%
Do not know	0	0.0%
Refused	1	0.2%

E28 Getting in and out of bed or a chair

	Frequency	Percent
Without any help	576	96.0%
With some help	20	3.3%
Cannot do it at all	4	0.7%
Do not know	0	0.0%
Refused	0	0.0%

E29 In the past 12 months, how much help have you needed getting or arranging transportation? Would you say:

	Frequency	Percent
A lot	22	3.7%
Some	35	5.8%
None	543	90.5%

E30 When you have trouble getting the transportation you need, what would you say are the main reasons?

*Asked only to those respondents who answered “a lot” or “some” to question E29.*

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said “yes” to the questions.*

	Frequency	Percent
Having to rely on others	29	50.9%
Not available when I need to go	9	15.8%
Cannot afford it	3	5.3%
Unfamiliar with transport options/system	1	1.8%
Car does not work	1	1.8%
Have trouble getting around without someone to help	11	19.3%
Don't know who to call	1	1.8%
Not available in my community	2	3.5%
Transportation does not go where I need it to go	7	12.3%
Sick or recovering	8	14.0
Difficulty walking	1	1.8%
Do not know	8	14.0%
Refused	2	3.5%

E30b When you do go out, what types of places do you go to?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said “yes” to the questions*

	Frequency	Percent
Grocery shopping	497	82.8%
Leisure activities like parks	392	65.3%
Work	127	21.2%
Restaurants or bars	441	73.5%
Other	326	54.3%
Refused	4	0.7%

E30c Is there somewhere you would like to go, but can't because of a lack of transportation? If so, please tell me where.

	Frequency	Percent
None	552	92.0%
Vacation out of area	32	5.3%
Community events	3	0.5%
Shopping or chores	7	1.2%
Local travel like restaurants	5	0.8%
Other	1	0.2%

E31 Are there other kinds of services that you need that we have not mentioned?

	Frequency	Percent
No other services	569	94.8%
Help with prescriptions	8	1.3%
Public transportation	7	1.2%
Insurance help	1	0.2%
Other	1	0.2%
Affordable caregivers	3	0.5%
Maid or housecleaning service	10	1.7%
Price of food	1	0.2%

E32 How much practical support do you receive these days from the following sources? Examples of practical support are being given a ride somewhere, having someone shop for you, loan you money, or do a home repair for you.

How about your family? Would you say you receive a lot, some, a little, or no practical support at all?

	Frequency	Percent
A lot	142	23.7%
Some	84	14.0%
A little	67	11.2%
None at all	305	50.8%
Do not know	2	0.3%

E33 How much practical support do you receive from your friends?

	Frequency	Percent
A lot	89	14.8%
Some	89	14.8%
A little	72	12.0%
None at all	344	57.3%
Do not know	4	0.7%
Refused	2	0.3%

E34 Your neighbors

	Frequency	Percent
A lot	61	10.2%
Some	65	10.8%
A little	72	12.0%
None at all	397	66.2%
Do not know	3	0.5%
Refused	2	0.3%

E35 A church or spiritual group

	Frequency	Percent
A lot	76	12.7%
Some	65	10.8%
A little	36	6.0%
None at all	420	70.0%
Do not know	1	0.2%
Refused	2	0.3%

E36 A club or social group

	Frequency	Percent
A lot	45	7.5%
Some	48	8.0%
A little	30	5.0%
None at all	473	78.8%
Do not know	2	0.3%
Refused	2	0.3%

E37 A non-profit or community agency

	Frequency	Percent
A lot	18	3.0%
Some	21	3.5%
A little	15	2.5%
None at all	543	90.5%
Do not know	2	0.3%
Refused	1	0.2%

E38 How much SOCIAL support do you receive from the following sources? Social support includes being cared for, loved, listened to, and respected.

How about from your family?

	Frequency	Percent
A lot	465	77.5%
Some	65	10.8%
A little	24	4.0%
None at all	44	7.3%
Do not know	2	0.3%

E39 How much social support do you receive from your friends?

	Frequency	Percent
A lot	370	61.7%
Some	117	19.5%
A little	39	6.5%
None at all	73	12.2%
Do not know	1	0.2%

E40 Your neighbors

	Frequency	Percent
A lot	223	37.2%
Some	119	19.8%
A little	87	14.5%
None at all	166	27.7%
Do not know	5	0.8%

E41 A church or spiritual group

	Frequency	Percent
A lot	234	39.0%
Some	90	15.0%
A little	38	6.3%
None at all	233	38.8%
Do not know	3	0.5%
Refused	2	0.3%

E42 A club or social group

	Frequency	Percent
A lot	140	23.3%
Some	76	12.7%
A little	32	5.3%
None at all	345	57.5%
Do not know	4	0.7%
Refused	3	0.5%

E43 A non-profit or community agency

	Frequency	Percent
A lot	45	7.5%
Some	25	4.2%
A little	14	2.3%
None at all	505	84.2%
Do not know	6	1.0%
Refused	5	0.8%

E44 The following is a list of information sources. How often do you use each source to find out about services and activities available to you?

The newspaper. Would you say you use this:

	Frequency	Percent
Frequently	359	59.8%
Sometimes	117	19.5%
Never	122	20.3%
Do not know	1	0.2%
Refused	1	0.2%

E45 Radio

	Frequency	Percent
Frequently	174	29.0%
Sometimes	233	38.8%
Never	191	31.8%
Do not know	1	0.2%
Refused	1	0.2%

E46 Television

	Frequency	Percent
Frequently	420	70.0%
Sometimes	129	21.5%
Never	50	8.3%
Do not know	0	0.0%
Refused	1	0.2%

E47 The library

	Frequency	Percent
Frequently	107	17.8%
Sometimes	215	35.8%
Never	277	46.2%
Do not know	0	0.0%
Refused	1	0.2%

E48 Internet

	Frequency	Percent
Frequently	240	40.0%
Sometimes	114	19.0%
Never	245	40.8%
Do not know	0	0.0%
Refused	1	0.2%

E49 Word of mouth

	Frequency	Percent
Frequently	258	43.0%
Sometimes	266	44.3%
Never	72	12.0%
Do not know	2	0.3%
Refused	2	0.3%

E50 Senior publications

	Frequency	Percent
Frequently	118	19.7%
Sometimes	212	35.3%
Never	266	44.3%
Do not know	2	0.3%
Refused	2	0.3%

QCare Do you provide care for one or more family members or friends aged 60 or over on a regular basis?

	Frequency	Percent
Yes	190	15.8%
No	1008	84.0%
Do not know	1	0.1%
Refused	1	0.1%

**CAREGIVER QUESTIONS: THESE QUESTIONS ASKED ONLY TO RESPONDENTS WHO ANSWERED “YES” TO QUESTION QCare.**

C1 For how many family members or friends do you provide care?

	Frequency	Percent
1	146	76.8%
2	30	15.8%
3	9	4.7%
4	1	0.5%
5 or more	4	2.1%

C2 For whom do you provide this care?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said "yes" to the questions*

	Frequency	Percent
Spouse	50	26.3%
Parent	101	53.2%
Friend/neighbor	15	7.9%
Adult child	3	1.6%
Grandchild	3	1.6%
Child	4	2.1%
Partner	3	1.6%
Other family member	32	16.8%
Other	6	3.2%
Do not know	0	0.0%
Refused	0	0.0%

C3 About how many hours per week do you spend providing care for this person or persons? Would you say:

	Frequency	Percent
1-5 hours	49	25.8%
6-10 hours	33	17.4%
11 to 20 hours	19	10.0%
More than 20 hours	84	44.2%
Do not know	4	2.1%
Refused	1	0.5%

C4 What kind of assistance do you provide?

Note: Respondents can choose more than one response for this question.

Responses reflect percentage of respondents who said "yes" to the questions

	Frequency	Percent
Cooking, laundry and house cleaning	49	25.8%
Home maintenance or repair	88	46.3%
Transportation	136	71.6%
Interpreter	32	16.8%
Feeding, bathing, toileting, dressing, or grooming	64	33.7%
Administering medications	83	43.7%
Managing the person's financial affairs	99	52.1%
Direct financial support	83	43.7%
Providing emotional reassurance	141	74.2%
Arranging and monitoring outside help or resources	99	52.1%
Other	17	8.9%
Refused	0	0.0%

C5 I'm now going to read a list of problems that people who are caregivers sometimes experience as a result of their care giving activities. For each one, please rate it is a major problem, a minor problem, or no problem.

Understanding government programs such as Medicare, Medicaid, SSI, or In-Home Supportive Services.

	Frequency	Percent
Major problem	53	27.9%
Minor problem	51	26.8%
No problem	83	43.7%
Do not know	2	1.1%
Refused	1	0.5%

C6 Finding out about legal options

	Frequency	Percent
Major problem	29	15.3%
Minor problem	59	31.1%
No problem	100	52.6%
Do not know	2	1.1%
Refused	0	0.0%

C7 Getting cooperation and assistance from other family members

	Frequency	Percent
Major problem	31	16.3%
Minor problem	52	27.4%
No problem	107	56.3%
Do not know	0	0.0%
Refused	0	0.0%

C8 Ensuring the care recipient's safety

	Frequency	Percent
Major problem	17	8.9%
Minor problem	45	23.7%
No problem	128	67.4%
Do not know	0	0.0%
Refused	0	0.0%

C9 Identifying available transportation resources

	Frequency	Percent
Major problem	18	9.5%
Minor problem	31	16.3%
No problem	139	73.2%
Do not know	2	1.1%
Refused	0	0.0%

C11 Communicating with service providers

	Frequency	Percent
Major problem	23	12.1%
Minor problem	42	22.1%
No problem	123	64.7%
Do not know	1	0.5%
Refused	1	0.5%

C12 Balancing other family responsibilities, such as children

	Frequency	Percent
Major problem	26	13.7%
Minor problem	33	17.4%
No problem	130	68.4%
Do not know	0	0.0%
Refused	1	0.5%

C13 Dealing with dangerous, unwanted, or difficult behaviors of the care recipient

	Frequency	Percent
Major problem	10	5.3%
Minor problem	35	18.4%
No problem	145	76.3%
Do not know	0	0.0%
Refused	0	0.0%

C14 Involvement in decisions about the care recipient's medical treatment requirements

	Frequency	Percent
Major problem	25	13.2%
Minor problem	38	20.0%
No problem	126	66.3%
Do not know	1	0.5%
Refused	0	0.0%

C15 Adjusting your work schedule and meeting your work responsibilities

	Frequency	Percent
Major problem	23	12.1%
Minor problem	47	24.7%
No problem	119	62.6%
Do not know	1	0.5%
Refused	0	0.0%

C16 Meeting your personal needs such as personal time or exercise

	Frequency	Percent
Major problem	34	17.9%
Minor problem	53	27.9%
No problem	103	54.2%
Do not know	0	0.0%
Refused	0	0.0%

C17 Please tell me whether or not you experience any of the following as a result of your care giving responsibilities?

*Note: Respondents can choose more than one response for this question.*

*Responses reflect percentage of respondents who said "yes" to the questions*

	Frequency	Percent
Physical strain or fatigue	65	34.2%
Feeling emotionally upset	85	44.7%
Lack of cooperation from family members	49	25.8%
Not having enough money to pay for care	32	16.8%
Interference with family relationships	36	18.9%
Finding caregiver support programs	31	16.3
Other	16	8.4%
Transportation problems	2	1.1%
Finding quality healthcare	1	0.5%

## DEMOGRAPHICS

D1 These last few s are so we can compare your responses to others who have taken the survey.

Which of the following best describes where you live?

	Frequency	Percent
Single family home	949	79.0%
Townhouse, condominium, duplex, or apartment	164	13.7%
Mobile home	60	5.0%
Assisted living facility	8	0.7%
Nursing home	1	0.1%
Other	12	1.0%
Refused	7	0.6%

D2 Do you own or rent your home?

	Frequency	Percent
Own	1028	85.6%
Rent	138	11.5%
Other	25	2.1%
Refused	10	0.8%

D3 How many people, including yourself, live in your home?

	Frequency	Percent
1	307	25.6%
2	546	45.5%
3	195	16.2%
4	82	6.8%
5	35	2.9%
6	13	1.1%
7	2	0.2%
8	2	0.2%
9	2	0.2%
10	1	0.1%
40	2	0.2%
52	1	0.1%
97	1	0.1%
Do not know	1	0.1%
Refused	11	0.9%

D4 What is your marital status?

	Frequency	Percent
Married	731	60.9%
Partnered, not married	22	1.8%
Divorced	141	11.7%
Separated	13	1.1%
Widowed	203	16.9%
Single, never married	78	6.5%
Other	4	0.3%
Refused	9	0.7%

D5 What is the highest grade in school or year of college you have completed?

	Frequency	Percent
Grade school	37	3.1%
High school graduate	294	24.5%
Some college	355	29.6%
College graduate	335	27.9%
Post graduate degree	172	14.3%
Refused	8	0.7%

D6 What is your age?

	Frequency	Percent
42 to 45	111	9.3%
46 to 50	183	15.3%
51 to 55	158	13.2%
56 to 60	165	13.8%
61 to 65	148	12.4%
66 to 70	132	11.0%
71 to 75	93	7.8%
76 to 80	81	6.8%
81 to 85	58	4.8%
86 to 90	22	1.8%
91 and older	6	0.5%
Refused	44	3.6%

D7 What was your total household income in 2006? Was it:

	Frequency	Percent
Less than \$20,000	98	8.2%
\$20,000 to \$50,000	291	24.2%
\$50,000 to \$75,000	175	14.6%
\$75,000 to \$100,000	122	10.2%
More than \$100,000	210	17.5%
Refused	305	25.4%

B35b What is your employment status? Are you:  
 Asked only to those respondents in the "Baby Boomers" category

	Frequency	Percent
Employed full time	378	62.9%
Employed part time	53	8.8%
Not employed	54	9.0%
Retired	89	14.8%
Other	24	4.0%
Refused	3	0.5%

Respondent gender (*Interviewer determined*)

	Frequency	Percent
Male	447	37.2%
Female	754	62.8%