

Public Perspective, Part Two

*PUBLIC SURVEY RESEARCH ON PERCEPTIONS OF
AGING SERVICES*

*Opening Doors to
Aging Services*

LeadingAge[®]

Public Opinion Survey

METHODOLOGY

Survey conducted online May 10-17, 2021, with 800 American adults and oversample of 400 adults ages 45+ nationwide.

Margin of error = +/- 3.5%.

Conducted by 3W Insights for LeadingAge.



Perceptions of Aging Services

Views of the sector from American adults nationwide



The aging services sector overall does not have a public perception crisis.

x2

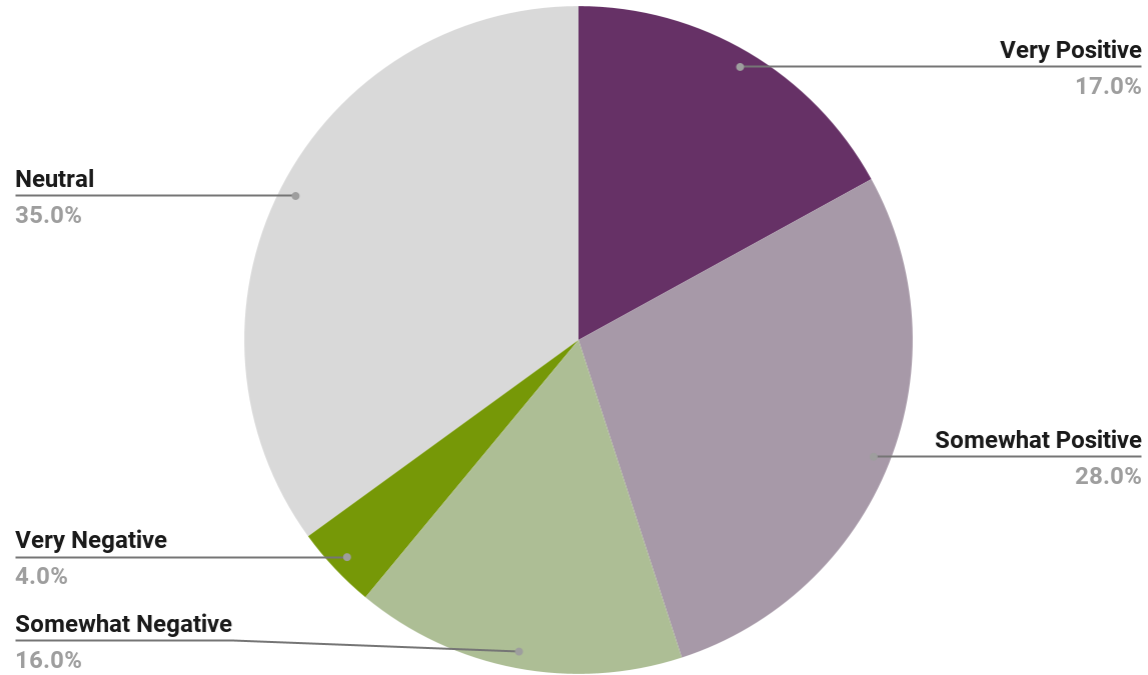
Twice as many Americans have a favorable perception of the sector than unfavorable

<50%

...but, just 45% have a positive view of the sector

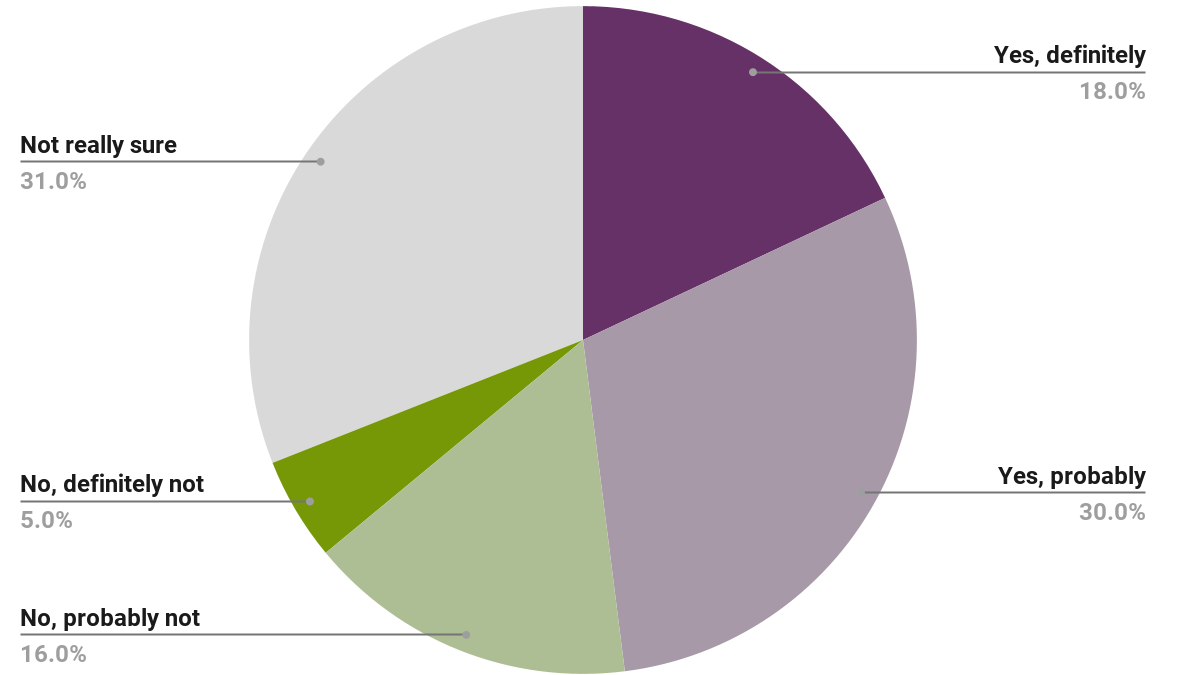
Views of the sector

45% positive view
20% negative view



Trust in the sector

48% trust
21% don't trust



1/3 are unsure

Who is “not really sure” they trust the sector?

31% said they’re “not really sure”

They are more likely to be:

Women (particularly aged 45+)

Those aged 45+

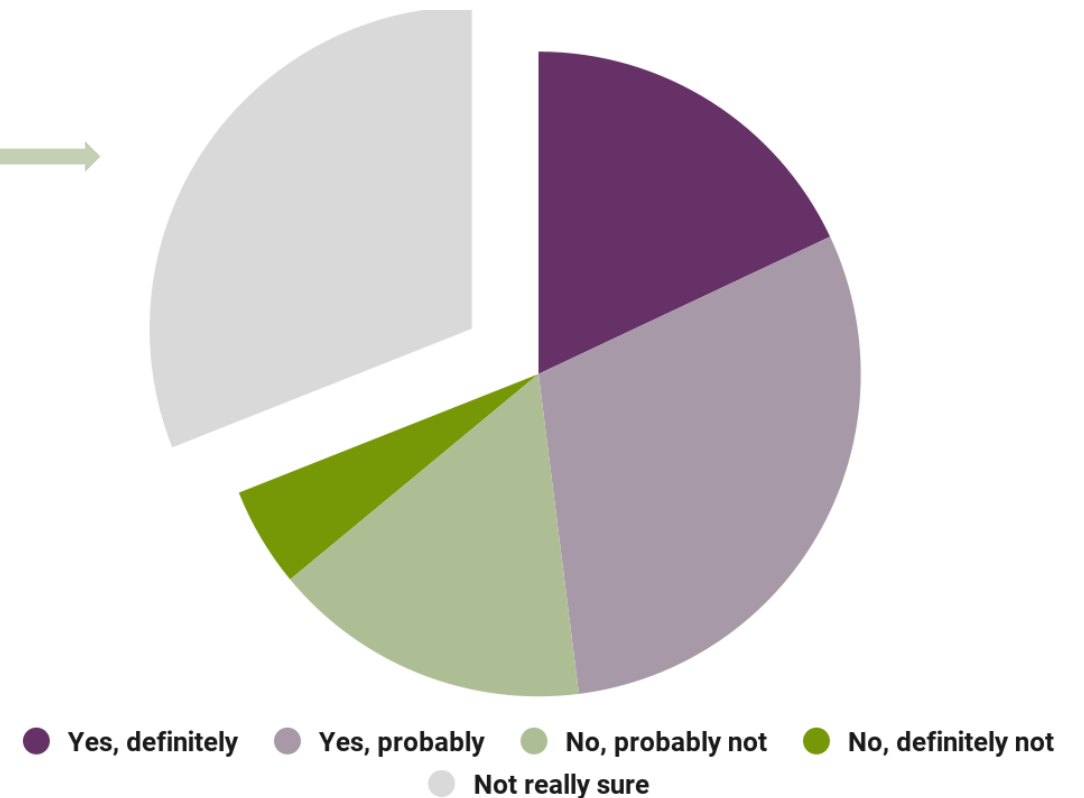
Non-consumers of aging services

Household income <\$100K

Live outside of the northeast

Republican or Independent

Trust in the sector



Little is known about our sector...

What comes to mind when asked about the sector:



- Nursing homes
- Assisted living
- Health care

**...but people who have used aging services or care
report positive experiences**

More than half of people have had direct experience with the
sector and **68%** said it was a positive experience.

Experience drives confidence--what consumers value

68% Good Experience:

Quality of care most cited

Quality of care	24%
Received the medical attention needed	13%
Pleasant environment	11%
Near friends and family	10%
Felt less alone	9%
Enjoyed living with other people	9%
Devoted professionals	9%
Trusted a faith-based care organization	7%
Vibrant social activities	5%
Other	2%

16% Bad Experience:

Standard of care and medical attention most cited

Standard of care lower than expected	29%
Staff did not provide the medical attention needed	26%
Staff was unhelpful or unkind	16%
Unpleasant environment	14%
Organization was all about the bottom line	7%
Difficult for friends and family to visit	2%
Disliked living with other people	2%
Hard to make friends or have meaningful interaction with others	1%
Other	5%

Many previous consumers would recommend aging services

Q: “Based on the experience you had [with aging services], would you recommend this service to somebody else if they needed it?”

Yes	70%
No	14%
Not sure	17%

Resounding support for care professionals

Words That Best Describe

Compassionate

Dedicated

Essential

Professional

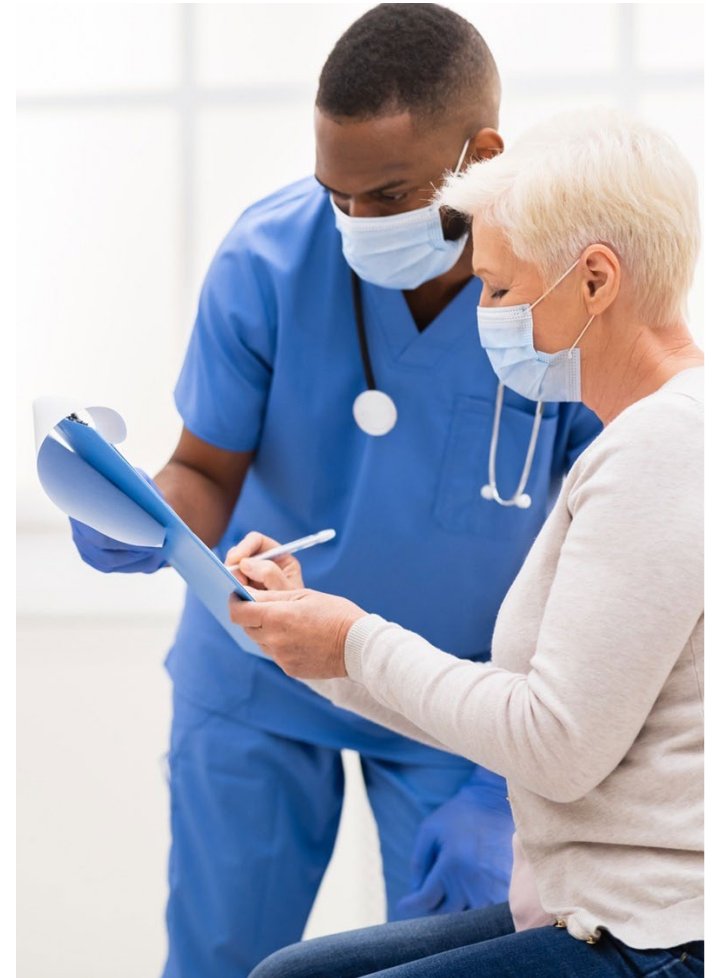
Words That Least Describe

Lazy

Incompetent

Unskilled

Disengaged



What words best characterize the kind of people who work in the aging services sector?

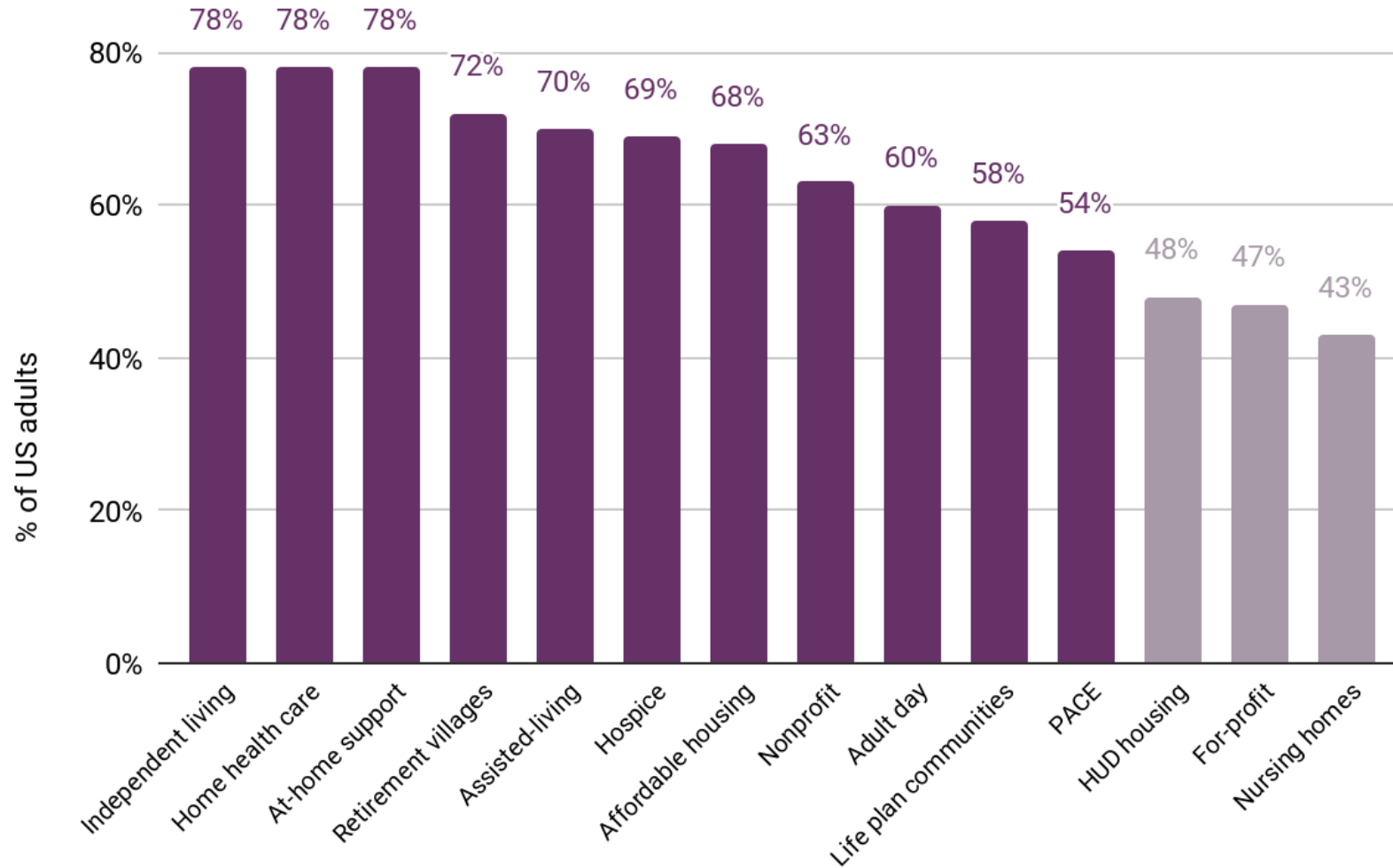
Many Americans aware care workers are poorly paid



	Best describes	Respondents			
		Age 18-29	Age 30-44	Age 45-64	Age 65+
Compassionate	42%	26%	34%	48%	53%
Dedicated	32%	29%	26%	38%	34%
Essential	29%	16%	25%	34%	36%
Professional	28%	27%	29%	28%	27%
Poorly paid	25%	13%	11%	35%	36%

What words best characterize the kind of people who work in the aging services sector?

11 out of 14 provider types viewed favorably



Only nursing homes, HUD housing, and for-profit aging services providers have an unfavorable perception

For each of the following services, do you have a favorable or unfavorable opinion?

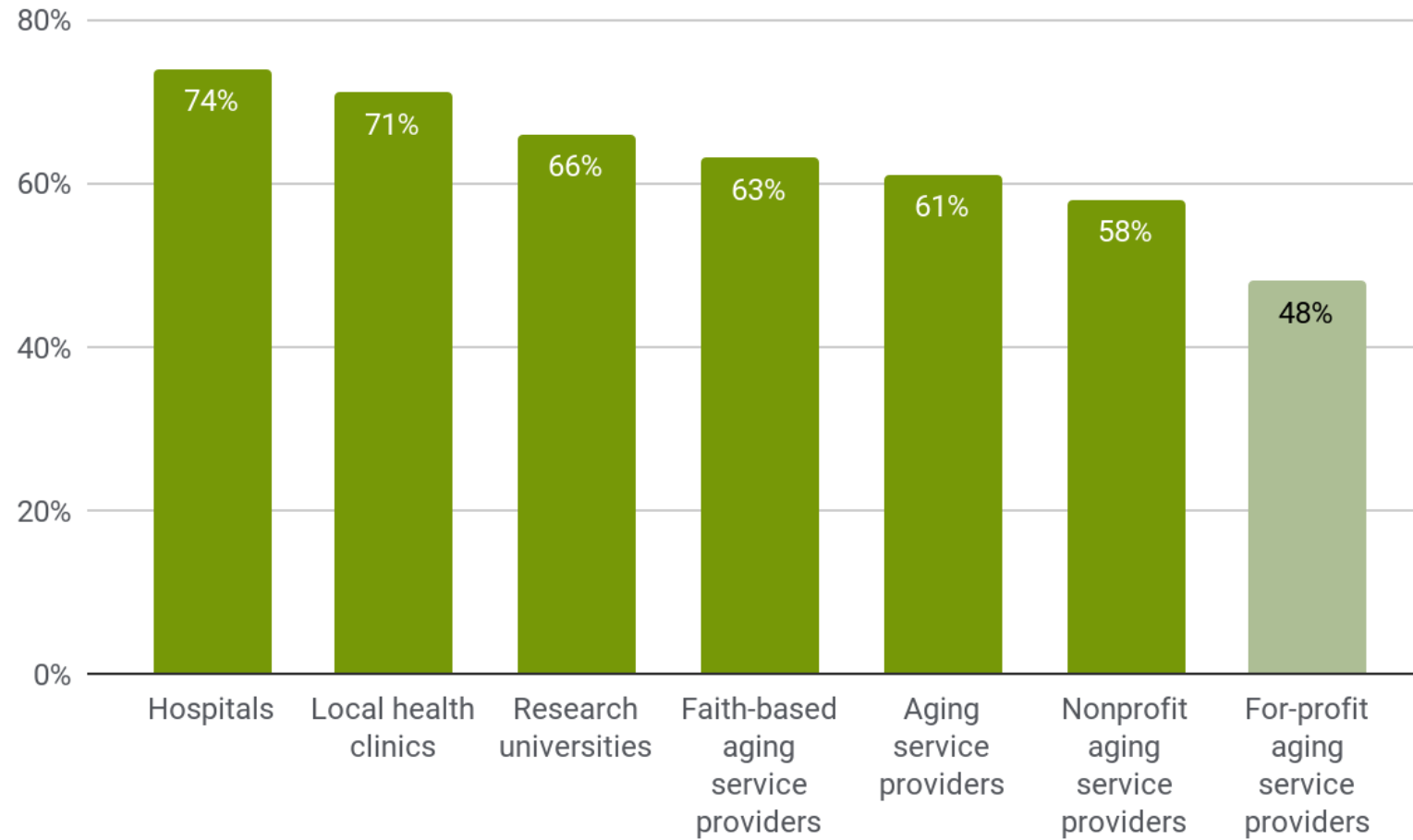
Favorable views of provider types, but quality ranks lower

For each of the following services, do you have a **favorable or unfavorable** opinion?

And for the same list, how would you rate the **quality of service or care** that its customers receive?

Provider Type	Favorable	Quality
Independent living	78%	68%
Home health care	78%	65%
At-home support	78%	65%
Retirement villages	72%	62%
Assisted living communities	70%	59%
Hospice	69%	65%
Affordable senior housing	68%	56%
Nonprofit aging service providers	63%	51%
Adult day care	60%	50%
Life plan communities	56%	51%
Programs of All-Inclusive Care for the Elderly (PACE)	54%	46%
HUD housing	48%	42%
For-profit aging service providers	47%	44%
Nursing homes	43%	37%

Provider favorability comparison



For each of the following entities, do you have a favorable or unfavorable opinion?

General Perceptions of Aging



Many Americans do not consider themselves old ...including 27% of people 65+ years old

Q: “Would you say that you, yourself, are ‘old?’”

Yes, definitely	19%
Yes, sort of	35%
No, not really	34%
Definitely not	13%

Only half of Americans can rely on family as they age

Q: “When I am older, my family will probably provide all the care and services I need.”

52% of Americans agree

Total Agree	Male	Female	Age 18-29	Age 30-44	Age 45-64	Age 65+
52%	54%	51%	58%	62%	43%	52%

Two-thirds of Americans may seek professional services as they age

Q: “Regardless of how old you are now, would you ever consider getting extra care or services to support you as you get older?”

62% of Americans said yes

Total Agree	Male			Female			Age 18-29	Age 30-44	Age 45-64	Age 65+
	Total Agree	Age <44	Age 45+	Total Agree	Age <44	Age 45+				
62%	63%	78%	50%	62%	65%	60%	69%	73%	57%	53%

27% are unsure

Americans value things that support their health and independence

	Very Important Total	Very Important to Women 45+
Good mental health	74%	85%
Good physical health	71%	75%
Independence	69%	80%
Financial health and security	67%	74%
To live in your own home	67%	76%
Respect and dignity	65%	77%

Americans recognize professionalism of aging services sector

Q: “I would trust *professionals* in the aging services sector more than myself to care for an older family member.”

Q: “I would trust *providers* in the aging services sector more than myself to care for an older family member.”

55% of Americans agree						
Total Agree	Male	Female	Age 18-29	Age 30-44	Age 45-64	Age 65+
55%	63%	47%	63%	65%	46%	48%

48% of Americans agree						
Total Agree	Male	Female	Age 18-29	Age 30-44	Age 45-64	Age 65+
48%	50%	45%	57%	58%	38%	41%



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