2023 Marin County Older Adults Needs Assessment

TOPLINE REPORT
Davis Research LLC
January 2024
Background & Objectives

• Marin County Health and Human Services contracted Davis Research to conduct a thorough needs assessment of older adult residents (age 60+) to better understand their current needs and concerns.

• This survey serves as a follow-up to a similar needs assessment survey conducted in 2019.

• Contact was made on behalf of Marin County Health and Human Services and respondents were screened to identify an adult age 60 and over.

• From November 27th, 2023, to December 19th, 2023, a survey was conducted among 412 Marin County residents (60+ years old).

• Oversample (OS) targeting of African American, Asian, Hispanic, and Rural populations was a new addition to data collection methodology in 2023 to bolster the data pool.

• The survey was offered by phone and online in English, Spanish, Vietnamese, and Chinese languages.

• The average interview length was 24 minutes for phone interviews and 22 minutes for online surveys.

• Some data has been weighted to provide a more accurate distribution across these demographics.

• Significance testing was performed at a 90% and 95% confidence level.
2024 Demographic Breakdown (Gen Pop)

**Gender**
- Female: 55%
- Male: 44%
- Non-Binary: 1%

**Income**
- Low Income: 25%
- Non-Low Income: 75%

**Age**
- 60-64: 25%
- 65-69: 23%
- 70-74: 21%
- 75-79: 13%
- 80-84: 9%
- 85+: 9%

*Note: These charts reflect weighted survey data*
2024 Demographic Breakdown (Gen Pop)

**Ethnicity (Hispanic/Latino Heritage)**
- Hispanic: 6%
- Non-Hispanic: 93%
- Refused: 1%

**Sexual Identity**
- Heterosexual: 92%
- LGBTQ+: 4%
- Refused: 2%

**Race**
- White: 85%
- POC: 15%
Geo-Maps of Respondent Population

[Map showing geographical distribution with markers indicating main and OS selections]
Topline Observations

THE STRUGGLE IS REAL:

• Since 2019, older adults are expressing elevated levels of concern across all areas.
• Marin County seniors are experiencing more food insecurity now than in 2019 (up +8 percentage points).
• About a third of older adults feel isolated or lonely at least some of the time.

RISING COSTS:

• As the cost of living continues to rise, many older adults on fixed incomes can’t keep up and struggle to make ends meet.
• 47% of those surveyed say it is difficult to live on their total household income right now.
• Financial security is the concern that increased the most since 2019; +16 percentage points from 13% to 29% in 2023.

HOUSING AND DAILY LIVING EXPENSES:

• Accessing affordable housing in Marin County is a growing concern as local real estate prices continue to increase.
• Affording other living expenses such as utilities, groceries, and healthcare expenses is a big struggle.

HEALTH AND QUALITY OF LIFE:

• Three-quarters of older adults feel their quality of life is “Excellent” or “Very Good”.
• Six out of every ten older adults describe their health as “Excellent” or “Very Good”.
• 90% of older adults report exercising at least a few times per week.
• No *significant* changes for any of these measures were made since 2019.

HIGHER NEED POPULATIONS:

• Older adults who belong to these groups are more likely to be adversely impacted in 2023 than in 2019:
  • 75+ years old
  • Low Income
  • Less Educated
  • Women
  • Hispanic
  • African American
  • Live Alone
  • Lonely
  • Food Insecure
Noteworthy Differences: 2019 vs. 2023

FOOD INSECURITY:

- Food insecurity among older adults rose +8 points since 2019 (18% vs. 10%).
- Worried food would run out before getting more money [“Often” or “Sometimes” True]: rose +6 points since 2019 (16% vs. 10%).
- Food didn’t last / No money to buy more food [“Often” or “Sometimes” True]: almost 2x more likely compared to 2019 (13% vs. 7%).

BURDEN ON CAREGivers:

- In 2023, unpaid caregivers are 3x more likely to report physical stress, 2x as likely to report emotional stress, and 2x as likely to report financial stress “Very Often”.
- Unpaid caregivers are significantly more likely to say they are unaware of support services and/or how to access them.

INCREASED LEVELS OF CONCERN:

- Marin residents are significantly more likely to have concerns in the following areas vs. when surveyed in 2019:
  - Affording healthcare, medications, rent/mortgage
  - Crime, financial abuse, scams
  - Financial security
  - Feeling depressed
  - Getting healthcare/meds
  - Losing memory/cognition
  - Getting out to socialize
Noteworthy Detailed Findings: Health & Quality of Life

- More than half of older adults give high marks to their quality of life and health.
- Certain specific populations are adversely impacted when it comes to their health and quality of life:

<table>
<thead>
<tr>
<th>Group</th>
<th>% Needs Improvement (Someday / Definitely)</th>
<th>Δ vs. Gen Pop (40%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>25%</td>
<td>-11%</td>
</tr>
<tr>
<td>Women</td>
<td>48%</td>
<td>+8%</td>
</tr>
<tr>
<td>Food Insecure</td>
<td>59%</td>
<td>+19%</td>
</tr>
<tr>
<td>Lonely</td>
<td>51%</td>
<td>+11%</td>
</tr>
<tr>
<td>Non-College Grad</td>
<td>56%</td>
<td>+16%</td>
</tr>
<tr>
<td>African American</td>
<td>62%</td>
<td>+22%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Group</th>
<th>% Fair or Poor</th>
<th>Δ vs. Gen Pop (13%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>75+</td>
<td>20%</td>
<td>+7%</td>
</tr>
<tr>
<td>Low Income</td>
<td>24%</td>
<td>+11%</td>
</tr>
<tr>
<td>Food Insecure</td>
<td>27%</td>
<td>+14%</td>
</tr>
<tr>
<td>Lonely</td>
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<td>+16%</td>
</tr>
<tr>
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<td>+20%</td>
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<tbody>
<tr>
<td>Men</td>
<td>6%</td>
<td>-5%</td>
</tr>
<tr>
<td>Women</td>
<td>16%</td>
<td>+5%</td>
</tr>
<tr>
<td>Low Income</td>
<td>34%</td>
<td>+23%</td>
</tr>
<tr>
<td>Food Insecure</td>
<td>46%</td>
<td>+35%</td>
</tr>
<tr>
<td>Live Alone</td>
<td>19%</td>
<td>+9%</td>
</tr>
<tr>
<td>Lonely</td>
<td>33%</td>
<td>+22%</td>
</tr>
<tr>
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<td>21%</td>
<td>+10%</td>
</tr>
</tbody>
</table>

- Older adults are maintaining an active lifestyle.
  - Nearly 90% of older adults in Marin County report exercising at least a few times a week.
  - Older adults in West Marin report notably higher levels of daily exercise (73% vs. 45% of the general population).
  - Those who are not lonely are significantly more likely to exercise daily versus those who are lonely. (48% vs. 32%) ⊹

⊹ 95% confidence
Noteworthy Detailed Findings: Mobility Needs

- Consistent with 2019, driving a personal vehicle remains the primary method most Marin County residents use to get around.

- Dramatic shifts since 2019 reflect a significant decrease in:
  - Walking / Biking
  - Friends / Family
  - Taxi / Lyft / Uber
  - Public Transit

- Note: Changes in survey methodology in 2023 may explain some of the shifts. In 2019 this question was asked as a yes/no for each method of transportation. In 2023 it was asked open ended without reading the list of options. The responses mentioned were then coded.
Noteworthy Detailed Findings: Current Concerns

- Older adults in 2023 have significantly more concerns and elevated levels of concerns.
- In 2019, older adults were significantly more likely to express concern in less than 3 areas.
- The following areas are where older adults in 2023 are significantly more likely to have concerns relative to 2019:
  - Affording healthcare
  - Affording medication
  - Affording rent / mortgage
  - Crime, Financial Abuse, Scams
  - Feeling Depressed
  - Financial Security
  - Getting healthcare / medications I need
  - Knowing how to access info about resources / services
  - Losing my memory/cognition
  - Getting out of the house to socialize

Top 6 Most Frequently Indicated Concerns

<table>
<thead>
<tr>
<th>Concern</th>
<th>2019</th>
<th>Δ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Climate Change</td>
<td>64%</td>
<td>+6%</td>
</tr>
<tr>
<td>Affording Assisted Living Services</td>
<td>41%</td>
<td>NEW FOR 2023</td>
</tr>
<tr>
<td>Financial Security</td>
<td>29%</td>
<td>+16%</td>
</tr>
<tr>
<td>Disasters (fire/flood/earthquake)</td>
<td>26%</td>
<td>+1%</td>
</tr>
<tr>
<td>Crime, Financial Abuse, Scams</td>
<td>26%</td>
<td>+13%</td>
</tr>
<tr>
<td>Losing Memory or Cognition</td>
<td>25%</td>
<td>+10%</td>
</tr>
</tbody>
</table>

◊ 95% confidence, * 90% confidence
Noteworthy Detailed Findings: Housing Affordability

- Older adults with the highest levels of concern around affording their rent or mortgage has doubled since 2019 (20% vs. 10%).

- Housing affordability struggles are more pronounced among the following groups (Top 2 Box): Women (26%), Low-Income (38%), Hispanics (32%), African Americans (41%), Aged d60-64 (35%).

- Data for those who state they are not at all concerned has drastically shrunk to below 50%.

- Household composition has remained largely unchanged since 2019.

How concerned are you about affording rent or mortgage?

<table>
<thead>
<tr>
<th>Year</th>
<th>1 - Not at all Concerned</th>
<th>2</th>
<th>3 - Somewhat Concerned</th>
<th>4</th>
<th>5 - Very Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>7% 3% 7% 10%</td>
<td></td>
<td></td>
<td></td>
<td>72%</td>
</tr>
<tr>
<td>2023</td>
<td>15% 6% 17% 11%</td>
<td></td>
<td></td>
<td></td>
<td>49%</td>
</tr>
</tbody>
</table>

Who else is living with you in your home?

- Live Alone: 33%
- Spouse/Partner: 55%
- Grandchildren: 3%
- Adult Children: 45%
- Other: 9%
Noteworthy Detailed Findings: Food Insecurity

- Food insecurity among older adults rose +8 percentage points since 2019 (18% vs. 10%).
- Those who felt the following statement was at least “sometimes true” increased by 65% since 2019: Worried my food would run out...
- Those who felt the following statement was at least “sometimes true” nearly doubled since 2019: Food I bought didn’t last and I didn’t have money to get more.

18% of older adults surveyed in Marin County are classified as Food Insecure

- Almost half of those who are lonely are also classified as food insecure; +14 points above the general population of older adults in Marin.
- Women are twice as likely as men to be food insecure (27% vs. 12%).
- Non-Caucasians are twice as likely as Caucasians to be food insecure (30% vs. 15%).
- Among the different age brackets, the youngest age cohort (60-64) is significantly more likely to be food insecure relative to those aged 75 and older (27% vs. 17%).

◊ 95% confidence
Noteworthy Detailed Findings: Social Isolation

• Women are almost three times as likely as men to have felt excluded or devalued because of their age (at least somewhat often); 26% vs. 9%.

• Nearly half of women feel they lack companionship at least some of the time (47% vs. 29% of men).

• These groups are more than twice as likely (vs. the general population) to feel they OFTEN lack companionship.
  o Food Insecure: 24%
  o Low Income: 22%

• Although a smaller sample, LGBTQ individuals are 2 to 3x more likely to show higher levels of feeling isolated or left out.

• Women are 3x more likely to eat alone “All the time” relative to men (26% vs. 8%).

*Social Isolation Measurement Question

95% confidence
Noteworthy Detailed Findings: Healthcare Access

- While the vast majority of older adults who attempted to seek out medical or dental care were able to receive it, less than a fifth attempted to receive mental healthcare.
- Of those that did attempt to receive mental healthcare, just over 70% were able to receive the mental healthcare they sought out.
- The incidence of falls remains consistent with 2019 levels.
- 20% of older adults classified as “Food Insecure” fell 2 or more times in the past year vs. 7% of the general population.
- Older adults classified as “Lonely” were three times more likely to fall 2+ times in a year compared to those who are “Not lonely” (14% vs. 4%)\(^\circ\)
- Hispanic older adults are much more likely to visit the ER following a fall (65% vs. 23% of the general population)*

\(^\circ\) 95% confidence, *small sample size
Noteworthy Detailed Findings: Unpaid Caregiving

• One-fifth of older adults provide unpaid care to an older adult or an adult with disabilities.
  o The level of unpaid caregiving in this category has remained consistent with 2019 (21%).
  o The majority of unpaid caregivers work to support other adults (their partner or another adult).
  o Almost a third of older adults providing unpaid care do so for their grandchildren (at least once a month).

• Older adults experiencing stress from unpaid caregiving has increased since 2019.
  o Women are significantly more likely to experience financial stress (Very Often) from unpaid caregiving versus their male counterparts (22% vs. 6%)*
  o In 2023, older adults are experiencing stress (physical, emotional, and financial) from unpaid caregiving more frequently (relative to 2019)
    ▪ Physical (Very Often): 28% vs. 9% ♦
    ▪ Emotional Stress (Very Often): 31% vs. 16% ♦
  o In 2023 (vs. 2019) older unpaid caregivers are significantly more likely to have financial stress Very/Somewhat Often (40% vs. 21%) ◊*

• One fifth of older adults need help to find or access services. The following groups have elevated levels of need:
  o Lonely (42%)
  o Caregivers (40%)
  o Low Income (35%)
  o Food Insecure (34%)
  o Age 75-79 (31%)
  o Live Alone (29%)
  o Women (26%)

What specific type(s) of services do you need assistance in accessing? (Base: Answered Yes)

- Medical appointments/care 19%
- Transportation 18%
- In-home care/assistance 15%
- Other 15%
- Technology support 11%

* 90% confidence
♦ 95% confidence
◊ Small sample size
Noteworthy Detailed Findings: Emergency Preparedness

- In the event of an emergency most could independently evacuate, but many lack a plan.
- Individuals aged 75 or older are twice as likely not to be able to evacuate independently relative to the general population (for 60+).
- The majority (61%) of Marin County residents surveyed indicated that they are signed up with Nixle and/or AlertMarin.

**In the event of an emergency (fire, earthquake, or natural disaster).... n=412**

- Are you able to evacuate independently without assistance? 94% Yes, 6% No, 0% Prefer not to answer
- Do you have a plan in place to ensure you receive assistance with evacuating? 47% Yes, 48% No, 5% Prefer not to answer
- Have you made a communication plan if you were separated? 50% Yes, 49% No, 1% Prefer not to answer
- Is there a neighbor you would contact (call, knock on door)? 85% Yes, 15% No, 0% Prefer not to answer

**Are you signed up to receive emergency notifications with Nixle and AlertMarin?**

- Nixle and/or AlertMarin: 61%
- With another agency: 1%
- Yes, not sure where: 7%
- No / Not sure: 31%

n=412
Noteworthy Detailed Findings: Employment

• Employment statistics for older adults in Marin remain steady when compared to 2019.

• Between 35% and 45% of individuals are working and relying on that as a source of income for their household, consistent with 2019 levels.

• Job seekers who struggle the most to find employment are Caregivers (12%), Women (12%), Low-income Individual (15%), Food Insecure (18%), LGBTQ+ (23%). *

• The younger cohort of older adults (60-64) are significantly more likely to struggle finding employment than the older cohorts.

* Small sample size