

An Audience in Motion

2026 Media Preferences of Older Adults:
Digital Confidence, AI Adoption, and the
Channels That Reach Them

July 2026



media logic®

Survey Overview

As the Medicare market has grown to more than 70 million Americans*, understanding how older adults navigate both traditional and digital media is more important than ever.

Our 9th annual Media Preferences of Older Adults survey provides fresh insights into evolving media habits, comfort with digital environments, and the enduring value of established channels. This year's survey had a specific focus on digital behaviors with a deep dive on Artificial Intelligence.

This survey, conducted 4/22/26-5/1/26 with 625 people ages 63-75, offers a current snapshot of behaviors, preferences, and trends shaping how older adults consume media today.

Topics Covered in the 2026 Study

Digital Confidence
& Technology
Adoption



Media Consumption
Patterns,
Motivations
& Attitudes



Online Behavior,
Artificial Intelligence
Usage and Attitudes



The Digitally
Capable Medicare
Consumer



A Note on Language

Age Cohorts

Throughout this report we reference two cohorts within the 63–75 demographic:

- Younger cohort: ages 63–68
- Older cohort: ages 69–75

Where differences between cohorts are noted, they reflect meaningful behavioral distinctions — not minor variations.

Statistical Language

Statistical / Meaningful Difference: The difference is large enough and based on sufficient respondents to be confident it reflects a real insight — not random chance. Reported at the 95% confidence level.

Directional Difference: Suggests a direction of difference but is not statistically confirmed. Worth noting as a trend; not suitable as a basis for definitive conclusions.

Executive Summary

Executive Summary

The media habits of older adults have been shifting faster than the industry's assumptions about them. Each year, this audience moves further into digital confidence, deeper into mobile behavior, and closer to AI adoption – and this shift is becoming **more expensive to ignore**.

The portrait that emerges from the **2026 Older Adults Media Preferences Survey** is not one of a cautious, traditional audience, but one actively in motion. That motion is purposeful — more than ever, seniors are using media to research, compare, and decide on their own terms. Campaigns that earn credibility across TV, digital, social, and search will **outperform single-channel approaches**.

Strategies that treat this as a single audience will underserve it. The **younger cohort** (63-68) and **older cohort** (69-75) **differ meaningfully** in digital confidence, social media receptivity, and comfort with emerging technologies. The data that follows maps where each segment is, and what it takes to reach them.

Key Findings

- **Digital confidence** among adults 63–75 continued on an upward trend, rising +5 points YOY. **41% now rate their tech skills in the top tier**, with no meaningful confidence gap between younger (63–68) and older (69–75) cohorts.
- **Smartphones continue to overtake computers** as the primary internet access device (64% vs. 51%)
- TV holds its lead as the top product discovery channel at 59%, but Google Search closed the gap from 31 points to just 13 in a single year. Streaming now beats cable (63% vs. 39%), and **YouTube is reaching 85% of respondents, 66% of whom go there directly**, rather than following a Google link.
- **Facebook leads social** at 72% daily use, but is slipping with the younger cohort. YouTube has emerged as a strong second platform, gaining in both time spent and trust.
- **Phone** remains the top communication channel preference for Medicare information, but the lead has softened from 61% to 51% in one year, **while text messaging rose 6 points to 18%**.
- This audience moves across platforms to research and decide. **No single digital channel owns the journey** — 53% research online before making decisions, 45% name Google Search as where they first learn about new products, 26% use YouTube for product reviews, and 58% say social media is where they discover new products and services.

Key Findings – Artificial Intelligence

- **AI adoption among adults 63–75 more than doubled in a single year** — from 16% to 34% — while **concern dropped from 55% to 43%**. The most common pairing in the data is "already using" alongside "conflicted" or "concerned".
- Digital confidence, as opposed to age, is the strongest predictor of AI adoption. **High-confidence respondents are nearly 10 times more likely to be active AI users** (49% vs. 5%). AI adoption rates among the 63–68 and 69–75 cohorts are virtually identical at 34% and 35%.
- 85% of self-identified AI skeptics are already using it — through Siri, Alexa, and Google search summaries they don't think of as AI. **The technology is not the barrier. The label is.**
- 57% of this audience encounters AI-generated summaries at the top of Google search results, and the majority read rather than skip them, often without recognizing them as AI. **For Medicare marketers, being accurately represented in those summaries is no longer optional.**
- Medicare plan comparison during Annual Enrollment is the single health-related AI use case this audience is most open to, with 56% noting they used it or say they would. **It is also the highest-trust scenario tested.**

Marketing Implications

- **Stop measuring digital channels by phone response alone.** TV still drives discovery at 59%, but Google Search has closed the gap to 13 points in one year. Digital channels influencing awareness and research deserve their own attribution or you risk misreading what is actually moving the needle.
- **Get GEO-ready now.** The majority of this audience already reads AI-generated summaries at the top of Google search results — often without recognizing them as AI. Plans that invest in Generative Engine Optimization before AEP 2027 will be accurately and favorably represented where this audience is already looking.
- **Plan for the full digital funnel.** This audience uses multiple platforms across the path to purchase with 54% actively evaluating options and comparing plans before they call. Content that meets them during that window, not just at the moment of decision, will earn the conversion.
- **Make YouTube a dedicated channel, not an afterthought.** YouTube's gain in popularity deserves thoughtful application of content. A how-to video or plan explainer on the channel is a search and discovery asset. Treat it like one, not like a social post.
- **Avoid labeling AI in consumer-facing communications.** The label carries the fear the function doesn't. Name tools by what they do - a plan comparison guide, a benefits assistant, a personalized search tool, and resistance drops significantly.
- **Digital builds the path; phone closes it.** The phone remains the conversion moment, but digital is shaping the consideration set before anyone picks it up. Measure both.

Digital Confidence & Technology Adoption

Older Adults Are Tech-Confident

Tech confidence continues to grow, with 4/10 rating their digital technology skills in the top tier (8-10). This is a meaningful +5 ppt increase over 2025

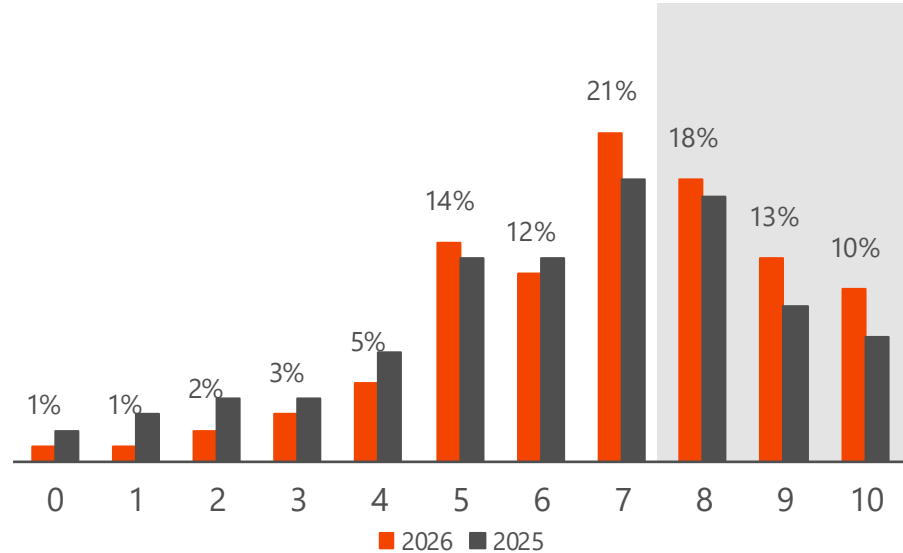
While the younger cohort is directionally more confident at the higher ratings, there is no statistical difference between younger (63–68) and older (69–75) cohorts at the top tier (8–10) level.

Confidence is a whole-demographic story.

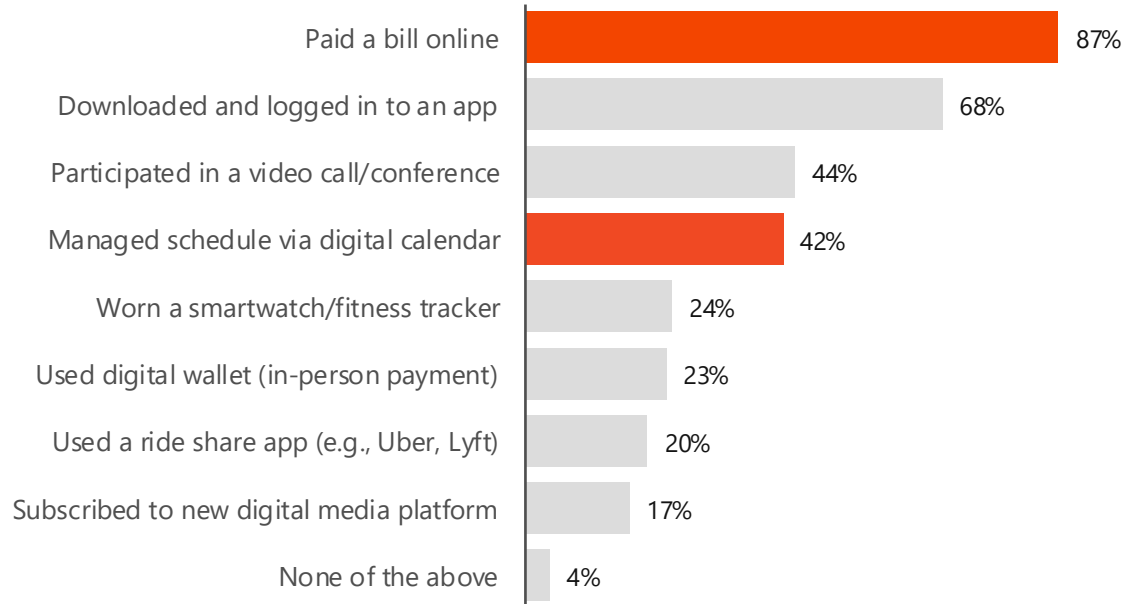
Q. Using a scale of 1-10, in general, how confident are you with digital technology (e.g., smartphone, internet, apps)?
n=625 older adults, percentages may not sum to 100% due to rounding.

41%

Rank digital technology confidence between 8-10



Older Adults Confidently Embrace Digital Activities



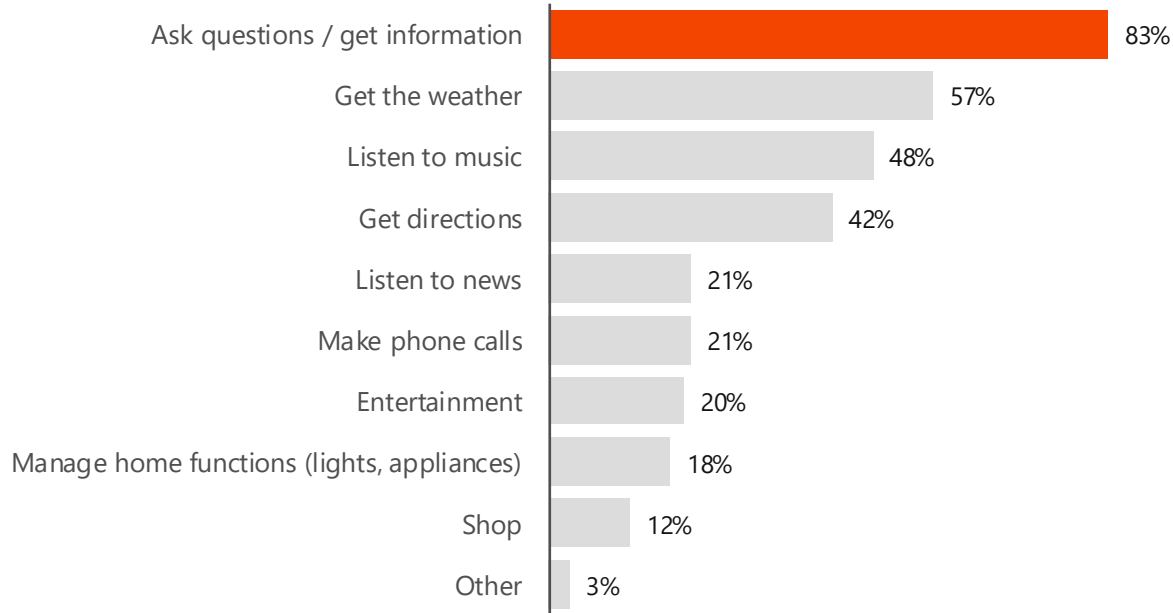
87% pay bills online
Which is up from 82% in 2025
(+5 ppt, meaningful)

42% manage a digital
calendar — a new high-signal
behavior

The younger cohort is
significantly more likely to
use a digital wallet than the
older cohort.

Q. Which of the following digital activities have you done on your own in the past 6 months? Please select any that apply.

Voice Assistants are an Answer Engine, Not an Entertainment Hub



About a third of this audience uses a voice assistant regularly — through a dedicated device or their smartphone.

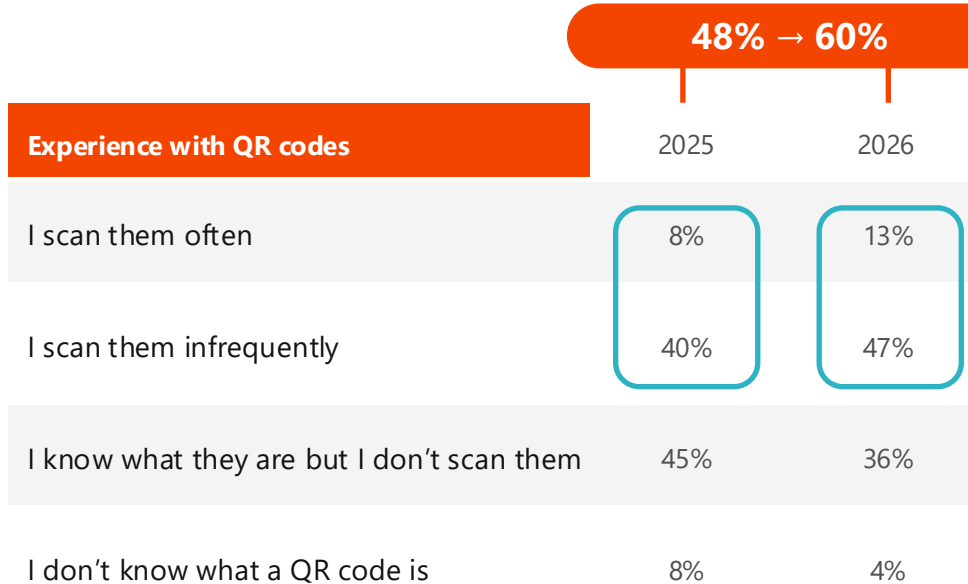
And when they do, the use is consistent:

8 in 10

use their voice assistant primarily to ask questions and get information

Q. You mention that you use a voice assistant. What do you use them for? Please select any that apply.

Older Adults Moved From Knowing About QR Codes to Using Them



In 2025, nearly half knew what QR codes were — but chose not to use them.

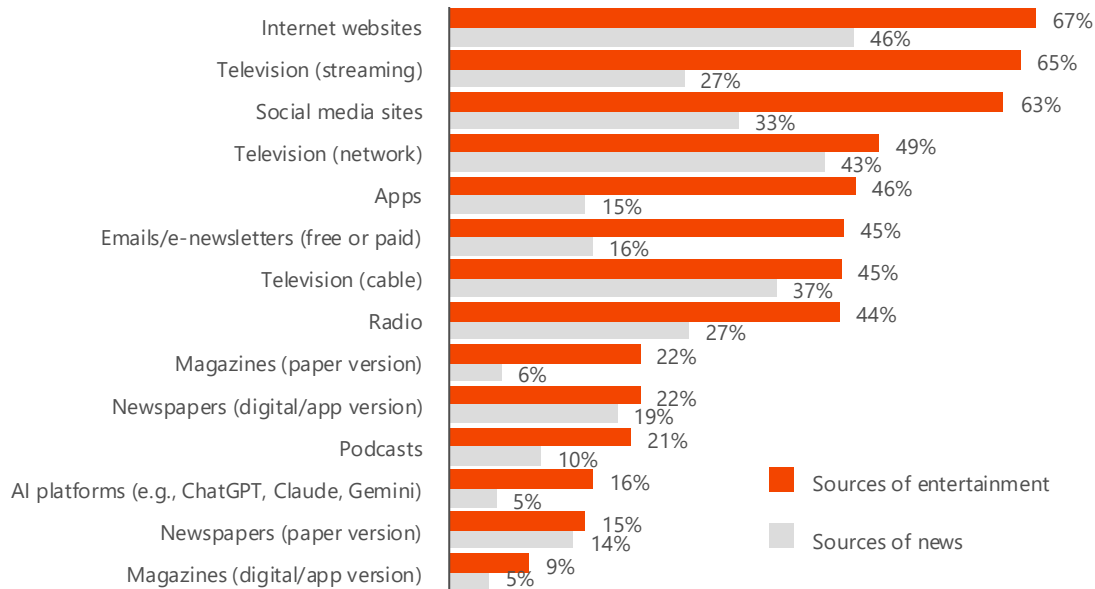
In 2026, **60%** of adults 63–75 report scanning QR codes. The shift is likely tied to smartphone adoption: as the phone became the primary internet device, QR codes became a natural extension of how this audience already navigates online.

Q. Which of the following best describes your experience with QR codes?

Media Consumption Patterns, Motivations and Attitudes

Purpose Determines Platform: Entertainment vs. News

Sources of entertainment and news/current events



Q. Which sources do you use for entertainment on a frequent basis? Please select any that apply.

Q. Where do you get your news/information about current events? Please select any that apply.

The entertainment/news split

For **entertainment**, Older Adults choose websites, streaming TV and social media (67%, 65%, 63% respectively) as their top sources.

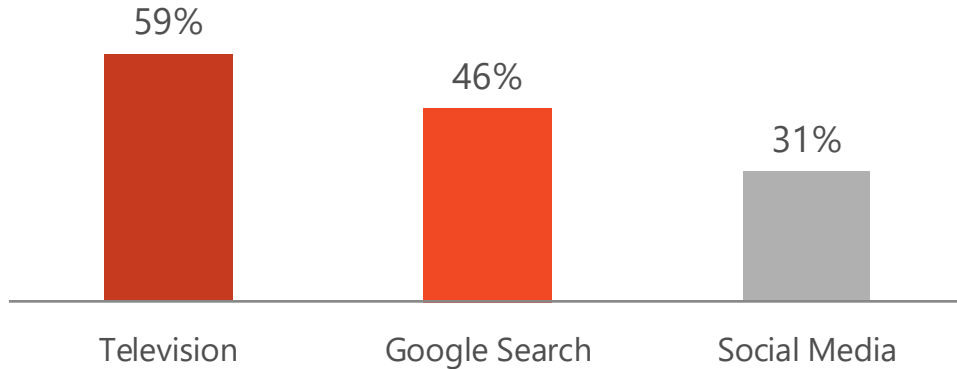
While much lower, radio is surprisingly resilient (44%) though significantly fewer enjoy podcasts (21%).

For **news**, we see a confluence of the traditional and contemporary with websites (46%) and network TV (43%) as top sources, followed by Cable TV (37%) and Social Media (33%).

Gender split

Men are significantly more likely than women to use network TV for both entertainment and news, and YouTube specifically for news (70% vs. 56%).

The Product Discovery Landscape Shifted — In a Single Year



Television: 74% in 2025 → 59% in 2026

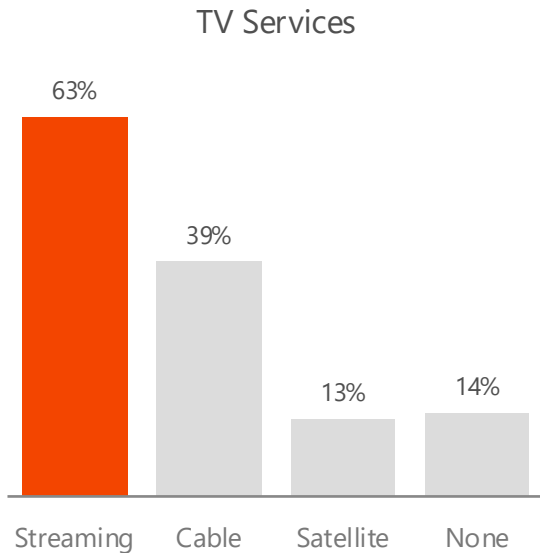
Q. Which place do you think you are most likely to learn about a new product or service that interests you? Please select up to 2.

At 59%, **television** remains the #1 product discovery channel for this demographic, though it dropped from last year.

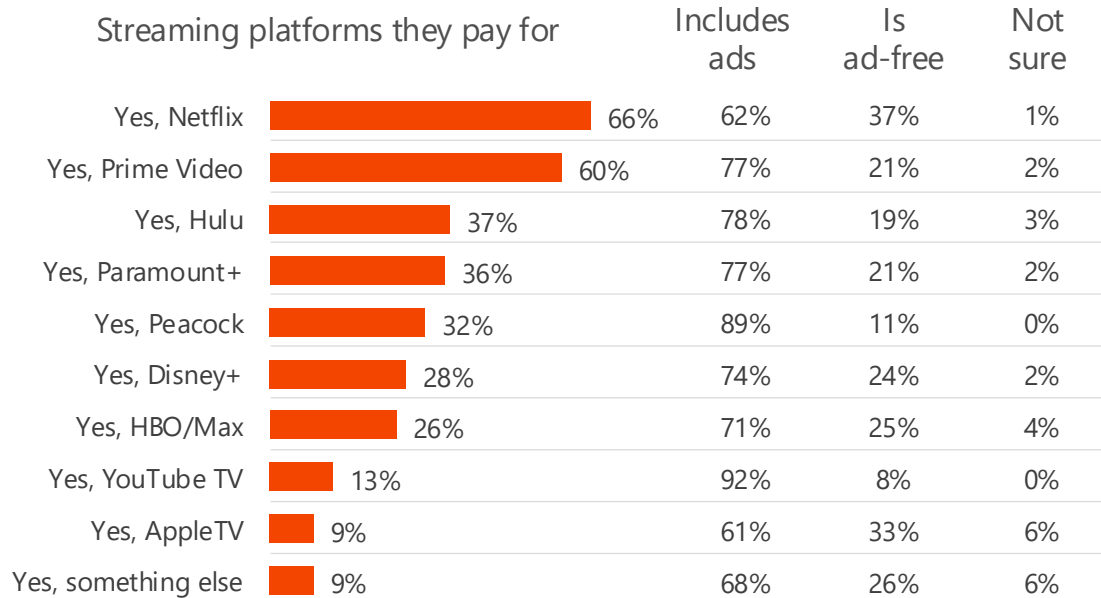
Google Search is new to the top three this year. And 38% of this audience is using Google AI Overviews as part of that search experience. SEO and GEO strategy are no longer optional.

Social media directionally higher for the younger cohort but not statistically significant.

Streaming Dominates — and Most Are Watching With Ads



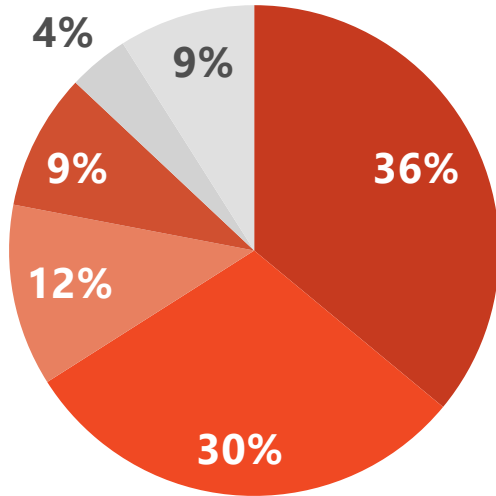
Q. What TV services do you subscribe to?



Q. Do you pay for a subscription for any of the following streaming platforms?

Q. For the streaming services you currently pay for, do you have a subscription that includes ads or is it fully ad-free?

Almost All Older Adults Use Social Media Daily



- Under an hour
- 1-2 hours
- 2-4 hours
- More than 4 hours
- Use, not daily
- Don't use

Q. In a typical day, how much time do you spend using social media?

87% Use social media at least daily

More than half (51%) spend 1 or more hours per day. While there is no difference in frequency of usage, the younger cohort finds social media more relevant and enjoyable than the older cohort

Younger vs. Older Cohort — Social Media Attitudes		
	Younger	Older
Would use social to market to people like me	68%	57%
Social is my favorite place to be entertained	48%	40%
Social provides advertising relevant to me	49%	43%

Social Media Is a Relevant Source of New Product Information

Social media is one of the top three places respondents are likely to learn about a new product or service that interests them (along with television and Google search)

58%

say "social media is a place I find out about new products or services"

62%

say "If I were selling a product to people like me, I would definitely use social media to tell people about it"

46%

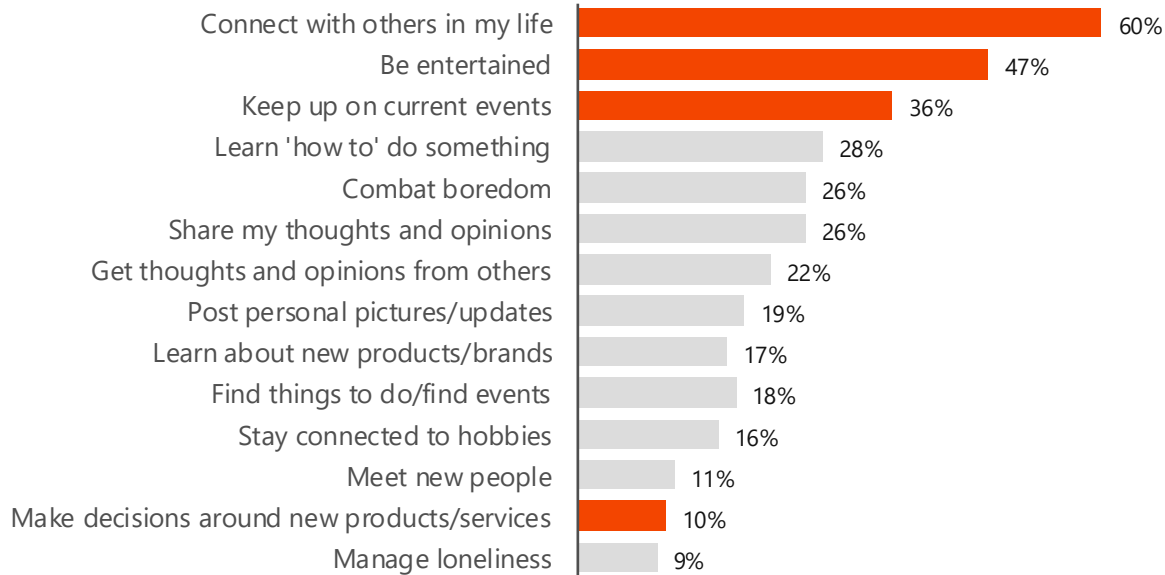
say "social media provides me with advertising that is relevant to me and my life"

Q: How much do you agree with the following statements about social media?

Q: In the last 6 months, have you made a purchase decision based on an ad you saw on social media?

Q: We talked about a number of different types of entertainment and media today. And all of those types of media have advertising that tells you about new products or services. Which place do you think you are most likely to learn about a new product or service that interests you? Please select up to 2.

Social Media for Connection, Discovery Happens Anyway



6 in 10 of this audience come to social media to connect, and **nearly half** come to be entertained.

36% use social to keep up on events.

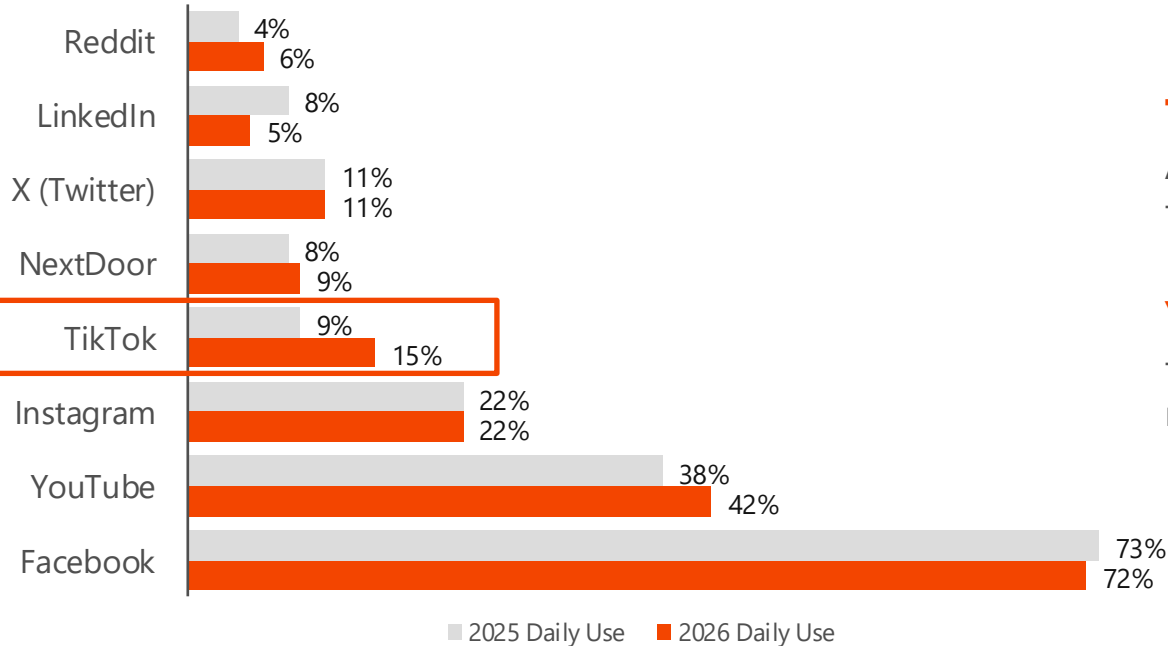
Only **10%** cite product decision-making as a motivation — yet when asked if they had made a purchase based on an ad seen on social media, **24%** said yes. Intent and behavior diverge.

Q. When you think about the time you spend using social media, what are your motivations/benefits?

Please select any that apply

Q. In the last six months, have you made a purchase decision based on an ad you saw on social media?

Facebook and YouTube Dominate — TikTok Is Growing



TikTok, +6 points.

A small, but growing platform for this demographic

YouTube daily use at 42% (↑ from 38%) confirms its growing role as a destination.

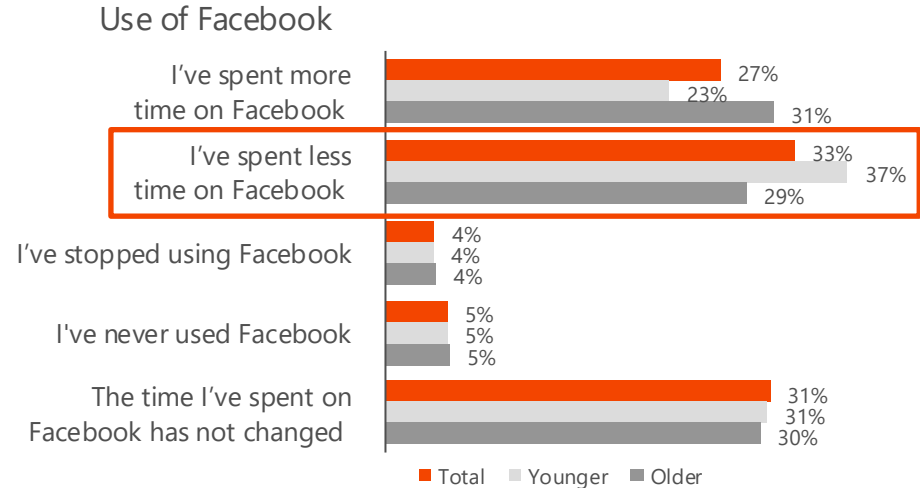
Q. How much time do you spend using the following social media platforms?

Facebook Holds Today — But the Younger Cohort Is Pulling Back

Of the respondents who use social media daily, **74%** noted Facebook as the social media platform where they spend the most time (followed by YouTube at 50% and Instagram at 20%)

The younger cohort is much more likely to be spending less time on Facebook.

- Q. In a typical day, how much time do you spend using social media?
- Q. On which of the following social media platforms do you tend to spend the most time?
- Q. Which of the following best describes your use of Facebook over the past year?
- Q. Which of the following describes why your use of Facebook has changed?



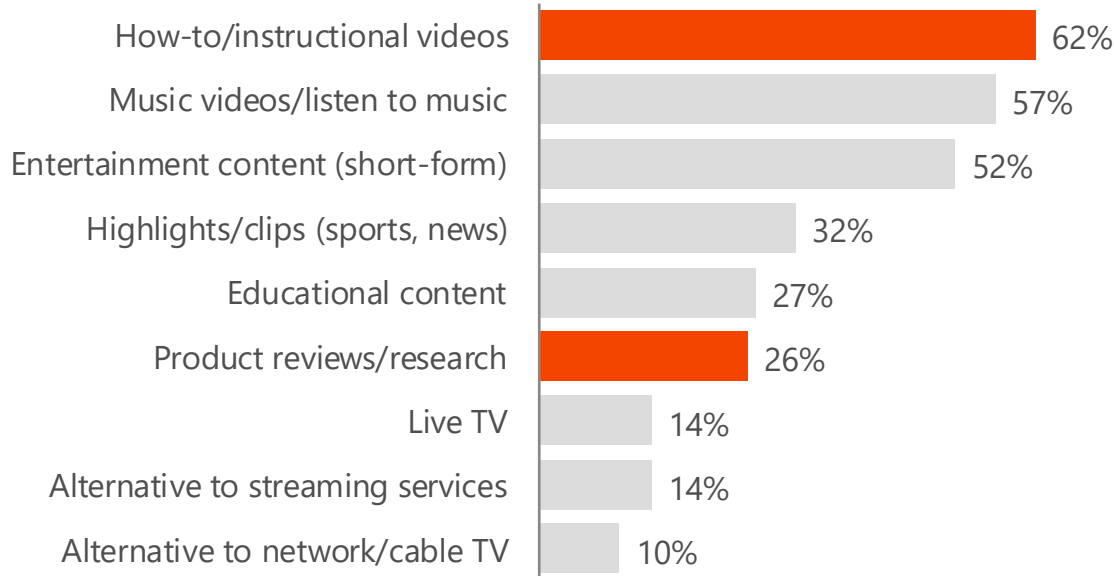
Of the 33% who say they've spent less time on Facebook:

44% spending less time on social media overall

36% concerned about misinformation

32% dislike extreme political views

YouTube is a “Destination” For Both Fun and Function



85% of older adults use YouTube

Only **61%** are aware of the difference between YouTube and YouTube TV.

66% go directly to YouTube without a Google search first, **18%** find it via Google.

YouTube has destination status.

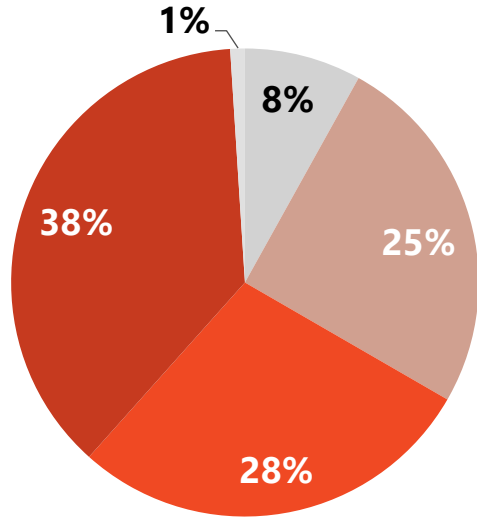
Q. In which of the following ways, if any, do you use YouTube? / When seeking video content on YouTube, do you tend to:

Q. Are you aware of the difference between YouTube (on-demand, creator content) and YouTube TV (live/streaming TV)

Q. In general, if/when seeking out video content you then watch on YouTube, do you tend to:

Online Behavior, Artificial Intelligence Usage and Attitudes

Older Adults Spend Substantial Time Online — and on Mobile



■ Under an hour
 ■ 1-2 hours
 ■ 2-4 hours
 ■ 4+ hours
 ■ Less than daily

2/3 of older adults spend at least two hours a day online — more than a third spend four or more — and increasingly, they are doing it from their phone

Primary internet device (choose 1-2)

Smartphone	64%	+7 pts
Computer/Laptop	51%	—
Tablet	23%	—
Smart TV	17%	+6 pts
E-reader	1%	—

Q. In a typical day, how much time do you spend online/on the internet? / What device(s) do you tend to use for your online/internet activity most often?

The Internet Informs — It Is a Decision-Support Tool

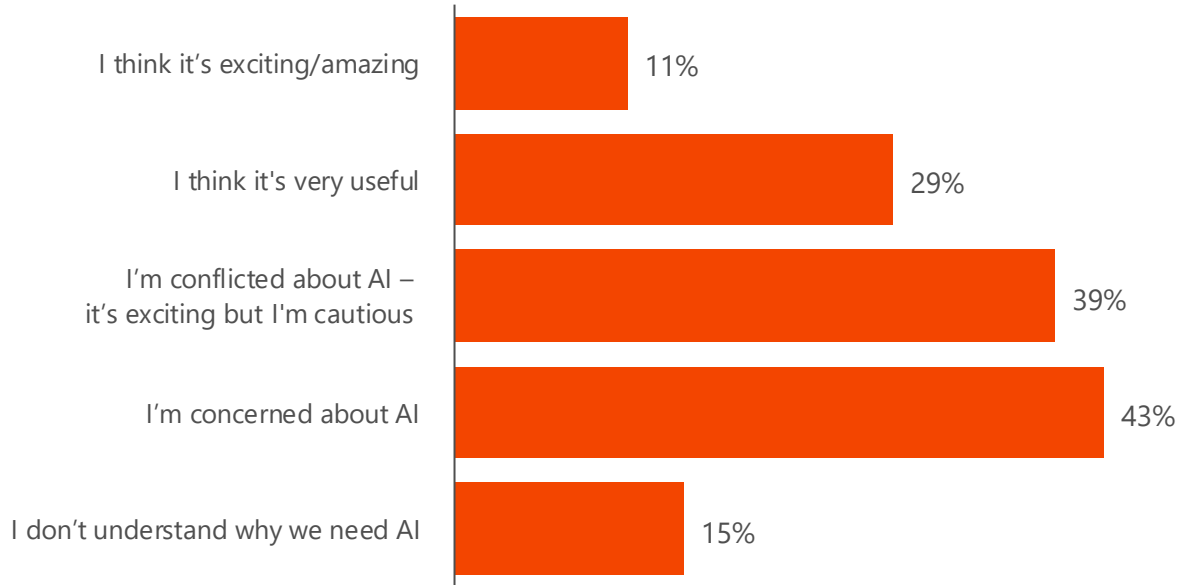


More than half (54%) use the internet to **research before deciding**. They are in digital channels before they make a call.

37% use it for Health/Medical research, an increase from **21%** last year. The younger cohort is much more likely to use the internet for entertainment (e.g., watch videos/trailers, listen to music).

Q. On what activities/topics do you tend to spend time online/on the internet?

AI Attitudes Have Shifted — Meaningfully



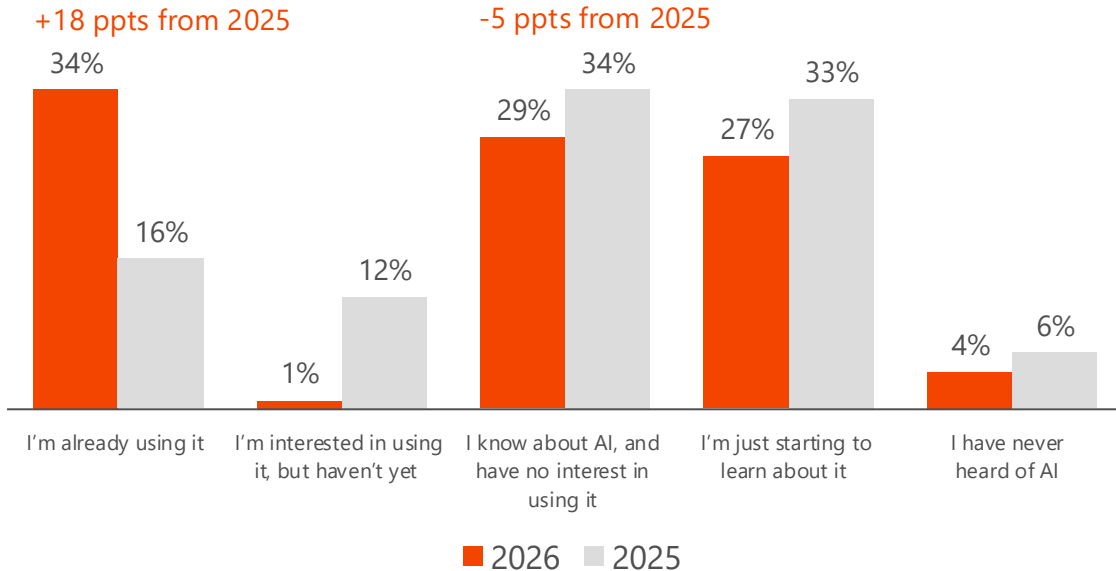
Older Adults say they are **less concerned** about AI which aligns with increased usage (next page).

The younger cohort is **directionally more open** to AI, but it's not a meaningful difference.

Q. Which best describes your attitude about AI? Please select 1–2.

AI Adoption More Than Doubled in One Year

Active users increased from 16 to 34% between 2025 and 2026



Top platforms used (past 12 months)	
Gemini	61%
ChatGPT	60%
CoPilot	47%
Google AI Overviews	42%
Claude	25%
Perplexity	23%
None of the Above	21%

Q. In general, which best describes your experience with AI? / Which AI platforms or services have you used in the past 12 months?

This Audience Is Already Using AI Search

57%

Are aware that Google
shows AI summaries
(an additional 13% are not sure)

When they see the Google AI summary, they are most likely to:

Read the AI summary and scroll to results	53%
Skip the AI summary and go to results	28%
Just read the AI summary	13%
Not sure	5%

Q. Are you aware that when you search for something on Google, at the top of the page is an AI-generated summary of results?

Q. When you see Google's AI summary, are you more likely to...?

This Audience Is Also Using AI Search Without Knowing It

52%

When shown an example of Google's AI summary recalled seeing it, but did not realize it was an AI summary

66%

Are actively using Google AI Overviews

Q. Please see this example of how Google presents an AI summary when showing results of a search. Which of the following best describes you?

AI-Created Advertising: Most Are Neutral or Accepting

Q. Have you seen an advertisement you knew was created by AI? / What is your point-of-view on AI-created advertising? / Does it affect your trust in the brand?

42%

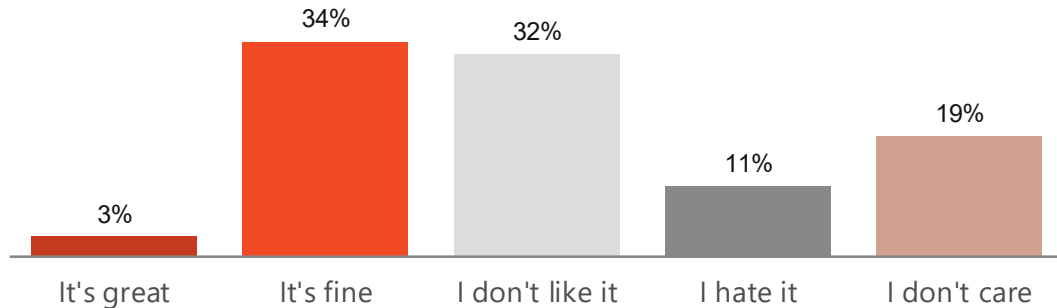
say they have seen an ad they knew was AI-created
41% say they're not sure

56%

have a positive or neutral reaction ("it's great", "it's fine" or "I don't care")
Only 11% say 'I hate it'

53%

say it does not impact how much they trust the product or brand
44% say it makes them trust the product/brand less



Q. Have you ever seen an advertisement that you knew had been created by AI?

Q. Whether or not you've seen an ad created by AI, what is your point-of-view on seeing advertising you know has been created by AI?

Q. Let's say you could tell that an ad was created by AI. To what degree, if at all, does it impact how much you trust the product/brand that is being advertised?

AI Is Primarily an Information Tool — With a Health Dimension



Q. You mentioned you've used AI. What do you tend to use it for? Please select any that apply.

The Health Dimension

30% of AI users are using it for health/medical needs.

15% have already used AI to answer specific health/medical questions, 41% have not used AI for this — but say they would.

12% say they have shared health symptoms or conditions to get more information and 43% say they have not used AI for this, but would.

The Central AI Tension: Willing to Use It — Cautious to Trust It

Topic	Have used + Open to using	← gap →	Completely/ A lot of trust
Recommendations on a health care plan	53%	← gap →	14%
Uploading medical test results to understand	49%	← gap →	19%
Recommendations on auto insurance	50%	← gap →	17%
Help with monthly budgeting	43%	← gap →	12%
Help making decisions about retirement	34%	← gap →	11%

We exposed respondents to a range of financial and health-related topics and asked how much they'd trust AI for this type of information, whether they are using it and how likely they would be to do so in the future.

Across the board, Older Adults say they don't trust AI, but also seem fairly willing to experiment with AI for many of those topics that may require personal and/or sensitive information.

The examples to the left illustrate this tension.

Q. How much do you/would you trust AI-provided information for each of the following needs? / Have you, or would you, use AI for these types of information

For Medicare Decisions, AI Trust and Openness Are Highest of Any Topic Tested

Most likely to TRUST AI (somewhat + a lot + completely)

Comparing Medicare plans during AEP	64%
Sharing health symptoms for info	62%
Recommendations on auto insurance	61%
Answering specific health questions	61%
Recommendations on a health plan	57%

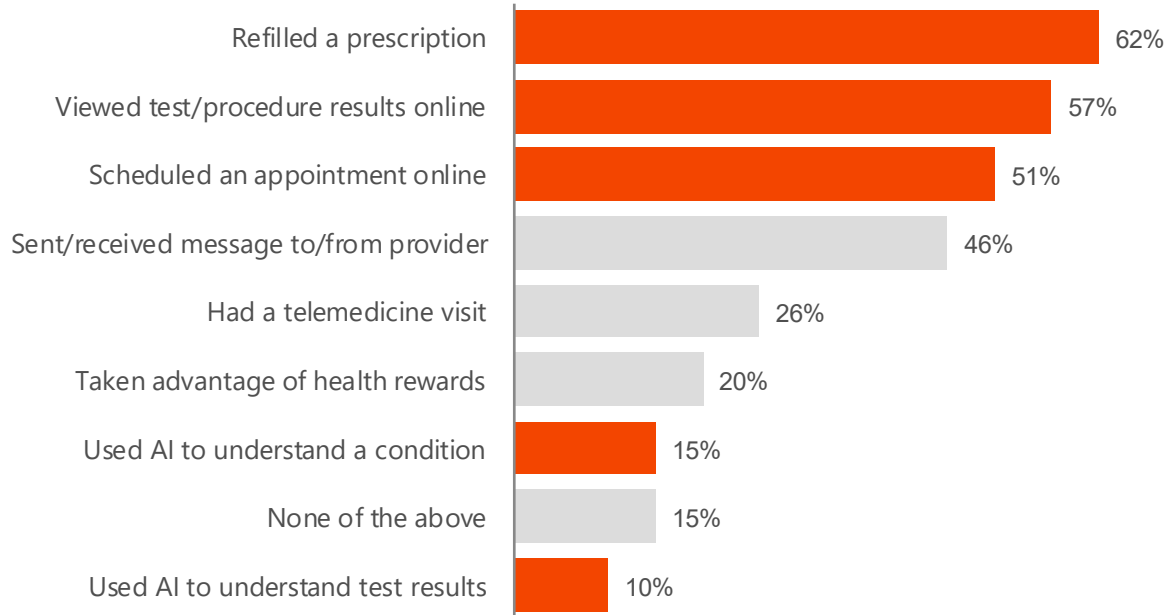
Most likely to USE AI (have used + open to using)

Comparing Medicare plans during AEP	56%
Answering specific health questions	56%
Sharing health symptoms for info	55%
Recommendations on a health plan	53%
Recommendations on auto insurance	50%

Q. How much do you/would you trust AI for each of the following? / Have you, or would you, use AI for these types of information?

The Digitally Capable Medicare Consumer

Older Adults are Adopting Digital Health-Centric Activities



Q. Which of the following digital health activities have you done in the past 12 months?

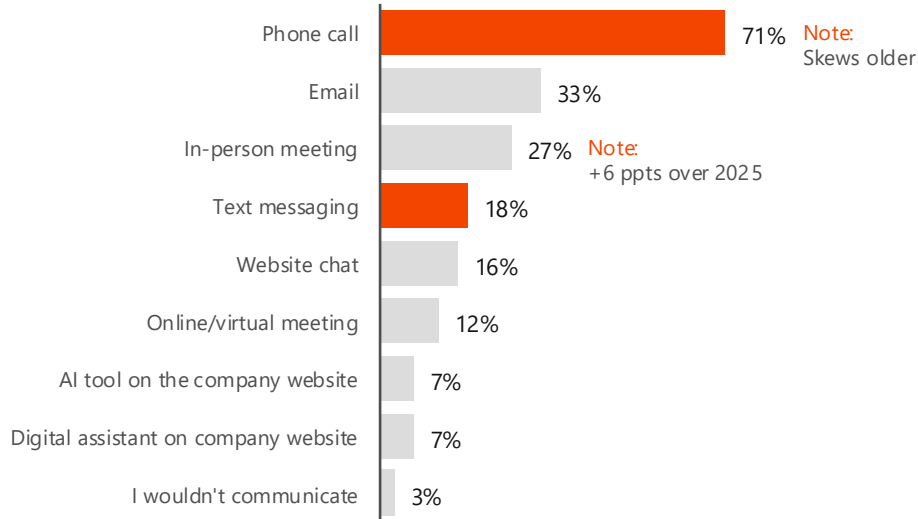
The **top three** behaviors — prescription refill (62%), test results (57%), and scheduling (51%) — are core digital health interactions.

The **younger cohort is** significantly more likely to schedule online (54% vs. 48%) and have telemedicine visits (30% vs. 22%).

AI health use is emerging - 15% used AI to understand a condition; 10% used AI to understand test results. Small — but consistent with the 30% of AI users who report using AI for health/medical needs.

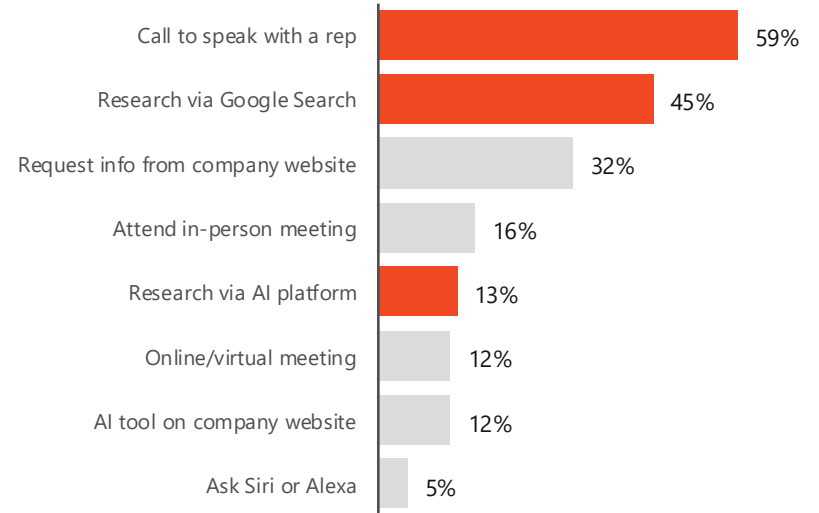
For Medicare Plan Information, Phone Still Preferred, but Open to Digital Tools

Q. If you have a question about a Medicare plan you are considering, how would you prefer to communicate with a representative?



Preferred communication with a rep

To learn about a Medicare plan you might be considering enrolling in, which of the following ways are you most likely to get information?

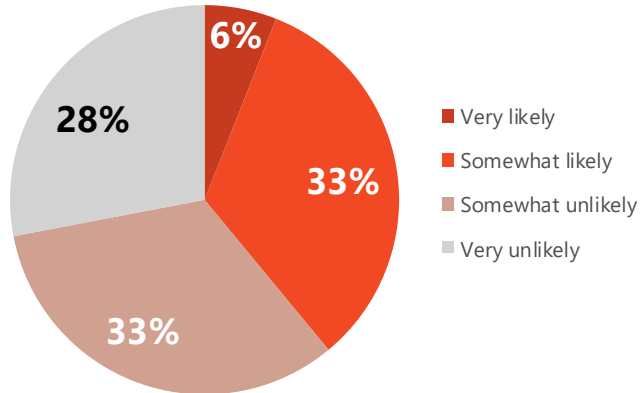


How they get Medicare plan information

Digital Assistants on Insurance Websites: Building Trust is Key

39% likely to engage

Notably: No difference by age cohort



Likely to engage with
insurance company digital assistant

Q. How likely are you to engage with the digital assistant on a health insurance company's website?



Trust the digital assistant to...

Trust
(Completely + Somewhat) **Distrust**
(Completely + Somewhat)

Give you the correct information

44%

38%

Give you enough information

43%

35%

Give you information that's right for you

42%

37%

Q. How much do you trust it to...?

The AI Label Triggers Resistance, Not the Technology

Across the study, older adults are gradually incorporating AI-powered tools into health and insurance decisions, yet when asked directly about "AI", **many express hesitation**. The pattern is consistent: **it seems to be the label, not the technology, that gives them pause**.

Media coverage has shaped how this generation hears the word "AI", often connecting it to complexity, disruption, and uncertainty. **For a generation navigating yet another technology shift, some skepticism is understandable**.

The path forward is straightforward: **build tools that work, name them for what they do**, keep a human available, and let early adopters lead the way.

"It's gonna take time, you know how older people are. It's hard for them to grab technology, but I'm willing to give it a try."

"My daughter currently uses AI-powered tools to obtain information regarding health concerns for both herself and me. So it's all new to me but I am slowly becoming more accustomed to using AI tools."

"The best way to learn about health insurance and Medicare is face-to-face with a real human being. AI is not qualified to make decisions in any way, shape, or form."

Q. As our final question related to health insurance and Medicare, what would make you more comfortable using AI-powered tools for health insurance-related decisions?

An Audience in Motion: What the Data Tells Us

Each year, this audience finds new ways to surprise us. Adoption rates across devices, platforms, and now AI — continue to outpace expectations.

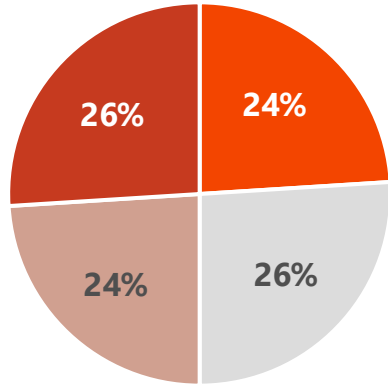
Digital confidence is now a whole-demographic story, though nuances remain. Platform preferences, social media attitudes, and comfort with emerging technology still differ between the younger and older cohorts in ways that reward a segmented approach.

The discovery path is taking more forms than it used to. **Television may trigger search. Search leads to YouTube. Social informs. Phone converts.** Facebook is losing enthusiasm among the younger cohort, while **YouTube is gaining ground** as a purposeful research destination.

AI is the sharpest trend line in this year's data: adoption more than doubled while concern dropped significantly. Much of this audience is already using AI-powered tools without recognizing them as such, and AI-driven search is accelerating that exposure. Representing your plan accurately in those results is becoming as important as any paid channel — and **using AI to compare Medicare options at enrollment is the use case this audience is most ready to embrace.**

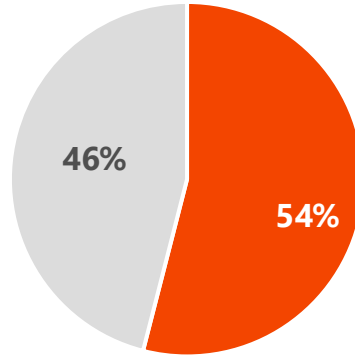
A Closer Look at Our Respondents

Age



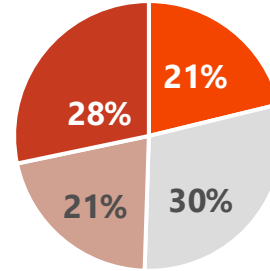
■ 63-65 ■ 66-68 ■ 69-71 ■ 72-75

Gender



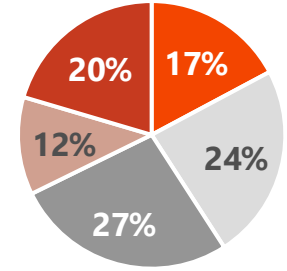
■ Female ■ Male

Geography



■ Northeast
■ Southeast
■ Midwest
■ Southwest/West

Affluence



■ All needs + all wants
■ All needs + most wants
■ All needs + some wants
■ All needs + few wants
■ Struggle to afford

Ethnicity: Caucasian 75% | African American/Black 12% | Hispanic/Latino(a) 12% | Asian 5% | Other/NA 4%

n=625 | Ages 63-75 | Conducted April 22 - May 1, 2026 | Nationally representative

About Consumer In Sight

Consumer In Sight (CIS) is an investigative research series conducted by Media Logic with the aim of gaining new insights into consumer preferences and behaviors in the healthcare and financial services industries. Using an industry-leading software platform, we survey geo-targeted and national panels to track the changing marketing landscape and support clients in connecting with consumers through creative executions and multichannel media.



About Media Logic

Media Logic is a national leader in healthcare marketing – providing strategic, breakthrough solutions that drive business. Media Logic offers deep experience in branding and lead generation and is an expert in turning research and segmentation data into actionable plans. Leveraging more than two decades of health plan marketing knowledge, Media Logic understands the nuances of Medicare, group and individual exchange prospects. From traditional ad campaigns to retention efforts to content marketing, everything Media Logic does is focused on generating results for clients...giving them an edge in a competitive, constantly changing environment.

Learn more about Media Logic at medialogic.com and subscribe to our healthcare marketing newsletter at medialogic.com/newsletter.

If you have any questions, please contact:



Denise Carney-Jones
Group Director – HC Practice Lead
518.940.4892
dcarney-jones@medialogic.com



Josh Martin
Group Director – HC Practice Lead
518.621.1611
jmartin@medialogic.com

Thank you

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