

**Retirement Relocation Among College Graduates:  
A Survey of Virginia Tech Alumni**

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## Introduction

Research on the residential mobility of persons who have fully or partially retired identifies two major purposes of such relocation. Care-related relocation occurs in response to the inevitable increase in physical dependence that accompanies older age, particularly after age 75. Some of these moves occur in anticipation of greater infirmity, but usually they are prompted by a change in health status or the death of a spouse. Most of these moves are within the local community or to a community where relatives will provide care. In years past, residential care-giving fell almost exclusively to family members or to "old-age homes" sponsored by charities or special service groups. Today, residential care for the elderly is provided in a variety of settings, including life-care communities which provide a progression of care levels that moves from complete independence into assisted living and then to skilled nursing care.

Amenity relocation occurs primarily among persons aged 60 to 70 for the purpose of enhancing quality of life during retirement. Such relocation often involves an inter-state move, or at least a move away from one's earlier, work-bound residential community. Unlike care-related relocation, which is driven by the location of care givers, amenity relocation is based on a variety of personal life-style preferences and community characteristics. Nationally, the principal destination of amenity relocation has been Florida, which has captured a phenomenal proportion of retirement relocation (about one-in-four inter-state moves by the elderly have been to Florida). No other state compares with Florida. After California, Arizona, and Texas, which each receive between 5 and 10 percent of inter-state migration by the elderly, the next highest states capture 2 to 3 percent of elderly inter-state relocation.<sup>1</sup> Nonetheless, various communities

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<sup>1</sup>Longino, Jr., Charles F. 1990. "Retirement Migration Streams: Trends and Implications for North Carolina Communities." *Journal of Applied Gerontology*, 9,4:393-404.

outside of Florida, California, Arizona, and Texas have established themselves as desirable retirement locations. Not everyone wants a tropical or semi-tropical climate and many retirees have preferred areas with four seasons, ranging from Asheville, North Carolina to Northern Michigan. The economic independence initially afforded retirees by Social Security has now been augmented by higher life-time earnings, private pensions, and accumulated wealth. Each succeeding cohort of retirees has been better able to move to the locations that maximize their personal life-styles and preferences.

The major focus of this study was a national survey of Virginia Tech alumni between the ages of 55 and 70, conducted to determine their potential interest in Blacksburg as a retirement location. Most retirees who make an amenity relocation move to communities they are already familiar with through previous residence or visits. Virginia Tech alumni represent a cross section of retirees who live throughout the United States who are already familiar with Blacksburg and the New River Valley. There are approximately 10,000 alumni from the Classes of 1946 to 1961 who are nearing retirement or have recently retired. A random sample of 1,030 was mailed a questionnaire on their post-retirement residential preferences and their attitudes about Blacksburg as a retirement location. Five-hundred and sixty responded by the deadline for this report (the small number of later returns would have no impact on the results presented here).

This research was funded under a contract with Principal's Options, Inc. Inquiries regarding the study may be directed to the Virginia Center for Housing Research, Virginia Tech, 401 Wallace Hall, Blacksburg, Virginia 24061-0451, (703) 231-3993.

## **Survey of Virginia Tech Alumni**

The questionnaire mailed to the sample of Virginia Tech Alumni from the Classes of 1946 to 1961 collected data on demographic and economic characteristics of the respondent's households; their current housing; preferred housing; preferred location characteristics; probability of moving and reasons for moving; and attitudes towards and interest in Blacksburg as a retirement location. The results are presented in three parts: a demographic and economic profile of the respondents; residential preferences and mobility expectations; and, interest in Blacksburg as a retirement location.

### Demographic and Economic Profile of Respondents

Based on their demographic and economic characteristics, the survey respondents represent a highly desirable market for retirement housing. In short, they are successful, healthy, and have the resources to move wherever they desire.

Only alumni with at least one person aged 55 and over were asked to complete the questionnaire. Three-fourths of the households had two persons aged 55 or over; 23 percent had one person in this age group; and a few households had three persons. Only 6 percent had someone aged 75 or older in the household, the age at which interest starts to shift to care-related housing. Half of the households included someone between the ages of 65 and 74, and two-thirds of the households included someone between the ages of 55 and 64. As intended, the survey results reflect the prime age groups that are likely to be interested in amenity relocation. Although younger persons were not totally absent from these households, only 13 percent had someone aged 45 to 54 years; 6 percent had someone in the household between the ages of 20 and 44; and 4 percent included persons under 20 years.

Three-fourths of the respondents said that their health does not stand in the way of doing the things they want to do and only 4 percent said that their health impeded their activities "a great deal". Few of the respondents reported (for themselves or their spouses) needing assistance or having serious difficulty with daily living tasks, such as bathing, cooking, or driving. (See Table 1.) Approximately one-in-ten had serious difficulty with more physically taxing tasks, such as yard work, home repairs, and house cleaning.

**Table 1. Ranking of Tasks Respondent or Spouse Has Difficulty Performing**

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<u>Tasks</u>	<u>%</u>
1. Yardwork	13.0%
2. Routine home repairs	12.9%
3. House cleaning	9.1%
4. Walking	5.0%
5. Cooking	3.9%
6. Driving	2.3%
7. Bathing	0.9%
8. Putting clothes on	0.9%

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Median household income was \$60,000, an especially impressive sum considering only 32 percent of the respondents and 20 percent of spouses were employed full-time. (Sixty-one percent of the respondents were fully retired or otherwise not working and 7 percent worked part-time.) Nearly one-in-five (19 percent) reported household incomes of \$100,000 or more, plus 13 percent had incomes between \$75,000 and \$100,000. No one had an income below \$10,000 and only 2 percent had incomes below \$20,000. (A national survey of persons

aged 55 and over conducted in 1992 reported a median household income of \$21,000.<sup>2</sup>)

Based on their ages and incomes a high rate of home ownership would be expected. Nonetheless, the magnitude of home ownership is impressive--98 percent. Additionally, over half (54 percent) had no mortgage. The median value of their houses was \$161,000, double the median reported for owner-occupied housing nationally in 1990. Fifteen percent owned houses worth \$300,000 or more, another 15 percent had houses between \$200,000 and \$300,000, and 55 percent had houses between \$100,000 and \$200,000. Only 15 percent said their houses had market values below \$100,000.

High house values and low mortgage balances contributed to a strong equity position, with median equity of \$133,000. Almost one-in-five (19 percent) had equity in their houses of \$200,000 or more; half had \$100,000 to \$200,000; and 22 percent had \$50,000 to \$100,000. Only 9 percent had equity below \$50,000. This equity represents the ability to purchase retirement housing outright or with a substantial downpayment. In addition to the equity in their primary residence, 28 percent also reported that they owned a second home.

High equity also means these households currently have relatively low monthly housing costs. The median payment for taxes, insurance, and mortgage was \$400. Thirty-eight percent paid less than \$300 per month for their current housing. Although 19 percent paid \$1,000 or more, only 8 percent paid \$1,500 or more per month for their houses. Unlike younger homeowners, who typically "trade-up" in house value and increase their monthly payment with a move, most older homeowners look to reduce their house payment when they move.

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<sup>2</sup>American Association of Retired Persons, *op. cit.*

Reflective of their value, the houses occupied by the respondents are spacious. The median number of square feet was 2,220 and one-in-four (26 percent) had houses with 3,000 or more square feet.

The average respondent was also a long-term resident of his or her community. Nearly one-half (48 percent) have been in the geographic area (e.g. a metropolitan area) they currently live in for more than 30 years. One-fifth have lived in the same area for 21 to 30 years and 14 percent for 11 to 20 years. Only 9 percent had moved into their geographic area in the past 10 years. Length of residence in their current house was of a shorter duration than in the community as a whole, reflecting intra-area mobility. No one had lived in their current house for more than 30 years and 34 percent had moved within the past 10 years, but obviously most of these moves were within the same community.

Only 2 percent of the respondents lived in a building or community designed for retirees or senior citizens. This is significantly lower than the 6 percent reported in the AARP survey for persons aged 55 and over. In all likelihood this reflects greater demand for care-related housing among the frail elderly in response to physical needs more so than personal preferences. Also, the supply of publicly assisted, rental housing for lower-income elders is almost exclusively provided in age-segregated buildings. Given current supply and demand relationships for retirement housing, it is important to stress that only a very small proportion (probably 5 percent or less) of any large group of retirees is likely to live in a community or building specifically designed for retirees or the frail elderly.

### Residential Preferences and Mobility Expectations

Given their extremely high rate of ownership, it is not surprising that 94 percent of the respondents were living in a single-family house, with only 4

percent in townhouses and a scant 2 percent in multi-family structures. (See Figure 1.) Although single-family housing is also the type of home preferred (by 76 percent) if the respondent were to move, there is a significant shift toward townhouses (16 percent) and, less so, to multi-family structures (6 percent). This near 20 percentage point drop in single-family housing when comparing current to preferred occupancy reflects a pattern of scaling down housing consumption after retirement. This does not mean that the respondents are dissatisfied with their current housing or that they are likely to move. Indeed one of the impediments to their residential mobility is that few, if any, of these households would be compelled to move because of any inadequacy in their current housing. As will be seen shortly, few of these households have any immediate plans to move.

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As with the disjuncture between current and preferred type of housing, the respondents would scale back on the size of housing they consume if they move. (See Figure 2.) There is a clear preference for smaller units than currently consumed, with significant increases in units with less than 1,500 square feet and with 1,500 to 1,999 square feet. Although Figure 2 seems to suggest that the respondents currently in units with 2,500 or more square feet would prefer units with 1,500 square feet or less, the shifts between current and preferred house sizes are less dramatic. For most respondents, the desire is to consume housing that is no more than 500 square feet smaller than currently consumed.

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Size and housing type adjustments can readily be made within almost any given community. A shift in community type will more likely require a longer move. Slightly over half of the respondents were living in a central city or suburb (most were in a suburb). If they were to move, however, almost half

would prefer to live in a small town (47 percent preferred compared with 29 percent current). Surveys of residential preferences of Americans have long shown a greater preference for small town life than is reflected in actual residential locations, which is heavily oriented to metropolitan areas. A large counterbalance to this preference is the relative scarcity of employment opportunities in small towns and the greater opportunities in metropolitan areas. Retirement could free many of the respondents to this survey from residential locations previously determined by employment and enable them to act on their preference for small town life.

There are many impediments to moving, particularly to a new community. As noted, many of those surveyed are long-term residents of their existing communities. Family, friends, and a variety of social networks are important and strong ties that reduce residential mobility. Thirty-eight percent of the respondents completely ruled out a move and another 33 percent said they were unlikely to move. (See Table 2.) Most of remainder indicated there was a 50/50 chance of moving (16 percent). Only one-in-ten was very likely to move and just 4 percent said they definitely will move.

**Table 2. Ranking of Likelihood of Moving in the Next 5 Years**

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<u>Likelihood of Moving</u>	<u>%</u>
1. Plan to stay here, won't move	37.6%
2. Unlikely to move, but some chance	33.3%
3. 50/50 chance of moving	15.6%
4. Very likely to move	9.6%
5. Definitely will move	4.0%

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If there was any chance of a move over the next 5 years, the respondents were asked to select from a list of possible motives all the reasons that apply to them. (See Table 3.) The two most frequently cited reasons for possibly moving were to reduce living costs (38 percent) and to obtain a smaller house (34 percent). Next in importance were to eliminate responsibility for yard work (26 percent), move near children or relatives (23 percent), and health care (22 percent). Seventeen percent identified moving to a planned retirement community as a reason for possibly moving.

**Table 3. Ranking of Reasons for Moving in the Next 5 Years**

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<u>Reasons for Moving</u>	<u>%</u>
1. Reduce living costs	37.6%
2. Want smaller house	34.4%
3. Prefer condo or other unit where not responsible for a yard	25.7%
4. Move near children/relatives	23.0%
5. Health care	21.9%
6. Want better climate	20.3%
7. Better recreational/leisure opportunities	19.7%
8. Move to planned retirement community	17.0%
9. Companionship/socialization	14.8%

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The survey participants were asked how important a variety of factors would be to choosing a location, if they were to move. These factors covered geographic, climatic and general community characteristics, cost of living, housing, recreation, retirement community services, and neighborhood services.

The most important community characteristic considered in making a move was a low crime rate. This was rated very important by 79 percent of the respondents. (See Table 4.) Being near children or other relatives and having

companionship and opportunities to make friends were rated very important by about one-in-three respondents. A warm climate and a variety of geographic characteristics (lakes, rivers, low mountains, ocean and beach access) were rated as very important by 10 to 20 percent of the respondents.

**Table 4. Ranking of Very Important for Location Characteristics**

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<u>Location Characteristics</u>	<u>%</u>
1. Low crime rate	79.0%
2. Be near children or other relatives	34.2%
3. Companionship, opportunities to make friends	32.7%
4. Warm climate (no snow)	20.1%
5. Lakes, rivers	19.3%
6. Large shopping centers	16.6%
7. Access to a university	12.6%
8. Low mountains	13.2%
9. Ocean and beach access	11.5%
10. High mountains	3.7%

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Between one-fourth and one-third of the respondents rated a variety of cost-of-living features as very important, desiring to spend less than they currently do for local and state taxes, housing, and utilities. That more respondents were sensitive to cost-of-living features than to climate and geography (e.g. beaches) highlights the importance of promoting whatever comparative advantages Blacksburg might have in this arena.

Respondents were also asked about the importance of neighborhood characteristics, on-site or nearby recreational services, and convenience or care-giving services often provided by a retirement community. The most important neighborhood characteristic to have within a fifteen minute walk was a grocery store, followed by a pharmacy. (See Table 5.) The most important recreational opportunity was walking trails (rated very important by 37 percent), followed by

golf (23 percent). (See Table 6.) Less than one-in-five respondents rated any of the other recreational opportunities as very important.

**Table 5. Ranking of Very Important to Live within a Fifteen Minute Walk of Destination**

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<u>Destination</u>	<u>%</u>
1. Grocery store	32.2%
2. Pharmacy or drug store	26.8%
3. Doctors' offices	20.7%
4. Cultural resources like libraries, theater, etc.	19.6%
5. Recreational facilities like swimming, golf, tennis	19.0%
6. A hospital	18.2%
7. Public transportation	15.3%

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**Table 6. Ranking of Very Important for Availability of Recreational Opportunities**

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<u>Recreational Opportunities</u>	<u>%</u>
1. Walking trails	37.4%
2. Golf	22.5%
3. Indoor walking track	19.4%
4. Exercise equipment	17.2%
5. Swimming	16.5%
6. Fishing	13.5%
7. Whirlpool, steam room, sauna	11.6%
8. Boating	10.4%
9. Tennis	8.4%
10. Hunting	6.8%
11. Cards/board games	6.3%
12. Aerobics classes	4.6%
13. Dance classes	2.0%
14. Yoga classes	0.4%

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Consistent with their desire to reduce their responsibility for yard work, the most important service provided by retirement communities was lawn maintenance. (See Table 7.) Other "convenience" services, such as laundry and house cleaning, were rated by more people as very important than "assisted care"

services that are often required by the frail elderly. This is undoubtedly related to the low incidence of personal care problems for those surveyed.

**Table 7. Ranking of Very Important for Availability of Services**

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<u>Services</u>	<u>%</u>
1. Lawn maintenance	28.7%
2. Laundry and house cleaning	21.9%
3. Light home repair	17.6%
4. Transportation for daily trips	15.0%
5. Central dining	9.1%
6. Organized social activities	6.8%
7. Personal care (bathing/dressing)	4.2%
8. Home delivered meals	3.1%

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The survey also measured the importance of various housing characteristics. In general, designs promoting convenience and attractiveness were more often rated as very important than design aides for the frail or handicapped. A single-story structure, large master bedroom, pleasant views, and garage were rated as very important by 50 to 57 percent of the respondents, whereas med-alert buzzers and accessibility for persons with handicaps were rated as very important by less than 20 percent.

When asked what type of community they preferred for their early retirement years, 62 percent selected a traditional neighborhood with a mix of ages. Thirty-two percent preferred single-family houses and townhouses, with central recreational facilities, for retirees--the type of community being proposed for Blacksburg. Only 7 percent preferred an apartment building with central dining facilities for retirees or a "life-care" community.

The exceptionally high preference for a retirement community of single-family houses and townhouses suggests that there is significant unmet demand for such retirement communities for this group of retirees. There are serious obstacles to realizing this level of demand in that "preferences" do not automatically convert to residential mobility, particularly if the household is generally pleased with its current housing and has a network of social relationships tying it to a community. In addition, even if a household would prefer a retirement community and is likely to move, there are many competing choices for a new location and for any given house within that location. Estimating how much of this potential demand might be met by a particular community and, more specifically, by a particular development is obviously a difficult task.

#### Interest In Blacksburg as a Retirement Location

Several questions were asked to help indicate the degree to which those surveyed would be attracted to Blacksburg. Respondents were asked to rate (from very negative to very positive) 14 different community characteristics for Blacksburg. They were also asked when they had last visited Blacksburg, if they had read or heard about the Blacksburg Electronic Village, and the importance of education programs at Virginia Tech in their choice of a retirement location.

Over one-third of the respondents (35 percent) had visited Blacksburg within the past year (this includes a few who live in Blacksburg) and another 27 percent visited within two to five years. Eighty percent have visited within a ten year period and only 10 percent have not been to Blacksburg in over 20 years.

Table 8 presents the ratings of Blacksburg across various community characteristics. The table includes mean scores, the percent of positive responses, and the percent "don't know". Mean scores were calculated by assigning the

following values to the responses: -2, very negative; -1, somewhat negative; 0, neutral; +1, somewhat positive; +2 very positive. ("Don't know" responses were not included in the calculation of mean scores.) For the most part, the mean scores and the percent of positive responses are closely correlated. The percent "don't know" responses varies from a low of 5 to a high of 57. Certain characteristics like climate and scenery could be judged by nearly everyone based on their years at Virginia Tech, whereas other characteristics like public transportation and the Blacksburg Electronic Village require much more recent experience with the community.



**Table 8. Ranking of Blacksburg Community Characteristics**

<u>Community Characteristics</u>	<u>Mean Score*</u>	<u>% Positive Responses**</u>	<u>% Don't Know Responses</u>
1. Scenery/natural beauty	1.59	86.5%	6.0%
2. Virginia Tech	1.57	84.9%	6.2%
3. Educational opportunities	1.52	78.6%	10.3%
4. Cultural activities	.96	56.2%	22.6%
5. Recreation	.85	51.7%	24.0%
6. Community landscaping	.75	46.2%	25.0%
7. Blacksburg Electronic Village	.63	(18.4%)	57.2%
8. Entertainment	.56	38.4%	28.7%
9. Cost-of-Living	.49	31.5%	31.5%
10. Housing	.49	27.7%	42.1%
11. Restaurants	.37	(33.3%)	27.2%
12. Health care	.37	24.3%	39.2%
13. Climate	.16	(38.7%)	4.8%
14. Public transportation	-0.04	11.1%	45.1%

\*Based on range -2 to +2 with -2 representing most negative response and +2 representing most positive response.

\*\*Percents in parentheses are low or high compared to the mean ranking. The relatively low percent of positive responses for Blacksburg Electronic Village but a relatively high mean ranking is the result of many neutral and few negative responses. The relatively high percent of positive responses but relatively low mean rankings for restaurants and climate is the result of negative responses offsetting the effect of positive responses.

Three characteristics of Blacksburg received extremely high ratings (79 to 87 percent positive ratings): scenery/natural beauty; Virginia Tech; and educational opportunities. These were also items that most of the respondents could evaluate. Only two other characteristics, cultural activities and recreation, received positive ratings by a majority, followed by community landscaping. The remaining items received one-third or fewer positive ratings.

Public transportation received the lowest mean score, but nearly half of the respondents could not rate this item. Climate, health care, and restaurants were also given low ratings. Climate received the largest percentage of negative ratings (30 percent) but also received 39 percent positive ratings. This is likely to

be the most serious impediment for some to consider Blacksburg as a retirement location. Thirteen percent of the respondents rated restaurants as a negative characteristic of the community.

The low rating for health care and the rather tepid rating for cost of living identify potential problems. Cost of living is a major factor in influencing the choice of a retirement location among this group. It was the most frequently cited reason for potentially moving over the next 5 years. Better communication of Blacksburg's cost of living is needed to the extent that it can be documented to be lower than elsewhere in Virginia (e.g. Northern Virginia) or in other states. Health care was identified more often as a reason for moving in the next 5 years than climate, recreation/leisure, or a planned retirement community. The quality of health care in Blacksburg should be clearly addressed in the marketing plan for the proposed retirement community.

The Blacksburg Electronic Village could potentially provide significant benefits to the residents of a retirement community through such activities as discussion groups, investment groups, home shopping, and the information resources of the Internet. Almost one-third of the respondents had read or heard about the Blacksburg Electronic Village, but most respondents either did not know enough to rate it or were neutral.

Education programs at Virginia Tech could also be a positive factor in attracting retirees to Blacksburg. Virginia Tech received positive ratings from 85 percent of the respondents (less than 1 percent were negative) and 22 percent said that the availability of education programs at Virginia Tech would be very important in their choice of a retirement location. Another 54 percent said this would be somewhat important and only 25 percent said educational programs at Virginia Tech would not be important to their choice of a retirement location.

Another important factor for many people in deciding on a retirement location is proximity to their children or other relatives. (Almost all of the respondents had children.) Thirteen percent of the respondents said that it would be very important to be within an hour driving time of their children or other relatives and 35 percent said it would be very important to be within four hours driving time of their children. Over half of the respondents (55 percent) had children or other relatives within a four hour driving distance of Blacksburg.

## **Conclusions**

In response to our survey, one Virginia Tech alumnus wrote to us stressing the difficulty in predicting post-retirement location.

"The topic of post-retirement location is a very personal thing, full of individual needs and desires (many beyond the individual's control). I feel blessed in having a wife that knew/cared more about where we would enjoy living than I did at the time of retirement. For us, we have found nothing better than southern Florida and condo living (even with its well known shortcomings)."

This study illuminates the complexities of the post-retirement location decision and, more specifically, the strengths and weaknesses of Blacksburg as a potential location.

As a retirement location, Blacksburg can definitely appeal to a well-educated, successful, middle-to-high income population of retirees. Few would be compelled to move because of any inadequacy in their current housing, and marketing must overcome the ties that retirees have to their existing homes and communities. The potential strengths of Blacksburg in attracting this population are: scenic beauty, low crime, a small town life-style, reduced living costs, smaller houses, lawn and home maintenance services, Virginia Tech, educational opportunities, and proximity to children and other relatives.

Climate is a potential problem for some, but not everyone. Services that address winter weather problems (e.g. snow removal and transportation) should be stressed. The quality of health care should also be addressed. Housing costs will have to be competitive with new construction in traditional, age-integrated subdivisions.

## **APPENDIX I: Survey Methodology**

### **Respondents**

Virginia Tech alumni from the Classes of 1946 to 1961 were mailed a questionnaire in October 1994 to assess their post-retirement residential preferences and their attitudes about Blacksburg as a retirement location. The random sample of 1,030 alumni represents 10 percent of the total alumni graduating between 1946 and 1961 and targets 55 to 70 year old professionals. Drawing the sample from Virginia Tech alumni ensured a sample that would be familiar with the Blacksburg area but currently reside throughout the United States.

Of the 1,030 questionnaires mailed to alumni, 585 were completed for a response rate of 59 percent (the findings in this report are based on the 560 responses returned at the time of analysis). Eighteen questionnaires were returned as undeliverable, respondent deceased, or respondent not within the designated age category. Ten questionnaires were returned not completed.

In part, non-response may reflect alumni who did not fit the age qualification for the survey even though respondents were asked to return the questionnaire designating that no one in the household was 55 years of age or older. Also alumni in the 55 or older group are likely to travel and may not have received their questionnaire in time to reply.

### **Questionnaire**

The questionnaire was designed to determine demographic characteristics of 55 to 70 year old professionals, their post-retirement relocation preferences, and their interest in a proposed retirement community in Blacksburg, Virginia. The questionnaire consisted of 42 questions and could be completed in

approximately 20 minutes. The final questionnaire was the product of a thorough review process by the Center, a gerontologist, and the developers.

### Field Procedure

To promote a good response rate, we used Dillman's Total Design Method to conduct the survey. Along with the questionnaire, we mailed the Virginia Tech alumni a first-class letter explaining the purpose of the study and stressing the importance of responding. We assured respondents of the confidentiality of their responses, and stressed an identification number written on the questionnaire would be used only for recording purposes. We personalized the addresses on both the letter and envelope (both on Virginia Tech and Virginia Center for Housing Research stationary). To facilitate returns, the questionnaire was printed with a postage-paid business reply address on the back. The respondent merely had to seal the questionnaire and mail (we provided tabs for the respondents to use for sealing the questionnaire). In addition to the letter and questionnaire, we enclosed a map of the proposed retirement community in Blacksburg and recent newspaper articles describing the project.

One week following the first mailing, we mailed a postcard reminder to all alumni who had not yet responded. Two weeks following the postcard reminder, we mailed to those alumni who had not returned a questionnaire a complete survey packet (questionnaire, map, and newspaper articles) with a letter again explaining the importance of responding to the survey.

### Analysis

We designed the questions on the survey to facilitate coding of the data. We entered data into a computer file directly from the questionnaire. After a thorough check of the data, we analyzed the information through use of SAS, a

statistical computer program. New variables were created from existing variables to provide better measures of interest. We produced frequencies of variables, two-way tables comparing variables, and means of selected variables both for the overall group and selected groups such as the target group of interested alumni. Also, we compared responses of the earlier respondents versus the later respondents, and found few differences.

**APPENDIX II: RETIREMENT RELOCATION QUESTIONNAIRE**

See file rtapp2pb.doc