

FACTORS INFLUENCING RELOCATION TO A RETIREMENT COMMUNITY

by

Elise Bonwit

Thesis submitted to the Graduate Faculty of the
Virginia Polytechnic Institute and State University
in partial fulfillment of the requirements for the degree of

MASTER OF SCIENCE

in

Management, Housing and Family Development

APPROVED:

R. P. Lovingood, Chairman

D. E. Hinkle

B. A. Hughston

April, 1977

Blacksburg, Virginia

ACKNOWLEDGMENTS

The author is indebted to the developer of the retirement communities and the residents who participated in this research. Without their cooperation, this study would not have been possible.

She is grateful to her committee: Dr. Rebecca P. Lovingood, chairman; Dr. Dennis E. Hinkle; Dr. George A. Hughston; and Dr. James E. Montgomery, former committee member; for their time, direction, expertise, and critical appraisal.

Special thanks for their inspiration and support to _____, grandmother; and _____, parents. Also to the late _____, grandfather, for sharing his value of an education.

Appreciation is expressed to her friends _____, _____, _____, and _____ for their encouragement during this study.

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CHAPTER I

INTRODUCTION

Background of the Study

Recent advances in medical technology related to disease prevention, detection, and treatments plus improved medical equipment, better nutrition, and a higher level of economic resources have contributed to an increase in the percentage of people in the 65 and over age group in industrialized nations. In the United States, during the two decades from 1950 to 1970, an increase of approximately 8 million aged people has occurred to bring the figure to about 20 million, or approximately 10 percent of the total population. Moreover, an increase of 22.5 percent to 24.5 million is expected between 1970 and 1980, and a 53.0 percent increase to 30.6 million has been predicted from 1970 to the year 2000. Depending upon the birth rate, the aged may represent from 10.7 to 12.5 percent of the population in the year 2000 (U.S. Bureau of the Census, 1975:6).

Although our culture generally affords a higher level of living than ever before, often the aged are victims of fixed income, rising costs, and physical deterioration (Hoffman, 1973:18; Nye and Berardo, 1973:578; Schultz and Rogers, 1975:302). Some common forms of physical deterioration include dulling of the senses, slowness of motor skills, lack of coordination, and a loss of strength and energy (Cavan,

1965:50; Lawton and Azar, 1966:11-14; Moore, 1968:221). Despite the obstacles of fixed incomes, rising costs, and physical deterioration, most aged people remain in homes of their own (Cavan, 1965:50; Focus II..., 1974:13). However, the health and financial status of the aged is not altogether bleak. Many of the aged experience good health and secure economic status enabling them the opportunity to select a living arrangement to meet their current needs.

During the later years most Americans are retired from gainful employment. This often causes problems of a diminished self-concept and feelings of worthlessness. Perhaps if individuals can remain independent through an appropriate near environment, they can retain feelings of worth, dignity, and a wholesome self-concept.

Retirement communities, defined as age-restricted residential areas, are a viable option for a segment of the aged. Gottschalk (1972:235) believes less than 5 percent of the aged live in retirement communities. Another writer contends that retirement communities are a \$250 million business and the fastest growing segment of the housing market ("New Life . . .," 1972:70). Del Webb, the developer of Sun City, Arizona, who originally estimated the market potential of retirement communities to be 2 percent of all retirees, has since revised his estimate to 10 percent ("New Life . . .," 1972:70). With a present United States population of 22 million people aged 65 years and over (U.S. Bureau of the Census, 1975:6), the 2 percent prediction would yield 440,000 potential residents; the 10 percent figure would encompass as many as 2.2 million. Early retirement and a minimum entrance

age of 50 years required by many retirement communities could further increase the number of potential residents.

Statement of the Problem

According to Nash, executive director of the National Retired Teachers Association (NRTA) and the American Association of Retired Persons (AARP),

. . . any concept or any program that approaches older citizens as a homogeneous group is doomed because they remain, in age, as diverse a group as they were in youth or in middle age. Too frequently we look for the single panacea, the single program (Proceedings of the National Forum . . ., 1975:9).

Clearly, it is necessary that a suitable near environment be available for the aged who constitute a large heterogeneous segment of the population. What, therefore, are the reasons a proportion of this population selects the retirement community for its near environment? Furthermore, what are the demographic characteristics of those who do?

Purpose and Potential Outcome

The purpose of this research was to explore the factors influencing the relocation of aged persons to two retirement communities. By identifying and recognizing the needs and preferences of the aged segment of the housing market, it should be easier to develop suitable housing and in turn increase the chances of the elderly to maintain independence. Information gained from this study could help professionals in direct contact with the late middle aged and aged to identify and evaluate their personal needs for an appropriate near

environment. The findings also would be pertinent to those professionals planning and building housing units for this group and those directly involved in government decision making.

This area of study at the interface between older people and their near environments is especially appropriate for research in Home Economics because:

The ultimate goal of research in home economics is to maximize the satisfaction and well-being of individuals and families through increasing knowledge and understanding of man and his environment--his physical, cultural, and social milieu. Attention [has been] focused upon the reciprocal relationships between man and the quality of his near environment as distinct entities with sparse attention to the interfaces between them. Future research should reflect more concentration of effort at these interfaces (National Goals . . ., 1970:15).

In addition, one of the five national goals of Home Economics is to "Improve the physical components of man's near environment" (National Goals . . ., 1970:34). This can be done by identifying needs and preferences of people, in this case the elderly, through exploratory research.

Conceptual Framework

Recently Morris and Winter (1975) have developed a theory of family housing adjustment. According to this theory (Figure 1), families recognize a deficit in their current residence which reduces housing satisfaction. Such deficits often occur as families change stages in the life cycle, causing a change in family structure. A family's reaction to a recognized housing deficit is dependent upon the influence of family norms, cultural norms, and existing constraints (Morris and Winter, 1975:79).

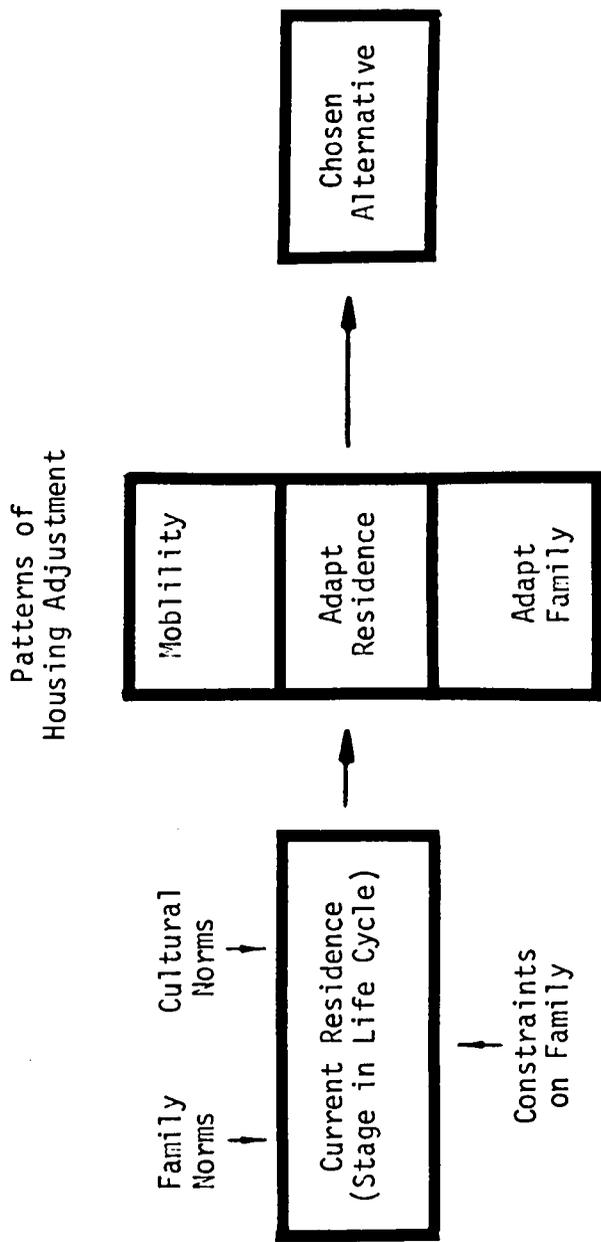


Figure 1: Simplified Diagram of Morris and Winter Theory of Housing Adjustment.

Family norms are the personal framework, or guidelines, within which a family assesses its housing. For example, one family might want a separate dining room because the family members tend to pursue individual activities but they gather for meals, whereas another family might prefer that this housing space be used for a "family room" where they can enjoy family-centered leisure activities together. Cultural norms include more general housing requirements which span five classifications established by Morris and Winter (1975:82). These were: "1) housing space norms, 2) tenure norms, 3) structure type norms, 4) quality norms, and 5) neighborhood and location norms." Finally, constraints on the family include 1) a family's decision-making ability, 2) economic, social, and political factors, and 3) attractive features of the dwelling (Morris and Winter, 1975:83).

Families react to alleviate a housing deficit and improve satisfaction by following one of three patterns: residential mobility or migration, residential adaptation, or family adaptation. Morris and Winter (1975:85) define residential mobility as relocation within a single housing market and a single labor market. Unlike residential mobility, relocation over a greater distance is differentiated as migration and may be a response to other variables in addition to a housing deficit. For example, a change of occupation and economic opportunity or a change of climate preference might initiate relocation by migration. In the first pattern, a family uses mobility (residential mobility or migration) to achieve appropriate

accommodations commensurate with their life style and stage in the life cycle. The second alternative finds the family adapting their residence to fit their needs. Last, is family adaptation to the dwelling unit whereby the family may postpone childbearing or arrange for family members to be housed at schools, institutions, or with other relatives. Regardless of the alternative chosen, all are contingent upon the influence of family and cultural norms, one's current housing conditions, and existing constraints (Morris and Winter, 1975:79).

The model for this study (Figure 2) parallels Morris and Winter's theoretical framework. Specifically, a late middle-aged or aged family recognizes that their near environment differs from their conception of what it should be. Thus, they experience a housing deficit based upon three factors: family norms, cultural norms, and constraints. They seek to reduce dissatisfaction through selection of one of the options of mobility, residential adaptation, or family adaptation.

Some aged select mobility to retirement communities where they may maintain their independence, enjoy leisure activities, and derive companionship from others in their age group. This conforms to family norms found in the United States today which encourage the nuclear family structure in which adult generations of a family maintain separate living accommodations and distinct lives. Retirement community living is further supported by the cultural norm encouraging the aged to remain independent. Finally, mobility to retirement

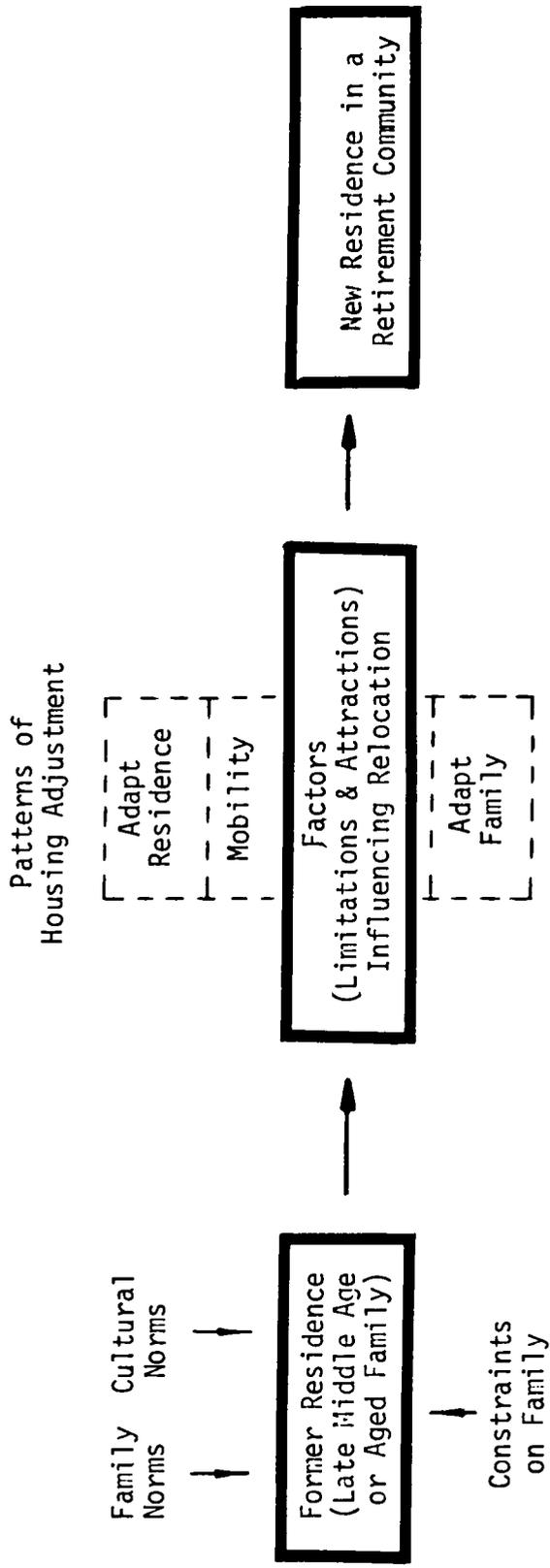


Figure 2: Conceptual Framework for This Study Derived from the Morris and Winter Theory of Family Housing Adjustment.

communities is precipitated also by constraints in the old near environment such as economic burden of a large dwelling unit, unsuitability of the dwelling unit, and lack of peers for social interaction.

In this study, the researcher attempted to identify the factors influencing the selection of a retirement community as a near environment, i.e., the option of residential mobility. Since most subjects were retired, and therefore did not rely on the labor market, mobility may include migration.

Definition of Terms

The following terms used in this study are defined to enhance readily clarity and precision:

Aged--any individual who is 65 years or older.

Late middle age--persons aged 55 through 64 years.

Retirement age--the age when permanent, full-time employment ceases. In the United States this is normally considered to be 65 years; full Social Security benefits are payable at this age.

Early retirement--cessation of permanent, full-time employment which occurs before age 65, most likely between ages 55 and 65 years.

Adult community--a term used by some developers to describe an age-restricted residential area.

Retirement community--an age-restricted residential area which is built specifically for older people.

Near environment--the area in which a person usually functions including the dwelling unit, neighborhood, and larger community.

Objectives of the Study

Objectives of this study were to:

1. Identify and compare demographic characteristics of the samples of residents from two retirement communities.
2. Identify and compare limitations, or "pushes," of the former near environment which caused the subjects to select mobility as their response to a housing deficit.
3. Identify and compare attractions, or "pulls," which caused the subjects to select the retirement community where they now live.

CHAPTER II

REVIEW OF LITERATURE

Introduction

Individuals differ in their responses to a housing deficit. According to Morris and Winter (1975:83), a person will attempt to alleviate a deficit, thereby improving housing satisfaction, by selecting one of the following options: residential mobility, residential adaptation, or family adaptation. The subjects who participated in this study had chosen the option of residential mobility to a retirement community. Therefore this literature search encompasses items related to retirement communities and their residents.

This review of literature includes published and unpublished work based upon empirical research or the experience of the writers. Literature from 1960 to the present time was examined and includes both domestic and foreign writings. Specific topics covered in this review are variables related to retirement such as retirement age, life expectancy, and retirement impact; and the environment of retired people, including housing needs, age segregation, residents of retirement communities, and retirement housing.

Variables Related to Retirement

Retirement Age and Life Expectancy

The inception of the Social Security Act in 1935 provided the aged with a retirement income thus enabling retirement from gainful employment. Age 65 has since become the "normal" retirement age because Social Security allows payment of full cash benefits at age 65. Social Security cash benefits in 1976 will total about \$76 billion. More than 32 million people receive these benefits; "nine out of ten paid jobs are covered under Social Security." The maximum benefit, effective June 1976, for a person retiring in 1976 at age 65 is \$387.30 per month. Average Social Security benefits for a single retired worker are \$218 per month; for an aged couple, both receiving benefits, are \$372 per month (Cardwell, 1976:1-2).

Currently there are about 22 million people aged 65 and over in the United States (U.S. Bureau of the Census, 1975:6). Life expectancy in 1973 was 67.6 years for all males and significantly higher, 75.3 years, for all females. Whites have a still longer life expectancy than average, or 68.4 years for all males and 76.1 years for females (U.S. Bureau of the Census, 1975:59). Thus, the average male can expect to live 2.6 years after retirement at age 65 and the female 10.3 years, with whites living even longer than the average.

If past trends continue, it is clear that one can expect the life span to continue to increase, adding to the number of years spent in retirement. It can be projected that increasing opportunities for

early retirement, before age 65, will also lengthen the number of years spent in this stage of life. Social Security and some private pensions provide a means for early retirement because partial retirement benefits are payable at age 62. More people appear to be taking advantage of this opportunity. In 1973, 8.7 percent (749,070) of all males aged 62 to 64 years were receiving Social Security retirement benefits compared with 6.9 percent (470,925) in 1965 (U.S. Bureau of the Census, 1975:289). Another potential reason for early retirement is the high rate of unemployment in the United States; 9.2 percent (7,820,000) of the labor force was unemployed in April 1975, compared with 3.9 percent in 1969. Of the 7,820,000 unemployed, 1,500,000 or 19.2 percent were 45 to 64 years of age (U.S. Bureau of the Census, 1975:349). Many of these people may select early retirement because their age is often a barrier to re-entry into the work force, despite their work experience. Others may be induced to select early retirement because of benefits from private retirement and savings plans, the eradication of work related expenses, and the ability to move to an area with a lower cost of living.

Retirement Impact

Retirement from work forces the individual to make sudden changes in established routines and daily activities. Retirement "is usually accompanied by profound economic, social, and psychological readjustments" (Palmore, 1965:4). Despite this, Maddox (1970a: 16-18) contends that one can adapt to retirement with ease if one has experienced satisfaction with work, has adequate income and health,

and has planned for retirement. This stage can be rewarding for those who maximize their opportunities (Shock, 1968:152). Based upon the acceptance and growth of retirement facilities for the aged, it appears that some people seek to maximize their retirement opportunities by changing their residence.

Environment of Retired People

Housing Needs

Every individual has physical, social and psychological needs related to his environment. As Montgomery (1972:39) points out, the aged are no exception. He lists the following eight needs associated with one's life space: independence, safety and comfort, wholesome self concept, a sense of place, relatedness, environmental mastery, psychological stimulation, and privacy. This theory parallels Maslow's (1970:35-46) hierarchy of needs which includes psychological, safety, love and belonging, esteem, and self-actualization. The National Goals and Guidelines for Research in Home Economics (1970:34) states "The immediate environment should satisfactorily accommodate man's social needs, it should provide function, comfort, contentment, health, economic, psychological, and aesthetic satisfactions."

Although not explicitly defined, Montgomery's concept of life space and that of immediate environment appear to be similar to the definition of near environment used for this research. Near environment is the area in which a person usually functions including the dwelling unit, neighborhood, and larger community.

Any person's housing needs involve more than "shelter, good temperature controls, and a safe bathtub. . . . [They should encompass] aesthetics, economics, community planning, city administration, the structuring of a neighborhood, and the character of a community" (Toward a National Policy . . . , 1973:30).

At the 1971 White House Conference on Aging, Musson summarized,

Good housing is primary to the good life. Aspiring to the good life for our people will be fruitless unless the full significance of housing is understood. And there is no part of the population that would benefit more from a comprehensive, fully knowledgeable attack on the present deficiencies of housing than the elderly. It could remake their lives and remake our society (Toward a National Policy . . . , 1973:31).

Housing needs are significantly more important to the aged than to other age groups because, aside from their spouses, housing is likely the most important single factor in their lives. The aged spend more time at home than almost anyone else over the age of five (The Golden Years . . . , 1970:72; Toward a National Policy . . . , 1973:30).

The well-being of the aged is closely related to housing because diminishing physical capabilities restrict the ability of the elderly to adapt to their housing. Safe and suitable housing "may mean the difference between living independently or in an institution; between solitude and socialization; between safety and danger; or in extreme cases between life and death" (The Golden Years . . . , 1970:72).

Proppe (1968:176) investigated eight types of housing for the aged including remodeled housing, life-care housing with nursing facilities, and a "hotel." One non-profit facility was an 11,000 resident retirement community which offered individual homes. Each facility was evaluated for basic design determinants, lighting problems and corridors, the use of color, other design elements, and site planning. Data were gathered by asking open-ended questions of the residence management, residents, and personnel. Proppe (1968:179) found that problems occur when the needs of the elderly are not considered and with the lack of imaginative use of design elements, especially lighting, color, corridors, and spacial definition.

Recchie (1973:66-73) examined independence and safety related to dwelling unit satisfaction as experienced by 80 women residents of government housing for the elderly. Subjects included handicapped and well-elderly who were at least 65 years old, had resided in the dwelling unit for 6 months or more, and could perform normal housekeeping tasks. Recchie found that accommodating the needs of independence and safety through design criteria in housing contributes to the satisfaction of the elderly. Design criteria related to independence included such items as heights of wall switches and convenience outlets, widths of doors, types of door knobs, lighting, faucet controls and methods of opening windows. Items related to safety were floor types, lighting in hallways, number of threshold strips, range controls, and protective devices on windows.

Every segment of our society is entitled to a "decent home and a suitable living environment" (Housing Act of 1949), yet this becomes an increasingly difficult achievement if the inhabitants' needs are considered. This is especially true for the aged who generally have lessening physical resources, but do not constitute a homogeneous group.

Age Segregation

The retirement community provides housing for a group relatively homogeneous in age because of the age restrictions required for admittance. Both benefits and liabilities may accrue to the residents of an age segregated environment, hence controversy exists among writers over age segregation in retirement housing versus age integration in traditional housing. Some writers believe that age segregation, as found in retirement communities, removes the individual from the mainstream of society, depriving the young of the experience and knowledge of the aged, and conversely, isolating the aged from the energies associated with the young. These writers believe that the aged individual often may disengage from active life. Others point out that age segregation may actually enhance social interaction by placing the individual with a density of peers who have similar interests and time for leisure.

In the longitudinal Kansas City Study of Adult Life started in 1955, Cumming and Henry (1961:29, 230, 279) investigated the aging process as found in a sample of 172 physically healthy adults aged 48-68 and 107 persons aged 70-90. One outcome of this research was

development of the disengagement theory. Disengagement may result from a change in life goals allowing a lessening of responsibilities and a greater focus on one's inner self than in earlier life. Cumming and Henry (1961:147) believe disengagement is a response to three problems frequently associated with retirement: increased opportunities for sociability, a loss of status identity, and the loss of a peer group. Increased sociability is often a problem because people who were previously employed are not accustomed to unstructured daily activities which revolve predominately around social activities. In summary, Cumming and Henry (1961:50) perceive disengagement to be dependent upon a combination of one's decreasing number of roles, the lessening frequency of interaction with others, and a diminishing social lifespan.

Henry (1964:17) further indicates that as one ages and enters the "empty nest" and retirement cycles there are fewer demands and opportunities for involvement in one's work and family. Similarly, there is less need to focus on one's future and the accomplishment of goals. With the ease of former demands, one is able to focus on and develop new goals. Disengagement is described as a complementary process wherein society releases one from responsibilities and the individual responds by feeling less bound. Those who have met earlier goals are likely to receive this stage with pleasure; for those who have not, it may bring distress. Henry (1964:18) recognizes that people will likely react to this stage of the life cycle as they have to other events and crises in earlier life; people will also tend to

disengage in different ways, degrees, and at varying rates. In the purest form, one who disengages reduces social interaction and involvement with events, the freed attention is then focused upon one's inner thoughts.

Gillespie (1967:32) studied the disengagement hypothesis with the concept of neighborhood integration. He compared age with four other demographic variables: length of residence, social class, sex, and marital status. Data were collected in a 20 percent household sample of St. Paul, Minnesota. Neighborhood integration assessment was based on "participation in neighborhood voluntary associations, orientation to the neighborhood, and number of neighborhood friends." The disengagement hypothesis was only partially supported by the data. Although age was not related to participation in voluntary associations or to orientation to the neighborhood, among the elderly, age was the best predictor of the number of neighborhood friends and those with no neighborhood friends increases with age. Based on these findings, Gillespie (1967:32) suggested that one continues behavior patterns established earlier in life. That is, a person who was an introvert in youth will likely remain one in later life, likewise a gregarious individual will continue this behavior pattern. This parallels the activity theory described by Havighurst (1961:8) as the continuation, as long as possible, of activities and attitudes of middle age.

Following an investigation of social integration in age-segregated housing for the elderly, Lawton and Simon (1967:39) claimed opportunity for social integration is greater in age-segregated

congregate housing (age-segregated institutional housing often with nursing care) than in dispersed age-integrated housing (detached dwelling units within an age-integrated community). Lawton and Simon (1967:39) found that proximity to others influenced one's social interaction. Furthermore, the mentally and physically healthy mobile aged with a positive concept of aging were more independent, tended to visit people who were located further from their units, and tended to visit more frequently.

A longitudinal study was conducted during 1965-67 by Lehr and Rudinger (1969:258-59) from the Department of Psychology at the University of Bonn, West Germany. There were 185 subjects, aged 60-75 in 1965, who were interviewed and tested during one week each year. The findings appear to support the hypothesis that the degree of social participation is determined by personality variables, aspects of different roles, established behavior patterns, proximity to others, the lessening frequency of contacts, and a diminishing social life-space (Cumming and Henry, 1961:50; Gillespie, 1967:32; Lawton and Simon, 1967:39; Lehr and Rudinger, 1969:258-59).

Retirement communities may provide an ideal setting for social interaction because they contain a density of age peers and encourage leisure pursuits. In addition, retirement communities may help prevent disengagement by alleviating the three problems often associated with retirement--increased sociability, loss of status identity, and loss of a peer group (Cumming and Henry, 1961:147).

Increased sociability is facilitated by the social activities and recreational facilities characteristically found in retirement communities. These opportunities help the aged retain their life space and prevent them from experiencing a decreasing number of roles by allowing them to experience new roles. Status identity may be retained by the retirement community resident because he does not have to compete with younger people who rely on the status gained from the prestige associated with various occupations. He may also gain status from activities pursued within the retirement community. Although retirement communities are said to be age-segregated, they may encompass residents whose ages span several decades because of entrance ages of approximately fifty years. Nevertheless, the relative concentration of the aged helps retirees cope with the loss of peer group. The density of healthy aged in proximity to each other also should increase social interaction (Lawton and Simon, 1967:39).

Retirement Housing

Housing information was among the data gathered in a national survey of the health of older people. Shanas (1962:102, 103) reported that 83 percent of the 1,734 subjects aged 65 and over wished to maintain independence in homes of their own. In addition, 61 percent of these subjects considered homes for the aged to be least desirable because they signified a loss of independence, a prelude to death, and rejection by one's children.

A longitudinal study conducted by Peterson and Larson (1966: 129-30) was focused "on different levels of adjustment exhibited by

aging persons living in contrasting settings." The sample studied in the pilot phase of the research was comprised of approximately 400 individuals planning to move into a retirement community. A major reason for moving was dissatisfaction with one's present neighborhood because of deterioration of the community, influx of minorities, climate conditions, and problems with neighbors such as too many children, incompatibility, and loss through death or migration. A second factor was a desire to be free from the maintenance responsibilities associated with a larger home no longer needed during the empty nest stage of the life cycle.

A review of literature about retirement communities by Bultena and Wood (1969:210-12) included the following data. Residents of retirement communities have significantly higher morale than those in age-integrated communities, according to a Life Satisfaction Scale. Most residents are from the higher occupational and educational levels of the aged population and tend to settle particular retirement communities by class. These researchers believe that retirement community residents usually have good health; and lastly, relocation does not sever family ties or precipitate isolation.

Shanas (1969:140) examined housing for the aged and found that most of the aged live in housing which is in poor condition compared with other housing because it tends to be older housing in older neighborhoods. In addition, there is a high incidence of "overhoused" aged, people who live in houses which have a high ratio of number of rooms to the number of occupants.

Shanas (1969:144) perceives the retirement community as a relatively new form of housing which can help the aged retain their independence. She views the primary appeal of retirement communities as the good value of the house for the money, and contends that retirement communities are most successful when located in metropolitan areas. Projecting into the future, Shanas believes retirement communities may have a problem with concentrations of dependent elderly when the majority of residents, who entered the community in late middle age, are twenty years older.

Sherman (1971:118-38) investigated motivations causing the well-elderly to select age-segregated congregate housing. She compared residents in each of six age-segregated retirement facilities with a demographically matched control group of 600 respondents living in conventional housing units. The six sites examined by Sherman were a retirement hotel, a retirement village of rental units, an apartment tower, a retirement village of purchase units, a retirement village of cooperative units, and a life-care facility. The purchase and cooperative villages were similar because they both offered a form of tenure associated with home ownership and the potential for investment. Residents of these two sites had a mean age of 67.8 years, more than six years younger than residents at any of the other four facilities. Motivation for moving to retirement housing varied among the facilities. Interviews with residents of the purchase and cooperative villages revealed that residents selected this mode of retirement housing because of ease of maintenance, security, a climate which aids health and

recreational facilities. In addition, "a distinct pattern of pushes and pulls was traced for the residents at each of six different facilities . . . " (Sherman, 1971:135).

Gottschalk (1972:240) examined Moosehaven in Orange Park, Florida. Moosehaven is a 450 resident, non-profit retirement community sponsored by the Loyal Order of the Moose. Gottschalk believes that a small sized retirement community such as Moosehaven allows relationships to remain fairly personal, and that a retirement community can create an atmosphere in which ties to non-relatives can be established.

Summary

Because the aged are a heterogeneous group with varying expectations, resources, goals, experiences, and opportunities (Hoffman, 1973:17; Maddox, 1970b:23; Montgomery, 1965:1), retirement communities are not a panacea; rather, they are a viable option for the upper segment of the aged population who enjoy better health and economic security. Shanas (1969:143) believes retirement communities attract the "younger" segment of the aged population who are able to remain physically independent. According to the Administration of Aging, housing for the aged is for "active, self-reliant persons who are living longer, healthier, and more meaningful lives" (U.S. Congress House Committee . . . , 1963:84). Clearly, this coincides with Gottschalk's (1972:235) belief that retirement communities serve the relatively healthy aged who have above average incomes.

Research about retirement communities is in the exploratory stage. Little has been done to isolate the retirement community as a form of retirement housing, and investigate its assets and liabilities in order that developers and retired individuals may maximize the potential of this option. Because the retirement community is an acceptable and often sought housing option for the aged, research is essential to ascertain the reasons people move from their former homes, the reasons they select a retirement community, and a demographic description of these residents.

CHAPTER III

PROCEDURE

Data Collection

Instrument Development and Pretest

The instrument (Appendix A) developed for this research was designed to ascertain reasons for relocation to a retirement community and to identify demographic characteristics of the respondents. Questions used in the instrument were composed on the basis of the literature search and the related assumption that people move from their old residence because of dissatisfactions with the near environment and anticipation of positive characteristics in the new near environment.

The instrument consists of three sections: evaluation of the old near environment, evaluation of the new near environment, and demographic data. Evaluation of the old and new near environments was made by asking respondents to indicate the degree to which characteristics of the dwelling unit, neighborhood, and community influenced their decision to relocate. Demographic information was obtained by asking multiple-choice and open-end questions.

Content validity was established by comparing the test instrument with the literature. Clarity and readability were assessed by conducting a pretest at a progressive care residential facility for the

aged, Friendship Manor in Roanoke, Virginia, on September 22, 1976. Six residents of apartment units completed the questionnaire in an average time of fifteen minutes. Five of these residents had life leases (a form of ownership) on their apartment; the other resident was a renter. These individuals were similar to the actual sample in age and level of independence. Some revisions were made in the test instrument after consideration of comments made by the pretest respondents.

Location of the Sample

The subjects of this investigation were residents of two retirement, or adult, communities in Ocean County and Burlington County, New Jersey. These communities were selected because they offer single family detached dwelling units which are a prevalent form of housing in the United States. All dwelling units found in these communities were one-story designs and predominantly detached units.

The community in Ocean County was first occupied by residents in March, 1974; as of October, 1976, 102 dwelling units were occupied. Five semi-custom dwelling unit models are available, ranging in price from approximately \$34,000 to \$40,000 for about 800 to 1000 square feet of living area. Homeowners pay a maintenance fee of approximately \$40 per month to cover individual yard maintenance, maintenance of common grounds and a community bus, trash collection, taxes on common buildings, and around-the-clock security personnel.

Recreational facilities in this Ocean County community include a swimming pool with a sun deck, a lake for fishing and non-power boating, a horseshoe area, a croquet court, shuffleboard courts, a putting green, a nature walk, and a community bus service. There is also a recreation center containing a library/lounge with a fireplace, club rooms, card and game rooms, and a multi-purpose room.

Residency requirements limit the size of a household to three persons and prescribe that one member be 52 years of age or older. In addition, only children who are over 19 years old and single may be residents.

The Burlington County community was opened to its first residents in December, 1970. In October, 1976, occupied dwelling units numbered 1194. Several one-story duplex and quadruplex units were among the dwellings constructed at the community's inception. However, they now constitute less than one percent of the total community. This community has four semi-custom dwelling unit models ranging from approximately \$34,000 to \$40,000. Monthly maintenance fees are less than \$15 per unit, covering maintenance of the common grounds and community bus, trash collection, taxes on common buildings, and daytime security guards. The maintenance fee is low because individual yards must be maintained by the homeowner and security guards are on duty only in the daytime.

The Burlington County community has the following recreational facilities: two swimming pools, a canal and two lakes for fishing and non-power boating, shuffleboard courts, two barbecue areas, a

driving range, a bicycle path, community bus service, and two recreational centers.

Household size is limited to three persons, one of whom must be at least 55 years old. Furthermore, no member of the household may be under 19 years of age.

Criteria for Subject Selection

Subjects in this study were homeowners residing in the selected communities in Ocean County and Burlington County, New Jersey. The respondents included single or married residents, excluding children; if married, either spouse could complete the questionnaire.

Administration of the Instrument

The questionnaire was administered door-to-door by the researcher to households selected at random in the Ocean County and Burlington County adult communities from Monday, October 11 to Sunday, October 17, 1976. The sample size obtained represented 40 percent, or 40 units, of the Ocean County community and 10 percent, or 120 units, of the Burlington County community. To obtain this sample size, 54 contacts were made in Ocean County, 14 refused to complete the questionnaire yielding a refusal rate of 25.9 percent; likewise, in Burlington County there were 158 contacts made with 38 refusals, or a refusal rate of 24.1 percent.

The researcher introduced herself to the homeowners and presented a letter of introduction from Virginia Polytechnic Institute and State University (Appendix A) and one from the developer of the

community. The researcher stated the purpose of the questionnaire and reassured the subject of its confidentiality. The residents were encouraged to participate and complete the entire questionnaire.

During the time interval in which the respondent answered the questionnaire, the researcher proceeded to another dwelling unit to dispatch a questionnaire. Later the same day the researcher returned to collect the completed test instrument. If possible, it was checked at this time in front of the respondent to make certain no questions remained unanswered. In a few instances, the researcher read the questionnaire to the resident and marked it because physical limitations prohibited its completion unaided.

Data Analysis

Computer facilities were used to analyze all closed-end questions. Frequency distributions were generated to compile demographic characteristics of the sample and identify the "pushes" and "pulls" influencing subject mobility. Differences between the two retirement communities were determined by using the Chi Square statistic. Open-ended questions were hand tabulated and frequencies were calculated.

CHAPTER IV

RESULTS AND DISCUSSION

This study was designed to identify factors influencing relocation of the elderly to retirement communities. Demographic characteristics and preferences relating to the old and new near environments were obtained from residents of two retirement communities to determine the type and degree of influences upon mobility.

One hundred sixty usable questionnaires were completed by residents of two retirement communities in New Jersey. Twenty-five percent of the total sample, or representatives of 40 units, was obtained from an Ocean County retirement community. The remaining 75 percent of the sample, representing 120 units, was from a similar community in Burlington County. More males completed the questionnaire than females both in Ocean and Burlington counties.

Description of the Sample

Residents of the two retirement communities compose a rather homogeneous sample, although the larger Burlington community has a broader category span for almost every demographic variable which was examined (Table 1). None of the descriptive characteristics were significantly different for the two communities when treated with Chi Square ($p > 0.05$). Since these samples are homogeneous, influences upon

TABLE 1
 DESCRIPTIVE CHARACTERISTICS OF THE RESPONDENT
 (Total N = 160)

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Sex of respondent						
male	25	62.5	61	50.8	86	53.8
female	15	37.5	59	49.2	74	46.3
Age (years)						
45 to 54	--	--	3	2.5	3	1.9
55 to 64	12	30.0	35	29.2	47	29.4
65 to 74	22	55.0	74	61.7	96	60.0
75 to 84	6	15.0	7	5.8	13	8.1
not ascertained	--	--	1	0.8	1	0.6
Health (status)						
poor	--	--	6	5.0	6	3.8
fair	7	17.5	30	25.0	37	23.1
good	23	57.5	59	49.2	82	51.3
excellent	10	25.0	24	20.0	34	21.3
not ascertained	--	--	1	0.8	1	0.6
Marital status						
married	34	85.0	96	80.0	130	81.3
widowed	3	7.5	17	14.2	20	12.5
never married	3	7.5	6	5.0	9	5.6
not ascertained	--	--	1	0.8	1	0.6
Employment status						
retired	38	95.0	103	85.8	141	88.1
employed part-time (permanent employment)	1	2.5	3	2.5	4	2.5
employed full-time (permanent employment)	--	--	3	2.5	3	1.9
other	1	2.5	10	8.3	11	6.9
not ascertained	--	--	1	0.8	1	0.6

* There was no significant difference between the communities ($p > 0.05$).

Note: Percentages may not equal 100 because of rounding.

mobility (i.e., limitations or attractions) which are significantly different between communities cannot be attributed to demographic variables. Findings reported are based on aggregate data; however, data for the individual communities appear in descriptive tables.

Upon inspection of the aggregate data, it can be seen that the majority (60%) of the subjects in the Ocean and Burlington communities tended to be between 65 and 74 years old while slightly over 30 percent were aged 45 to 54. Fewer than 10 percent were over 74 years of age (Table 1). Their health was predominantly good (51.3%) or fair (23.1%). They were most often married (81.3%), and retired from gainful employment (88.1%).

Spouses of these subjects were most often between 65 and 74 years old (40.6%), although a high percentage (33.8%) was found in the 55 to 64 year category (Table 2). Since more males completed the questionnaire, this indicates that their wives were younger than themselves. Like the subjects, the spouses experienced good (39.4%) or fair (20.0%) health and were retired (65.6%).

These findings coincide with those of other researchers cited previously. Bultena and Wood (1969:210-12) believe most retirement community residents are in good health. Sherman (1971:118-38) found the mean age in two retirement communities was 67.8 years. Furthermore, in this study it was predictable that most subjects would be in the 65 to 74 year age group because the two retirement communities were less than six years old, age 65 is the "normal" retirement age, and

TABLE 2
 DESCRIPTIVE CHARACTERISTICS OF THE SPOUSE
 OR OTHER HOUSEHOLD MEMBER
 (Total N = 160)

	Ocean Co. *		Burl. Co. *		Total	
	(N = 40)		(N = 120)		(N = 160)	
	N	%	N	%	N	%
Age (years)						
45 to 54	--	--	2	1.7	2	1.3
55 to 64	12	30.0	42	35.0	54	33.8
65 to 74	17	42.5	48	40.0	65	40.6
75 to 84	5	12.5	6	5.0	11	6.9
85 or over	--	--	1	0.8	1	0.6
not ascertained**	6	15.0	21	17.5	27	16.9
Health (status)						
poor	2	5.0	9	7.5	11	6.9
fair	3	7.5	29	24.2	32	20.0
good	18	45.0	45	37.5	63	39.4
excellent	11	27.5	17	14.2	28	17.5
not ascertained**	6	15.0	20	16.7	26	16.3
Employment status						
retired	30	75.0	75	62.5	105	65.6
employed part-time (permanent employment)	--	--	3	2.5	3	1.9
employed full-time (permanent employment)	2	5.0	7	5.8	9	5.6
other	2	5.0	14	11.7	16	10.0
not ascertained**	6	15.0	21	17.5	27	16.9

* There was no significant difference between the communities ($p > 0.05$).

** High figures reflect the residents who were living alone,
 i.e., had no spouse or other household member.

Note: Percentages may not equal 100 because of rounding.

retirement often precipitates relocation, hence potential entry into a retirement community.

Most of the subjects in this sample had moved from a house (85.6%) they had owned (83.8%) which was within a 100-mile radius of the retirement community (82.5%) (Table 3). This probably would indicate that these residents liked the geographic area and had enjoyed ownership of single family detached dwelling units, and therefore, sought this form of residence for their retirement.

All subjects from the Ocean County community had lived there less than three years with most residing between 1 and 3 years, whereas the Burlington community subjects almost consistently spanned a residence period of 0 to 6 years with a peak of 3 to 5 years residency (Table 3). These figures are in concordance with potential lengths of residence created by the inceptions of both communities.

Education, occupation, and socioeconomic status (SES) were categorized and evaluated according to the Two Factor Index of Social Position designed by Hollingshead (1957:1-11). Formal education for this sample was high as most males and females had completed high school and many had attended or had graduated from college (Table 4).

Primary occupation of the males was predominantly in the top three categories devised by Hollingshead. Scores for these three categories and frequency distributions of the samples were: 1 = higher executives, proprietors of large concerns, and major professionals (15.0%); 2 = business managers, proprietors of medium sized businesses, and lesser professionals (30.0%); and 3 = administrative personnel,

TABLE 3
HOUSING CHARACTERISTICS OF THE SAMPLE
(Total N = 160)

	Ocean Co. *		Burl. Co. *		Total	
	(N = 40)		(N = 120)		(N = 160)	
	N	%	N	%	N	%
Last residence type						
house	38	95.0	99	82.5	137	85.6
mobile home	--	--	1	0.8	1	0.6
apartment	2	5.0	18	15.0	20	12.5
other	--	--	1	0.8	1	0.6
not ascertained	--	--	1	0.8	1	0.6
Last type of tenure						
owned	38	95.0	96	80.0	134	83.8
rented	2	5.0	21	17.5	23	14.4
not ascertained	--	--	3	2.5	3	1.9
Distance from last residence						
100 miles or less	37	92.5	95	79.2	132	82.5
101 - 500 miles	2	5.0	17	14.2	19	11.9
501 - 1000 miles	1	2.5	3	2.5	4	2.5
1001 - 2000 miles	--	--	3	2.5	3	1.9
2001 miles or more	--	--	1	0.8	1	0.6
not ascertained	--	--	1	0.8	1	0.6
Present length of residence						
less than 1 year	7	17.5	21	17.5	28	17.5
1 year but less than 2	16	40.0	8	6.7	24	15.0
2 years but less than 3	17	42.5	20	16.7	37	23.1
3 years but less than 4	--	--	25	20.8	25	15.6
4 years but less than 5	--	--	24	20.0	24	15.0
5 years but less than 6	--	--	20	16.7	20	12.5
not ascertained	--	--	2	1.7	2	1.3

* There was no significant difference between the communities ($p > 0.05$).
Note: Percentages may not equal 100 because of rounding.

TABLE 4
EDUCATION AND SOCIOECONOMIC STATUS OF THE SAMPLE
(Total N = 160)

	Ocean Co. *		Burl. Co.*		Total	
	(N = 40)		(N = 120)		(N = 160)	
	N	%	N	%	N	%
Last grade completed by husband						
graduate school	2	5.0	7	5.8	9	5.6
college graduate	10	25.0	29	24.2	39	24.4
1 year college, no degree	10	25.0	23	19.2	33	20.6
high school graduate	11	27.5	36	30.0	47	29.4
grade 10	2	5.0	17	14.2	19	11.9
grade 7	2	5.0	1	0.8	3	1.9
less than grade 7	1	2.5	2	1.7	3	1.9
not ascertained	2	5.0	5	4.2	7	4.4
Last grade completed by wife						
graduate school	--	--	1	0.8	1	0.6
college graduate	9	22.5	14	11.7	23	14.4
1 year college, no degree	7	17.5	24	20.0	31	19.4
high school graduate	18	45.0	59	49.2	77	48.1
grade 10	2	5.0	14	11.7	16	10.0
grade 7	1	2.5	3	2.5	4	2.5
not ascertained	3	7.5	5	4.2	8	5.0
Primary occupation of husband**						
1 - high status	6	15.0	18	15.0	24	15.0
2	11	27.5	37	30.8	48	30.0
3	12	30.0	25	20.8	37	23.1
4	2	5.0	10	8.3	12	7.5
5	4	10.0	14	11.7	18	11.3
6	1	2.5	8	6.7	9	5.6
7 - low status	--	--	2	1.7	2	1.3
not ascertained	4	10.0	6	5.0	10	6.3
Males' socioeconomic status**						
1 - high status	6	15.0	18	15.0	24	15.0
2	9	22.5	26	21.7	35	21.9
3	15	37.5	38	31.7	53	33.1
4	5	12.5	24	20.0	29	18.1
5 - low status	1	2.5	9	7.5	10	6.3
not ascertained	4	10.0	5	4.2	9	5.6

* There was no significant difference between the communities ($p > 0.05$).
** Hollingshead scale.

Note: Percentages may not equal 100 because of rounding.

small independent businesses, and minor professionals (23.1%). Since the education and occupation levels were high, it was also found that the SES was high, with over 35 percent of the male subjects in the top two SES levels. These findings concur with the belief that retirement communities tend to be settled by class and most residents are from the higher education and occupation levels of the aged population (Bultena and Wood, 1969:210-12).

It was not possible to determine income levels or sources of income because these items were frequently left unanswered and other subjects indicated they were not willing to reveal accurate information in this area.

Influences on Mobility

The questionnaire was designed with six categories relating to limitations and attractions of the near environment. These categories, or areas of potential influence on one's mobility, are combinations of specific items on the questionnaire. Limitations were measured for the last dwelling unit (Items 1-7), the old neighborhood (Items 8-14), and the old community (Items 15-21). Similarly, attractions were assessed for the new dwelling unit (Items 22-28), the new neighborhood (Items 29-30), and the new community (Items 31-41).

Residents from both retirement communities were compared using Chi Square to determine any significant differences between the samples for influences on mobility and selection of a retirement community. Responses to only 7.3 percent, or 3, of the 41 items were

found to be significantly different between the two communities ($p < 0.05$). Two of these items pertained to the last dwelling unit; the third, to the new dwelling unit.

Limitations of the Old Near Environment

Dwelling unit. The two communities were found to be significantly different for two of the items regarding influence of last dwelling unit on mobility (Table 5). The first item concerned the large size of the last dwelling unit. Over 60 percent of the respondents in the Ocean County community (O) indicated that the large size of their old home was a moderate or great influence on their decision to move. Conversely, almost an equal proportion of respondents in the Burlington (B) sample perceived this as having little or no influence. It is logical, therefore, that subjects from both communities were not influenced by having a residence which was too small (91.3%).

The second item found to be significantly different was "property taxes were too high" (Table 5). Most respondents from the Ocean County community (O = 62.5%) felt this was a great influence, whereas the Burlington subjects were equally divided between those who felt taxes were no influence on their move (B = 40.0%) and their counterparts who were greatly influenced (B = 40.0%).

Stairs, interior house maintenance, exterior house and yard maintenance, and maintenance expenses were found to be an influence on relocation (Table 5). Stairs were a moderate or great influence for 52.5 percent of the Ocean County respondents and 43.3 percent of

TABLE 5
 INFLUENCES OF LAST DWELLING UNIT ON MOBILITY
 (Total = 160)

	Ocean Co. (N = 40)		Burl. Co. (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Last residence was too large*						
no influence	10	25.0	59	49.2	69	43.1
little influence	5	12.5	14	11.7	19	11.9
moderate influence	6	15.0	15	12.5	21	13.1
great influence	19	47.5	32	26.7	51	31.9
Last residence was too small						
no influence	39	97.5	107	89.2	146	91.3
little influence	1	2.5	7	5.8	8	5.0
moderate influence	--	--	3	2.5	3	1.9
great influence	--	--	1	0.8	1	0.6
not ascertained	--	--	2	1.7	2	1.3
Property taxes were too high on last home*						
no influence	7	17.5	48	40.0	55	34.4
little influence	3	7.5	13	10.8	16	10.0
moderate influence	5	12.5	11	9.2	16	10.0
great influence	25	62.5	48	40.0	73	45.6
Last residence had stairs						
no influence	17	42.5	54	45.0	71	44.4
little influence	2	5.0	12	10.0	14	8.8
moderate influence	4	10.0	22	18.3	26	16.3
great influence	17	42.5	30	25.0	47	29.4
not ascertained	--	--	2	1.7	2	1.3
Inside of last home was too hard to maintain						
no influence	21	52.5	62	51.7	83	51.9
little influence	7	17.5	24	20.0	31	19.4
moderate influence	5	12.5	12	10.0	17	10.6
great influence	7	17.5	20	16.7	27	16.9
not ascertained	--	--	2	1.7	2	1.3

TABLE 5 - Continued

	Ocean Co. (N = 40)		Burl. Co. (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Outside of last home and yard were too hard to maintain						
no influence	10	25.0	51	42.5	61	38.1
little influence	4	10.0	12	10.0	16	10.0
moderate influence	7	17.5	14	11.7	21	13.1
great influence	19	47.5	42	35.0	61	38.1
not ascertained	--	--	1	0.8	1	0.6
Maintenance expenses on last home were becoming more than resident wished to spend						
no influence	15	37.5	40	33.3	55	34.4
little influence	5	12.5	15	12.5	20	12.5
moderate influence	7	17.5	30	25.0	37	23.1
great influence	13	32.5	34	28.3	47	29.4
not ascertained	--	--	1	0.8	1	0.6

*There was a significant difference between the communities ($p < 0.05$).

Note: Percentages may not equal 100 because of rounding.

the Burlington community respondents but no influence for almost as many (O = 42.5%, B = 45.0%) others. Similarly, exterior house and yard maintenance was a moderate or great influence for the two retirement communities (51.2%). Maintenance expenses had helped precipitate a move in many instances (65.0%), and interior maintenance had a moderate to great influence on the moves made by some of the subjects (27.5%). These findings parallel the investigation by Peterson and Larson (1966:129-30) which revealed that prospective retirement community residents wish to be free from the maintenance responsibilities associated with a larger home no longer needed during the empty nest stage of the life cycle.

Neighborhood. As indicated by the high response rate of "no influence" (85.6%), zoning of the old neighborhood was clearly not a motivation for relocation (Table 6). This was also true for the item pertaining to upkeep of property by one's neighbors; respondents felt this was not an influence (65.6%).

Some subjects were concerned with other characteristics of the neighborhood to the extent that these factors did have moderate or great influence on their move. Factors relating to safety were a concern to these people, who felt their neighborhood was changing (42.5%) and that they were not safe from robberies, muggings, and vandalism (50.6%). Subjects were also affected by the traffic (35.0%), the noise (38.1%), and the presence of too many children in the vicinity (33.2%). Peterson and Larson (1966: 129-30) also found that the elderly migrated to retirement communities because there were too

TABLE 6
 INFLUENCES OF LAST NEIGHBORHOOD ON MOBILITY
 (Total = 160)

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Old neighborhood was rezoned to include development of apartments, shopping malls, and/or small businesses						
no influence	36	90.0	101	84.2	137	85.6
little influence	2	5.0	8	6.7	10	6.3
moderate influence	--	--	1	0.8	1	0.6
great influence	2	5.0	8	6.7	10	6.3
not ascertained	--	--	2	1.7	2	1.3
Neighborhood property was not being maintained						
no influence	29	72.5	76	63.3	105	65.6
little influence	4	10.0	22	18.3	26	16.3
moderate influence	4	10.0	10	8.3	14	8.8
great influence	3	7.5	10	8.3	13	8.1
not ascertained	--	--	2	1.7	2	1.3
The neighborhood was changing						
no influence	20	50.0	49	40.8	69	43.1
little influence	7	17.5	15	12.5	22	13.8
moderate influence	3	7.5	17	14.2	20	12.5
great influence	10	25.0	38	31.7	48	30.0
not ascertained	--	--	1	0.8	1	0.6
Old neighborhood was not safe from robberies, muggings, and vandalism						
no influence	17	42.5	45	37.5	62	38.8
little influence	6	15.0	10	8.3	16	10.0
moderate influence	9	22.5	23	19.2	32	20.0
great influence	8	20.0	41	34.2	49	30.6
not ascertained	--	--	1	0.8	1	0.6

TABLE 6 - Continued

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
There was too much traffic						
no influence	25	62.5	53	44.2	78	48.8
little influence	3	7.5	22	18.3	25	15.6
moderate influence	6	15.0	23	19.2	29	18.1
great influence	6	15.0	21	17.5	27	16.9
not ascertained	--	--	1	0.8	1	0.6
There was too much noise						
no influence	23	57.5	51	42.5	74	46.3
little influence	7	17.5	17	14.2	24	15.0
moderate influence	4	10.0	17	14.2	21	13.1
great influence	6	15.0	34	28.3	40	25.0
not ascertained	--	--	1	0.8	1	0.6
There were too many children						
no influence	24	60.0	60	50.0	84	52.5
little influence	7	17.5	14	11.7	21	13.1
moderate influence	3	7.5	12	10.0	15	9.4
great influence	6	15.0	32	26.7	38	23.8
not ascertained	--	--	2	1.7	2	1.3

* There was no significant difference between the communities ($p > 0.05$).

Note: Percentages may not equal 100 because of rounding.

many children in their old neighborhood and because an influx of minorities had occurred.

Community. Only two aspects of the old community had an influence upon mobility (Table 7). First, the lack of people nearby with similar interests was influential (33.2%). Second, freedom from the former constraint to reside close to work greatly influenced some residents (30.6%).

All other items relating to community characteristics were found to be "no influence" for at least 70 percent of the total sample. Specific non-influential items for the total sample were weather conditions, air quality, recreation facilities, transportation system, and community services.

Attractions of the New Near Environment

Dwelling unit. The third item which shows a significant difference between communities is in this category (Table 8). It is item 22, "my new house is a good value for the money." Residents of the older Burlington community revealed this factor was a moderate or great influence more often than did the Ocean County sample (O = 52.5%, B = 82.5%). Contrary to this, Ocean County residents were greatly influenced, more than twice as often as Burlington residents, for the item "taxes on this house are fair" (O = 77.5%, B = 30.0%).

Another item which differed between communities was the item pertaining to the inclusion of individual yard maintenance in the monthly maintenance fee. Since this service was not available at the

TABLE 7
 INFLUENCES OF LAST COMMUNITY ON MOBILITY
 (Total = 160)

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
There were not enough people nearby with interests similar to resident						
no influence	23	57.5	83	69.2	106	66.3
little influence	7	17.5	11	9.2	18	11.3
moderate influence	5	12.5	13	10.8	18	11.3
great influence	5	12.5	12	10.0	17	10.6
not ascertained	--	--	1	0.8	1	0.6
No longer needed to live in community to be close to work						
no influence	26	65.0	60	50.0	86	53.8
little influence	3	7.5	6	5.0	9	5.6
moderate influence	3	7.5	11	9.2	14	8.8
great influence	8	20.0	41	34.2	49	30.6
not ascertained	--	--	2	1.7	2	1.3
The weather was unsatisfactory						
no influence	36	90.0	106	88.3	142	88.8
little influence	3	7.5	7	5.8	10	6.3
moderate influence	--	--	3	2.5	3	1.9
great influence	1	2.5	2	1.7	3	1.9
not ascertained	--	--	2	1.7	2	1.3
There was a lot of air pollution						
no influence	30	75.0	84	70.0	114	71.3
little influence	4	10.0	18	15.0	22	13.8
moderate influence	3	7.5	8	6.7	11	6.9
great influence	3	7.5	9	7.5	12	7.5
not ascertained	--	--	1	0.8	1	0.6

TABLE 7 - Continued

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
There were not enough recreational facilities						
no influence	27	67.5	85	70.8	112	70.0
little influence	5	12.5	12	10.0	17	10.6
moderate influence	1	2.5	12	10.0	13	8.1
great influence	7	17.5	9	7.5	16	10.0
not ascertained	--	--	2	1.7	2	1.3
The transportation system did not meet my needs						
no influence	33	82.5	96	80.0	129	80.6
little influence	1	2.5	10	8.3	11	6.9
moderate influence	3	7.5	4	3.3	7	4.4
great influence	3	7.5	8	6.7	11	6.9
not ascertained	--	--	2	1.7	2	1.3
There were not enough community services such as ambulance service, medical aid, police and fire protection						
no influence	39	97.5	105	87.5	144	90.0
little influence	--	--	8	6.7	8	5.0
moderate influence	--	--	3	2.5	3	1.9
great influence	1	2.5	2	1.7	3	1.9
not ascertained	--	--	2	1.7	2	1.3

* There was no significant difference between the communities ($p > 0.05$).

Note: Percentages may not equal 100 because of rounding.

TABLE 8
 INFLUENCES OF NEW DWELLING UNIT ON MOBILITY
 (Total = 160)

	Ocean Co. (N = 40)		Burl. Co. (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
New house was a good value for the money*						
no influence	10	25.0	10	8.3	20	12.5
little influence	9	22.5	11	9.2	20	12.5
moderate influence	8	20.0	40	33.3	48	30.0
great influence	13	32.5	59	49.2	72	45.0
The taxes on this house were fair						
no influence	--	--	29	24.2	29	18.1
little influence	3	7.5	18	15.0	21	13.1
moderate influence	6	15.0	36	30.0	42	26.3
great influence	31	77.5	36	30.0	67	41.9
not ascertained	--	--	1	0.8	1	0.6
Yard maintenance was in- cluded in the monthly maintenance fee						
no influence	3	7.5	118	98.3	121	75.6
little influence	2	5.0	--	--	2	1.3
moderate influence	3	7.5	--	--	3	1.9
great influence	32	80.0	--	--	32	20.0
not ascertained	--	--	2	1.7	2	1.3
House was new when resident bought it						
no influence	6	15.0	17	14.2	23	14.4
little influence	4	10.0	9	7.5	13	8.1
moderate influence	--	--	16	13.3	16	10.0
great influence	30	75.0	78	65.0	108	67.5

TABLE 8 - Continued

	Ocean Co. (N = 40)		Burl. Co. (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Inside of the house was easy to maintain						
no influence	2	5.0	12	10.0	14	8.8
little influence	3	7.5	6	5.0	9	5.6
moderate influence	6	15.0	20	16.7	26	16.3
great influence	29	72.5	81	67.5	110	68.8
not ascertained	--	--	1	0.8	1	0.6
Outside of the house was easy to maintain						
no influence	3	7.5	14	11.7	17	10.6
little influence	1	2.5	7	5.8	8	5.0
moderate influence	4	10.0	25	20.8	29	18.1
great influence	32	80.0	73	60.8	105	65.6
not ascertained	--	--	1	0.8	1	0.6
The house has no stairs						
no influence	6	15.0	17	14.2	23	14.4
little influence	4	10.0	7	5.8	11	6.9
moderate influence	2	5.0	10	8.3	12	7.5
great influence	28	70.0	86	71.7	114	71.3

* There was a significant difference between communities ($p < 0.05$).

Note: Percentages may not equal 100 because of rounding.

Burlington community, it had no influence upon one's selection of a home there; however, it was a great influence to 80.0 percent of the Ocean County residents.

The other four items in this category were a great influence to at least 60 percent of the sample from each community. In addition, three of the four items were more often influential to the Ocean County subjects. These items were: the house was new (O = 75.0%, B = 65.0%), easy interior maintenance (O = 72.5%, B = 67.5%), easy exterior maintenance (O = 80.0%, B = 60.8%), and the absence of stairs (O = 70.0%, B = 71.7%).

Similar residential attractions have been found in other investigations of the aged. Shanas (1962:102-103) found that the aged wish to maintain independence in homes of their own; likewise, more recent research by Sherman (1971:118-38) reconfirms that this age group desires independence and believes ease of maintenance in retirement housing can facilitate attainment of this objective.

Neighborhood. Two items were included on the questionnaire to measure attractions of the new neighborhood (Table 9). Both were found to be an important motivation for most participants in this study and responses between communities closely coincided. Quietness of the neighborhood was of great importance to 70 percent of the Ocean County community and 69.2 percent of the Burlington County community. This was also true for the item concerning lack of neighborhood traffic (O = 67.5%, B = 61.7%).

TABLE 9
 INFLUENCES OF NEW NEIGHBORHOOD ON MOBILITY
 (Total N = 160)

	Ocean Co. *		Burl. Co. *		Total	
	(N = 40)		(N = 120)		(N = 160)	
	N	%	N	%	N	%
The neighborhood is quiet						
no influence	3	7.5	11	9.2	14	8.8
little influence	3	7.5	6	5.0	9	5.6
moderate influence	6	15.0	20	16.7	26	16.3
great influence	28	70.0	83	69.2	111	69.4
There is not much traffic						
no influence	6	15.0	17	14.2	23	14.4
little influence	2	5.0	8	6.7	10	6.3
moderate influence	5	12.5	21	17.5	26	16.3
great influence	27	67.5	74	61.7	101	63.1

* There was no significant difference between the communities ($p > 0.05$).

Note: Percentages may not equal 100 because of rounding.

Community. Facilities and services ranked high among the characteristics of moderate or great importance (Table 10). Many people were attracted to the wide variety of recreational facilities (74.4%) and the provision of a community center (68.8%). Likewise, residents were influenced by having adequate police and fire protection (69.4%), and by the availability of a community bus for transportation to local shopping areas (65.7%).

It was found that many participants were moderately or greatly attracted to the community because of the absence of young families (63.8%). They were also attracted because of the concentration of people with similar interests and the resulting potential for leisure activities (71.3%).

The climate (59.4%) and air quality (65.1%) were of moderate or great influence to most of the sample. Contrary to this, most residents were influenced little or none by the distance from shopping areas (77.3%), medical care (51.9%), or their family and relatives (72.6%).

Open-ended Questions

A section of the questionnaire was comprised of open-ended questions dealing with preferences related to recreational facilities and attitudes toward the retirement community. This gave the subjects an opportunity to reveal previously unsolicited attitudes. These items were completed by the respondents about their own attitudes and those of their spouses or other members of their household. Over two times

TABLE 10
 INFLUENCES OF NEW COMMUNITY ON MOBILITY
 (Total = 160)

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
There is a good variety of recreational facilities						
no influence	6	15.0	11	9.2	17	10.6
little influence	5	12.5	18	15.0	23	14.4
moderate influence	12	30.0	29	24.2	41	25.6
great influence	17	42.5	61	50.8	78	48.8
not ascertained	--	--	1	0.8	1	0.6
There was a community center						
no influence	10	25.0	29	24.2	39	24.4
little influence	5	12.5	4	3.3	9	5.6
moderate influence	5	12.5	30	25.0	35	21.9
great influence	20	50.0	55	45.8	75	46.9
not ascertained	--	--	2	1.7	2	1.3
There is adequate police and fire protection						
no influence	9	22.5	19	15.8	28	17.5
little influence	2	5.0	17	14.2	19	11.9
moderate influence	11	27.5	32	26.7	43	26.9
great influence	18	45.0	50	41.7	68	42.5
not ascertained	--	--	2	1.7	2	1.3
There is a community bus for transportation to shopping areas						
no influence	7	17.5	24	20.0	31	19.4
little influence	7	17.5	15	12.5	22	13.8
moderate influence	6	15.0	20	16.7	26	16.3
great influence	20	50.0	59	49.2	79	49.4
not ascertained	--	--	2	1.7	2	1.3

TABLE 10 - Continued

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Young families are not allowed in this community						
no influence	15	37.5	26	21.7	41	25.6
little influence	5	12.5	12	10.0	17	10.6
moderate influence	5	12.5	25	20.8	30	18.8
great influence	15	37.5	57	47.5	72	45.0
There were many people nearby with similar interests so resi- dents can enjoy leisure activities						
no influence	6	15.0	21	17.5	27	16.9
little influence	2	5.0	15	12.5	17	10.6
moderate influence	9	22.5	27	22.5	36	22.5
great influence	23	57.5	55	45.8	78	48.8
not ascertained	--	--	2	1.7	2	1.3
The climate satisfied the resident						
no influence	9	22.5	30	25.0	39	24.4
little influence	3	7.5	21	17.5	24	15.0
moderate influence	11	27.5	32	26.7	43	26.9
great influence	17	42.5	35	29.2	52	32.5
not ascertained	--	--	2	1.7	2	1.3
There was little or no air pollution						
no influence	6	15.0	30	25.0	36	22.5
little influence	2	5.0	16	13.3	18	11.3
moderate influence	10	25.0	24	20.0	34	21.3
great influence	22	55.0	48	40.0	70	43.8
not ascertained	--	--	2	1.7	2	1.3

TABLE 10 - Continued

	Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Total (N = 160)	
	N	%	N	%	N	%
Close to shopping areas						
no influence	23	57.5	74	61.7	97	60.6
little influence	7	17.5	20	16.7	27	16.9
moderate influence	3	7.5	18	15.0	21	13.1
great influence	7	17.5	7	5.8	14	8.8
not ascertained	--	--	1	0.8	1	0.6
Close to medical care						
no influence	20	50.0	34	28.3	54	33.8
little influence	5	12.5	24	20.0	29	18.1
moderate influence	8	20.0	30	25.0	38	23.8
great influence	7	17.5	31	25.8	38	23.8
not ascertained	--	--	1	0.8	1	0.6
Resident was nearer family and relatives than in last home						
no influence	31	77.5	75	62.5	106	66.3
little influence	3	7.5	7	5.8	10	6.3
moderate influence	2	5.0	10	8.3	12	7.5
great influence	4	10.0	25	20.8	29	18.1
not ascertained	--	--	3	2.5	3	1.9

* There was no significant difference between the communities ($p > 0.05$).

Note: Percentages may not equal 100 because of rounding.

as many respondents cited their spouses' preferences to be the same as their own, except for the items about most liked recreation facilities (Items 43 and 44). This could result because after many years of marriage, couples may tend to pursue similar interests, or because the respondent erroneously believes this to be true.

Most Liked Recreational Facilities

Residents participating in this study were asked "which one recreational facility in this community attracted you the most?" The most frequent response from males and females at both retirement communities was the swimming pool (Table 11). The next most attractive facility, although it was not as consistently popular, was the recreation hall or community center. In addition, at least 20 percent of the sample did not regard any one facility as most appealing. Others named activities rather than facilities when answering these questions (Items 43 and 44).

Least Liked Recreational Facilities

At least 30 percent of the subjects did not cite any facility as the one that least attracted them to the community; furthermore, some subjects named community activities rather than facilities available within the community (Table 12). The golf facility, a putting green, was the facility which least attracted males and females in the Ocean County community. At the Burlington County community, the

TABLE 11
RECREATIONAL FACILITY WHICH MOST ATTRACTED RESIDENT

	Males			Females		
	N	%		N	%	
			Ocean Co. (N = 40)	Burl. Co. (N = 120)	Ocean Co. (N = 40)	Burl. Co. (N = 120)
	N	%	N	%	N	%
Community recreational facilities cited						
billiards	2	5.0	5	4.2	--	--
golf*	--	--	6	5.0	--	2
lake, boating	2	5.0	2	1.7	--	2
shuffleboard	1	2.5	3	2.5	3	7
swimming pool, pool	13	32.5	32	26.6	16	44
recreation halls, community center	6	15.0	9	7.5	6	3
Activities cited						
biking	--	--	2	1.7	--	1
bowling*	1	2.5	1	0.8	--	1
cards, bridge	--	--	5	4.2	--	4
clubs, classes (dancing, sewing)	--	--	7	5.8	2	15
outdoor (walking, gardening)	--	--	3	2.5	--	5
social gatherings	2	5.0	1	0.8	4	--
Blank, none, not any one	13	32.5	44	36.7	9	22.5
						36
						30.0

* The golf facility at the Ocean County community was a putting green, at the Burlington County community a driving range. No bowling facilities exist within either community.

TABLE 12

RECREATIONAL FACILITY WHICH LEAST ATTRACTED RESIDENT

	Males						Females					
	Ocean Co. (N = 40)		Burl. Co. (N = 120)		Ocean Co. (N = 40)		Burl. Co. (N = 120)		Ocean Co. (N = 40)		Burl. Co. (N = 120)	
	N	%	N	%	N	%	N	%	N	%	N	%
Community recreational facilities cited												
barbeque area	1	2.5	1	0.8	--	--	--	--	--	--	--	--
billiards	1	2.5	9	7.5	--	--	--	--	4	3.3	1	0.8
bus trips	1	2.5	1	0.8	1	2.5	8	20.0	7	5.8	1	0.8
golf*	6	15.0	7	5.8	2	5.0	2	5.0	11	9.2	8	6.7
lake, boating, fishing	1	2.5	1	0.8	2	5.0	3	7.5	11	9.2	8	6.7
shuffleboard	3	7.5	9	7.5	3	7.5	2	5.0	2	5.0	1	0.8
swimming pool, pool	3	7.5	11	9.2	3	7.5	2	5.0	8	6.7	--	--
recreation halls (table tennis)	1	2.5	--	--	2	5.0	--	--	--	--	--	--
Activities cited												
biking	--	--	2	1.7	--	--	2	1.7	2	1.7	1	0.8
bowling*	--	--	2	1.7	--	--	2	1.7	1	0.8	9	7.5
cards, bridge	1	2.5	7	5.8	1	2.5	4	10.0	23	19.3	1	0.8
clubs, classes (dancing, sewing)	2	5.0	16	13.4	3	7.5	1	0.8	1	0.8	1	0.8
outdoor (walking, gardening, horseshoes)	3	7.5	1	0.8	2	5.0	1	0.8	1	0.8	1	0.8
social gatherings	2	5.0	--	--	1	2.5	1	2.5	1	0.8	--	--
tennis*	1	2.5	--	--	1	2.5	1	2.5	1	0.8	--	--
Blank, none, not any one, all	14	35.0	53	44.2	12	30.0	51	42.5	51	42.5	51	42.5

* The golf facility at the Ocean County community was a putting green, at the Burlington County community a driving range. No bowling or tennis facilities exist within either community.

shuffleboard and swimming pool were found unappealing only to a small percentage of the male and female population (Items 45 and 46).

Assets of the Communities

Respondents were asked what they and their spouses liked most about the retirement community (Items 47 and 48). "The people," or one's "friendly neighbors," was the most frequent answer for more than 30 percent of the two samples (Table 13). In addition, safety or security, quietness, and social activities were three predominant responses among the variety indicated by the subjects.

Limitations of the Communities

Over 24 percent of the subjects from both communities felt that there was nothing they least liked about the retirement community (Table 14). Some residents did dislike aspects of the community; most prevalent was the distance from all shopping. This conflicts with the closed-end section of the questionnaire in which residents indicated that proximity to shopping areas, proximity to medical care, and distance from friends and relatives were no influence upon their selection of a retirement community (Table 10). The researcher speculates that the discrepancy occurred because: 1) distances may seem greater when one must travel over them on a regular basis; 2) perceptions of distance vary among people; 3) some respondents may not have considered this factor when selecting the retirement community, but later were discontent with its location; or 4) "not true" would have been selected

TABLE 13

COMMUNITY CHARACTERISTICS MOST LIKED BY RESIDENTS

	Males			Females		
	Ocean Co. (N = 40)	Burl. Co.* (N = 120)	Burl. Co.* (N = 120)	Ocean Co.* (N = 40)	Burl. Co.* (N = 120)	Burl. Co.* (N = 120)
	N	%	N	%	N	%
Characteristics cited						
absence of children, teenagers, traffic	--	--	4	2.9	--	--
bus service	1	2.5	--	--	1	2.1
climate, open country, soil type	--	--	7	5.2	1	2.1
ease of property maintenance	--	--	2	1.5	--	--
homes, compact single family detached, home ownership	3	7.5	5	3.7	2	4.2
neat, clean appearance of community, landscaping	4	10.0	4	2.9	3	6.2
peer group	2	5.0	3	2.2	2	4.2
people, friendly neighbors	15	37.5	45	33.6	23	47.8
privacy	--	--	4	2.9	1	2.1
proximity to relatives	--	--	2	1.5	--	--
recreational activities	--	--	3	2.2	--	--
recreational facilities	--	--	3	2.2	--	--
safety, security, guards, freedom	6	15.0	12	9.0	7	14.6
social activities	4	10.0	4	2.9	4	8.3
quietness	2	5.0	30	22.8	2	4.2
Blank, nothing, everything	3	7.5	6	4.5	2	4.2
					10	6.3

* Some residents gave more than one response for this item, therefore the total is greater than N.

TABLE 14

COMMUNITY CHARACTERISTICS LEAST LIKED BY RESIDENTS

Characteristics cited	Males						Females					
	Ocean Co. (N = 40)		Burl. Co.* (N = 120)		Ocean Co.* (N = 40)		Burl. Co.* (N = 120)		Ocean Co.* (N = 40)		Burl. Co. (N = 120)	
	N	%	N	%	N	%	N	%	N	%	N	%
Characteristics cited												
absence of young people	--	--	1	0.8	1	2.3	--	--	1	2.3	--	--
air pollution from landfill, pig farm	--	--	7	5.3	--	--	9	7.5	--	--	9	7.5
climate, type of soil	1	2.5	2	1.5	1	2.3	1	0.8	1	2.3	1	0.8
concentration of old people,												
constant news of illness, death	--	--	2	1.5	--	--	2	1.7	--	--	2	1.7
cost, inadequate recreational facilities,												
no golf course or year round swimming	1	2.5	3	2.3	--	--	3	2.5	--	--	3	2.5
distance from churches, city, cultural												
activities, friends, relatives,												
highways	1	2.5	5	3.8	1	2.3	5	4.2	1	2.3	5	4.2
distance from all shopping	5	12.5	30	22.9	7	15.9	31	25.8	7	15.9	31	25.8
dogs, pets	2	5.0	5	3.8	2	4.5	3	2.5	2	4.5	3	2.5
houses too close, overexpansion,												
lack of individuality	--	--	6	4.5	--	--	3	2.5	--	--	3	2.5
inadequate security	--	--	--	--	--	--	1	0.8	--	--	1	0.8

TABLE 14 - Continued

	Males				Females			
	Ocean Co. (N = 40)		Burl. Co.* (N = 120)		Ocean Co.* (N = 40)		Burl. Co. (N = 120)	
	N	%	N	%	N	%	N	%
Lack of shade trees, quality of maintenance of common grounds	4	10.0	--	--	6	13.6	1	0.8
Lack of transportation	1	2.5	4	3.1	1	2.3	4	3.3
people, cliques, gossip	1	2.5	7	5.3	1	2.3	7	5.8
quality of houses	1	2.5	--	--	1	2.3	--	--
quietness	--	--	1	0.8	--	--	--	--
rules, regulations, lack of communication	1	2.5	4	3.1	1	2.3	2	1.7
services, once a week trash collection	1	2.5	4	3.1	1	2.3	7	5.8
social gatherings	1	2.5	2	1.5	1	2.3	2	1.7
taxes, local township	--	--	3	2.3	--	--	3	2.5
unkept promises by sales department	--	--	2	1.5	--	--	2	1.7
unresponsive developer, management	6	15.0	2	1.5	5	11.3	2	1.7
Blank, none, nothing	13	32.5	39	29.9	14	31.7	29	24.2
Everything	1	2.5	2	1.5	1	2.3	3	2.5

* Some residents gave more than one response for this item, therefore the total is greater than N.

as a response to the closed-end items if it had been included among the four potential responses.

Other disliked characteristics were lack of shade trees or quality of the maintenance of common grounds, and unresponsiveness of the developer and manager. These sources of discontentment are easily understood if one considers that most residents last resided in single family detached dwelling units which likely had established landscaping and most certainly allowed one a greater degree of control over the near environment. "Environmental mastery" is considered an important housing need (Montgomery, 1972:39).

CHAPTER V

SUMMARY

In recent decades gerontological research has been established and is gaining importance. It is necessary to understand the aged, their needs and preferences, in order to help them retain independence within a society which values this trait. Experts agree that attention should be focused on this segment of the United States' population, which includes about 22 million people aged 65 and over (U.S. Bureau of the Census, 1975:6), yet research in some areas relating to the aged is still in the exploratory stage. This study was conducted to determine the factors which caused aged individuals to select mobility as an alternative to a housing deficit, specifically the influences which precipitate a move from their last residence and relocation in a retirement community.

In reviewing the literature, little research was found about why people move to retirement communities. Therefore, the purpose of this exploratory research was to identify characteristics of the old and new near environments (the dwelling unit, neighborhood, and community) which influenced relocation. Demographic characteristics were also examined and the two samples used in this study were compared to determine existing differences.

The test instrument used in this study was a questionnaire developed by the researcher. It contained closed and open-ended questions

needed to obtain relevant data, and was designed to be completed by the subject (Appendix A).

Data were collected by door-to-door contact within two retirement communities in New Jersey during the week of October 11-17, 1976. A 40 percent sample, or 40 questionnaires, was obtained from an Ocean County community and a 10 percent sample, or 120 questionnaires, was obtained at a Burlington County community. Housing in both communities was predominantly single family detached dwelling units. The communities have common recreational facilities and monthly maintenance fees to cover services and maintenance of common grounds.

Conclusions

Three conclusions were found based on the results of this study. First, no significant differences in demographic variables were found between the two samples when treated with the Chi Square statistic. Subjects from these samples comprised a rather homogeneous group who were between 65 and 74 years old, in good health, married, and retired from permanent employment. In addition, most of these participants had last resided in a house which they owned and was within a 100-mile radius of the retirement community. Only three items used to measure attractions or limitations of the old and new environment were found to be significantly different between communities. These items pertained to the following influences: the large size of one's last dwelling unit, high property taxes on the last dwelling unit, and the value of one's new dwelling unit for the money.

Second, there was no one factor which precipitated mobility; rather, a combination of limitations, or "pushes," within the old near environment and attractions, or "pulls," within the new near environment were influences upon relocation.

Finally, in the old near environment, dwelling unit and neighborhood factors were found to be influences, but community factors were not. Almost all the items relating to the new near environment were influences in the participants' decisions to move to the retirement community.

Limitations of this Study

Generalizations are appropriate only to people with characteristics and environments similar to the participants of this study. It is possible that specific findings of this study are only indicative of residents in northeastern metropolitan area retirement communities who were predominantly the healthy, "young," elderly who were married and retired, and belonged to the upper socioeconomic strata based upon educational achievements and upper level occupations.

Other limitations of this study include the following:

--The two retirement communities primarily had only single family detached dwelling units.

--The location of these retirement communities may be atypical because of the number of retirement communities located in the southern regions of the United States.

--Both retirement communities were less than ten years old and still growing, so they included modern technological developments.

--Most of the residents were fairly young elderly, enabling them to maximize their opportunities within the retirement communities.

--Most residents last resided within a 100-mile radius of the retirement community, lending cultural control to the research.

--The SES developed by Hollingshead is dated because technology has changed, eliminated, and created jobs; however, the age of the respondents made this a suitable method of classification.

Discussion and Implications

Community Differences

Only three items designed to assess influences on mobility were found to be significantly different between communities. Two of these items pertained to the last dwelling unit. Many Ocean County residents were influenced by the large size of their last dwelling unit, and they were also motivated toward mobility because they believed taxes on their property were too high. This could logically be predicted because taxes are directly proportional to the size, and value, of one's property. Conversely, the Burlington County residents were not greatly influenced by the large size of their last dwelling unit or their property taxes.

The third item which was significantly different related to influences of the new dwelling unit on mobility. Burlington County residents indicated that their new house was a good value for the money

more often than did Ocean County residents. After examining length of residence for subjects from both communities, one might speculate that responses about "value of a house for the money" were affected by decreasing purchasing power created by inflation. That is, many Burlington community residents had owned their houses from 3 to 6 years, and therefore likely paid less for a comparable dwelling unit than did Ocean County subjects who purchased dwelling units within the last 3 years.

Community Location

It should also be noted that although residents indicated in the closed-ended items that distance from shopping areas, medical care, or family and relatives were no influence, they expressed dissatisfaction in the open-ended section. For example, residents disliked traveling 10 miles for bread or milk, movies in the evening, a snack at a fast food establishment, or to have their hair styled. Perhaps these items were no influence toward mobility because residents did not even consider them when they moved, but later realized they were important aspects of one's near environment.

Resident Satisfaction

Most residents who participated in this study indicated that they were content with their residence in a retirement community; hence, lending support to the belief that retirement communities constitute a viable option for a segment of the aged population. Since there are many retirement communities with varying facilities

throughout the United States, it is the potential resident's responsibility to thoroughly investigate this option to find a community which meets his/her needs and preferences.

It is likely that residents of the retirement communities examined in this study were content because they remained part of a familiar cultural milieu. They still were within reasonable proximity to family and friends, and could retain a sense of place in a familiar geographic region.

This satisfaction may be further enhanced because these residents were the married, young, healthy aged who could maximize their opportunities for recreational and leisure activities which abound in retirement communities. However, this euphoric pursuit of pleasure could be drastically reduced as these residents age 10 or 20 more years and widowhood alters the community demographic mix. Furthermore, as these people age, it is inevitable that they will experience disabilities and may become homebound or require continuous nursing care. This problem could have less impact on the community if a constant influx of young, healthy aged is maintained.

These implications are pertinent to planners and developers who can design retirement communities to meet the present and projected needs and preferences of the aged. Retirement communities can be more self-sustaining by inclusion of small neighborhood shopping areas, services, and progressive care facilities which are often needed as the resident ages. Progressive care facilities would not only provide care but also would enable residents to maintain contacts with

friends in the community. However, since our society offers no incentive for profit-oriented developers to provide these facilities, and because they are costly to provide and maintain, it is likely that only non-profit organizations will incorporate them into retirement communities.

Test Instrument and Implementation

Although the instrument was adjusted as a result of pretesting, implementation of the questionnaire on a larger-scale revealed that changes in the test instrument and the procedure might have influenced the results of this study. The following are four suggestions for instrument change. Two items (Items 56, 57) concerning sources and amount of income should be eliminated because their personal nature tended to alienate prospective participants. Items about the female's occupation should be omitted because SES was based solely on the male's status. The items about the size of the organization for which the subject worked should be discarded because they often confused the respondent and were not instrumental in determining SES (Items 65, 66). Finally, it is suggested that the degrees of influence used in assessing the closed-end questions (Items 1-41) be changed to: Not True, No Influence, Some Influence, and Great Influence.

Although the researcher presented a letter of introduction from the developer and the homeowners' association, advance publicity which includes a picture of the researcher should appear in the retirement community newsletter, or newspaper, and posters announcing the study

should be hung at the recreation centers within the community. This would help increase receptiveness of the residents and alleviate suspicion created by a stranger conducting a study within a community where solicitation is forbidden.

Recommendations for Further Study

Three recommendations for further study follow:

1. Further research is needed to ascertain whether these findings are true for retirement communities which offer forms of housing other than traditional single family detached dwelling units.
2. Research is needed to determine whether the results would be true for retirement communities located in warmer climates, within the "sun belt," since there are many retirement communities in that area.
3. Since this study has practical application for developers of retirement communities, people who have left the retirement community should be contacted to determine specific factors, or dissatisfactions, which influenced them to move.

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APPENDIX A



COLLEGE OF HOME ECONOMICS

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY

Blacksburg, Virginia 24061

DEPARTMENT OF MANAGEMENT, HOUSING AND FAMILY DEVELOPMENT

Letter of Introduction

October 1, 1977

As a graduate student at Virginia Polytechnic Institute and State University, I am gathering information about adult communities to complete research for my Master's thesis.

I appreciate your cooperation in completing the attached questionnaire. The questionnaire consists of statements about why you moved from your last home, why you selected a home in this community, and a few questions about you and others in your household.

For my study to be complete, it is important for you to complete the whole questionnaire. All answers will be confidential!

Thank you for your cooperation.

Elise Bonwit

Thank you for assisting Elise Bonwit in this research. We hope that the information she gathers will help those who plan and build housing units for others like yourself.

Rebecca P. Lovingood, Ph.D.
Assistant Professor

These are some statements about homes, neighborhoods, and communities which may have influenced your decision to move from your last home. Please indicate the degree to which they influenced your decision to move from your last home.

	No Influence	Little Influence	Moderate Influence	Great Influence
Example: There were too many pets in my old neighborhood.	(1)	(2)	(3)	(4)
1. My last residence was too large.	(1)	(2)	(3)	(4)
2. My last residence was too small.	(1)	(2)	(3)	(4)
3. My last residence had stairs.	(1)	(2)	(3)	(4)
4. The inside of my last home was too hard to maintain.	(1)	(2)	(3)	(4)
5. The outside of my last home and the yard were too hard to maintain.	(1)	(2)	(3)	(4)
6. Property taxes were too high on my last home.	(1)	(2)	(3)	(4)
7. Maintenance expenses on my old home were becoming more than I wished to spend.	(1)	(2)	(3)	(4)
8. The neighborhood was changing.	(1)	(2)	(3)	(4)
9. There were too many children in my old neighborhood.	(1)	(2)	(3)	(4)
10. There was too much noise in my old neighborhood.	(1)	(2)	(3)	(4)

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	No Influence	Little Influence	Moderate Influence	Great Influence
11. Neighbors were not maintaining their property in my old neighborhood.	(1)	(2)	(3)	(4)
12. There was too much traffic in my old neighborhood.	(1)	(2)	(3)	(4)
13. My old neighborhood was not safe from robberies, muggings, and vandalism.	(1)	(2)	(3)	(4)
14. My old neighborhood was rezoned to include development of apartments, small businesses, and/or shopping malls.	(1)	(2)	(3)	(4)
15. The weather was unsatisfactory.	(1)	(2)	(3)	(4)
16. There was a lot of air pollution in my old community.	(1)	(2)	(3)	(4)
17. I no longer needed to live in my old community to be close to work.	(1)	(2)	(3)	(4)
18. There were not enough people nearby with interests similar to mine.	(1)	(2)	(3)	(4)
19. There were not enough recreation facilities in my old community.	(1)	(2)	(3)	(4)
20. In my old community, the transportation system did not meet my needs.	(1)	(2)	(3)	(4)
21. In my old community, there were not enough community services such as ambulance service, medical aid, police and fire protection.	(1)	(2)	(3)	(4)

Please Go To Next Page.

These are some statements which may have influenced your decision to select your new home in this adult community. Please indicate the degree to which they influenced your decision to move into this community.

	No Influence	Little Influence	Moderate Influence	Great Influence
22. My new house is a good value for the money.	(1)	(2)	(3)	(4)
23. My house was new when I bought it.	(1)	(2)	(3)	(4)
24. The inside of this house is easy to maintain.	(1)	(2)	(3)	(4)
25. The outside of this house is easy to maintain.	(1)	(2)	(3)	(4)
26. This house has no stairs.	(1)	(2)	(3)	(4)
27. Yard maintenance is included in the monthly maintenance fee so I do not have to do my own yard work.	(1)	(2)	(3)	(4)
28. The taxes on this house are fair.	(1)	(2)	(3)	(4)
29. The neighborhood is quiet.	(1)	(2)	(3)	(4)
30. There is not much traffic in this neighborhood.	(1)	(2)	(3)	(4)
31. Young families are not allowed in this community.	(1)	(2)	(3)	(4)

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	No Influence	Little Influence	Moderate Influence	Great Influence
32. This community has a good variety of recreational facilities.	(1)	(2)	(3)	(4)
33. This community is close to shopping areas.	(1)	(2)	(3)	(4)
34. This community is close to medical care.	(1)	(2)	(3)	(4)
35. This community has adequate police and fire protection.	(1)	(2)	(3)	(4)
36. There is a community bus to transport me to shopping areas.	(1)	(2)	(3)	(4)
37. There are many people nearby with interests similar to mine so I may enjoy leisure activities with them.	(1)	(2)	(3)	(4)
38. The climate here satisfies me.	(1)	(2)	(3)	(4)
39. There is little or no air pollution in this community.	(1)	(2)	(3)	(4)
40. This community is nearer my family and relatives than my last home was.	(1)	(2)	(3)	(4)
41. There is a community center.	(1)	(2)	(3)	(4)
42. When did you move into this community? Please give the month and year.				

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43. Which one recreational facility in this community attracted you the most?

44. Which one recreational facility do you think attracted your spouse (or others in your household) the most?

45. Which one recreational facility in this community attracted you the least?

46. Which one recreational facility do you think attracted your spouse (or others in your household) the least?

47. What do you like most about this community?

48. What do you think your spouse (or others in your household) likes the most?

49. What do you like least about this community?

50. What do you think your spouse (or others in your household) likes the least?

Please Go To Next Page.

Please answer the following questions about yourself. Please circle the best answer.

51. ____ What is your sex?
1. male
2. female
52. ____ What is your current marital status?
1. married
2. widowed
3. divorced or separated
4. never married
53. ____ Do you consider your health to be?
1. poor
2. fair
3. good
4. excellent
54. ____ How old were you on your last birthday?
1. 44 or under
2. 45 to 54
3. 55 to 64
4. 65 to 74
5. 75 to 84
6. 85 or over
55. ____ Are you?
1. retired
2. employed part-time (permanent employment)
3. employed full-time (permanent employment)
4. other, please state _____
56. ____ What are your sources of income? Please circle all that apply.
1. present employment
2. Social Security
3. private pension plan
4. dividends from stock and/or bonds
5. interest from bank accounts
6. insurance annuity
7. other, please state _____
57. ____ What is your current joint gross income?
1. under \$5,000
2. 5,000 - 6,999
3. 7,000 - 9,999
4. 10,000 - 11,999
5. 12,000 - 14,999
6. 15,000 - 17,999
7. 18,000 - 20,999
8. 21,000 - 23,999
9. 24,000 or more

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58. ____ Was your last residence a
1. house
2. mobile home
3. apartment
4. other, please state _____
59. ____ Did you own or rent your last residence?
1. owned
2. rented
60. ____ How close was your last home to this community?
1. 100 miles or less
2. 101 - 500 miles
3. 501 - 1000 miles
4. 1001 - 2000 miles
5. 2001 miles or more

If you are married, please answer the following questions about your spouse.
If you are not married, but are living with someone else, please answer these questions about that person.

61. ____ Is your spouse's health?
1. poor
2. fair
3. good
4. excellent
62. ____ How old was your spouse on his/her last birthday?
1. 44 or under
2. 45 to 54
3. 55 to 64
4. 65 to 74
5. 75 to 84
6. 85 or over
63. ____ Is your spouse?
1. retired
2. employed part-time (permanent employment)
3. employed full-time (permanent employment)
4. other, please state _____

Please Go To Next Page.

Please answer the following questions.

64. ____ What is, or was the primary occupation of you and your spouse?
(Example: bookkeeper)
husband _____ wife _____
65. ____ Where are, or were, you and your spouse employed?
(Example: privately owned retail store)
husband _____ wife _____
66. ____ How big is the organization in which the husband worked?
1. small - employs only a few people
2. medium - employs about one hundred people
3. large - employs thousands of people
67. ____ How big is the organization in which the wife worked?
1. small - employs only a few people
2. medium - employs about one hundred people
3. large - employs thousands of people
68. ____ What is the last grade in school completed by the husband?
1. doctoral degree or graduate school
2. college or university graduate
3. at least one year of college, but did not graduate
4. high school graduate
5. grade 10
6. grade 7
7. less than grade 7
69. ____ What was the last grade in school completed by the wife?
1. doctoral degree or graduate school
2. college or university graduate
3. at least one year of college, but did not graduate
4. high school graduate
5. grade 10
6. grade 7
7. less than grade 7

Thank you for your help. Have a nice day!

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FACTORS INFLUENCING RELOCATION TO RETIREMENT COMMUNITIES

by

Elise Bonwit

(ABSTRACT)

This study was designed to identify factors influencing relocation to retirement communities. Participants were residents of two New Jersey retirement communities which offered single family detached dwelling units with common grounds, community recreational facilities, and security guards. Residents paid monthly maintenance fees to cover operation of the common areas.

Total sample size was residents of 160 dwelling units. Specifically, respondents were from 40 units, or a 40 percent sample, in an Ocean County community and from 120 units, or a 10 percent sample, in a Burlington County community.

The researcher developed a test instrument designed to ascertain reasons for relocation. Data were collected October 11-17, 1976, by the researcher who contacted the subjects at their homes.

First, it was found that no significant differences existed between the samples and that only three items relating to influences upon mobility were significantly different between communities. These items were the large size of one's last dwelling unit, high property

taxes on the last dwelling unit, and the value of one's new dwelling unit for the money. Second, no one factor precipitated relocation; rather, it was a combination of factors within the old and new near environments. Last, dwelling unit and neighborhood factors for the old and new near environments were influences, but community factors were only an influence as they relate to the new near environment.