



**Senior's Motivations  
For Considering And Selecting A Retirement Community:  
Lessons From Ten CCRC's**

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Presented At:

**“Know They Customer Further:  
Why People Move Into Congregate and Continuing Care Communities”**

**NASLI**  
National Exposition  
Phoenix, Arizona  
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## Participating Communities

American Retirement Corporation:

Williamsburg Landing  
Williamsburg, VA

Meadowood  
Worcester, PA

Southminster  
Charlotte, NC

Roland Park Place  
Baltimore, MD

FIDUX:

The Willows at Westborough  
Westborough MA

Leisure Care, Inc:

Leisure Park at Lakewood  
Lakewood, NJ

Life Care Services:

Green Hills  
Ames, IA

Marriott:

The Fairfax  
Fort Belvoir, VA

Retirement Living Group:

Palm Terrace  
Laguna Hills, CA

### Survey Response Rates

Facility	Total Residents	Available Residents	Total In Survey	Response Rate
A	132	122	106	87%
B	186	180	134	74%
C	212	205	116	57%
D	306	220	196	89%
E	263	263	144	55%
F	----	201	123	61%
G	180	180	44	24%
H	350	250	213	85%
I	209	209	136	65%
J	270	260	134	52%

**Total Residents:** Number of residents living in independent living units.

**Available Residents:** Number of residents living in independent living units who were available to be surveyed, that is, were not either away or in a health care facility.

**Response Rate:** The number of surveys divided by the number of available

## TOTAL CCRC

## Age When Moved In

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
UNDER 60	4	.3%	0	.0%	0	.0%	4	.6%
60-64	20	1.5%	5	1.0%	2	2.5%	13	1.9%
65-69	114	8.7%	29	5.8%	6	7.4%	76	10.8%
70-74	259	19.7%	78	15.7%	8	9.9%	170	24.2%
75-79	367	28.0%	128	25.8%	29	35.8%	205	29.2%
80-84	336	25.6%	154	31.0%	16	19.8%	156	22.2%
85-89	176	13.4%	89	17.9%	11	13.6%	66	9.4%
90+	37	2.8%	14	2.8%	9	11.1%	12	1.7%
Total	1313	100.0%	497	100.0%	81	100.0%	702	100.0%
Average		77.9		79.3		79.6		76.6

## Age Today

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
UNDER 60	2	.2%	0	.0%	0	.0%	2	.3%
60-64	8	.6%	1	.2%	0	.0%	7	1.0%
65-69	47	3.6%	15	3.0%	3	3.7%	28	4.0%
70-74	201	15.3%	52	10.4%	8	9.9%	137	19.6%
75-79	293	22.3%	85	17.0%	17	21.0%	188	26.9%
80-84	386	29.4%	159	31.8%	24	29.6%	194	27.8%
85-89	260	19.8%	132	26.4%	17	21.0%	103	14.7%
90+	116	8.8%	56	11.2%	12	14.8%	40	5.7%
Total	1313	100.0%	500	100.0%	81	100.0%	699	100.0%
Average		80.5		82.0		81.9		79.1

## Sex

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
MALE	431	32.8%	0	.0%	84	100.0%	343	49.1%
FEMALE	884	67.2%	515	100.0%	0	.0%	356	50.9%
Total	1315	100.0%	515	100.0%	84	100.0%	699	100.0%

## TOTAL CCRC

## Marital Status When Moved In

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
MARRIED	708	53.6%	0	.0%	0	.0%	708	100.0%
SINGLE	96	7.3%	80	15.5%	14	16.7%	0	.0%
WIDOWED	492	37.3%	415	80.6%	67	79.8%	0	.0%
DIVORCED	24	1.8%	20	3.9%	3	3.6%	0	.0%
Total	1320	100.0%	515	100.0%	84	100.0%	708	100.0%

## Marital Status Today

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
MARRIED	620	47.3%	2	.4%	3	3.7%	615	87.6%
SINGLE	117	8.9%	92	18.3%	18	22.2%	4	.6%
WIDOWED	555	42.4%	394	78.3%	58	71.6%	83	11.8%
DIVORCED	18	1.4%	15	3.0%	2	2.5%	0	.0%
Total	1310	100.0%	503	100.0%	81	100.0%	702	100.0%

## Health When Moved In

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
EXCELLENT	348	26.1%	125	24.5%	14	16.7%	199	28.3%
GOOD	758	56.9%	295	57.8%	49	58.3%	394	56.1%
FAIR	202	15.2%	81	15.9%	19	22.6%	97	13.8%
POOR	24	1.8%	9	1.8%	2	2.4%	12	1.7%
Total	1332	100.0%	510	100.0%	84	100.0%	702	100.0%

## Health Today

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
EXCELLENT	257	19.4%	88	17.3%	9	10.8%	155	22.1%
GOOD	693	52.2%	263	51.8%	52	62.7%	355	50.7%
FAIR	334	25.2%	139	27.4%	18	21.7%	170	24.3%
POOR	43	3.2%	18	3.5%	4	4.8%	20	2.9%
Total	1327	100.0%	508	100.0%	83	100.0%	700	100.0%

## Did Respondent Uproot Oneself to Move Here?

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
YES	826	62.9%	312	61.9%	50	60.2%	446	64.5%
NO	488	37.1%	192	38.1%	33	39.8%	246	35.5%
Total	1314	100.0%	504	100.0%	83	100.0%	692	100.0%

## TOTAL CCRC

## How Many Facilities Visited?

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
0	71	5.4%	37	7.3%	2	2.5%	31	4.4%
1	430	32.4%	193	38.1%	36	45.6%	190	27.0%
2	291	21.9%	112	22.1%	13	16.5%	159	22.6%
3	220	16.6%	86	17.0%	14	17.7%	109	15.5%
4	112	8.4%	36	7.1%	5	6.3%	67	9.5%
5	91	6.9%	25	4.9%	6	7.6%	58	8.2%
6	42	3.2%	7	1.4%	2	2.5%	33	4.7%
7	19	1.4%	3	.6%	0	.0%	16	2.3%
8	12	.9%	3	.6%	0	.0%	8	1.1%
9	8	.6%	1	.2%	0	.0%	7	1.0%
10	13	1.0%	2	.4%	0	.0%	11	1.6%
11	2	.2%	1	.2%	1	1.3%	0	.0%
12	6	.5%	0	.0%	0	.0%	6	.9%
13	4	.3%	0	.0%	0	.0%	4	.6%
14	2	.2%	0	.0%	0	.0%	2	.3%
15	3	.2%	0	.0%	0	.0%	3	.4%
Total	1326	100.0%	506	100.0%	79	100.0%	704	100.0%
Average		2.6		2.1		2.2		3.0

## How Happy Is Respondent With Decision to Move Here?

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
VERY HAPPY	842	64.3%	315	62.9%	54	65.9%	451	65.4%
SOMEWHAT HAPPY	281	21.5%	108	21.6%	16	19.5%	150	21.7%
NEITHER	138	10.5%	65	13.0%	9	11.0%	61	8.8%
SOMEWHAT UNHAPPY	45	3.4%	10	2.0%	3	3.7%	28	4.1%
VERY UNHAPPY	3	.2%	3	.6%	0	.0%	0	.0%
Total	1309	100.0%	501	100.0%	82	100.0%	690	100.0%

## TOTAL CCRC

## Reasons for Considering a Retirement Community

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
NO HOME REPAIRS	758	56.3%	268	52.0%	43	51.2%	427	60.3%
NO HOUSEKEEPING	497	36.9%	183	35.5%	32	38.1%	269	38.0%
FEAR OF BEING BURDEN	515	38.3%	184	35.7%	31	36.9%	286	40.4%
FAMILY PRESSURE	107	7.9%	51	9.9%	12	14.3%	38	5.4%
CONCERN FOR SPOUSE	697	51.8%	94	18.3%	20	23.8%	573	80.9%
LOSS OF SPOUSE	165	12.3%	99	19.2%	28	33.3%	27	3.8%
I'M LESS ABLE	262	19.5%	99	19.2%	18	21.4%	139	19.6%
SPOUSE IS LESS ABLE	175	13.0%	17	3.3%	5	6.0%	152	21.5%
CLOSER TO MY FAMILY	256	19.0%	122	23.7%	17	20.2%	107	15.1%
CRIME AT HOME	65	4.8%	30	5.8%	8	9.5%	27	3.8%
FINANCIAL PROTECTION	471	35.0%	159	30.9%	27	32.1%	273	38.6%
ACCESS TO SERVICES	849	63.1%	359	69.7%	56	66.7%	414	58.5%
OTHER	117	8.7%	62	12.0%	6	7.1%	49	6.9%

## Reasons for Considering This Retirement Community

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
FRIENDS WHO LIKE IT MANAGEMENT	277	20.6%	110	21.4%	11	13.1%	149	21.0%
REPUTATION	245	18.2%	74	14.4%	19	22.6%	145	20.5%
HEALTH CARE PROGRAM BETTER	672	49.9%	238	46.2%	39	46.4%	376	53.1%
LOCATION/CLIMATE	182	13.5%	57	11.1%	22	26.2%	100	14.1%
LIFE CARE GUARANTEE	748	55.6%	264	51.3%	49	58.3%	421	59.5%
TRANSPORTATION SERVICES	280	20.8%	136	26.4%	11	13.1%	127	17.9%
ARCHITECTURE/DESIGN LAYOUT OF LIVING UNIT	138	10.3%	37	7.2%	13	15.5%	84	11.9%
553	41.1%	191	37.1%	35	41.7%	316	44.6%	
CONVENIENT FOR LOVED ONES	374	27.8%	174	33.8%	20	23.8%	170	24.0%
FRIENDLY STAFF	386	28.7%	166	32.2%	25	29.8%	181	25.6%
PROGRAM OF ACTIVITIES	212	15.8%	107	20.8%	7	8.3%	89	12.6%
ONLY FACILITY NEAR ME	86	6.4%	36	7.0%	8	9.5%	40	5.6%
ASSISTANCE DAILY NEEDS	88	6.5%	38	7.4%	2	2.4%	45	6.4%
NURSING CARE UNIT	752	55.9%	261	50.7%	43	51.2%	431	60.9%
COSTS LOWER/FAIRER	139	10.3%	37	7.2%	13	15.5%	84	11.9%
SPONSOR AFFILIATION	125	9.3%	47	9.1%	7	8.3%	70	9.9%

## TOTAL CCRC

## Concerns About Life in a Retirement Community

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
FEAR OF MISTAKE	453	33.7%	146	28.3%	28	33.3%	269	38.0%
FEES/EXPENSES	681	50.6%	249	48.3%	35	41.7%	379	53.5%
NOT RESPECT PRIVACY	83	6.2%	30	5.8%	6	7.1%	47	6.6%
NOT FIT IN	124	9.2%	55	10.7%	13	15.5%	50	7.1%
PROMISES NOT KEPT	354	26.3%	112	21.7%	16	19.0%	221	31.2%
NOT ENOUGH STORAGE	194	14.4%	64	12.4%	10	11.9%	116	16.4%
SEE FAMILY LESS	110	8.2%	51	9.9%	10	11.9%	48	6.8%
LIVING WITH OLD PEOPLE	163	12.1%	54	10.5%	19	22.6%	86	12.1%
OTHER	71	5.3%	23	4.5%	2	2.4%	45	6.4%



## TOTAL CCRC

## Benefits of Living in Particular Community

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
ACTIVITIES	150	13.6%	65	15.3%	7	9.9%	76	13.0%
TRANSPORTATION	125	11.3%	62	14.6%	2	2.8%	57	9.8%
ACCESS TO HEALTH	145	13.1%	41	9.6%	5	7.0%	97	16.6%
HEALTH DELIVERY	7	.6%	4	.9%	1	1.4%	2	.3%
CLIMATE/LOCATION	68	6.2%	19	4.5%	5	7.0%	44	7.5%
NEAR CHILDREN/COMMUNITY	76	6.9%	40	9.4%	6	8.5%	27	4.6%
EQUITY	8	.7%	3	.7%	0	.0%	4	.7%
CARING STAFF	214	19.4%	78	18.3%	14	19.7%	119	20.4%
CARING RESIDENTS	416	37.7%	159	37.3%	29	40.8%	219	37.5%
PEACE OF MIND	92	8.3%	38	8.9%	2	2.8%	50	8.6%
PERSONAL FREEDOM	150	13.6%	48	11.3%	14	19.7%	88	15.1%
MEALS	170	15.4%	75	17.6%	17	23.9%	77	13.2%
HOUSEKEEPING	49	4.4%	14	3.3%	8	11.3%	25	4.3%
MAINTENANCE	55	5.0%	19	4.5%	1	1.4%	33	5.7%
OTHER SERVICES	30	2.7%	16	3.8%	1	1.4%	12	2.1%
LIVING ASSISTANCE	20	1.8%	7	1.6%	1	1.4%	12	2.1%
SECURITY	88	8.0%	37	8.7%	1	1.4%	50	8.6%
OTHER	27	2.4%	10	2.3%	1	1.4%	15	2.6%
LAYOUT OF								
APT/BUILDINGS	12	1.1%	3	.7%	1	1.4%	8	1.4%
NOT A BURDEN	4	.4%	1	.2%	0	.0%	3	.5%
PRIVACY	12	1.1%	8	1.9%	0	.0%	4	.7%

## TOTAL CCRC

## Disadvantages of Living in Particular Community

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
ACTIVITIES	7	1.1%	4	1.8%	0	.0%	2	.6%
TRANSPORTATION	72	11.7%	32	14.0%	2	6.5%	35	10.0%
ACCESS TO HEALTH	33	5.3%	10	4.4%	0	.0%	23	6.6%
HEALTH DELIVERY	22	3.6%	5	2.2%	0	.0%	17	4.9%
CLIMATE/LOCATION	22	3.6%	5	2.2%	0	.0%	17	4.9%
SEPARATED FROM WORLD	5	.8%	2	.9%	0	.0%	3	.9%
COSTS	87	14.1%	29	12.7%	2	6.5%	55	15.8%
POOR CONSTRUCTION	63	10.2%	19	8.3%	3	9.7%	41	11.7%
LOCATION OF								
BUILDINGS	29	4.7%	14	6.1%	2	6.5%	12	3.4%
MORE COMMON AREAS	27	4.4%	11	4.8%	2	6.5%	13	3.7%
MEALS	74	12.0%	20	8.8%	6	19.4%	45	12.9%
HOUSEKEEPING	10	1.6%	9	3.9%	0	.0%	1	.3%
MAINTENANCE	10	1.6%	6	2.6%	0	.0%	4	1.1%
OTHER	47	7.6%	14	6.1%	3	9.7%	29	8.3%
APARTMENT LAYOUT	3	.5%	1	.4%	0	.0%	2	.6%
APARTMENT FEATURES	10	1.6%	4	1.8%	1	3.2%	5	1.4%
MORE STORAGE	25	4.0%	7	3.1%	0	.0%	18	5.2%
ENCLOSED WALKS	11	1.8%	2	.9%	0	.0%	9	2.6%
MORE RESIDENT INPUT	17	2.8%	2	.9%	1	3.2%	14	4.0%
MIX OF RESIDENTS	63	10.2%	35	15.4%	3	9.7%	24	6.9%
PROMISES NOT KEPT	22	3.6%	5	2.2%	0	.0%	17	4.9%
DISTANCE FROM FAMILY	15	2.4%	7	3.1%	1	3.2%	7	2.0%
NO SPACE FOR CAR	17	2.8%	3	1.3%	1	3.2%	13	3.7%
POOR MANAGEMENT	24	3.9%	4	1.8%	3	9.7%	17	4.9%
POOR STAFF	12	1.9%	2	.9%	1	3.2%	7	2.0%
SECURITY	11	1.8%	4	1.8%	2	6.5%	5	1.4%
56	1	.2%	0	.0%	1	3.2%	0	.0%

## TOTAL CCRC

## What Changes or Improvements Would Be Recommended?

	TOTAL		SINGLE FEMALE		SINGLE MALE		MARRIED COUPLE	
	N	%	N	%	N	%	N	%
ACTIVITIES	12	1.5%	5	1.6%	1	2.3%	6	1.3%
TRANSPORTATION	32	3.9%	15	4.9%	1	2.3%	15	3.3%
ACCESS TO HEALTH	20	2.4%	9	2.9%	0	.0%	11	2.4%
HEALTH DELIVERY	15	1.8%	4	1.3%	1	2.3%	10	2.2%
CLIMATE/LOCATION	13	1.6%	3	1.0%	0	.0%	10	2.2%
SEPARATED FROM WORLD	2	.2%	1	.3%	0	.0%	1	.2%
COSTS	16	2.0%	1	.3%	1	2.3%	14	3.1%
POOR CONSTRUCTION	227	27.8%	80	26.0%	10	22.7%	131	29.2%
LOCATION OF								
BUILDINGS	48	5.9%	28	9.1%	2	4.5%	17	3.8%
MORE COMMON AREAS	159	19.4%	71	23.1%	9	20.5%	76	16.9%
MEALS	60	7.3%	17	5.5%	4	9.1%	38	8.5%
HOUSEKEEPING	9	1.1%	5	1.6%	1	2.3%	3	.7%
MAINTENANCE	2	.2%	0	.0%	0	.0%	2	.4%
OTHER	79	9.7%	36	11.7%	6	13.6%	36	8.0%
APARTMENT LAYOUT	38	4.6%	14	4.5%	3	6.8%	20	4.5%
APARTMENT FEATURES	46	5.6%	13	4.2%	2	4.5%	29	6.5%
MORE STORAGE	80	9.8%	30	9.7%	4	9.1%	45	10.0%
ENCLOSED WALKS	52	6.4%	20	6.5%	2	4.5%	29	6.5%
MORE RESIDENT INPUT	14	1.7%	3	1.0%	2	4.5%	9	2.0%
MIX OF RESIDENTS	40	4.9%	22	7.1%	0	.0%	16	3.6%
PROMISES NOT KEPT	18	2.2%	5	1.6%	0	.0%	13	2.9%
DISTANCE FROM FAMILY	2	.2%	0	.0%	0	.0%	2	.4%
NO SPACE FOR CAR	50	6.1%	10	3.2%	5	11.4%	35	7.8%
POOR MANAGEMENT	10	1.2%	3	1.0%	1	2.3%	6	1.3%
POOR STAFF	10	1.2%	5	1.6%	0	.0%	5	1.1%
SECURITY	11	1.3%	3	1.0%	0	.0%	8	1.8%