

CONSUMER RESPONSE TO
HOUSING OPTIONS FOR
OLDER CANADIANS

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ABSTRACT

This study explored seniors' attitudes and preferences towards a variety of available and emerging housing options, support services, design features, tenure and sponsorship of housing for older people. This information, as well as socio-demographics, existing housing characteristics, reasons for considering a move, and follow-ups of their moving decisions, was examined through one hundred personal interviews which were conducted in Edmonton during the summer and fall of 1990. Findings are provided for both renters and homeowners, as well as by age, sex and marital status.

Study findings indicate that there is substantial interest in emerging housing options including Abbeyfield housing, congregate housing, garden suites, sheltered housing, and renovations. There are also smaller markets for home-sharing, accessory apartments, flexible-use housing, bi-family units, mobile home developments, retirement villages, and life care communities.

However, developers or sponsors of housing for older people must be sensitive to local differences, needs and preferences. Furthermore, seniors wish to be involved in the planning and design of such housing. The report concludes with comments and recommendations made by study participants.

EXECUTIVE SUMMARY

Demographics indicate that Canada's population is aging. As a result, a number of innovative housing options have been introduced in Canada over the last decade and several more are in the planning stages.

This study explored seniors' attitudes and preferences towards a variety of available and emerging housing options, support services, design features, tenure and sponsorship of housing for older people. This information, as well as socio-demographics, existing housing characteristics, reasons for considering a move, and follow-ups of their moving decisions was examined.

One hundred personal interviews were conducted with seniors who were searching for housing information through the Housing Registry of The Society for the Retired and Semi-Retired in Edmonton. Interviews took place during the summer and fall of 1990.

Most respondents were women, many of whom were widowed, living alone, and were renting accommodation. The average age of all participants was 70 years. Over one-third of participants were receiving the Guaranteed Income Supplement which indicated that they were living on very limited incomes. Yet only two respondents were living in government subsidized housing. However, many of the seniors in this study were experiencing financial difficulties due to increasing housing related costs. Edmonton has had low vacancy rates and several rental increases over the past year which have affected many seniors on fixed incomes who are renters. In addition, some homeowners were experiencing the equity rich, cash poor scenario. Findings are provided for both renters and homeowners, as well as by age, sex and marital status.

Although most seniors would prefer to remain where they were living, the major reasons for considering a move were financial reasons associated with rental increases, difficulty maintaining their homes, poor health, or for companionship. Initially, the majority of respondents were considering an apartment or government subsidized housing. However, as they became aware of various options during the course of the interview, other alternatives such as support

services, renovations and newer emerging housing options would be seriously considered.

Study findings indicate that there is substantial interest in emerging housing options including Abbeyfield housing, congregate housing, garden suites, sheltered housing, and renovations. There are also smaller markets for homesharing, accessory apartments, flexible-use housing, bi-family units, mobile home developments, retirement villages, and life care communities.

The vast majority of respondents indicated they would prefer to rent, including the majority of homeowners, when they move. The most popular forms of sponsorship of housing developed for seniors would be public/government and private market sponsorship. Many would also like to have the following support services available: outdoor maintenance, social and recreational facilities, emergency response systems, special transportation, meal service and housekeeping services.

There was a very positive attitude toward design features which would assist daily living and aging-in-place. The majority of respondents would prefer the following features when they move: grab bars, main floor laundry, pull-out shelving, hand-held shower heads in the bathtub, seat in the shower, "soft-tubs", higher electrical outlets, rocker panel light switches, benches and parcel shelves at entrances, patio doors that swing open, and lever door handles and faucets.

The market for seniors housing is growing. However, developers or sponsors of housing for older people must be sensitive to local differences, needs and preferences. Furthermore, seniors wish to be involved in the planning and design of such housing. The report concludes with comments and recommendations made by study participants.

«Impressions des consommateurs sur les choix de logements pour les Canadiens âgés», par Lorraine Romank

RÉSUMÉ À L'INTENTION DE LA DIRECTION

Les statistiques démographiques montrent que la population canadienne vieillit. C'est pourquoi des choix de logements novateurs ont été proposés au Canada au cours de la dernière décennie et plusieurs autres sont en voie de planification.

Cette étude a pour but de déterminer les attitudes et les préférences des personnes âgées à l'égard des choix de logements, des services de soutien, des caractéristiques de conception, des modes d'occupation et des parrainages qui s'offrent ou s'offriront à eux. Outre cet aspect de la question, nous avons examiné des données recueillies sur les statistiques socio-démographiques, les caractéristiques des logements existants, les raisons motivant un déménagement ainsi que le suivi des décisions de déménager.

Cent entrevues ont été réalisées, durant l'été et l'automne de 1990, auprès de personnes âgées qui, par le biais du registre des logements disponibles de la Society for the Retired and Semi-Retired d'Edmonton, cherchaient à obtenir des renseignements sur le logement.

La plupart des personnes interrogées étaient des femmes. Beaucoup d'entre elles étaient veuves, locataires et seules. L'âge moyen de tous les participants était de 70 ans. Plus du tiers des participants recevaient le supplément de revenu garanti, une indication qu'ils avaient des revenus très limités. Pourtant, seulement deux personnes habitaient des logements subventionnés par le gouvernement. Par ailleurs, bien des aînés participant à l'étude éprouvaient des difficultés financières à cause de l'augmentation croissante des coûts inhérents au logement. Les taux d'inoccupation à Edmonton sont bas depuis un an et la ville a connu durant cette période plusieurs

augmentations de loyer qui ont touché beaucoup de locataires âgés disposant d'un revenu fixe. De plus, certains propriétaires s'avéraient riches en avoir propre, mais pauvres en liquidités. Les résultats de notre étude portent sur les locataires et les propriétaires et en précisent l'âge, le sexe ainsi que l'état civil.

Même si la majorité des aînés auraient préféré demeurer là où ils habitaient, ils devaient la plupart du temps songer à déménager à cause de la hausse des loyers, de la difficulté d'entretenir leur maison, d'une santé précaire ou de la solitude. Au début, la majorité des personnes interrogées recherchaient un appartement ou un logement subventionné. Toutefois, à mesure qu'ils ont pris connaissance des divers choix possibles pendant l'entretien, ils se sont mis à considérer d'autres solutions de rechange comme les services de soutien, la rénovation et les nouvelles formes de logement.

L'étude a permis de constater que les consommateurs s'intéressent aux nouvelles possibilités de logement comme les habitations de type Abbeyfield, les logements-foyers, les pavillons-jardins, les logements protégés et la rénovation. Il existe également de plus petits marchés pour la cohabitation, les appartements accessoires, les logements polyvalents, les habitations bifamiliales, les ensembles de maisons mobiles, les villages de retraite et les communautés fournissant des soins à vie.

La grande majorité des répondants, y compris les propriétaires, ont indiqué qu'ils préféreraient être locataires lorsqu'ils déménageraient. Les formes les plus populaires de parrainage de logements pour aînés seraient les entreprises publiques ou gouvernementales et celles du marché privé. Bien des personnes âgées souhaiteraient également disposer de services de soutien comme : l'entretien extérieur, les activités sociales et récréatives, les systèmes d'intervention d'urgence, le transport adapté, les repas ainsi que l'entretien ménager.

Les réactions ont été très favorables à l'égard des caractéristiques de conception facilitant le quotidien des personnes âgées et contribuant à les maintenir dans leur logement. La majorité des personnes interrogées apprécieraient les caractéristiques suivantes dans leur nouveau logement : barres d'appui, buanderie au rez-de-chaussée, étagères coulissantes, pomme de douche manuelle dans la baignoire, banc de douche, baignoires «flexibles»¹, prises de courant élevées, interrupteurs à bascule, banc et tablette pour paquets à l'entrée, portes-fenêtres battantes, poignées de porte de type bec-de-cane et robinets à levier.

Le marché du logement des personnes âgées est en pleine croissance. Les promoteurs ou les parrains d'habitations destinées aux personnes âgées doivent tenir compte des différences, des préférences et des besoins locaux. De plus, les aînés veulent participer à la planification et à la conception de leurs logements. Le rapport se termine sur des commentaires et des recommandations formulés par les participants à l'étude.

¹ Baignoire revêtue d'une matière flexible qui diminue les risques de blessure lors d'une chute.

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Luis Rodriguez, CMHC project manager, for his suggestions, assistance, and encouragement throughout this research project.

SECTION ONE

1.0 INTRODUCTION

1.1 Background

Demographics indicate that Canada's population is aging or 'greying'. Today, about 2.7 million Canadians are 65 years of age or older, approximately 10 percent of the population. As Canada enters the 21st century, this number will increase to nearly 4 million.¹ In Edmonton, by the year 2,000, it is projected² that the number of seniors 65 years of age or older will increase by 50% (from 1987 Civic Census figures) from approximately 47,000 to 70,000.

Because seniors today have varying levels of health, income and assets, as well as different needs and preferences, they will likely demand more choices of accommodation and services. Further, as people age, many will likely experience physical difficulties or a declining desire to maintain their homes. In the past, apartments, lodges or nursing homes were the primary alternatives for seniors who were socially isolated, could no longer maintain their homes, or required assistance in daily living. For other seniors who wanted housing that better reflected their changing needs and preferences (to travel for example), there were few options available.

1.2 An Overview of the Current Seniors Housing Market in Alberta

A number of innovative housing options have been introduced in Canada over the last decade ranging from retirement villages to Abbeyfield housing. In Alberta, private industry, non-profit organizations, and self-help seniors' groups have been involved with several innovative options over the last ten years. These include such options as homesharing, retirement villages, congregate housing, and continuum of care or multi-level care facilities.

¹ Stone, Leroy O. and Susan Fletcher (1986). *The Seniors Boom: Dramatic Increases in Longevity and Prospects for Better Health*. Ottawa: Statistics Canada, Health and Welfare Canada, and The Secretary of State of Canada.

² Edmonton Population Forecast, May 1988 cited in *Edmonton Seniors 2000: Strategies for the Future* (March 1989). The City of Edmonton.

Housing forms in Alberta vary from bungalow style units (usually one-storied small houses which are detached, semi-detached, or grouped in small clusters) to walk-up and high rise apartment buildings.

Types of tenure in Alberta range from rental to purchase options, including basic rentals, cooperatives, shared-equity lease arrangements, condominiums, and fee simple ownership. Most projects in Alberta, however, have been targeted to the middle to upper income senior.

Although retirement villages in Alberta are the most common housing option (among the more innovative forms of housing) for seniors, with some 30 projects in Edmonton alone, there are market opportunities for other emerging innovative housing options as well. These opportunities are further discussed in Section 6 of this report.

1.3 Purpose and Objectives of the Study

The purpose of this study was to answer several key questions about housing choices. As more housing options for older people become available in Canada, are seniors considering such alternatives rather than remaining in their existing homes? Do some life circumstances, such as failing health, force them to move? Which housing options do they prefer and what will they ultimately choose given a wide variety of alternatives? Would people choose different alternatives if they were aware of newer emerging options?

More specifically, this study identifies seniors' attitudes and preferences towards housing options specially designed for older people -- attitudes and preferences which may be changing as more, and perhaps more suitable, alternatives for this market become available in Canada.

The objectives of this study were to:

1. Identify and describe the socio-demographic characteristics of seniors participating in the survey.

2. Identify and describe existing housing characteristics of seniors participating in the survey.
3. Find out if seniors want to move.
4. Explore seniors' reasons for considering a move.
5. Determine if seniors perceive their next move as a final move.
6. Determine seniors' attitudes toward, preferences for, and likelihood of selecting, various available and emerging housing options and to compare these preferences to other selected research.
7. Explore the preferred type of tenure and sponsorship.
8. Explore attitudes and expectations about design features to assist daily living and aging-in-place, and about support services within housing designed for seniors.
9. Follow-up the actual housing decisions made by seniors participating in the survey.
10. Identify and analyze significant differences among seniors' responses according to their socio-demographic situations and profile these differences as various segments in the market.

1.4 Scope and Focus of the Study

Participants in this study included seniors who were living in their own homes, renting or owning, in the City of Edmonton and who were searching for housing alternatives through the Housing Registry of The Society for the Retired and Semi-Retired. The Housing Registry provides information about the various types of housing available for seniors in Edmonton.

Seniors were asked to participate in an interview which explored their housing needs and preferences, and which introduced them to a number of emerging options for their interest and opinions.

The study focused on available alternatives and emerging options discussed in the booklet *Housing Choices for Older Canadians* published by Canada Mortgage and Housing Corporation. Although many of the options discussed in this publication are not widely available in Canada or in Edmonton, they were included in the study to increase public awareness of these options and to help identify consumer interest in them.

1.5 Definitions

Seniors participating in this study were 55 years of age or older. They could, however, represent a variety of tenures, income levels, and household compositions.

Available and emerging options were explained and visually presented to study participants using an interview guide which incorporated photographs and brief descriptions of each option. This guide is in Appendix A.

1.6 Report Structure

The report is organized into seven sections:

- Section 2 describes the research methods used to gather the information.
- Section 3 profiles respondents and their current housing situation, reasons for considering a move, and what alternatives were being considered (prior to explaining any options).

- Attitudes toward a variety of available and emerging housing options, introduced to seniors during the interview, are discussed in Section 4. Options included those for staying put as well as for moving.
- Housing preferences among available and emerging options, their likely choice given the options currently available, and final actual decisions are discussed in Section 4.
- Section 5 provides information about seniors' preferences for 20 design features which could assist daily living tasks and allow seniors to live in their homes longer, as well as their overall opinion regarding the importance of such features.
- A summary of the findings of this study, comparison of these findings to other selected research, and conclusions and recommendations made by seniors for future consideration are discussed in Section 6.
- Appendix A provides a copy of the interview questionnaire and guide. Appendix B presents statistical information for interview questions in table format.

SECTION TWO

2.0 RESEARCH METHODS

2.1 Methods and Stages of Research

Primary data were collected through structured personal interviews, Part I of which was based on Gutman's study³ of attitudes toward housing options. Interviews were conducted with seniors, 55 years and over, who were searching for information about housing alternatives through The Society for the Retired and Semi-Retired in Edmonton. Interviews were conducted during the summer and fall of 1990.

The research was conducted in two stages: respondents first participated in an interview which lasted an average of 2.5 hours and were then telephoned several months later to follow-up their decision. It was proposed that each interview would take 1.5 hours. Interviews took longer than initially expected (1.5 hours) primarily due to the time required to explain each of the options, to the time that it took to listen to peoples' problems, and to answer other related housing questions.

2.2 Sample Design and Size

It was originally anticipated that all study participants would be recruited during their information appointment with the Housing Registry. However, the number of actual seniors searching for information during the study time frame was underestimated. Furthermore, because the interviews were lengthy, interview appointments typically needed to be scheduled for another time.

Because of the difficulty recruiting sufficient numbers of seniors who were thinking about moving, potential interviewees on file at the Housing Registry were also telephoned and asked if they would participate in the study, providing they were still searching for other housing alternatives. This resulted in 86

³ Gutman, Gloria, Milstein, Stephen, and Veronica Doyle (1987). *Attitudes of Seniors to Special Retirement Housing, Life Tenancy Arrangements and Other Housing Options*. Ottawa: Canada Mortgage and Housing Corporation.

interviews from the file and 14 from "walk-ins". A total of 100 interviews were conducted.

A question on tenure options was eliminated from the interview after pretests indicated that there would not be enough time for it.

2.3 Data Collection

Three interviewers were trained to conduct interviews over a four month period. However, one interviewer conducted most of the interviews over a six month period. This may have increased the reliability of the data.

Telephone follow-ups were also conducted by the primary interviewer.

2.4 Data Analysis

Questionnaire responses were computer-coded and a file established for each respondent. The data were analyzed by using a SPSS-X, a computer program for the social sciences. Frequency counts for all questions were obtained and are summarized in Appendix B. Cross tabulations were run to determine if there were statistically significant differences on the basis of the socio-demographic characteristics of seniors participating in the study and to establish various profiles of respondents.

2.5 Limitations of the Study

The results of this study should be viewed cautiously in drawing conclusions about the general population for several reasons:

- the sample only included seniors from Edmonton
- the sample size was relatively small, and
- the sampling procedure was not random.

In addition, it was intended that the sample would reflect the general population of Edmonton. However, only 17% of the sample, compared to 50% of the general population, were between 55 and 64 years of age. The 65 to 74 year olds represented a larger proportion of the sample at 58% versus 31% of the general population. The 75 and over sample was most representative at 25% compared to 19% of the general population.

SECTION THREE

3.0 CURRENT SITUATION OF SENIORS PARTICIPATING IN THE SURVEY

This section summarizes 100 interviews with 115 seniors (15 interviews were completed with married couples). Frequencies of responses are presented in this section in graphic format and in Appendix B as tables with both frequencies and percentages.

3.1 Socio-demographic Characteristics

Sex

Three out of four interviews were conducted with females. Married couples participated in 15 interviews and males in 11 interviews. In total, 89 females and 26 males (a ratio of 3.4 to 1) participated in the study. This ratio of females to males is higher than the the ratio of the general population of seniors 55 or older in Edmonton (which is 1.2 females to 1 male). The majority (83%) of the sample was 65 years of age or older with a high proportion of widowed individuals (47%) and renters (68%) who may be more representative of movers, as was the case with Leung's study.¹

Age

The average age of respondents was 70 years for both males and females. Nearly half (47%) of females were between 65 and 74 years of age, while two-thirds (69%) of males were in the same age category (Figures 3.1 and 3.2 on the following page).

¹ Leung, H.L. (1990). *Elderly Homeowners Turned Renters: Reasons for Move*. Ottawa: Canada Mortgage and Housing Corporation, External Research Grant.

Figure 3.1 Age of Female Respondents

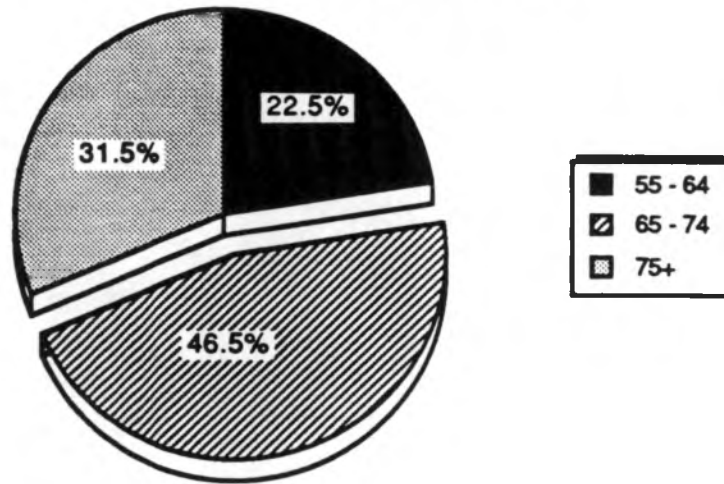
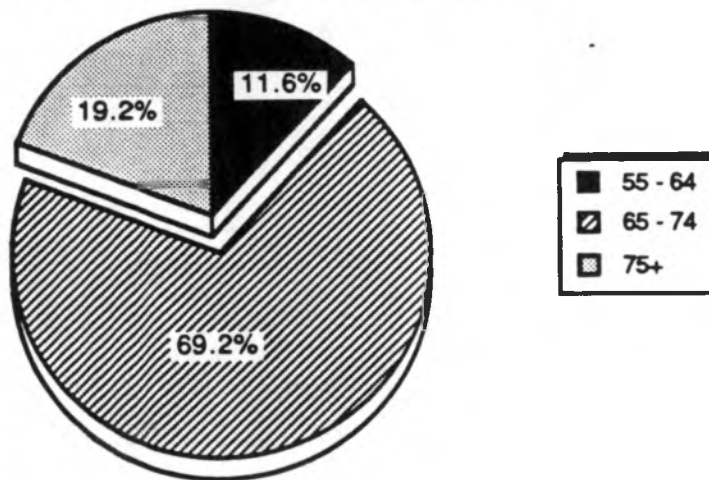
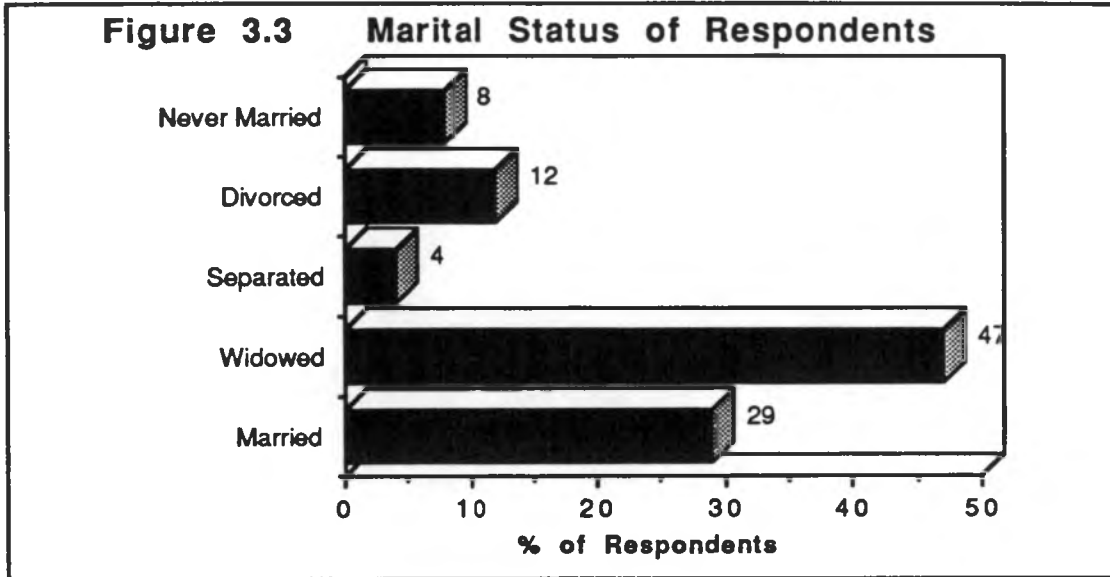


Figure 3.2 Age of Male Respondents



Marital Status

Approximately half of the female respondents (57%) and male respondents (46%) were widowed. However, there were more married male participants than females (36% compared to only 15%) but more females that were separated, divorced or never married (28% compared to 18%). Of the total participants, nearly half (47%) were widowed, 29% were married, and 24% were separated, divorced or never married (Figure 3.3).



Employment Status

Nearly 9 out of 10 (87%) of respondents were retired (Figures 3.4 and 3.5). Only 8% were still working full-time.

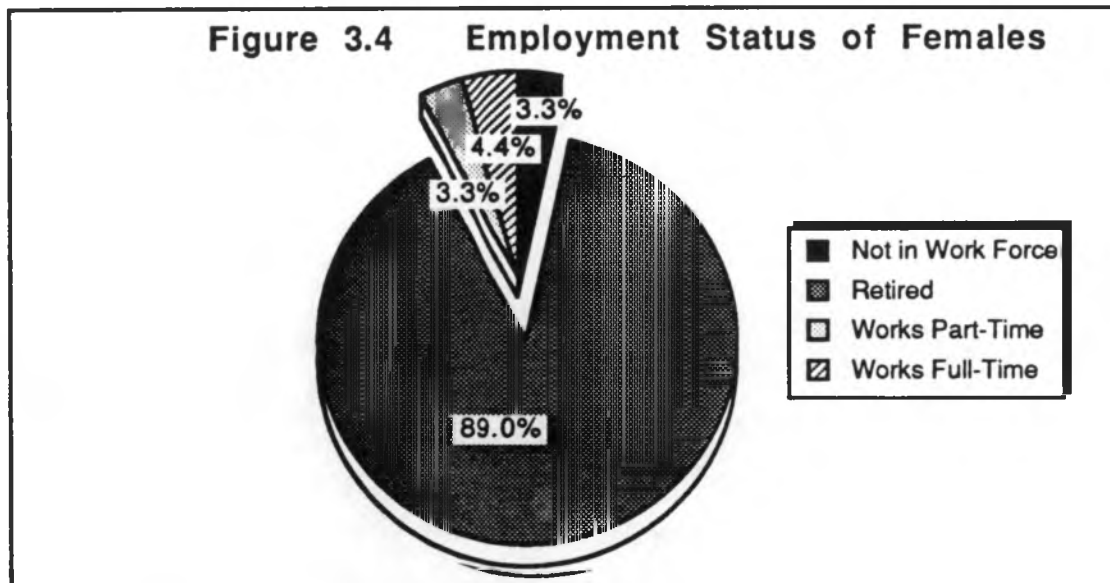
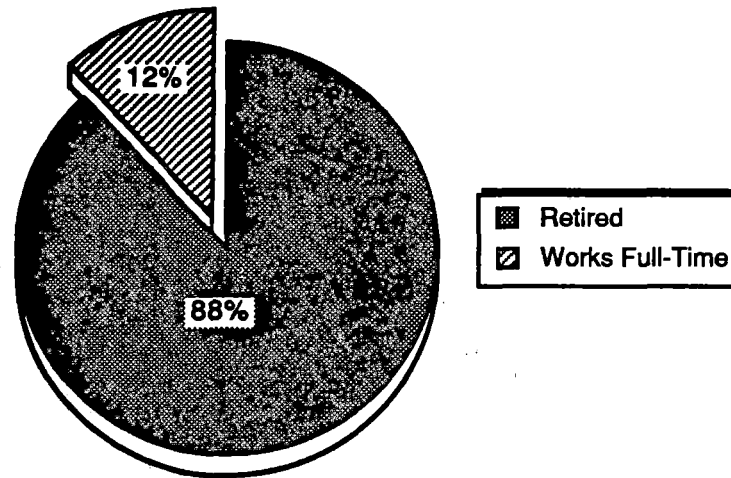


Figure 3.5 Employment Status of Males

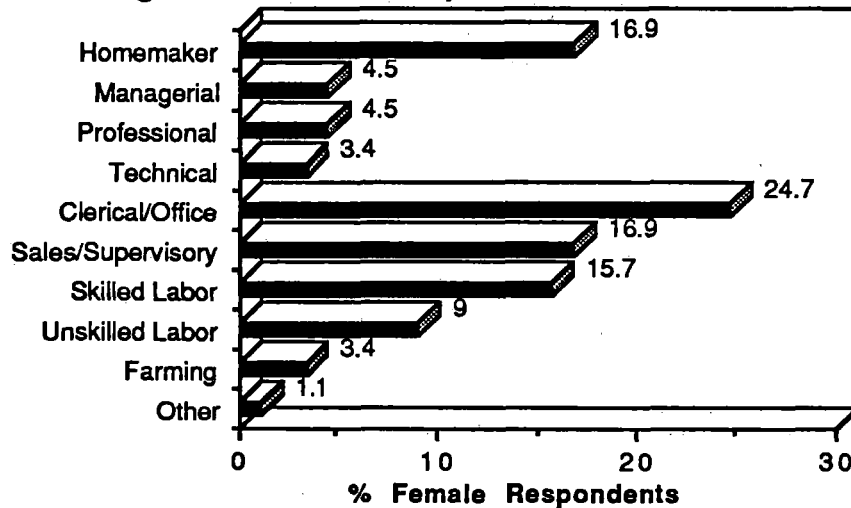


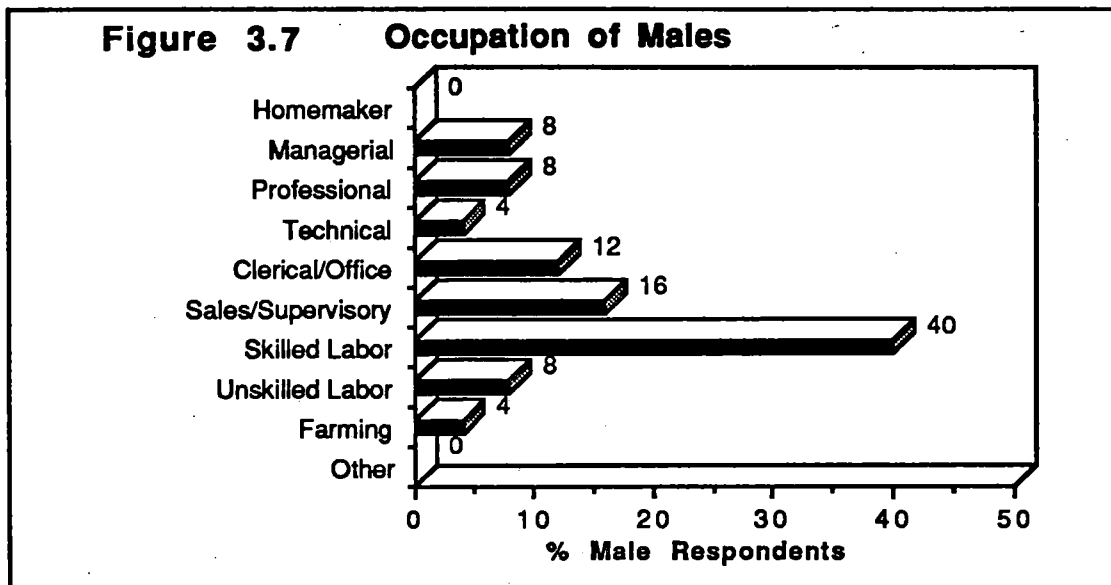
Occupation

More than eight in ten female respondents had worked outside the home at some point in their lives (Figure 3.6). The majority (57%) of these women had clerical/office, sales/supervisory or skilled labor occupations. Less than 10% held managerial or professional jobs.

The majority (54%) of male respondents had sales/supervisory or skilled labor occupations (Figure 3.7). Similarly, only 15% of males had managerial or professional positions.

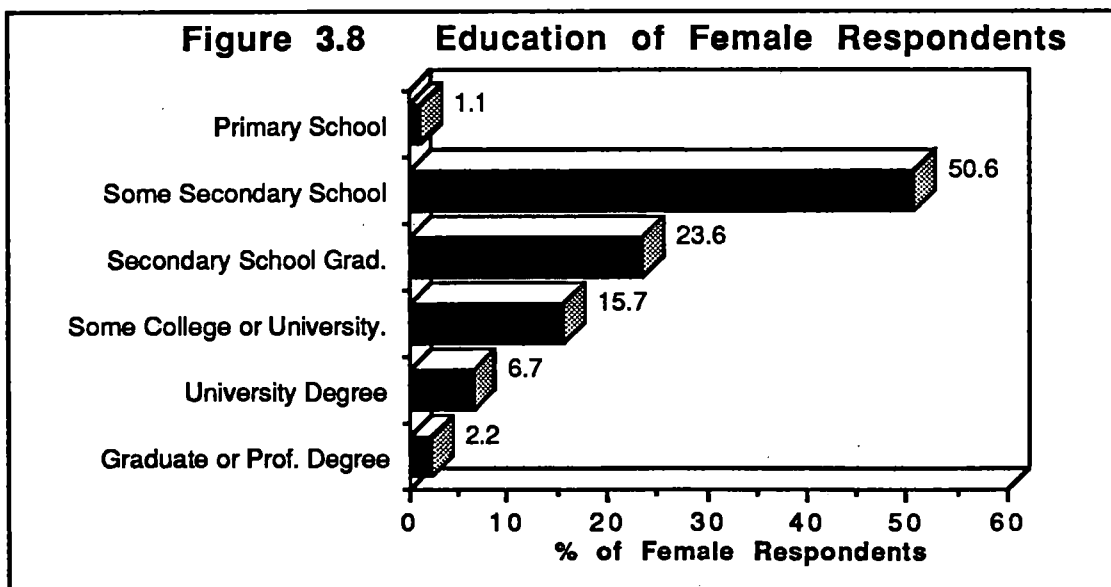
Figure 3.6 Occupation of Females

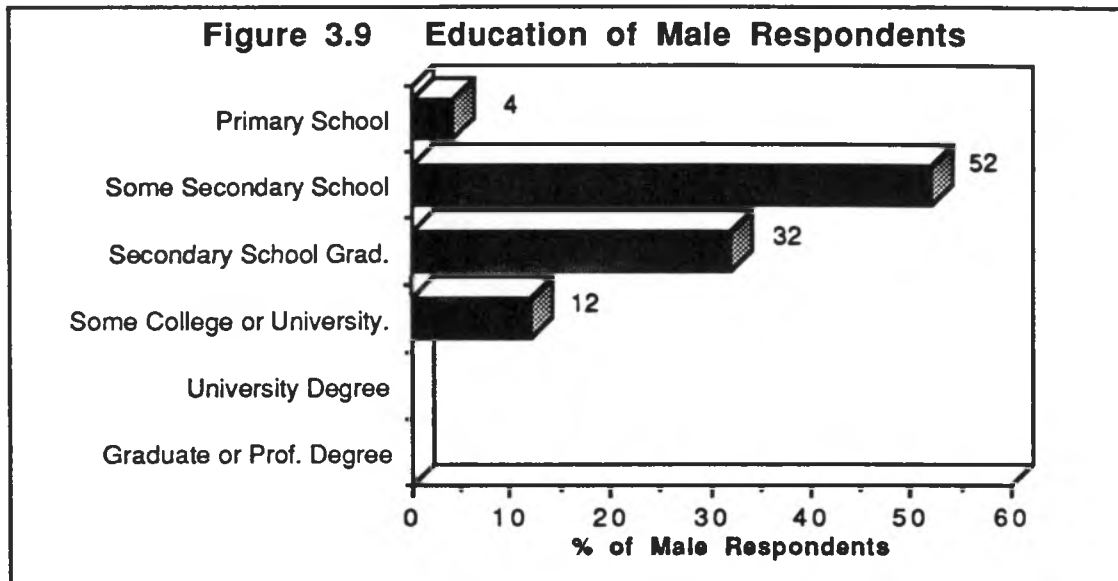




Education

The vast majority of females (74%) and males (84%) had some secondary or secondary school graduation (Figures 3.8 and 3.9). It should be noted that very few respondents had college or university level education. The level of education was reflected in the types of occupation respondents held at present or during their pre-retirement years.





Income

Since many older people prefer not to state their income, low income households were determined indirectly through the question about income supplements received, such as Humans on Welfare and the Guaranteed Income Supplement.

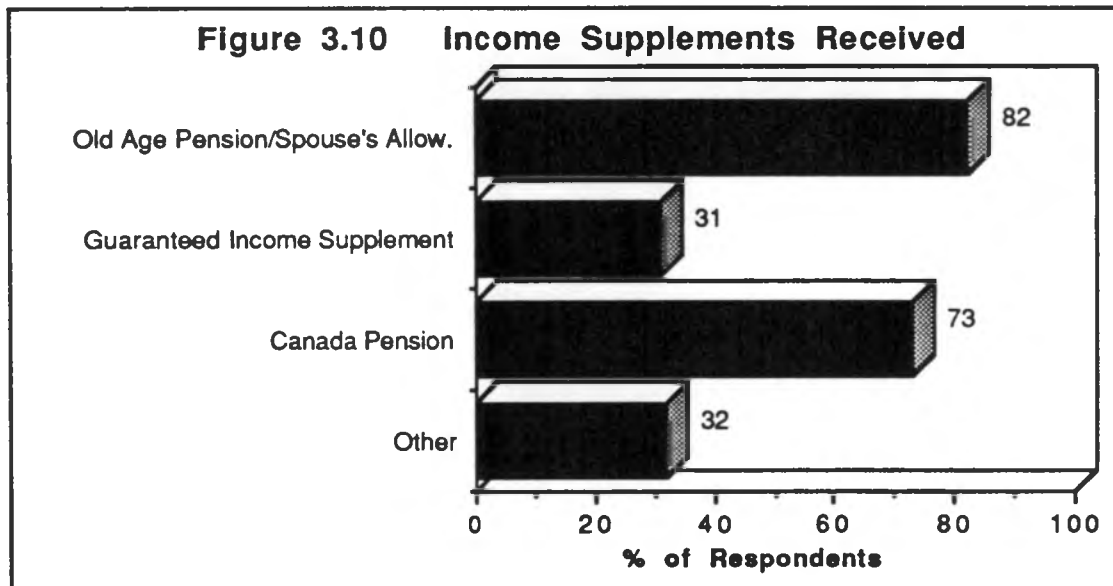
The vast majority of respondents received the Old Age Security Pension (82%), Spouse's Allowance (31%), and/or Canada Pension (73%) (Figure 3.10). When responses are broken down by sex, 73% of males, 80% of females, and all of the couples were receiving Old Age Security.

Nearly one in three respondents, however, also received the Guaranteed Income Supplement. Compared to the general senior population in Edmonton, 42% of all Edmontonians who receive the the Old Age Security Pension also receive the Guaranteed Income Supplement.² The study sample reflects this situation and the information collected indicates that about four in ten seniors today have little or no income other than these transfer payments. This finding was validated by responses to Question 20 which indicated that 37% of the study participants were considering a move because of financial reasons.

² *Edmonton Seniors 2000: Strategies for the Future* (March 1989). City of Edmonton.

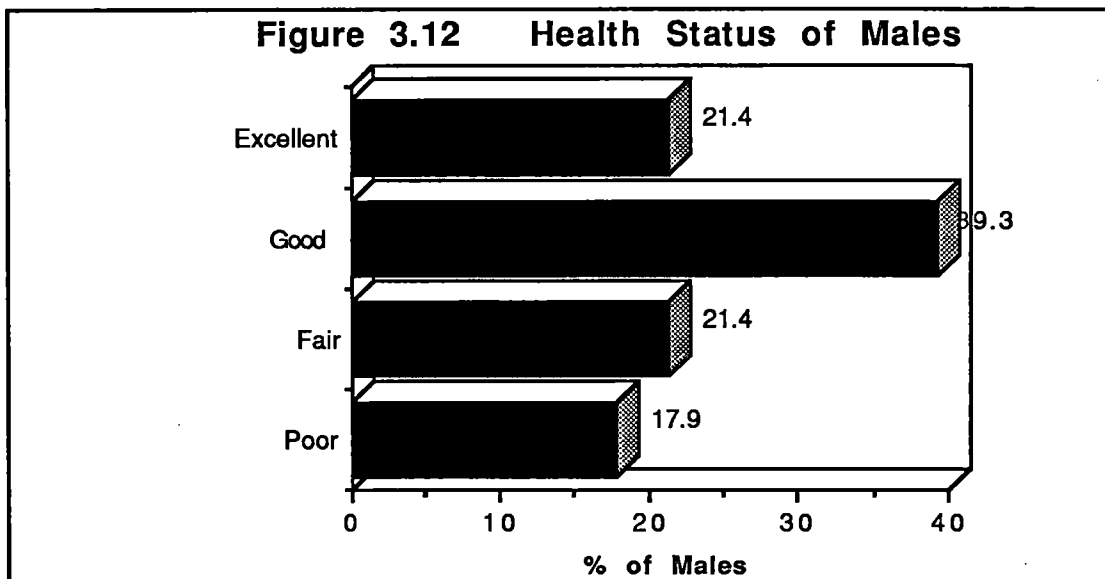
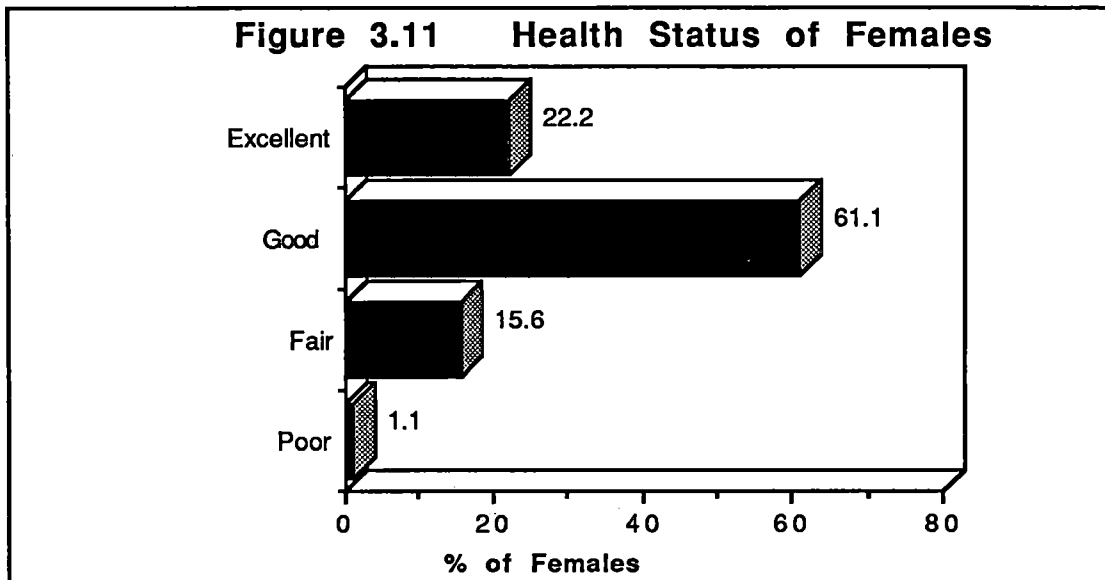
It is interesting to note that of the 31 respondents who received the Guaranteed Income Supplement, 13 were homeowners. (This reflects the fact that many seniors are equity rich and cash poor.) More specifically, of these 31 respondents who were receiving the GIS, two were male, four were couples, and 25 were female.

One in three seniors received other pensions such as disability pensions or company retirement pensions or other financial assistance such as welfare payments. Most of these, however, were retirement pensions. Nearly two in three males (64%) received such pensions compared to only 30% of females and 20% of couples.



Health

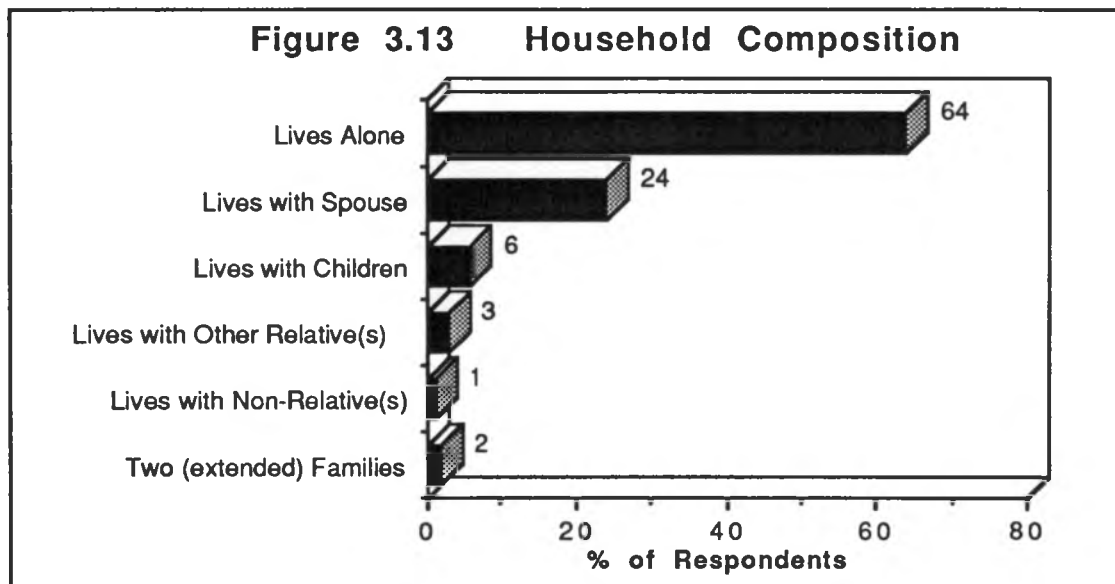
The vast majority of females (83%) and the majority of males (61%) reported their health as good to excellent (Figures 3.11 and 3.12). Although only 1% of females and 18% of males reported their health as poor. Overall, the health status of respondents was as expected since most respondents are still living independently. Further, responses to Question 20 support these findings in that 16% of respondents stated poor health as a reason for moving.



3.2 Living Arrangements

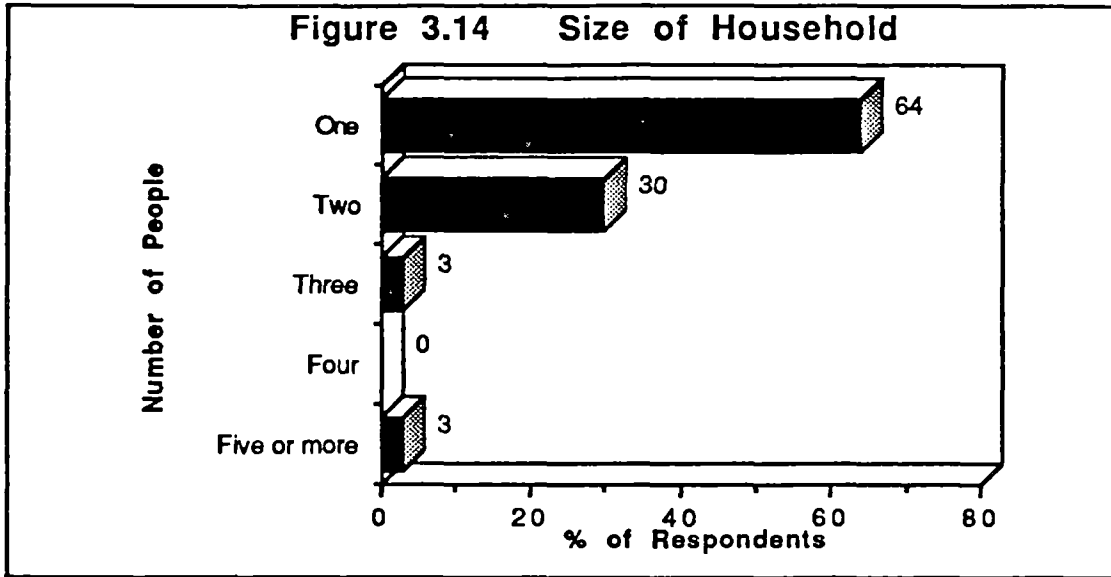
Nearly two-thirds of respondents lived alone (Figure 3.13). Only one in four lived with a spouse, while four married couples were living apart (in a nursing home for example). Ten percent of respondents were living with children, other relatives or non-related persons while two married couples were living with their children and their families (extended families).

The extended families purchased a home together with the seniors living in the basement level while their family lived in the upper level. Seniors wished to move away from these two families to restore their independence.



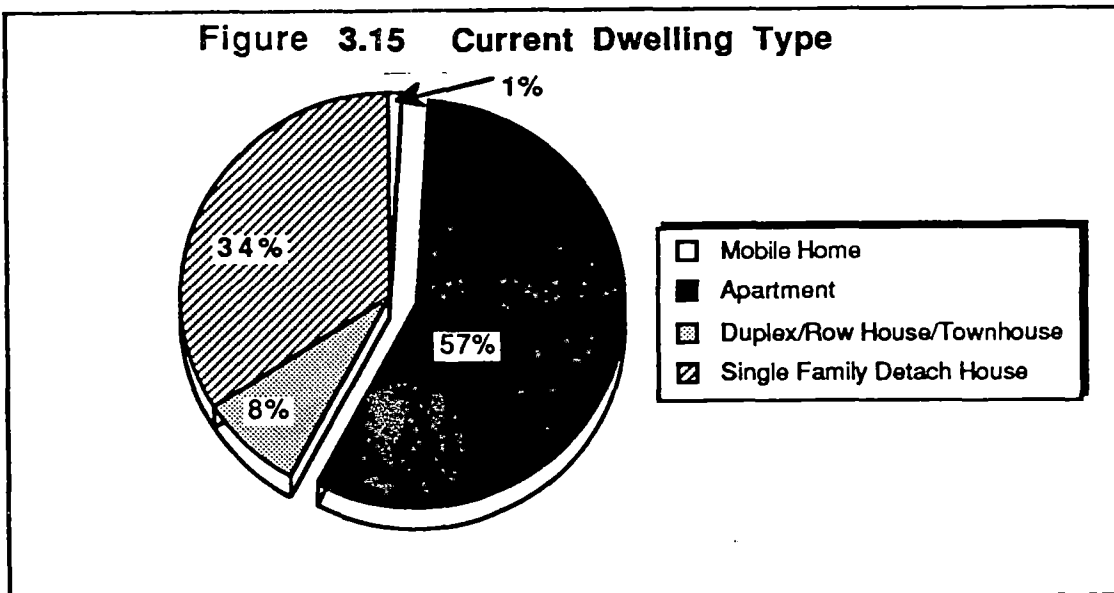
Size of Household

Although the vast majority (94%) of households were composed of one or two people, household sizes ranged from individuals living alone to families of seven (Figure 3.14 on the following page). Households with five or more individuals were extended families living under one roof typically to make owning a home more affordable to adult children and grandchildren.

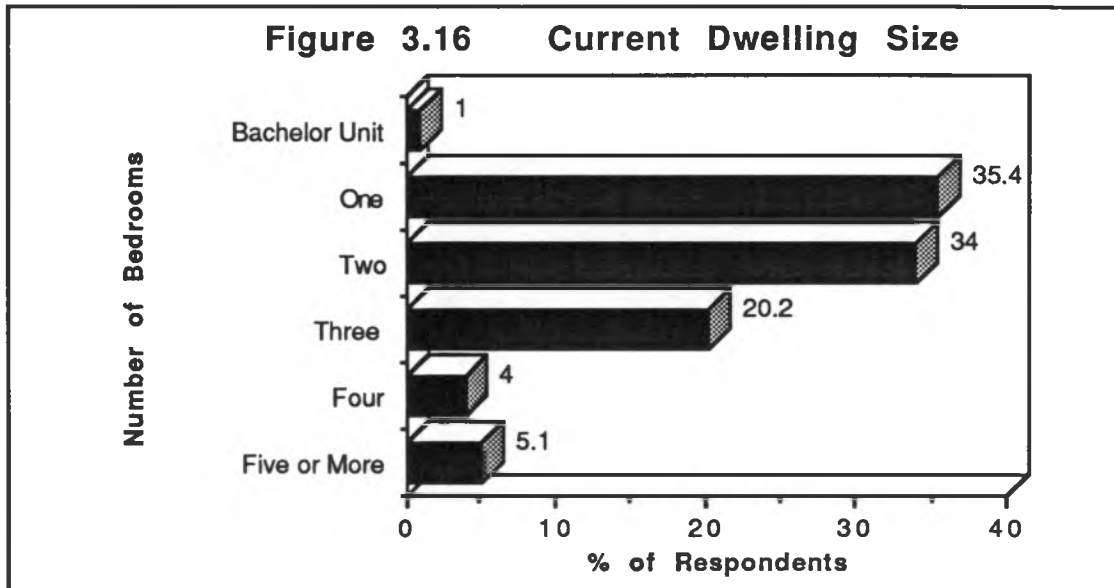


Current Dwelling Type and Size

Fifty-seven percent of respondents lived in apartments, 8% in duplexes, row houses or townhouses, 34% in single family detached houses, and only one respondent lived in a mobile home (Figure 3.15).

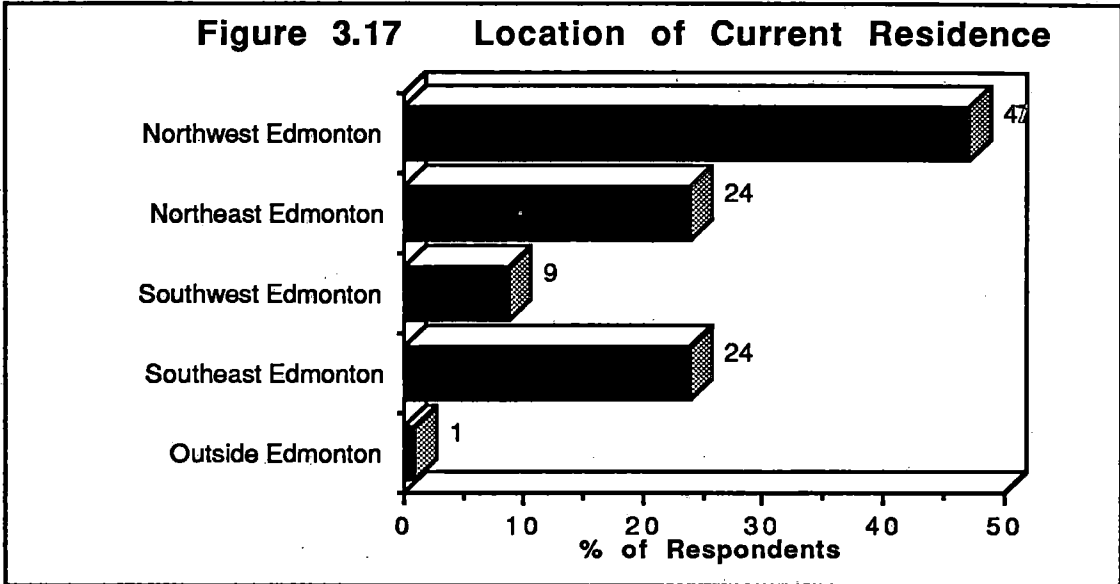


Dwelling size was questioned by asking the number of bedrooms. Nearly two-thirds (64%) of respondents lived in dwellings of two or more bedrooms (Figure 3.16). Only 36% lived in dwellings with only one bedroom or a bachelor suite and many commented that a two bedroom unit or home was a basic requirement.

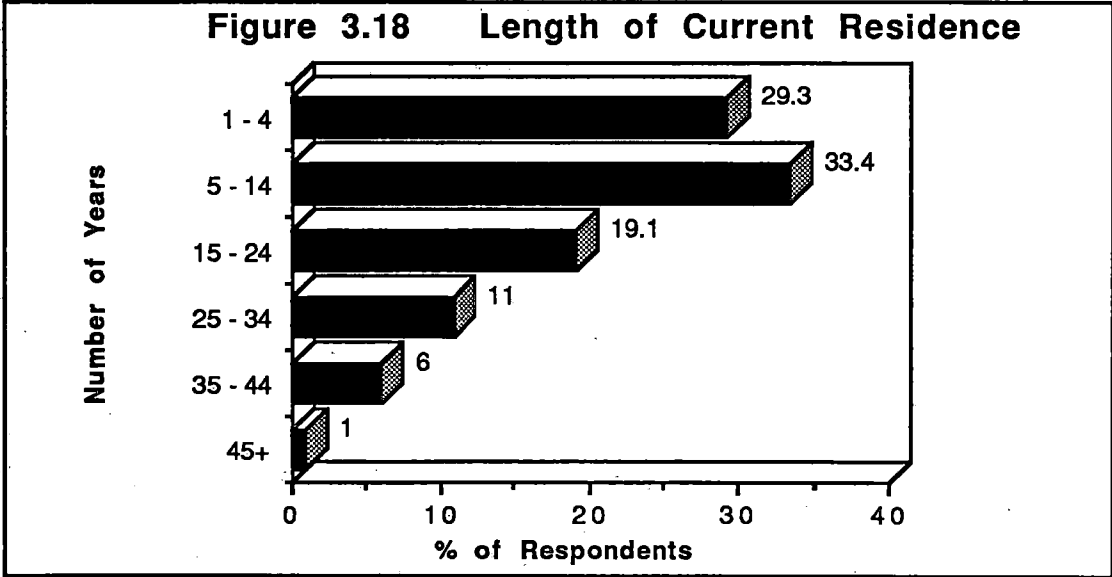


Location and Length of Current Residence

Seven of ten respondents lived on the Northside of Edmonton (Figure 3.17 on the following page). It is unclear why more than half the sample lived on the Northside versus the Southside of the river which divides Edmonton. One reason may be that the office of The Society for the Retired and Semi-Retired is on the Northside which makes it more accessible to residents living there.



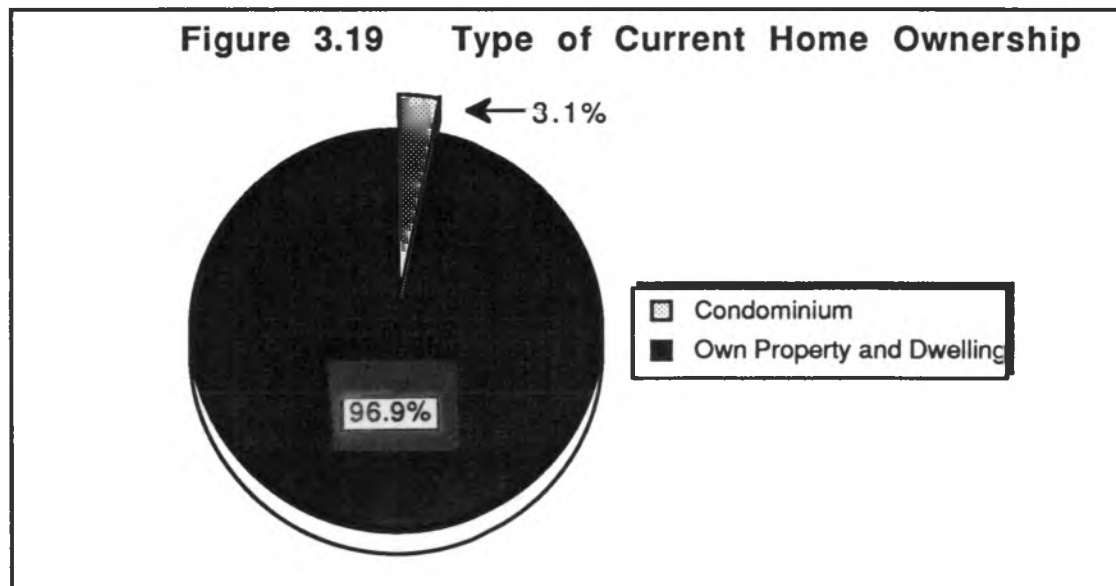
Only 30% of respondents lived in their current home for less than five years (Figure 3.18). In fact, more than one in three respondents (37%) lived in their homes for more than 15 years which suggested a familiarity with a neighborhood and friends that is difficult to move away from.



Current Tenure and Type of Ownership

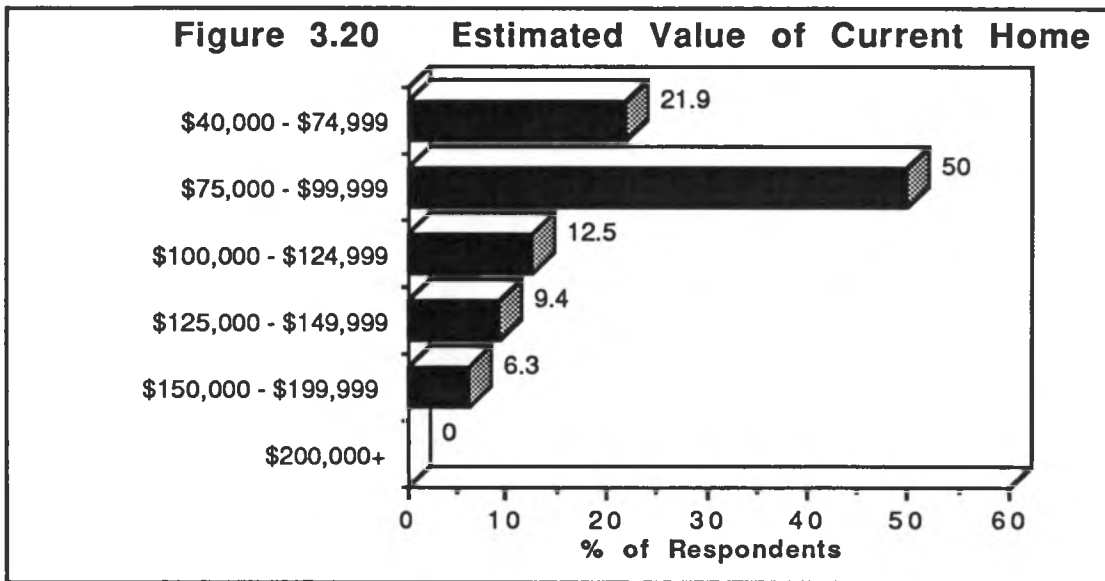
Typically two-thirds of seniors own their own homes. The reverse was the case in this study; two-thirds of respondents were renters and only one-third homeowners. Of the 32 homeowners, 31 owned regular ownership dwellings while one owned a condominium (Figure 3.19).

Tenure was cross-tabulated with marital status and age to see if there were any statistically significant differences; there were none.



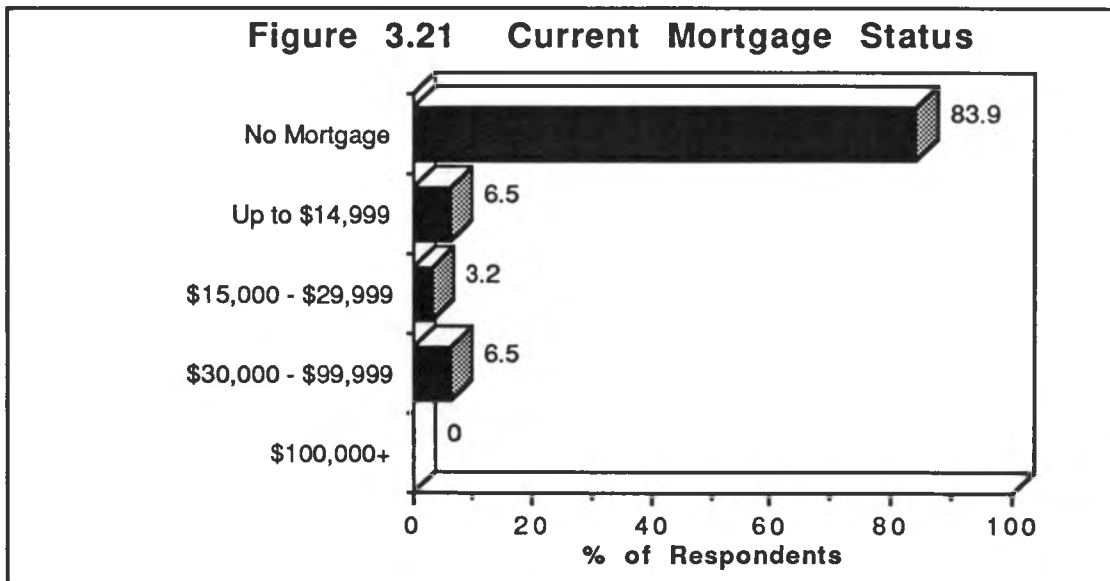
Current Home Value

Of the 32 homeowners, 72% valued their homes at under \$100,000 (Figure 3.20). According to The Edmonton Real Estate Board, the average home price in Edmonton in December of 1990 was \$108,000. Because it was thought that perhaps many seniors did not realize the actual value of their homes, a manual search of a cross-section of actual districts/neighborhoods and estimated values was undertaken. In several cases, the home values estimated by respondents were under the average home values according to real estate sales.



Mortgage Status

The vast majority of homeowners (84%) were mortgage free (Figure 3.21). Of the five respondents who still held mortgages on their homes, three had mortgages under \$30,000 and only one had a mortgage between \$30,000 and \$99,999 (an extended family).



3.3 Reasons for Moving

Question 20 asked study participants their major reasons for considering moving. Responses were categorized into several broad reasons which include:

- **financial reasons** (37 responses) most of which related to increasing rents
- **difficulty maintaining home** (23 responses) including too much upkeep or that the home was too large
- **poor health** (16 responses)
- **companionship** (16 responses) with other seniors, in adult communities, or to be near family
- **current home is unsuitable** (10 responses) uncomfortable or too small
- **need for better location** (8 responses) closer to recreational and community amenities
- **safety/security** (4 responses) neighborhood perceived as being unsafe
- **life transition** (3 responses) divorce or to move apart from other family members
- **design barriers** (3 responses), and
- **no choice** (3 responses) forced to move because of the sale of rental units or redevelopment.

When the above reasons for moving are categorized using Leung's categories,¹ the most frequently cited reason for considering a move is a shelter problem (i.e., difficulty maintaining one's home, the need for a better location, the current home is unsuitable, or design barriers. The next most frequent reason for moving is financial, followed by social support (i.e., companionship) and poor health which are tied. The least frequently cited reason is related to the neighborhood (i.e, safety or security). Life transition did not fit into Leung's categories. The results of these questions were very similar to Leung's study with the exception that financial reasons in Edmonton were more frequently cited as a reason for moving, likely due to dramatic rental increases over the past year.

³ See footnote 1 page 48 - 54.

Participants were also asked if they perceive their next move as a final move. Nearly eight out of ten people (78%) said yes or that they hope it will be. Six percent indicated a negative response because they did not really want to move and would only do so if it was absolutely necessary. Note that many (37 respondents) were experiencing rental increases or rising housing costs which were causing hardship since they were on fixed incomes. The remainder of respondents did not know if this would be their final move.

3.4 Reasons for Staying

Given a choice, the majority of respondents (56%) would prefer to remain where they now live. Generally, respondents liked living independently in familiar neighborhoods. Many would remain if their health permitted and if rents were affordable. Specific reasons for wanting to remain where they currently lived included:

- like the area (12 respondents) (e.g., familiar, close to amenities/ friends)
- if rent stays affordable (11 respondents)
- live in my own home (7 respondents)
- while in good health (6 respondents)
- like independence (6 respondents)
- like my apartment building and facilities (3 respondents) (e.g., spacious, swimming pool)
- have lots of space (2 respondents) (e.g., 3 or 4 bedroom home)
- if I can get help (2 respondents) (e.g., yard maintenance, repairs, cleaning, groceries)
- low cost (2 respondents)
- don't like moving (1 respondent)
- like my yard/garden (1 respondent)
- if I could renovate (1 respondent)
- own home is secure (1 respondent)

Generally, respondents who did not wish to remain in their current homes did not like their apartments or felt their homes required too much upkeep. Several people would prefer to live in adult housing projects, mainly for companionship.

Others indicated rental increases that they could not afford or that their current location was not convenient to services and amenities. Specific reasons given for not wanting to remain in their current home included:

- don't like my suite/building (10 respondents) (e.g., parking problems, rundown area, too many children)
- too much upkeep (8 respondents) (e.g., outdoor maintenance, repairs)
- prefer an adult community/building (5 respondents)
- rent is going up (4 respondents)
- no services or facilities nearby (3 respondents) (e.g., shopping, recreation/social)
- get away from family (2 respondents)
- home is too large (1 respondent)
- home is too small (1 respondent)
- unit is too hot (1 respondent)
- unit is too cold (1 respondent)
- unit is too noisy (1 respondent)
- lack of security (1 respondent)
- poor location (1 respondent)
- prefer to own than rent (1 respondent)
- too much stress (1 respondent)
- prefer old neighborhood (1 respondent)

3.5 Housing Options Being Considered

Prior to explaining available and emerging options to respondents, they were asked what type of housing arrangement they were currently considering (more than one response per respondent was allowed). Responses are outlined in Table 4.1 on page ---- in Section 4 of this report.

The majority of respondents were initially considering either a government subsidized apartment for seniors (43%) or a private market apartment (35%). Since two-thirds of respondents were renters, these findings are not unusual. However, the number of seniors considering subsidized apartments (43%) was higher than the number of seniors who received the Guaranteed Income

Supplement (31%). Although government subsidized units are based on 25% of income, this indicates that some seniors who are on fixed incomes, but do not receive the Guaranteed Income Supplement, are experiencing difficulties with rental increases. Thirty-seven percent of respondents did indicate financial reasons for moving.

Very few respondents were considering other alternatives other than buying a "condominium" or attached unit, or moving into a congregate or lodge facility where meals are served. This issue is further discussed in Section 4 and in the final section.

SECTION FOUR

4.0 ATTITUDES TOWARD AVAILABLE AND EMERGING HOUSING OPTIONS

This section discusses seniors' attitudes toward a number of available and emerging options which were explained and visually presented to study participants during the interviews. The interview guide is in Appendix A.

Note that the discussion focuses on the number or percentage (based on 100 interviews) of positive responses to the question of whether participants would seriously consider each of the options presented. The remainder represents not only "no" responses but also those who "did not know" and "only if...." responses. It was felt that by focusing strictly on the positive "yes" responses that this would give a better indication of the market potential of each option.

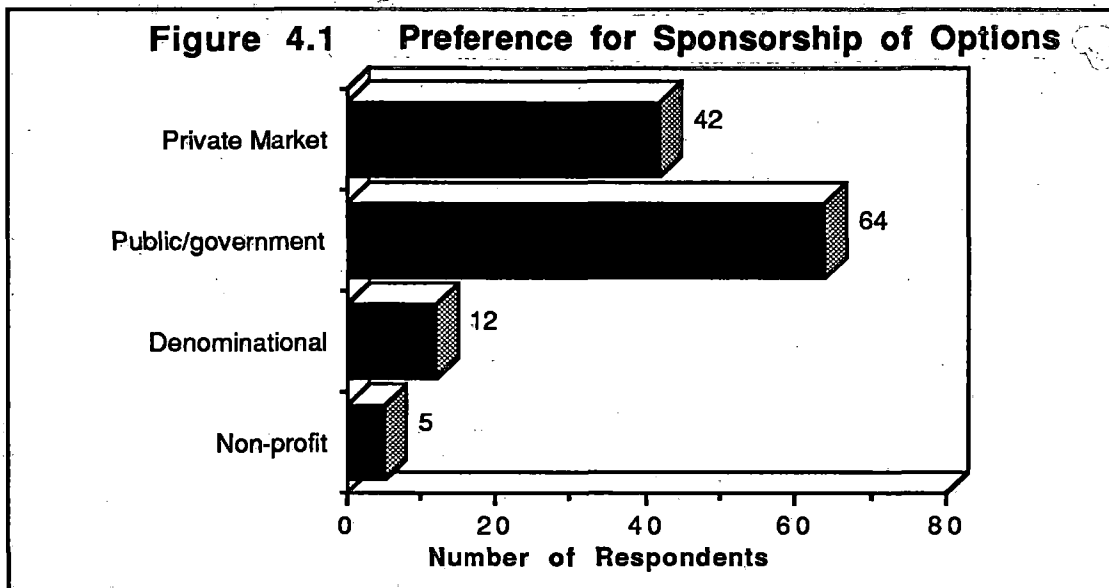
Prior to introducing study participants to available and emerging options, respondents were asked about their preferences regarding tenure, option sponsorship, and support services they would expect to have available in housing designed for seniors.

4.1 Preferred Tenure, Sponsorship and Support Services

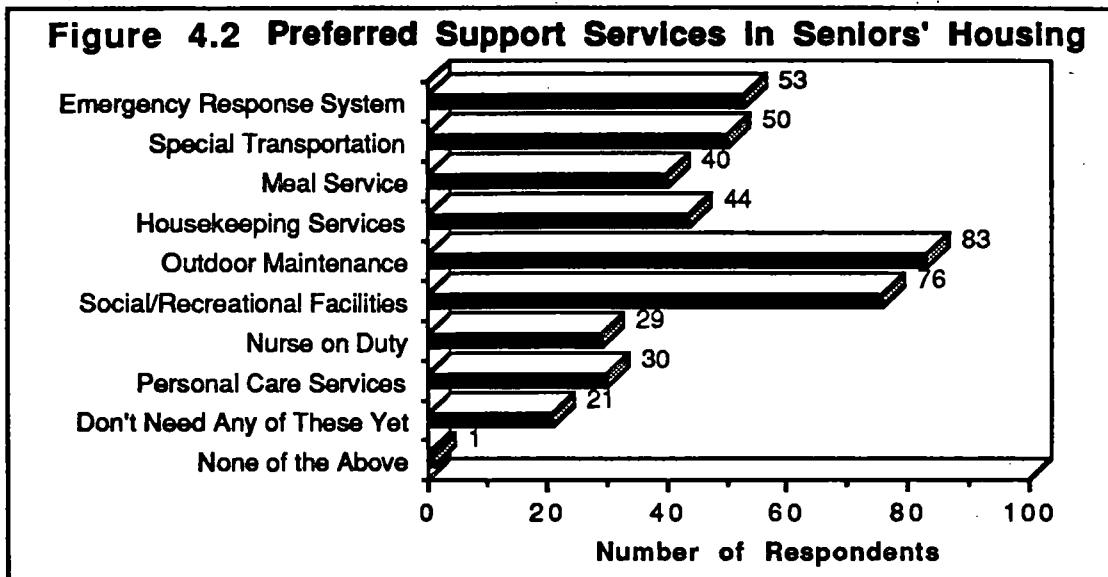
The vast majority of respondents (82%) indicated they would prefer to rent, 10 percent would rather own, and eight percent had no preference or did not know. (Note that two-thirds of the respondents in the study sample were renters. The reverse is the case in the general population of seniors which is comprised of approximating two-thirds homeowners.) Interestingly, two out of three homeowners would prefer to rent if they move and seven percent of renters would prefer to become owners.

Respondents were asked which types of housing sponsorship they would prefer and were allowed to select more than one answer. Figure 4.1 on the following page shows that the most popular form was public or government sponsorship, followed by the private market. Denominational and non-profit sponsorship were the least appealing. At the time of the interviews, only two participants were living in government subsidized self-contained apartments

(one was looking for a larger unit and the other wanted to leave a "bad" neighborhood). Increasing market rents were forcing many seniors in private apartments to seek government subsidized housing. Although non-profit housing is usually funded by government, participants did not perceive it as such.



Study participants were also asked which support services they would expect to be available in housing designed for seniors. Again, more than one answer was permitted. As Figure 4.2 shows, the most preferred services included outdoor maintenance, social and recreational facilities, emergency response systems, special transportation, meal service, and housekeeping services.



However, many respondents qualified their responses by saying that some services should be offered on an optional basis as required by residents. These options included meal service, housekeeping, and a nurse on duty.

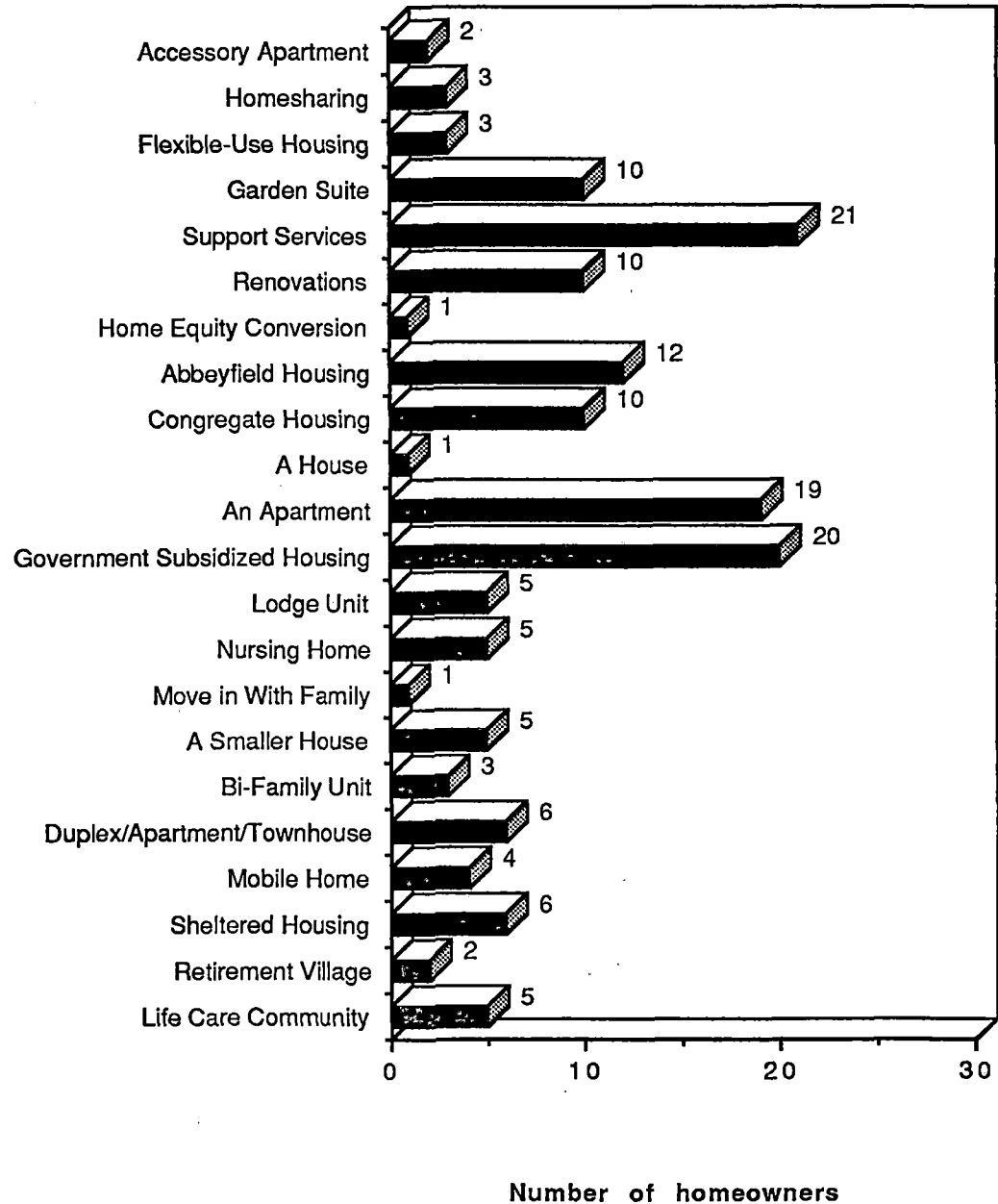
Twenty-one respondents indicated that they did not need any of these support services yet but would like to have them available when they are required.

4.2 Options for Staying Put

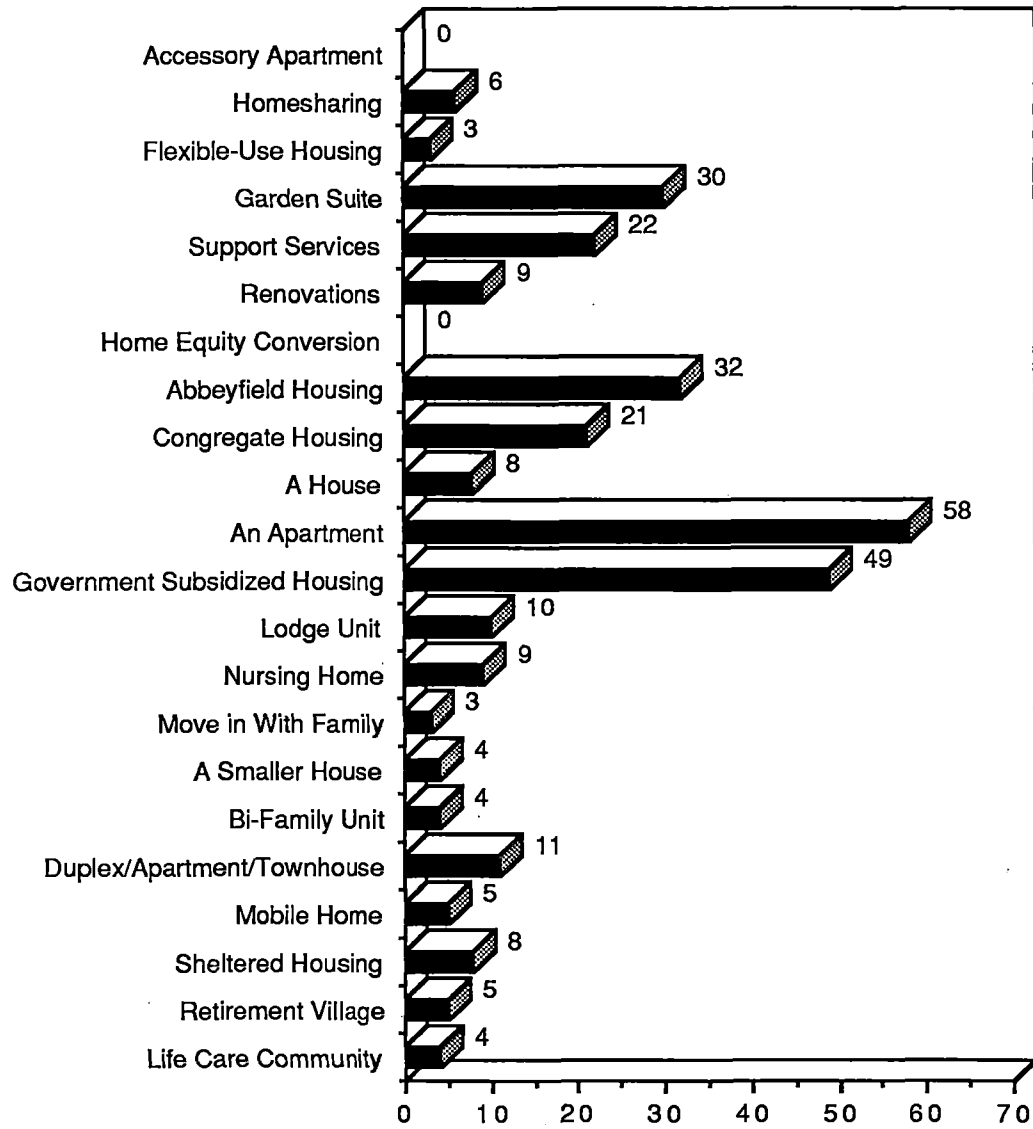
Figures 4.3 to 4.5 on the following pages represent responses of homeowners, renters, and the combined total. Support services and garden suites were the most popular options for staying put followed by renovations and homesharing. Garden suites may entail staying put or moving (to a family member's lot for example) depending on the circumstances. (Note that respondents were asked to respond to each option separately, therefore, percentage cannot be summed.)

Each option is discussed in more detail below to outline reasons for responses. In addition, each option was cross-tabulated with tenure (renters versus homeowners).

**Figure 4.3 Summary of Survey Results on Housing Options
(Options Homeowner Respondents Would Seriously Consider)**

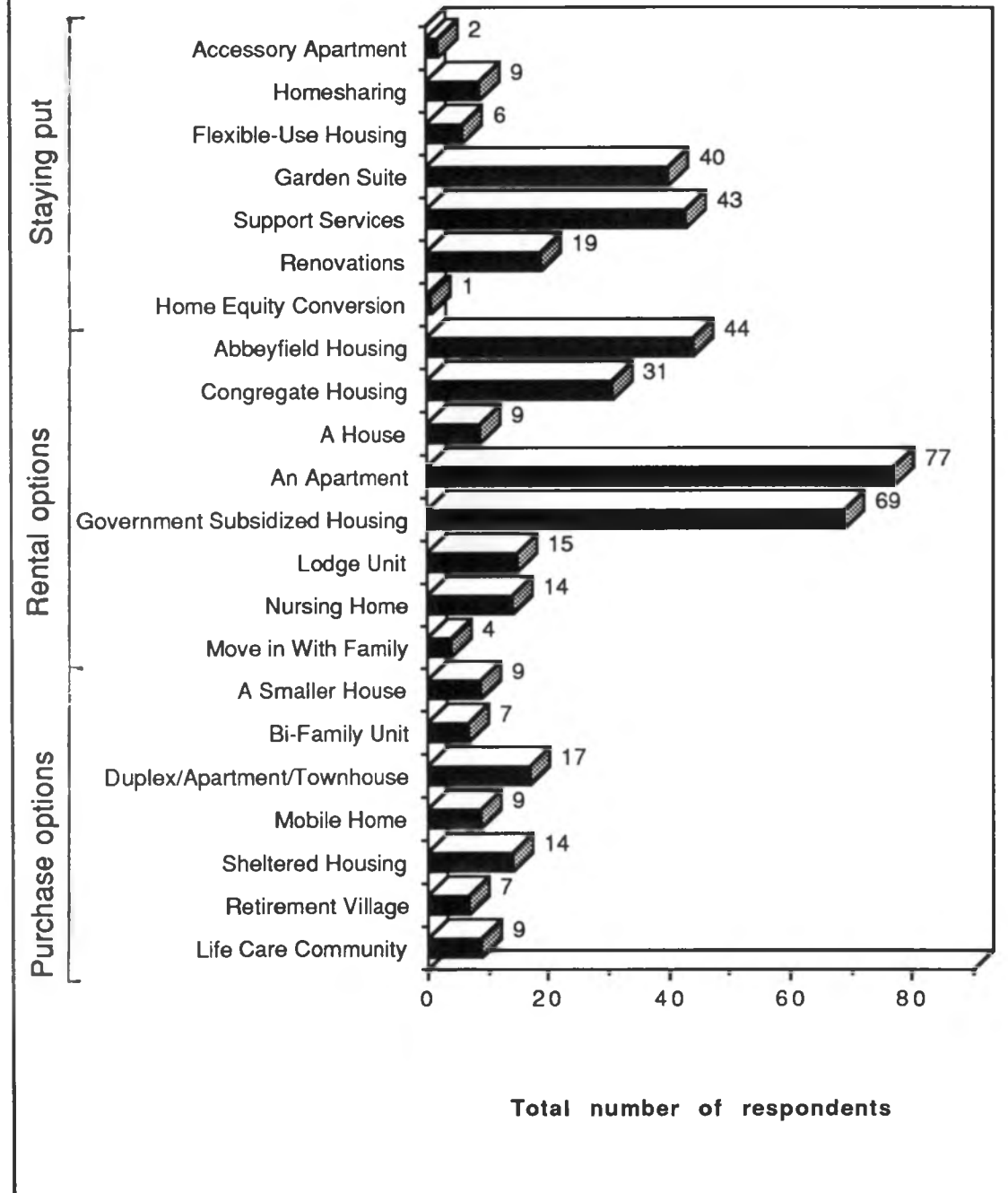


**Figure 4.4 Summary of Survey Results on Housing Options
(Options Renter Respondents Would Seriously Consider)**



Number of renters

**Figure 4.5 Summary of Survey Results on Housing Options
(Options Which All Respondents Would Seriously Consider)**



Accessory Apartment

Since the majority of respondents were renters, this option did not apply to their situation. Only two percent of participants who were homeowners would seriously consider an accessory apartment, although an additional two respondents currently have a basement suite in their home which was being rented out. Reasons for considering an accessory apartment included companionship, security, and to help share costs.

Reasons for not wanting an accessory apartment included decreased independence and privacy, not enough space, poor health, zoning problems, and difficulty in co-habiting.

Homesharing

Nine percent of respondents would seriously consider homesharing and an additional three were currently sharing their home. Interestingly, twice as many renters as homeowners would seriously consider homesharing (the reverse has typically the case in other studies) due to increasing rents. Reasons for considering homesharing included being able to help someone, share costs, and companionship if the match was compatible.

The major reasons for not wanting to share was the perception that it was an invasion of privacy and independence. Reasons that homeowners do not wish to share included "poor health, I'm too set in my ways, it wouldn't work, I do not like strangers, security problems, and it would interfere with my pension." Renters typically state that the space they live in is too small to share.

Flexible-Use Housing

Six percent of respondents would seriously consider flexible use housing to share costs and upkeep and for companionship. It was somewhat surprising that three renters would seriously consider flexible-use housing for their families' homes. In other words, senior renters would help finance a flexible-use setting in the homes of their adult children.

The major reasons for not considering flexible-use housing included "a preference for privacy and independence, my home is too small, it would not work, I'm too set in my ways, and no family to share with."

Garden Suite

Most respondents felt garden suites were an excellent idea. Forty percent of respondents would seriously consider a garden suite to be close to family yet have privacy and freedom, for security, to have help available when you need it, and to be able to do some gardening. Very surprisingly, 30 of the 40 respondents were renters who would like garden suites in the yards of their adult children's homes.

Although there was a high level of interest in garden suites, of the 40 percent who indicated they would seriously consider a garden suite, 11 did not have family currently living in Edmonton or felt there was not enough room on their lot or their family's lot. Many respondents who would consider garden suites qualified their interest with statements such as "if my son moves back to Edmonton, if my daughter's lot is large enough, and if the units are affordable."

Of the respondents who did not think they would seriously consider this option, most thought garden suites were a good idea but not for them. Many respondents did not want to be a bother or burden on their families. Others liked their current independence and privacy, did not have relatives living in Edmonton, did not have relatives with suitable lots, or did not want to babysit grandchildren.

Support Services

Forty-three percent of participants (almost an equal number of renters and homeowners) indicated they would seriously consider support services primarily to stay in their own homes for as long as possible. Support services would allow individuals with poor health to remain at home. The following list provides the percentage of respondents who indicated they would require specific services:

- emergency response system (58%)
- special transportation (58%)
- personal care services (35%)
- housekeeping services (72%)
- outdoor maintenance (84%)
- Meals on Wheels (47%), and
- social and recreational programs (53%).

The remaining respondents did not think support services were a suitable option to help them stay put at this time or wanted to move for more on-going social support (i.e., into a seniors' housing project).

Preferences for specific support services for housing developed for seniors were discussed in Section 4.1.

Renovations

Nineteen percent of respondents (a similar number of renters and homeowners) indicated they would seriously consider renovations to stay where they were currently living for as long as possible. Although renters indicated they would like their landlords to renovate units and buildings, many were referring more to redecorating. Several homeowners were thinking more of repairs or security than actual renovations.

Three homeowners have had some renovations done to their homes and others indicated they would need wheelchair access, a bathroom on the main floor, and means to get to the second floor. One respondent commented that this option would only be suitable if the government paid for the renovations.

Negative responses included wanting to sell or move, that renovations were not needed, that they don't own their own home, that their home is too large, or that their home needed too many repairs.

Home Equity Conversion

Only one respondent said she would seriously consider home equity conversion. This lady was in her late sixties, divorced, and was receiving the Guaranteed Income Supplement. She would seriously consider home equity conversion to allow her to maintain her home.

Because two-thirds of the sample were renters, this option was frequently not suitable. Twenty-four of the remaining 31 homeowners indicated that they did not need the money. Others homeowners wanted to move, did not want to lose equity, or leave debt after they die.

4.3 Options to Move

Options to move were divided into rental and purchase options. Figure 4.3 to 4.5 presented in the beginning of this section show which of these options to move would be seriously considered by respondents. Each option is also discussed below.

4.3.1 Rental Options

Abbeyfield Housing

This option was presented as a modified version of the Abbeyfield Society concept of private bed-sitting rooms and communal areas in large renovated homes. This modified version reflects research with seniors in British Columbia¹ who prefer larger, self-contained apartments and communal areas while retaining the small scale nature of the project.

Forty-four percent of respondents would seriously consider Abbeyfield housing (32 renters and 12 homeowners). Many felt that some help or care services could be provided while maintaining their privacy and independence.

¹ Murray, Charlotte (1988). *Supportive Housing for Seniors: The Elements and Issues for a Canadian Model*. Ottawa: Canada Mortgage and Housing Corporation.

Respondents also indicated that this option would give a cozy atmosphere with a small number of people and provide companionship while allowing for privacy. The type of facility would also provide a feeling of security.

Although there was a high level of interest in Abbeyfield housing, several respondents qualified their interest with such statements as "if it is reasonably priced, if the units were spacious enough, if my health deteriorates, and if the project is in a good location."

Respondents who were not interested in Abbeyfield housing wanted a purchase option, preferred congregate housing or garden suites, felt the units would be too small, or that residents may be incompatible or force too much "togetherness".

Congregate Housing

Thirty-one percent of respondents indicated they would seriously consider congregate housing (21 renters and 10 homeowners). Respondents felt congregate housing was an excellent idea with good facilities and services and was preferable to a nursing home. Several respondents qualified their interest with statements such as "if they were affordable" and "I'm not ready just yet."

Forty percent of respondents would not seriously consider this option because they felt they could not afford congregate housing. Other respondents preferred more privacy, were not ready yet, thought such projects were too luxurious, or preferred Abbeyfield housing.

Renting a House

Nine percent of respondents would seriously consider renting a house, primarily for the space. However, eight of these nine respondents were renters. Other respondents who would consider this option qualified their interest with the following stipulations: if the house was affordable, was in a quiet neighborhood, or if they were forced to sell their current home.

The vast majority (88% of renters and 97% of owners) were not interested in this option because of too much maintenance and upkeep or because of a lack of security. Others preferred purchase options.

An Apartment

Seventy-seven percent of respondents (58 renters and 19 homeowners) would seriously consider renting an apartment. (Note, however, that two-thirds of the sample were already renters, four of which rented houses rather than apartment units.) Respondents who were interested in this option liked the security and freedom apartment buildings provided, preferred adult-only buildings, and felt there were less "hassles" with maintenance and upkeep. Several respondents qualified their interest with comments such as "if units are spacious, if the location is good, and if the rent was reasonable."

Respondents not interested in apartments indicated they preferred purchase options or subsidized apartments, that rents were rising, or that they required some level of care. Some renters were considering a change of tenure from rental to ownership because of increasing rents.

Government Subsidized Apartment

Sixty-nine percent of respondents would seriously consider a government self-contained subsidized apartment (49 renters and 20 homeowners, 13 of whom were receiving the Guaranteed Income Supplement). Although only two participants were living in subsidized housing, 21% indicated that they need a subsidized apartment to ensure accommodation is affordable. (Note that 31 respondents were receiving the Guaranteed Income Supplement.) Interestingly, an additional 30 percent of respondents would consider this options if the units were spacious enough (many felt they were not) and others would if the location was good. However, it was not clear, but many of these respondents, although they are living on fixed incomes, may not be in financial need of subsidization. Many seniors may have responded positively to this option because of a lack of other affordable alternatives. For example, five respondents indicated that government subsidized units were too expensive because they would have to pay 25% of their income.

The remainder of the respondents either indicated that they did not need government subsidies, that the units were too small, or that the government invades their privacy.

A Lodge

There was overlapping of reasons regarding this option. Fifteen percent of respondents indicated they would seriously consider a lodge but only if necessary due to poor health (15 renters and 5 homeowners). However, an additional 19% of respondents would also consider a lodge if poor health made it necessary.

Others felt that lodge units were too small, they did not like bed-sitting rooms, and that the living in a lodge was too regimented.

Nursing Home

Although nursing homes are not generally labelled as a housing option, they were included in this study to see if other feasible options were preferred.

As with lodges, there was an overlapping of reasoning. Fourteen percent of respondents indicated that they would seriously consider a nursing home if it was necessary (9 renters and 5 homeowners). However, an additional 40% indicated they were "not ready for a nursing home yet" but would consider this option if their health deteriorated.

Other respondents felt that nursing homes provided a poor level of care and that multi-level care facilities would be better. Nursing homes are thought of as a last resort to independent living.

Moving In with Other Family Members

Only four percent indicated they would seriously consider moving in with other family members such as an adult son or daughter (3 renters and 1 homeowner).

One respondent felt moving in with family was preferable to a lodge. Others would only do so if they had separate living quarters within their family's home.

The vast majority would not consider moving in with family primarily because it would be incompatible with their lifestyles, would reduce their independence and privacy, and because they would not like to impose on their families.

4.3.2 Purchase Options

A Smaller House

Nine percent of respondents would seriously consider moving into a smaller house (4 renters and 5 homeowners). Homeowners felt they would retain their independence and ownership tenure and because it would be easier to maintain. Surprisingly, four renters would consider buying a small house because of increasing rents and felt that their money was being wasted.

Remaining respondents were not interested primarily because they were not interested in purchase options since they could not afford it. Others indicated that there was too much upkeep, that it would tie them down, or because of a lack of security.

Bi-Family Unit

Seven percent of study participants said they would seriously consider a bi-family unit (3 renters and 4 homeowners). Two of these respondents indicated that they now live in a bi-family unit although they may have been referring to a duplex. Reasons for considering this option included privacy, security, and living near family. As with flexible-use housing, renters would consider sharing a bi-family unit with their adult children yet retaining their independence.

The majority of respondents were not interested in bi-family units because they were not interested in buying, they could not afford it, because of too much upkeep, a lack of security, or not to impose on family.

Duplex/Apartment/Townhouse

Seventeen percent of respondents (11 renters and 6 homeowners) would seriously consider buying a duplex, apartment, or townhouse unit to maintain their independence and privacy, for security reasons, and because rents keep increasing. Several respondents would seriously consider this option only if there was no outdoor maintenance or if they were affordable.

The majority of respondents felt they could not afford this option or were not interested in buying. Others felt there was too much maintenance, did not like stairs, security was lacking, or that they had no control over who their neighbors were.

Mobile Home

Nine percent of respondents (5 renters and 4 homeowners) indicated they would seriously consider a mobile home because they could retain independence and privacy if the unit was affordable and in a good location. One respondent indicated that a seniors' project would be preferable.

Reasons for not considering a mobile home included affordability problems, too much maintenance, poor comfortability, often in poor locations, poor investments, and a lack of security (i.e., easy to break into).

Sheltered Housing

Fourteen percent of respondents indicated they would seriously consider sheltered housing (8 renters and 6 homeowners). Reasons included companionship, on-site facilities, security, privacy, and not having to move as one grows older. Interestingly, several renters indicated that they would consider purchasing into housing which would prevent another move.

Reasons for not considering sheltered housing included "not wanting to purchase a unit, not ready yet, too much togetherness, and too much like a highrise." (Although sheltered housing can also be rental units, it was included as a purchase option in this study.)

Retirement Villages

Seven percent of study participants indicated they would seriously consider a retirement village (5 renters and 2 homeowners). These respondents liked the facilities, village layout, security and privacy. Renters would consider purchasing to avoid further rental increases.

Respondents who were not interested in this option were primarily not interested in buying or could not afford it. Others were not ready yet, thought that there was too much "togetherness", preferred a highrise, or felt that there was not enough owner control.

Life Care Community

Nine percent of study participants would consider living in a life care community (4 renters and 5 homeowners). Respondents felt the concept was a good idea if it was affordable and in a good location. Care would be available in familiar surroundings when needed and one would not have to move again.

Most respondents, however, did not wish to purchase or thought they could not afford to live in a life care community. Others felt the community was too large, that they preferred government housing, or that they would be losing independence and privacy. (Although life care communities can be rental or ownership, it was presented as a purchase option in this study.)

4.4 Preferences Among Available and Emerging Options

Respondents were asked which their first and second choice of options would be among all the options discussed, regardless of whether their choice was currently available or not.

Table 4.1 on the last page of this section summarizes the housing preferences asked for a number of different times during the interview. Columns one to six summarizes preferences of participants (the values represent the number of

participants or percentages since there were 100 respondents). Column one summarizes responses to Question 21 which asked which alternatives participants were thinking about before they were presented with the various options in the study. Column 2 summarizes options that respondents indicated they would seriously consider as the interviewer explained and presented each option. Columns 3 and 4 represent respondents' first and second choice among all options (available and emerging). Columns 5 and 6 summarize respondents likely choice (given the options which were currently available in Edmonton) and their actual choice as determined through the follow-ups.

First Choice Among All Options

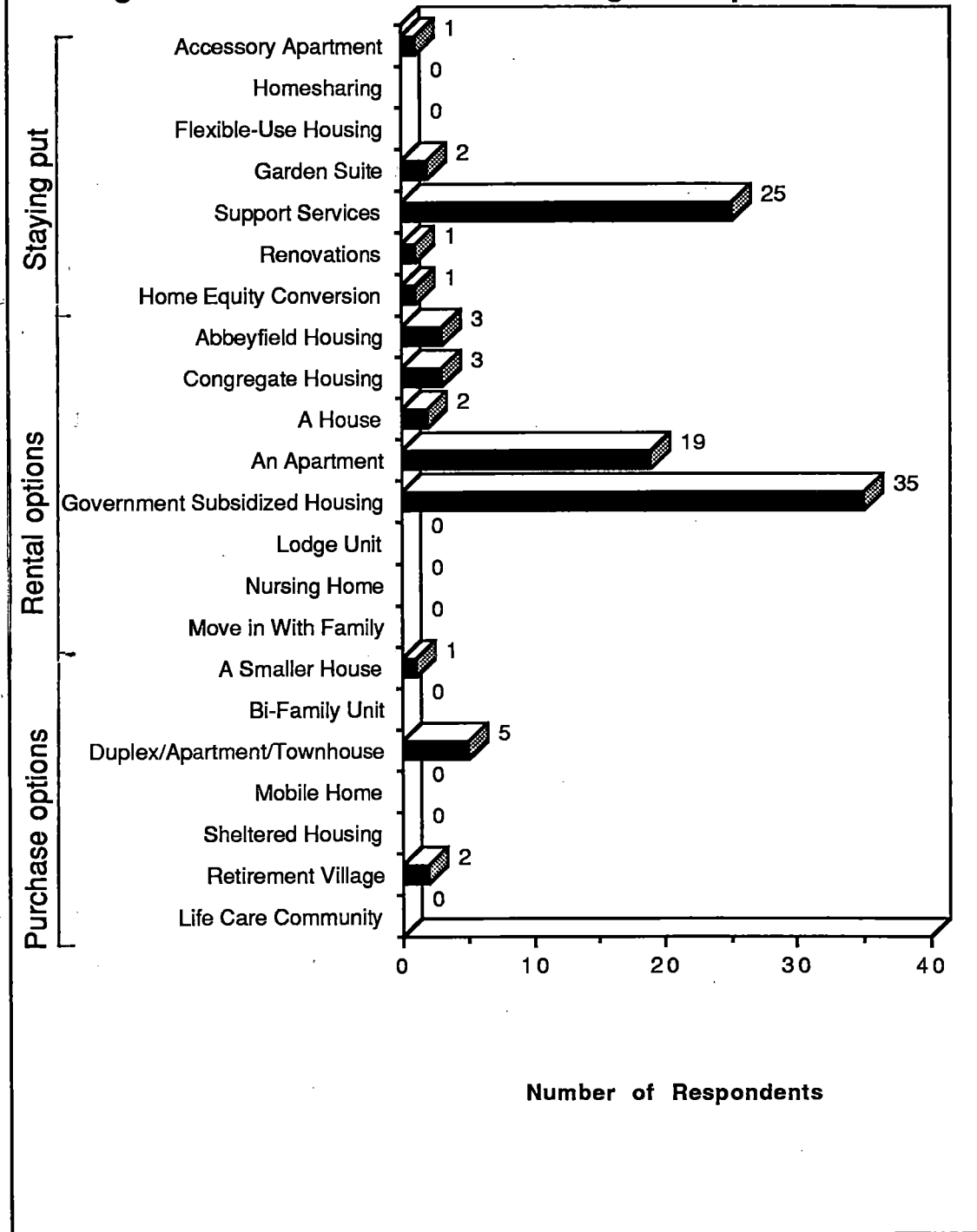
Figure 4.6 on the following page summarizes the first choice preferences of respondents, assuming that all options were available.

Two-thirds (62%) of respondents would prefer to move and rent, 30 percent would prefer to stay put in their current accommodation (both renters and owners) if possible, and only eight percent would prefer to move and purchase housing. Note that, since the sample was comprised of 68 renters and 32 owners, a few renters would prefer to become owners and vice versa. Most home owners, however, preferred to remain in their own homes as long as possible.

Of the 30 respondents who wanted to stay put, 25 would prefer support services to allow them to remain in their own home. This figure was substantially higher than the four respondents who initially indicated that they were thinking about support services as an alternative. (This is an excellent example of increasing awareness of options to better inform seniors of what alternative options are available to them.) The remaining five respondents chose a garden suite, accessory apartment, renovations or home equity conversion to allow them to stay put.

Two-thirds of the respondents preferred rental options as their first choice. Thirty-five of these respondents chose government subsidized self-contained apartments and 19 preferred market rental apartments. Three respondents preferred Abbeyfield style housing, three congregate housing, and one

Figure 4.6 First Choice Among All Options



preferred to rent a house. Although government subsidized housing in Alberta is typically low- to high- rise self- contained apartment units, participants were also interested in subsidies for newer options such as sheltered housing, Abbeyfield housing, and congregate housing.

Only eight respondents preferred purchase options. Five would select a semi-detached unit, one a smaller house and two people would prefer a retirement village unit.

Second Choice Among All Options

Figure 4.7 on the following page summarizes the second choice preferences of respondents, again, assuming all options were available.

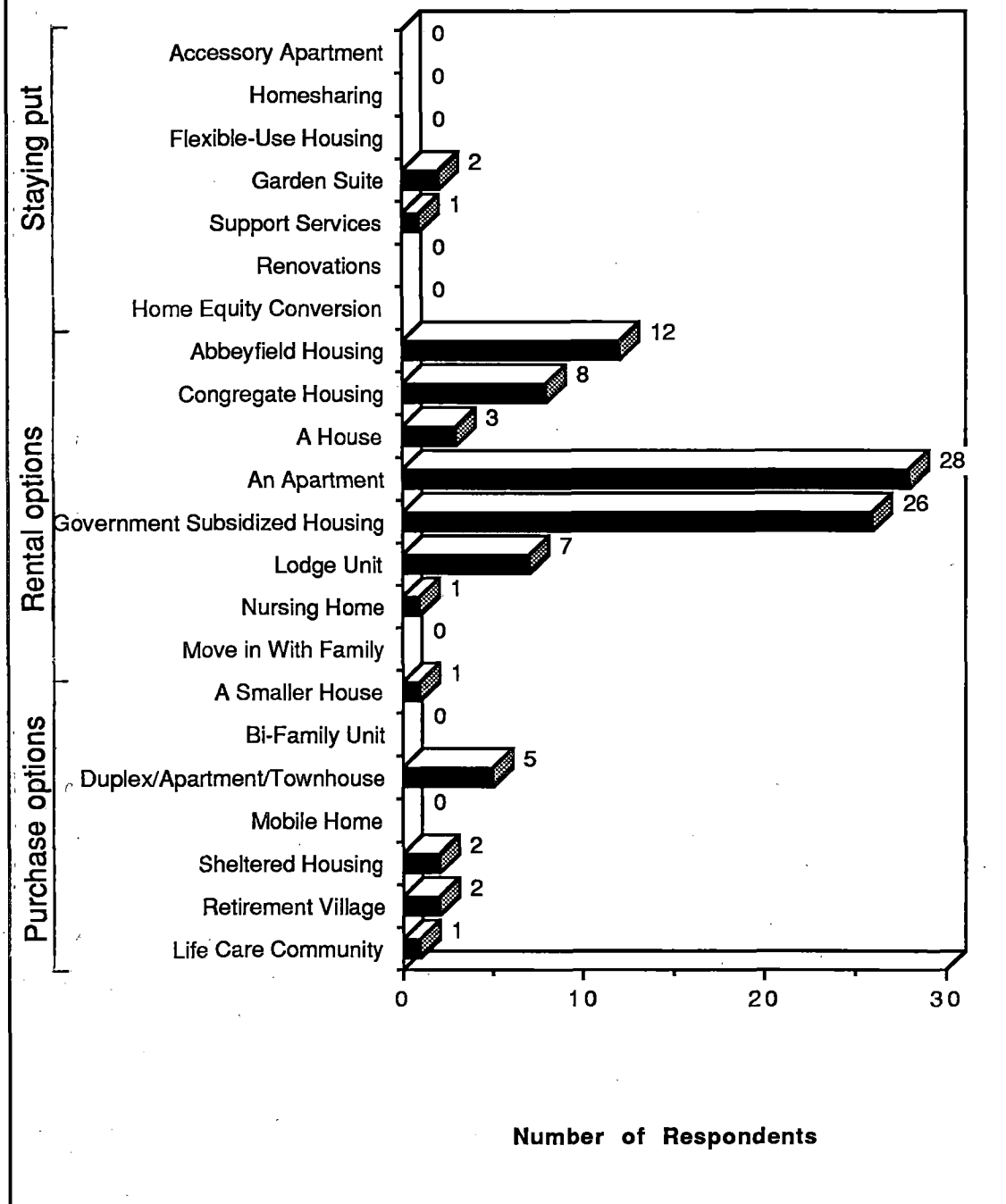
When respondents were asked for their second choice among all options (available and emerging), only three would stay put in their current homes, more people would rent (85% versus 62%) and three more respondents would purchase housing. One respondent did not have a second choice so was not forced to select one.

In analyzing respondents second choice, it becomes apparent that more people began to select emerging options such as garden suites, Abbeyfield style housing, congregate housing, sheltered housing, and life care communities. Perhaps subconsciously, people realize that many of these options are not yet available so they tend to realistically select available options first. This assumption may be supported by the higher interest in options which respondents would seriously consider.

4.5 Likely Choice Among Currently Available Options

Given the options which were currently available in Edmonton, two-thirds of respondents indicated that they would likely choose rental options, one-quarter would select options which would allow them to stay put, and 10 percent would likely select a purchase alternative.

Figure 4.7 Second Choice Among All Options



Of the 22 respondents who wanted stay put, 19 indicated that they would likely pursue support services to allow them to remain in their own homes. Two people would likely renovate their home and one would build an accessory apartment or basement suite. It is interesting to note that only four respondents had been considering support services prior to going through all the options in this study.

Of the 66 respondents who indicated they would select a rental option, 39 would likely pursue government subsidized housing, 21 would likely rent an apartment on the private market, five respondents were likely to select congregate housing, and one would probably rent a house.

Of the eleven respondents who thought they would purchase accommodation, seven thought they would likely purchase a semi-detached unit, two would buy into a retirement village unit, one would buy a mobile home, and one would purchase into a life care community.

4.6 Actual Decision

Respondents were telephoned several months after their interview to follow-up their final decision. However, in some cases, it was approximately six months between the initial interview and the follow-up while in other cases, the time lapse was only about two months for interviews which were scheduled later in the study. Actual choices are outlined in Table 4.1 on the last page of this section of the report.

Studies^{2,3,4} have indicated that seniors (particularly homeowners) generally take a long time, often up to a year, to make a decision to move. Only 18 respondents who participated in the 100 interviews actually moved within the

² Romank, Lorraine (1987). *Ownership Retirement Housing Projects in Alberta*. Edmonton: Alberta Municipal Affairs, Innovative Housing Grants Program.

³ Marketing: Why Many Elderly Choose Not to Move. *Housing the Elderly Report*, June 1987, page 3.

⁴ Dobkin, Leah. Retrofitting the American Dream. *Retirement Housing Report*, Volume 1 #8, April, 1987, page 2.

follow-up period of two to six months. The majority study participants (11 of 18) moved into accommodation which they had indicated would be their likely choice.

Of the respondents who moved, 11 were forced to do so, most because of rental increases. In fact, one widowed gentleman moved twice since July because of rental increases he could not afford. (Edmonton has experienced a series of rental increases over the past year which have seriously affected seniors on lower or moderate fixed incomes.) Four of nine respondents who moved because of rental increases moved from market rate apartments into government subsidized units. Two people down-sized from a two-bedroom to one-bedroom apartment to reduce rental costs. Three others were forced to move because their rental duplex was sold, because of an apartment fire, and because of stairs in their apartment building (because of health reasons they needed an elevator).

The remaining six respondents who were not forced to move did so for a variety of reasons:

- one renter bought a high rise condominium to avoid future rental increases
- one recently divorced renter bought a townhouse unit for freedom, security, and social reasons
- one homeowner purchased into a retirement village for freedom to travel
- one homeowner sold and moved into a seniors' apartment because of an incompatible family situation in which they shared a house
- one apartment renter moved to a seniors' apartment building for companionship with other people of the same age and recreational facilities, and
- two apartment renters moved to more suitable apartment accommodation (one needed a bigger unit to accommodate a piano, the other wanted to be closer to services and amenities).

Nineteen people had indicated they would seriously consider support services to remain in their own homes. However, two of these respondents did move: one to a smaller rented house, the other into an apartment. The remaining respondents did not want to move until they absolutely had to, when their health fails or they can no longer manage. Several people were receiving support

from Meals on Wheels, help with snow shovelling and outdoor maintenance, or help from family members. One widowed lady was homesharing with two students who help with household responsibilities. Others said they could manage for now or that their health had improved.

In analyzing the respondents who had indicated they would likely select government subsidized housing, only two participants were living in subsidized housing and nine out of 39 who were interested in such housing may not actually be in need of subsidies. These nine respondents were not receiving the Guaranteed Income Supplement nor did they give financial reasons for considering a move. Because of age, health problems, and the wish to be with people their own age, participants who were not in need of subsidized housing were interested in such accommodation. Interestingly, four people who indicated they would likely select government subsidized housing did not move into such accommodation. Several study participants commented that government subsidized units were too small and they did not wish to pay 25 percent of their income. Perhaps others fall into a gap where they cannot find, or afford, private market alternatives currently available in Edmonton which are suitable.

The remainder of the sample who did not move indicated that the weather has been too cold, that they are not quite ready to move yet, that they could not find anything suitable and were still looking, or that it was difficult to move especially when you have no family to help.

SECTION FIVE

Table 4.1 Housing Preferences
(Figures represent frequencies and percentages)

	(1)	(2)	(3)	(4)	(5)	(6)
STAYING PUT OPTIONS	Initial Choice Q21	Seriously Consider	1st Choice If Available	2nd Choice If Available	Likely Choice	Actual Choice
Accessory Apartment	0	2	1	0	1	0
Homesharing	0	9	0	0	0	1
Flexible-Use Housing	0	6	0	0	XXXXX	XXXXX
Garden Suite	1	40	2	2	XXXXX	XXXXX
Support Services	4	43	25	1	19	5
Renovations	1	19	1	0	2	0
Home Equity Conversion	0	1	1	0	XXXXX	XXXXX
Sub-Total	Can't Sum	Can't Sum	30	3	22	6
RENTAL OPTIONS						
Abbeyfield Style Housing	0	44	3	12	XXXXX	XXXXX
Congregate Housing	6	31	3	8	5	0
A House	3	9	2	3	1	1
An Apartment	35	77	19	28	21	9
Government Subsidized Apt.	43	69	35	26	39	4
Lodge Unit	6	15	0	7	0	0
Nursing Home	1	14	0	1	0	0
Move In With Family	0	4	0	0	0	0
Sub-Total	Can't Sum	Can't Sum	62	85	66	14
PURCHASE OPTIONS						
A Smaller House	2	9	1	1	0	0
Bi-Family Unit	0	7	0	0	XXXXX	XXXXX
Duplex/Apt/Townh/Condo	18	17	5	5	7	2
Mobile Home	2	9	0	0	1	1
Sheltered Housing	0	14	0	2	XXXXX	XXXXX
Retirement Village	3	7	2	2	2	1
Life Care Community	1	9	0	1	1	0
Sub-Total	Can't Sum	Can't Sum	8	11	11	4
Total	Can't Sum	Can't Sum	100	99	99	24

5.0 ATTITUDES TOWARD DESIGN FEATURES

Participants were given a visual presentation about design features and asked if they would prefer these features in their existing home, prefer them if/when they move, to only install as needed, or if they thought they were not likely to ever require these features. They were not informed, however, of the precise costs involved. Diagrams of the features are provided in the interview guide in Appendix A and statistical data on this question are provided in Appendix B.

Respondents were also asked for their overall opinion and comments regarding the importance of such design features in housing developed for older people.

5.1 Design Features Inside the Home

Several respondents indicated that they have some of the design features, such as grab bars or single lever faucets, in their current home (both renters and owners). Few people, however, indicated they would prefer most design features in their existing home, with the exception of grab bars in the bathtub. Rather, the majority of respondents preferred most of the design features in the interior of their next home if, or when, they move. It is unclear whether they thought it was impractical and/or too expensive to implement some of these features into their current home. Perhaps more likely, most respondents were not in desperate need of such features but would like them if they moved.

The following tables show preferences for design features for the interior and exterior of the home and present the number of respondents who indicated a "yes" response in each category. Table 5.1 and 5.2 summarize preferences of 68 renters and 32 homeowners, respectively. Table 5.3 summarizes the total response of all participants.

There were significant differences (i.e., more than 10%) between renters and owners for several features. A greater percentage of homeowners would like lever door handles, main floor laundry, higher electrical outlets, single lever faucets in sinks, a "soft-tub", and emergency alarm system if or when they move. More renters, on the other hand, would like lower cupboards.

Table 5.1 Renters' Preferences for Design Features

INTERIOR OF DWELLING	Number of Respondents			
	a	b	c	d
Wider halls and doorways	2	28	29	9
Patio doors that swing open	1	36	7	24
Lever door handles	6	28	24	10
Parcel shelf at entrances	3	44	10	11
Benches at entrances	8	41	8	11
Main floor laundry	14	46	7	1
Rocker panel light switch	4	41	15	8
Higher electrical outlets	4	44	12	8
Single lever faucets in sinks	9	39	10	10
Grab bars in bathtub	23	34	11	0
Grab bars near toilet	11	33	22	2
"Soft-tub"	5	47	4	12
Hand-held shower held in bathtub	16	36	7	9
Seat in shower	13	35	11	9
Pull-out shelving in kitchen	8	52	4	4
Lower cupboards and counters	8	27	9	23
Emergency response system	4	26	36	2
Burglar alarm system	1	31	31	5
EXTERIOR OF DWELLING				
No stairs or steps	5	25	37	1
Ramps	4	11	46	7

- a. like this feature in my existing home
- b. like this feature if/when I move
- c. only install this feature when required
- d. not ever likely to need this feature

Table 5.2 Homeowners' Preferences for Design Features

INTERIOR OF DWELLING	Number of Respondents			
	a	b	c	d
Wider halls and doorways	2	13	13	4
Patio doors that swing open	1	19	6	6
Lever door handles	1	24	6	1
Parcel shelf at entrances	2	22	5	3
Benches at entrances	4	21	3	4
Main floor laundry	3	29	0	0
Rocker panel light switch	2	24	4	2
Higher electrical outlets	3	26	2	1
Single lever faucets in sinks	3	23	3	3
Grab bars in bathtub	12	17	3	0
Grab bars near toilet	4	17	10	1
"Soft-tub"	0	26	0	6
Hand-held shower held in bathtub	8	20	3	1
Seat in shower	6	16	7	2
Pull-out shelving in kitchen	3	22	5	1
Lower cupboards and counters	3	9	6	14
Emergency response system	4	16	12	0
Burglar alarm system	3	13	15	1
EXTERIOR OF DWELLING				
No stairs or steps	1	11	19	1
Ramps	1	6	21	4

- a. like this feature in my existing home
- b. like this feature if/when I move
- c. only install this feature when required
- d. not ever likely to need this feature

Table 5.3 Preferences of All Respondents for Design Features

	Number of Respondents			
	a	b	c	d
INTERIOR OF DWELLING				
Wider halls and doorways	4	41	42	13
Patio doors that swing open	2	55	13	30
Lever door handles	7	52	30	11
Parcel shelf at entrances	5	66	15	14
Benches at entrances	12	62	11	15
Main floor laundry	17	75	7	1
Rocker panel light switch	6	65	19	10
Higher electrical outlets	7	70	14	9
Single lever faucets in sinks	12	62	13	13
Grab bars in bathtub	35	51	14	0
Grab bars near toilet	15	50	32	3
"Soft-tub"	5	73	4	18
Hand-held shower held in bathtub	24	56	10	10
Seat in shower	19	51	18	11
Pull-out shelving in kitchen	11	74	9	5
Lower cupboards and counters	11	36	15	37
Emergency response system	8	42	48	2
Burglar alarm system	4	44	46	6
EXTERIOR OF DWELLING				
No stairs or steps	6	36	56	2
Ramps	5	17	67	11

- a. like this feature in my existing home
- b. like this feature if/when I move
- c. only install this feature when required
- d. not ever likely to need this feature

The majority of respondents would prefer the following features when they move:

- grab bars for the bathtub
- main floor laundry
- pull-out shelving in the kitchen
- hand-held shower head in the bathtub
- higher electrical outlets
- a seat in the shower
- grab bars near the toilet
- "soft-tub" bathtub
- rocker panel light switches
- benches at entrances
- single lever faucets in sinks
- parcel shelves at entrances
- patio doors that swing open, and
- lever door handles.

The design features listed above represent preferences of older people and should be seriously considered in the development of housing for seniors. They also represent opportunities for developers who want to be leaders or innovators in the retirement housing marketplace.

Further, more than 10 percent of respondents would like the following features in their existing homes:

- grab bars for the bathtub (35%)
- hand-held shower in the bathtub (24%)
- seat in the shower (19%)
- main floor laundry (17%)
- grab bars near the toilet (15%)
- benches at entrances (12%)
- single lever faucets in sinks (12%)
- pull-out shelving in the kitchen (11%), and
- lower cupboards and counters (11%).

The results of this part of the study dealing with design features present opportunities for the industry to respond to seniors' housing needs.

Features such as patio doors that swing open, burglar alarms, and wider hallways and doors were design features which many respondents felt should be installed as they are needed. Wider halls and doorways are difficult to change after they have been built and developers of all housing need to seriously consider incorporating this element as universal, barrier-free design for the entire population. One can argue that wider hallways and doorways not only make maneuvering a wheelchair easier but also makes moving furniture much easier as well.

The only features that a significant number (approximately one-third) of respondents felt they would not likely to ever require were lower cupboards or counters and patio doors that swing open. Sliding doors could also be appropriate to seniors' needs.

5.2 Design Features Outside the Home

More than half of respondents felt that exterior stairs or steps (56%) and ramps (67%) should be installed as required. Most people can manage a few outside stairs and likely feel that a ramp design solution is too institutional and displays a lack of independence. Again, if graded or gently sloped entrances could be designed and incorporated into new housing projects for seniors who required them, without an institutional appearance, this approach might gain acceptance while remaining in one's home for a longer period of time. Public access areas should have both stairs and ramps.

5.3 Additional Comments by Respondents

The response to developing seniors' housing with design features which would assist daily living and aging-in-place was overwhelming positive. All 99 respondents to this question thought that designing seniors' housing in this way would benefit older people. Comments included:

- makes it easier to cope (16 respondents)
- good idea/worthwhile (14 respondents)
- very important for seniors (13 respondents)
- necessary for older people (13 respondents)
- provides safety and security (13 respondents)
- would allow seniors to stay in their own homes (11 respondents)
- would allow more freedom/independence (10 respondents)
- cheaper/easier than adding them later (2 respondents)
- very timely (2 respondents)
- do in consultation with seniors (1 respondent)
- would move where these features were available (1 respondent)
- essential with a wheelchair (1 respondent)
- peace of mind for family (1 respondent), and
- must be affordable (1 respondent).

SECTION SIX

6.0 CONCLUSIONS

This section summarizes the findings of this study, compares these findings to Gutman's study¹ of seniors' attitudes toward various housing options, discusses market opportunities for emerging seniors' housing alternatives, and outlines recommendations made by respondents for future considerations.

6.1 General Findings of the Survey

Socio-demographics

Most respondents who participated in a personal interview were women. Nearly half the sample were widowed, about one-quarter married and the remainder were divorced, separated or single. The average age of all respondents was 70 years.

Although the vast majority of study participants were retired, more than 80 percent of female respondents had worked outside the home at some point. Most female respondents were employed in clerical, office, or skilled labor jobs. Males were typically employed in sales, supervisory, or skilled labor jobs. Educational levels reflect employment with the majority of respondents receiving some secondary, or secondary school graduation.

Although the majority of respondents were receiving Old Age Security, Spouses' Allowance, and/or Canada Pension, over one-third were receiving the Guaranteed Income Supplement which indicated that they are living on very limited incomes. Furthermore, although the majority of respondents were not financially insecure, many were experiencing financial difficulties due to increasing housing related costs. Edmonton has had low vacancy rates and several rental increases over the past year which have affected many seniors on fixed incomes who are renters. In addition, some homeowners were experiencing the equity rich, cash poor scenario.

¹ Gutman, Gloria, Stephen Milstein, and Veronica Doyle (1987). *Attitudes of Seniors to Special Retirement Housing, Life Tenancy Arrangements and Other Housing Options*. Ottawa: Canada Mortgage and Housing Corporation.

Attitudes Toward Available and Emerging Options

Rental options were most preferred largely because of the number of renters in the study, followed by options for staying put.

1. Options for Staying Put

About four in ten seniors would seriously consider support services or garden suites to remain in their own homes or their families' homes in the case of garden suites. Respondents indicated they liked the privacy, freedom, independence, and yard offered by living in their own home. About one in five respondents would seriously consider renovating their home to allow them to remain. Ten percent or less would seriously consider each of the following options: accessory apartments, homesharing, flexible-use housing or home equity conversion.

2. Rental Options

Nearly 80 percent of respondents (85% of renters and 60% of owners) would seriously consider renting a private market apartment. Respondents would consider private market apartments for security, freedom, adult-only buildings, and less "hassles" with maintenance and upkeep.

Seven out of ten participants indicated they would seriously consider a government subsidized self-contained apartment. Market rents have increased several times over the past year in Edmonton and many seniors on fixed incomes were experiencing financial difficulties. Although only two respondents were living in government subsidized housing, the majority of those who would consider this option were in financial need, including homeowners who were equity rich but cash poor.

Three to four out of ten respondents would seriously consider Abbeyfield style housing and congregate housing for support services, amenities and companionship without losing their privacy and independence. Seniors would seriously consider lodges and nursing homes only as a last resort if they were in very poor health and required a higher level of care. Very few respondents

would seriously consider moving in with family because it would reduce their independence and privacy and because they do not want to impose on family members.

3. Purchase Options

About one in five respondents would seriously consider purchasing a semi-detached unit , "condominium" apartment or sheltered housing unit. Such options would provide privacy, independence, security, companionship, on-site facilities, and allow them to age-in-place. Ten percent or less would seriously consider buying a smaller house, a bi-family unit, a mobile home, or a unit in a retirement village or life care community.

Actual Decisions

Respondents were telephoned several months after their interview to follow-up their decisions. Three-quarters of respondents had not made their final decision at this point. Many indicated that they would prefer to remain where they were and that moving was very difficult for older people. Several people indicated that they will continue looking for alternatives when the weather improves or if their rent increases again.

Of the respondents who made a final decision, the majority (14 respondents) chose rental options that included apartment units, government subsidized housing, and a rental house. Support services and homesharing allowed six respondents to remain in their own homes. Another four respondents purchased apartment or townhouse units, a mobile home and a retirement village unit.

Because of high rents and rental increases, three renters turned homeowners (a high-rise condominium, a retirement village unit and a mobile home) and four private market apartment renters moved to government subsidized units.

them to remain in their own homes. As in Gutman's study, respondents saw companionship and reduction of costs as advantages, but incompatibility and loss of privacy as potential problems.

The least acceptable option for remaining in their own homes was the equity arrangement labelled "home equity conversion" in this study and "reverse annuity mortgages" in Gutman's research. Both groups of respondents indicated a concern with diminishing the estate left to one's heirs.

Selling and renting was not an option that most people in Gutman's study would seriously consider. However, in this study, between one-third and two-thirds of homeowners would seriously consider rental options such as government subsidized housing (13 homeowners were receiving the Guaranteed Income Supplement), private market apartments, congregate housing and Abbeyfield housing. Homeowners thought these options were generally affordable, provided security, recreational and social facilities, and were a solution to home maintenance.

Buying a smaller single family detached dwelling was considered a viable option typically by younger homeowners in both studies. Others felt that there would still be too much maintenance and upkeep. There was more interest in purchasing a mobile home in this study providing the project was in a good location.

More than half the homeowners in Gutman's study would consider buying a unit in an apartment or townhouse development versus less than 20 percent in this study. However, there was consensus that this option carried less responsibility than a single family home yet provides independence, privacy and security.

One-quarter of homeowners in Gutman's study would seriously consider buying a unit in a retirement village mainly for the amenities. In contrast, only six percent of the homeowners in this study would consider this option. Similarly, about one-third of homeowners versus less than 20 percent would seriously consider multi-level complexes or life care communities because they would not have to move again if they needed more care. As in Gutman's study, it was

somewhat surprising that a higher proportion of younger seniors between the ages of 55 to 64 years would seriously consider this option.

When asked which support features for seniors' housing developments were most attractive to them, a similar proportion of study participants in both studies would like meal service, housekeeping services, personal and medical care as required. Edmontonians were substantially more interested in social and recreational facilities and emergency response systems for seniors' housing projects.

When asked which options they would chose if all options were available, there were similar proportions of choices with the exception of life care communities or multi-level care which was substantially higher in Gutman's study.

Although there were many similarities among findings of both studies, many of the homeowners in this study would seriously consider rental options.

6.3 Market Opportunities

Study findings indicate that there is substantial interest in emerging housing options including Abbeyfield housing, congregate housing, garden suites, sheltered housing, and renovations. There are also smaller markets for homesharing, accessory apartments, flexible-use housing, bi-family units, mobile home developments, retirement villages and life care communities.

Developers or sponsors of housing for seniors must be sensitive to local differences, needs and preferences. There are opportunities for innovative projects such as a combining garden suites with a mobile park setting which provides not only social and recreational facilities but provisions for other required services. Small scale Abbeyfield housing is appealing to seniors providing they are designed with self-contained units of reasonable size. Affordable congregate housing is another market opportunity which may be feasible as a joint venture with private industry and non-profit sponsors.

Table 6.1 on the following page summarizes target markets by sex, marital status, age and tenure for those respondents who would seriously consider these options. Note that these target markets were developed from a relatively small convenience sample. Some options such as Abbeyfield housing, congregate housing, lodges and nursing homes do not reflect typical residents or primary targets for such projects but rather, reflect respondents in this study who would seriously consider such options, now or in the future.

6.4 Conclusions and Recommendations for Future Considerations

Study participants indicated that they enjoyed the interview, that they learned more about seniors' housing options, and that it was commendable that the government was taking the initiative to listen to seniors regarding their housing needs and preferences.

Although general comments were not solicited from respondents because of the lengthy interview, many participants did provide the following comments and recommendations for future housing projects:

- develop affordable housing
- develop government subsidized units for options such as sheltered housing, Abbeyfield and congregate housing
- ask seniors what they want in housing
- freeze or put a ceiling on rents for seniors
- provide multi-level care facilities in one location
- build larger, more spacious units which have two bedrooms including government subsidized units
- use larger windows
- locate projects near recreational and social facilities or on-site
- offer optional support services such as meals, housekeeping, personal care
- include balconies or patios
- provide elevators
- use design features to promote safety, security, comfort and independence
- develop projects that will allow seniors to remain as long as possible
- develop projects in familiar neighborhood surroundings

Table 6.1 Target Markets											
	Sex			Marital Status			Age			Tenure	
	F	M	C	M	W	D/S/N	55-64	65-74	75+	Rent	Own
STAYING PUT OPTIONS											
Accessory Apartment
Homesharing			.	^				.		.	.
Flexible-Use Housing
Garden Suite		
Support Services		^
Renovations		
Home Equity Conversion
RENTAL OPTIONS											
Abbeyfield Style Housing		
Congregate Housing		^			
A House		^			.	
An Apartment	^	
Gov't Subsidized Apt.	
Lodge Unit	
Nursing Home	
Move in With Family		
PURCHASE OPTIONS											
A Smaller House	
Bi-Family Unit	
Duplex/Apt/Townh/Condo	
Mobile Home		.	.	.			^				.
Sheltered Housing	
Retirement Village		
Life Care Community

Sex: F = females M = males C = couples

Marital status: M = married W = widowed D = divorced S = separated N = never married

Note: These target markets are based on a relatively small sample. Some options such as Abbeyfield, congregate, lodges and nursing homes do not accurately reflect all typical residents, but rather, respondents in this study who were seriously interested in such options, now or in the future. Additional research on specific target markets should be conducted prior to the development of new housing developments.

^ represents statistically significant categories at P=>0.05

- locate projects in safe neighborhoods and near public transportation, shopping and other services
- provide air conditioning and better thermostatic control in apartments
- plan for live-in caretakers in projects
- provide space for flower gardening
- frost-free refrigerators
- good construction
- good security
- design all living spaces on one floor; no stairs
- build large storage areas and closets
- have adequate laundry facilities on the same level as living space
- use construction techniques to ensure quite units, and
- provide kitchens even in projects which have meal service available.

In summary, as emerging options become more available many seniors will seriously consider moving, or remaining at home with support options, to better meet their needs and preferences as they age. As seniors become more aware of new options, they will begin to select non-traditional, emerging options -- options which are conveniently located in familiar surroundings, are low-maintenance, are affordable, provide social and recreational facilities, and are designed to assist daily living and aging-in-place.

APPENDICES

APPENDIX A: Interview Questionnaire and Guide

Interview Questionnaire

HOUSING OPTIONS STUDY

Name _____

Telephone _____

Contact _____

Interviewer _____

Date _____

Walk-in

From file

Follow-up of final choice: _____

Major reasons for the decision:

SUMMARY

PART I - PARTICIPANT INFORMATION

We ask that you provide the following information so that we may describe the overall characteristics of the people interviewed. Your responses will be confidential and anonymous.

1. Year of **birth** ____ (F) ____ (M)
 2. **Sex** female male
 3. Present **marital status**
 - married
 - widowed
 - separated
 - divorced
 - never married
 4. Present **employment status**
 - F M
 - work full-time
 - work part-time
 - retired
 - unemployed
 - not in work force
 5. Present **occupation** or major pre-retirement occupation if retired
 - F _____
 - M _____
 6. Your judgement of current **health**
 - F M F M
 - excellent fair
 - good poor
 7. Highest level of **education**
 - F M
 - primary school
 - some secondary school
 - secondary school graduation
 - some college or university
 - university degree
 - graduate or professional degree
 8. What **pensions or financial assistance** do you receive?
 - Old Age Pension or Spouse's Allowance
 - Guaranteed Income Supplement
 - Other _____
 9. Is your **present home** a
 - single family house
 - duplex, row house/ townhouse, semi-detached
 - apartment mobile home
 - other _____
 10. Who lives in **current household**?
 - self spouse
 - children (number: _____)
 - other relatives (number: _____)
 - non-relatives (number: _____)
 11. Total # of **people** in household ____
 12. Which **neighborhood** do you live in? _____
 13. How many **years** have you lived in this location? _____
 14. How many **bedrooms** are there in your current home? _____
 15. Do you rent own
- Ask Q 16 - 19 only if an owner.**
16. Type of **homeownership**
 - own property and dwelling
 - own dwelling, lease the land
 - condominium
 - shares in a cooperative
 - other _____
 17. What do you estimate your home would **sell for** on today's market?
\$ _____

18. Do you currently have a **mortgage** on your home? If so, how much?
- No mortgage
 - Mortgage of \$ _____

19. Are you seriously **considering selling** your current home?
- Yes No/not yet
 - My spouse has

Ask everyone Q 20 - 26

20. What are your **major reasons** for considering other types of housing?

21. What type of housing or housing arrangement are you **considering?** (**do not read categories**)
- staying put with support services
 - staying put with renovations
 - moving in with family
 - homesharing
 - a smaller house
 - duplex, townhouse, or row house
 - apartment
 - condominium
 - accessory apartment or basement suite
 - congregate housing
 - retirement village
 - mobile home
 - life care community
 - subsidized seniors' apartment
 - lodge
 - nursing home
 - other _____

22. Do you consider this a **final move?**
- Yes / hope so
 - No / unlikely
 - Don't know

23. Would you prefer to **remain** where you now live if possible?
- Yes (why?) _____
 - _____
 - _____
 - No (why?) _____
 - _____
 - _____

24. If you move, would you prefer to
- Rent Own No pref.

25. Which of the following types of housing **sponsorship** would you prefer? (more than one may be selected)
- non-profit
 - denominational
 - public / government
 - private market

26. If you were moving to housing **specifically designed for seniors**, which of the following **support services** would you expect to be available?
- Emergency response system
 - Special transportation
 - Meal service
 - Housekeeping services
 - Outdoor maintenance
 - Social / recreational facilities
 - Nurse on duty
 - Personal care services
 - Don't need any of these yet
 - None of the above

PART II - HOUSING OPTIONS

STAYING PUT.....

• ACCESSORY APARTMENTS

Is putting an accessory apartment or suite in your home something you would seriously consider doing?

Yes

No

Have a suite

Only if family / if desperate / if in poor health / if alone

Don't know

Other _____

Why? / Why not?

• HOMESHARING

Is homesharing something you would seriously consider?

Yes

No

Yes but only if shared with someone younger / in same predicament / a relative

Only as a last resort to prevent institutionalization

Is homesharing now

Discussed sharing with other seniors we know and would hire a nurse to share

Don't know

Other _____

Why? / Why not?

• FLEXIBLE-USE HOUSING

Is flexible-use housing something you would seriously considering doing?

Yes

No

Don't know

Other _____

Why? / Why not?

• GARDEN SUITES

Is a garden suite something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• WITH SUPPORT SERVICES

Is staying put in your own home with the assistance of support services something you would seriously consider?

- Yes No Don't know
 Other _____

Why? / Why not?

If **yes**, ask which of the following support services would be required.

- Emergency response system
- Special transportation
- Personal care services
- Housekeeping services
- Outdoor maintenance
- Meals on Wheels
- Social and recreation programs

• WITH RENOVATIONS

If some renovations were done to your current home would you seriously consider staying?

- Yes No Don't know
 Other _____

Why? / Why not?

• WITH HOME EQUITY CONVERSION

If you could convert some of your home equity into cash, would you seriously consider staying in your own home?

- Yes No Don't know
 Other _____

Why? / Why not?

RENTING...

• ABBEYFIELD CONCEPT

Is Abbeyfield housing something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• CONGREGATE HOUSING

Is congregate housing something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• RENTING A HOUSE

Is renting a house something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• RENTING AN APARTMENT

Is renting an apartment something you would seriously consider ?

Yes No Don't know

Other _____

Why? / Why not?

• GOVERNMENT SUBSIDIZED SELF-CONTAINED APARTMENTS

Is renting a government subsidized apartment something you would seriously consider ?

Yes No Don't know

Other _____

Why? / Why not?

• A LODGE

Is moving into a lodge something you would seriously consider ?

Yes No Don't know

Other _____

Why ? / Why not?

• A NURSING HOME

Is moving into a nursing home something you would seriously consider ?

Yes No Don't know

Other _____

Why? / Why not?

• MOVING IN WITH FAMILY

Is moving in with family something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

BUYING...

• A SMALLER SINGLE FAMILY HOUSE

Is buying a smaller house something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• BI-FAMILY UNITS

Is bi-family housing something that you would consider doing?

- Yes No Don't know
 Other _____

Why? / Why not?

• DUPLEX, APARTMENT, OR TOWNHOUSE

Is buying a duplex, apartment unit, or townhouse something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• A MOBILE HOME COMMUNITY

Is buying a mobile home something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• SHELTERED RETIREMENT HOUSING

Is sheltered retirement housing something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• RETIREMENT VILLAGE

Is buying a retirement village unit something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

• LIFE CARE COMMUNITY

Is buying a house or unit in a life care community something you would seriously consider ?

- Yes No Don't know
 Other _____

Why? / Why not?

PART III – SPECIAL DESIGN FEATURES

Go through the drawings of special design features one by one and ask their preference for each.

	<i>Like this in existing home</i>	<i>Like this if/when I move</i>	<i>Only install as needed</i>	<i>Not likely to ever require</i>
INTERIOR OF DWELLING				
Wider halls and doorways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio doors that <u>swing</u> open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lever door handles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parcel shelf at entrances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Benches at entrances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Main floor laundry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rocker panel light switch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Higher electrical outlets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Single lever faucets in sinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grab bars in bathtub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grab bars near toilet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"Soft-tub"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hand-held shower head in bathtub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seat in shower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pull-out shelving in kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lower cupboards and counters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency response system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Burglar alarm system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EXTERIOR OF DWELLING				
No stairs or steps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ramps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is your overall opinion regarding the importance of special design features for housing developed for older people?

PART IV - LIKELY CHOICE

If all of the options we discussed were available in Edmonton at the present time, which one would be your first choice? What would be your second choice? Which option do you think you will actually choose?

STAYING PUT...

- Accessory apartment
- Homesharing
- Flexible-use housing *
- Garden suite
- Support services
- Renovations
- Home equity conversion *

RENTING...

- Abbeyfield concept *
- Congregate housing
- A house
- An apartment
- Gov't subsidized apt
- Lodge unit
- Nursing home
- Move in with family

BUYING...

- A smaller house
- A bi-family unit *
- Duplex, apt, townhouse
- Mobile home
- Sheltered housing *
- Retirement village
- Lifecare community

* NOT AVAILABLE IN ALBERTA
AT THIS TIME

Interview Guide

SENIORS' HOUSING ALTERNATIVES STUDY

ALTERNATIVES for STAYING PUT

STAYING PUT WITH AN ACCESSORY APARTMENT



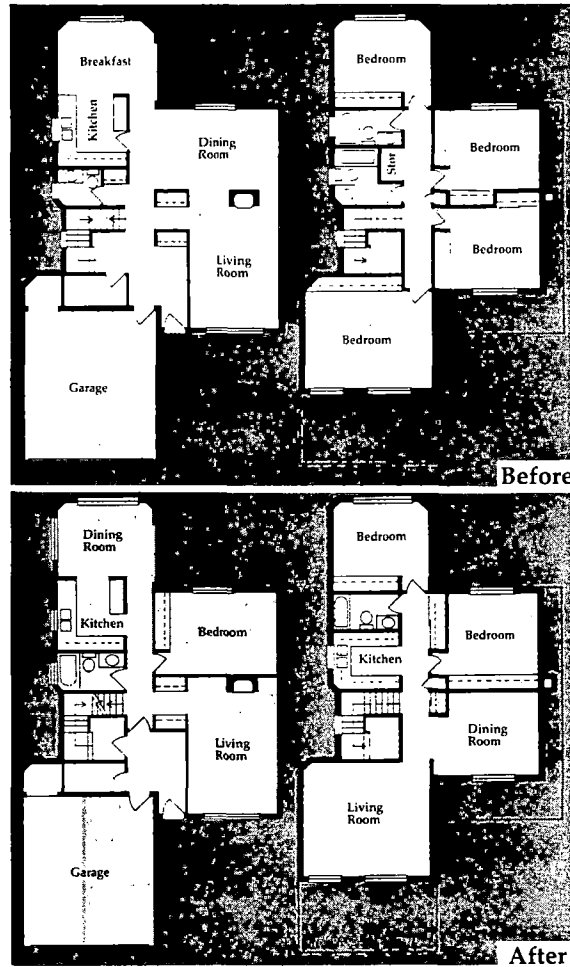
- **a small self-contained suite built in an existing home**
- **built in an older person's home or....**
- **built in a family member's home to accommodate an older relative**

STAYING PUT WITH HOMESHARING



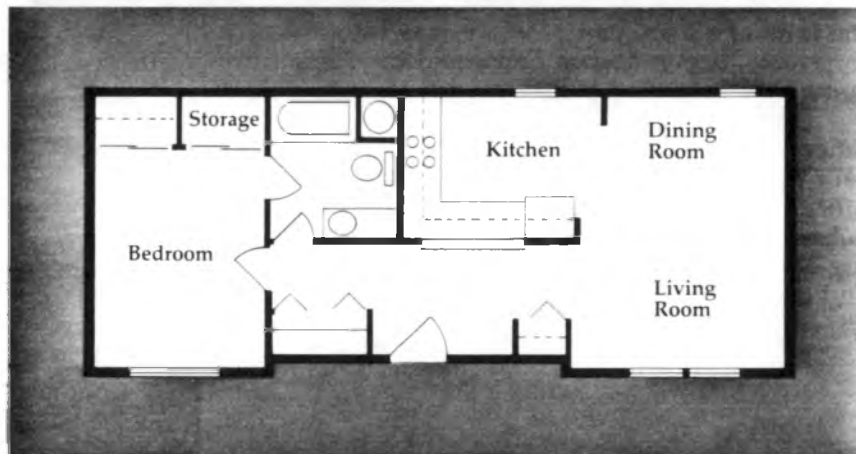
- **sharing your home with another (unrelated) person**
- **similar interests, habits, hobbies**
- **matched by using your preferences**
- **may arrange exchange of services for reduction in rent**

STAYING PUT WITH FLEXIBLE - USE HOUSING



- similar to an accessory suite but...
- designed and built so that it can be adapted and used by different family members as the family ages
- converted on a temporary or permanent basis
- could be used by children or an older relative

STAYING PUT WITH A GARDEN SUITE



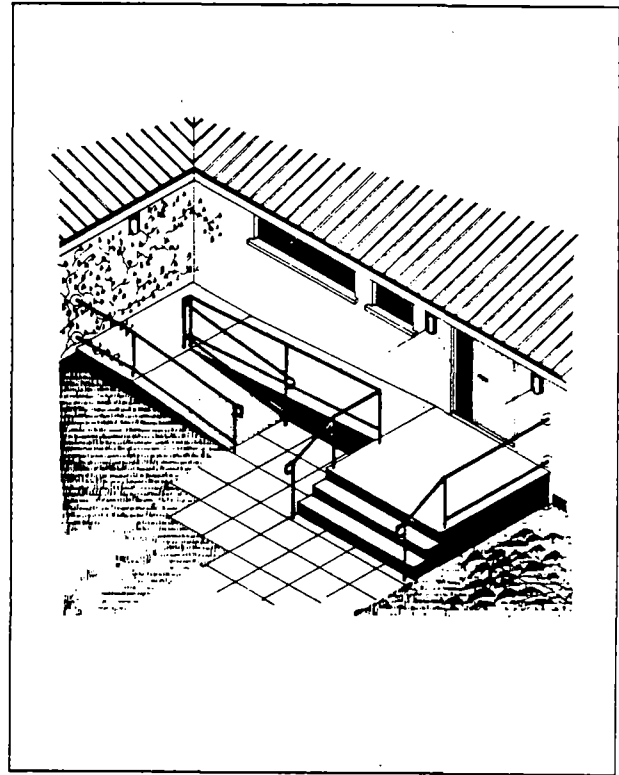
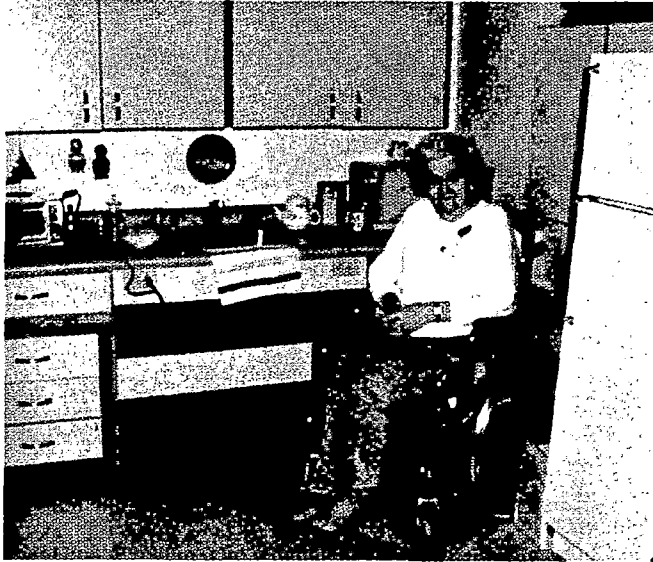
- also called a granny flat
- temporary units that are movable
- placed on a relative's lot or your own lot
- bedroom, living room, kitchen, bathroom, storage, laundry

STAYING PUT WITH SUPPORT SERVICES



- **meals on wheels**
- **emergency response system**
- **special transportation**
- **homecare services**
- **visiting homemaker**
- **social and recreational programs in the community**
- **counselling and information**

STAYING PUT WITH RENOVATIONS



- would allow you to remain in your own home
- e.g., ramps, lower cupboards, wider doorways, stairway seat "elevators"

STAYING PUT WITH HOME EQUITY CONVERSION



- a new type of financial arrangement
- e.g., a reverse mortgage
- allows older people to use assets for increased income
- lender provides a lump sum loan or monthly payments to you
- repaid when term expires, owner dies, or home is sold

RENTAL ALTERNATIVES

RENTING ABBEYFIELD HOUSING



- popular in Britain
- a large house for 7 to 10 people
- small, private self-contained 'apartments'^{*}
- two main meals served in residence dining room
- live-in housekeeper / manager
- operated by a non-profit society

* MODIFIED

RENTING CONGREGATE HOUSING



- private self-contained apartments with small kitchen
- residence dining room, social and recreational facilities
- often have a chapel, nurse, security desk

RENTING A HOUSE



- renting a house in the same neighborhood, another community or another city

RENTING AN APARTMENT



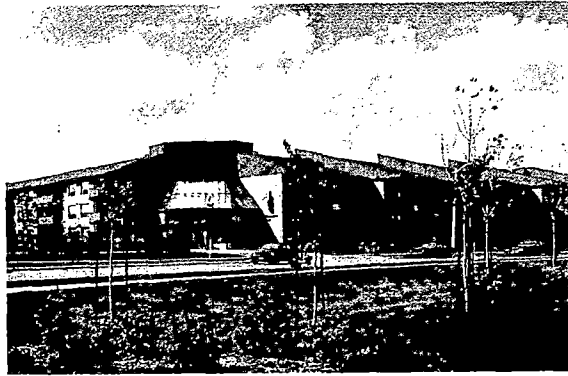
- **apartments vary from low- to high-rise buildings**
- **range from small to large, self-contained units**

RENTING A GOV'T SUBSIDIZED APARTMENT



- **typically bachelor or one-bedroom units**
- **some 2-bedroom units available for couples**
- **rent geared to income**

RENTING A LODGE UNIT



- **single or double besitting rooms**
- **government subsidized**
- **meals**
- **some personal care services**
- **social programs**

A NURSING HOME



- room and board
- standard, semi-private, and private rooms
- personal care
- nursing supervision

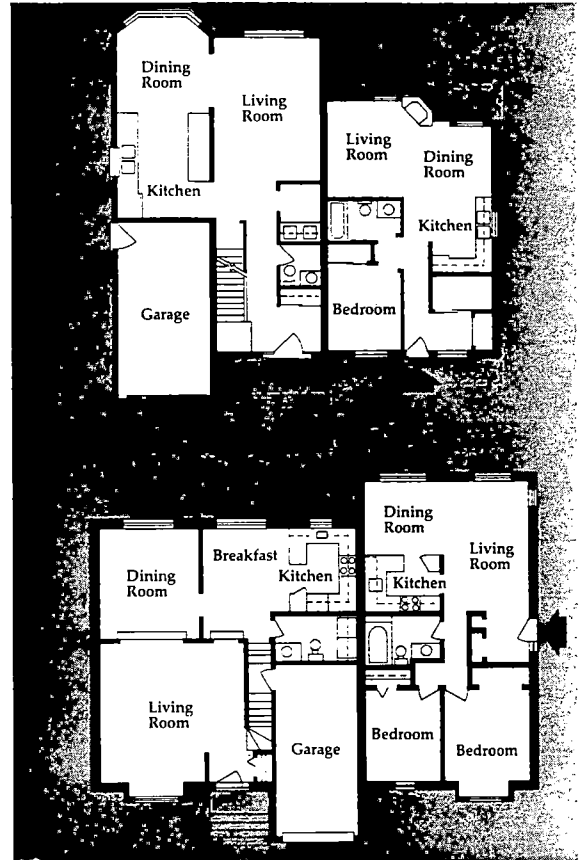
MOVING IN WITH FAMILY



- moving into a family member's home

PURCHASE ALTERNATIVES

BUYING A BI - FAMILY UNIT



- 2 dwellings side-by-side
- the larger unit is occupied by family
- the other unit is a smaller self-contained unit
- both identifiable from the street
- each has own entrance and address

BUYING A MOBILE HOME



- **mobile retirement communities**
- **attractive, peaceful, rural areas**
- **social and recreational facilities**
- **spacious units**
- **attractive designs**
- **unit is purchased, space is rented**

BUYING SHELTERED HOUSING



- units are purchased
- also popular in Britain
- specially built for older people
- 20 to 50 single-family homes or apartments
- emergency response systems
- social, recreational, and guest rooms
- limited care services such as meals

BUYING IN A RETIREMENT VILLAGE

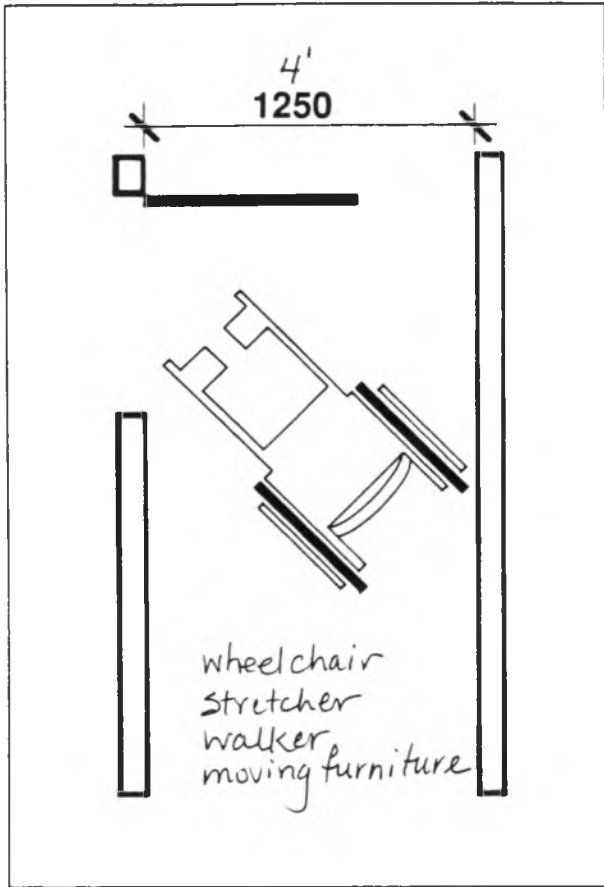


- typically 4- or 5-plex units
- single story
- generally 35 to 80 units in Edmonton
- between 100 and 200 units in other areas of Canada
- social / recreation center
- usually condominium ownership
- outdoor maintenance is provided
- attached garage, small patio
- often near services such as shopping and medical

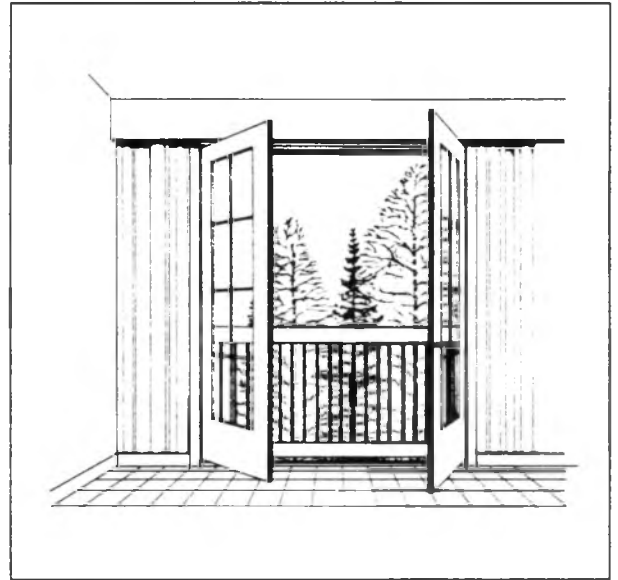
BUYING IN A LIFECARE COMMUNITY



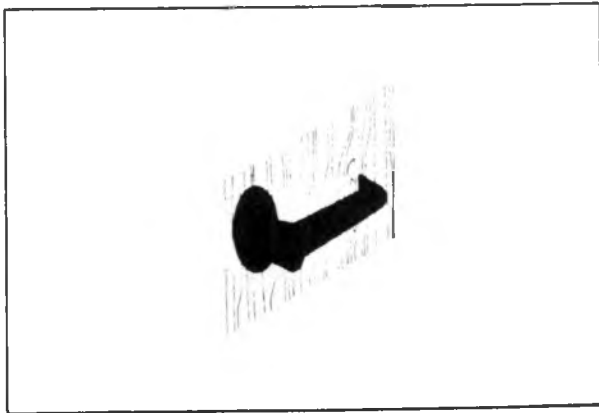
- popular in the United States
- independence is encouraged
- increasing levels of service and medical care as needed
- usually between 100 and 500 units in the lifecare community
- units range from houses to apartments
- residential rather than institutional environment
- recreational and social facilities



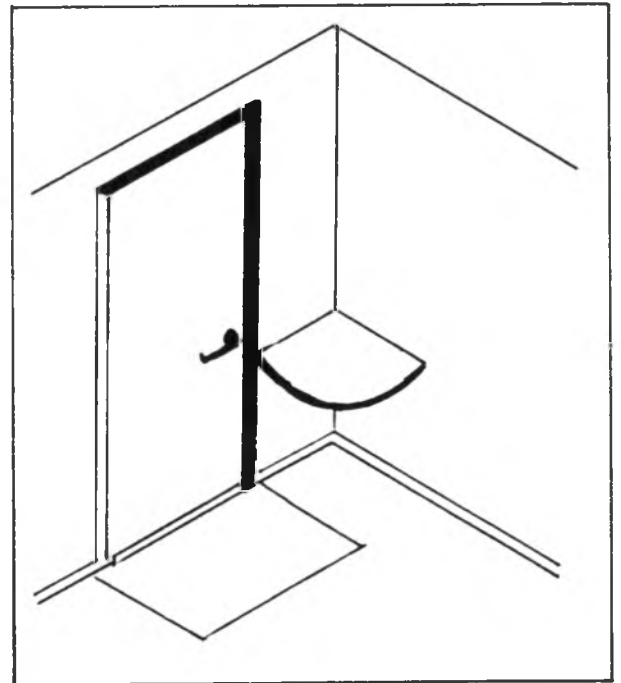
Wider halls and doorways



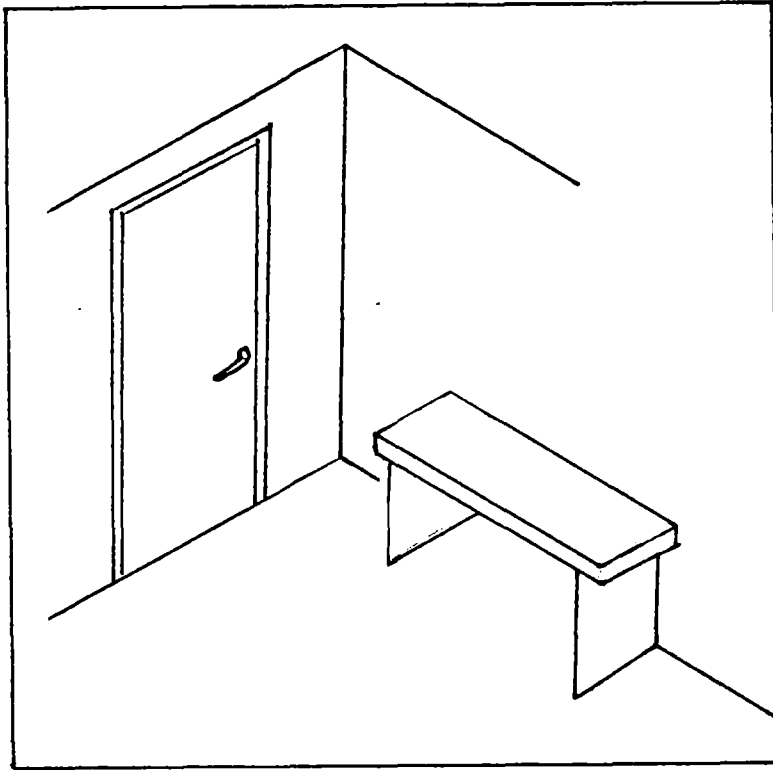
Patio doors that swing open



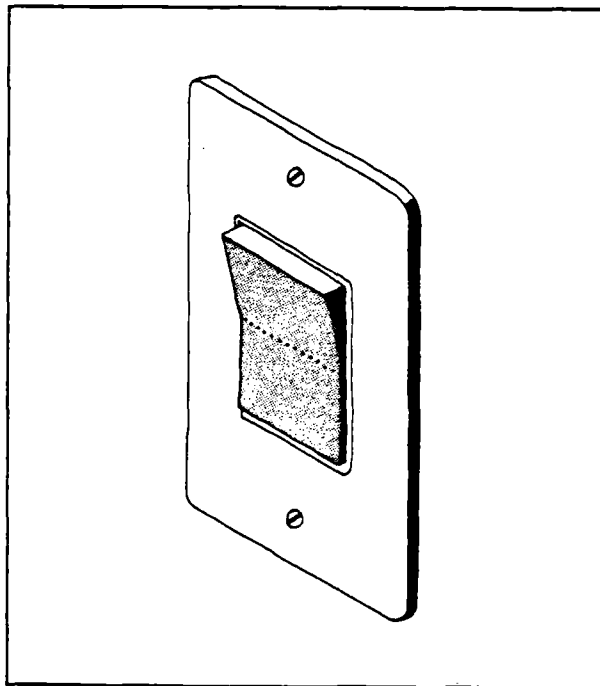
Lever door handles



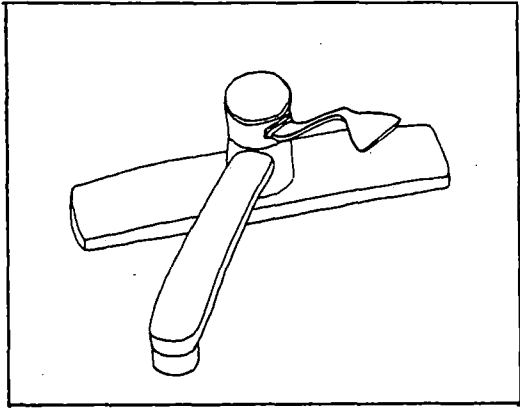
Parcel shelf at entrances



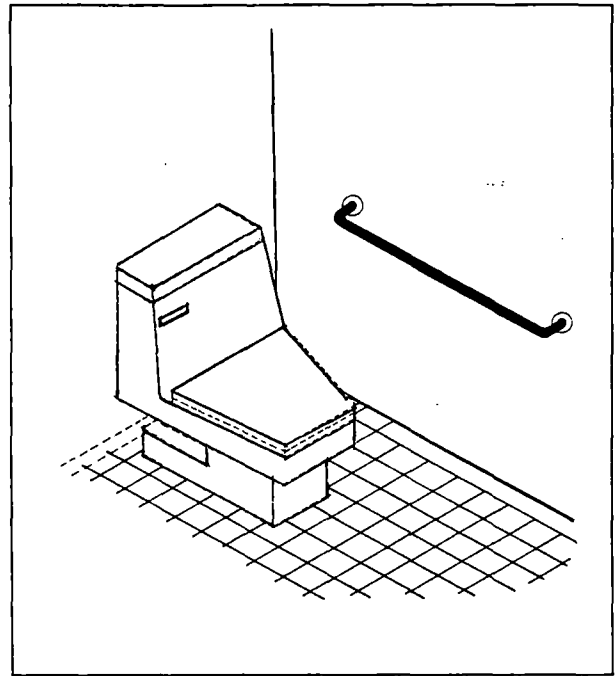
Benches at entrances



Rocker panel light switch

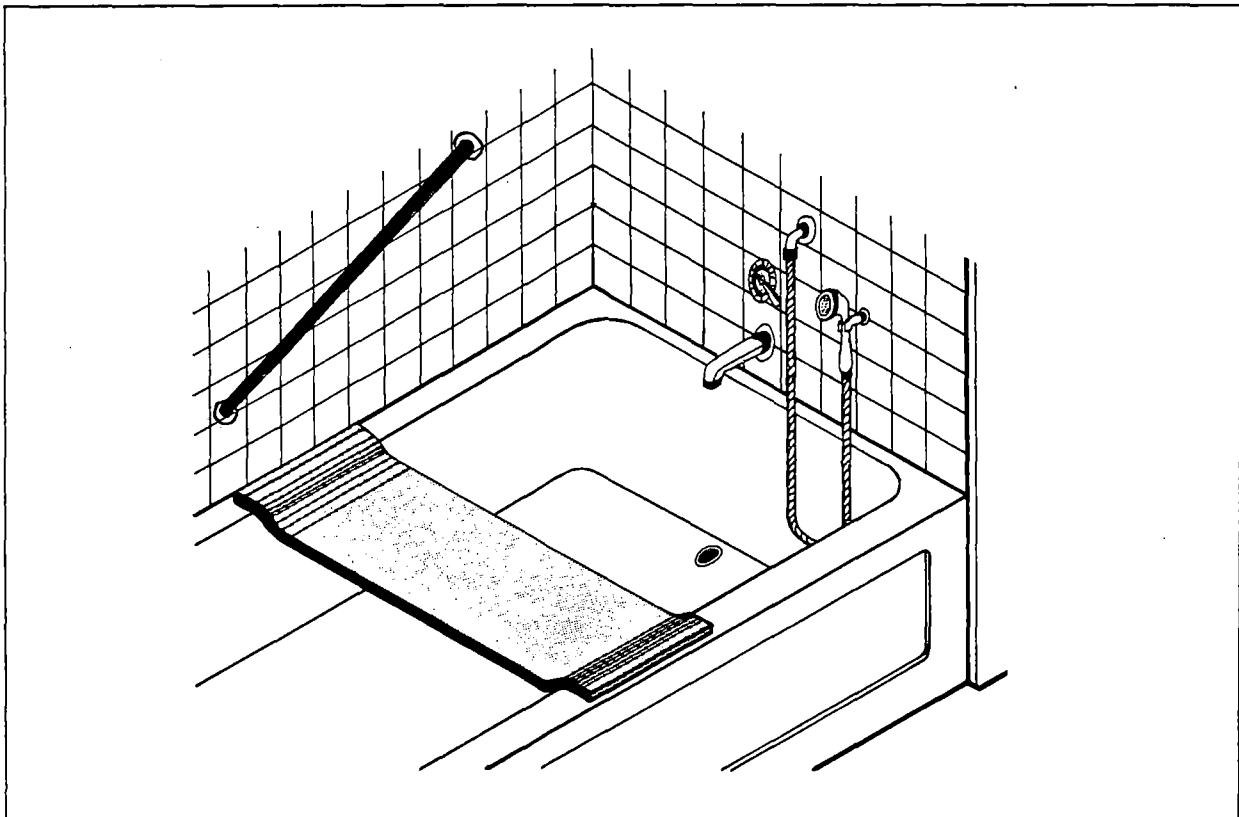


Single lever faucets in sinks



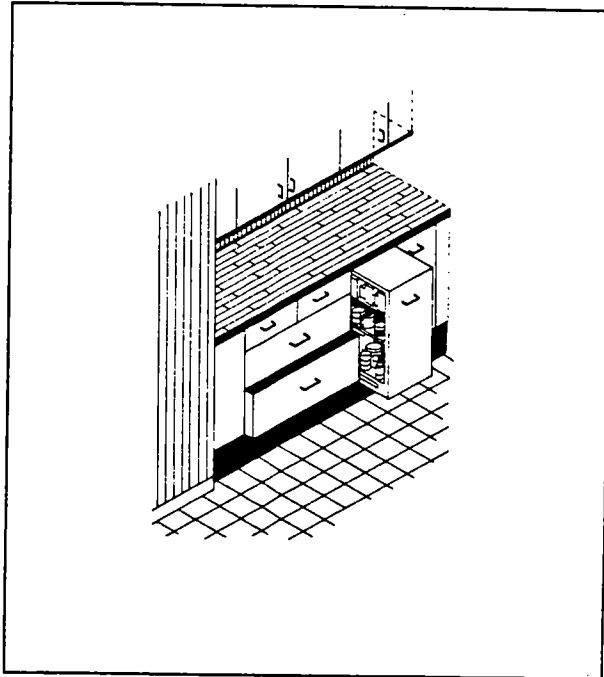
Grab bars near toilet

Grab bars in bathtub



Hand-held shower head in bathtub

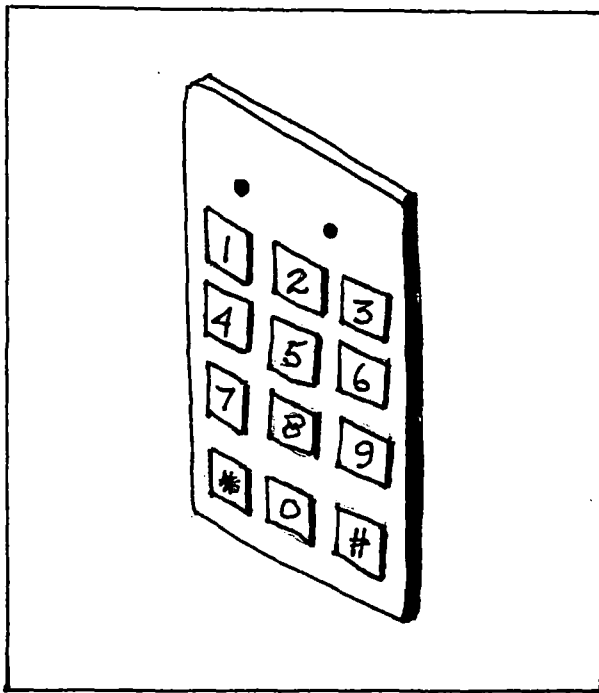
"Soft-tub"



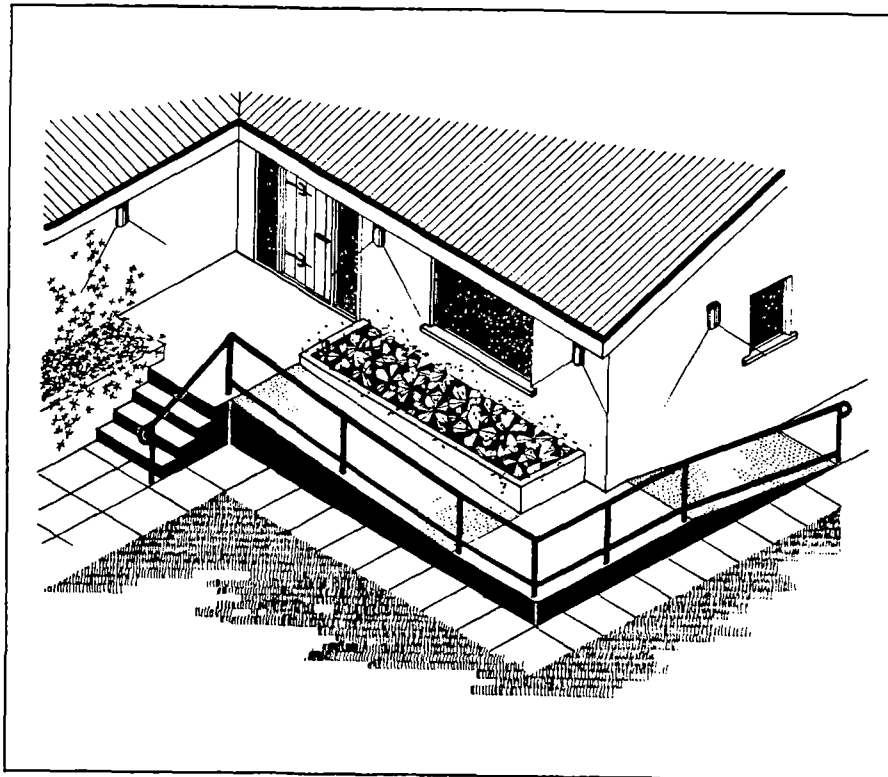
Pull-out shelving in kitchen
Lower cupboards and counters



Emergency response system.



Burglar alarm system



Ramps

PART IV - LIKELY CHOICE

If all of the options we discussed were available in Edmonton at the present time, which one would be your first choice? What would be your second choice? Which option do you think you will actually choose?

STAYING PUT....

Accessory apartment

Homesharing

Flexible-use housing *

Garden suite *

Support services

Renovations

Home equity conversion *

RENTING....

Abbeyfield concept *

Congregate housing

A house

An apartment

Gov't subsidized apt

Lodge unit

Nursing home

Move in with family

BUYING....

A smaller house

A bi-family unit *

Duplex, apt, townhouse

Mobile home

Sheltered housing *

Retirement village

Lifecare community

* Not currently available in Edmonton.

APPENDIX B: Tables

Table 1 Socio-demographic Characteristics of Respondents

Sex	Frequency	%	Valid %
Female	74	74	
Male	11	11	
Couple	15	15	

Table 2 Age

Female Respondents	Frequency	%	Valid %
55 - 64	20	22.5	
65 - 74	41	46.0	
75+	28	31.5	
Male Respondents	Frequency	%	Valid %
55 - 64	3	11.6	
65 - 74	18	69.2	
75+	5	19.2	

Table 3 Marital Status

Marital Status	Frequency	%	Valid %
Married	29	29.0	
Widowed	47	47.0	
Separated	4	4.0	
Divorced	12	12.0	
Never Married	8	8.0	

Valid % given where data is missing
45

Table 4 Employment Status			
Female Respondents	Frequency	%	Valid %
Works Full-Time	4	4.4	
Works Part-Time	3	3.3	
Retired	81	89.0	
Unemployed	0	0	
Not in Work Force	3	3.3	
Male Respondents	Frequency	%	Valid %
Works Full-Time	3	11.5	12.0
Works Part-Time	0	0	0
Retired	22	84.6	88.0
Unemployed	0	0	0
Not in Work Force	0	0	0
No Answer/Missing	1	3.9	Missing

Table 5 Present/Pre-Retirement Occupation

Female Respondents	Frequency	%	Valid %
Homemaker	15	16.9	
Managerial	4	4.5	
Professional	4	4.5	
Technical	3	3.4	
Clerical/Office	22	24.7	
Sales/Supervisory	15	16.9	
Skilled Labor	14	15.7	
Unskilled Labor	8	9.0	
Farming	3	3.4	
Other (i.e., Self-Employed)	1	1.1	
Male Respondents	Frequency	%	Valid %
Managerial	2	7.7	8.0
Professional	2	7.7	8.0
Technical	1	3.9	4.0
Clerical/Office	3	11.5	12.0
Sales	4	15.4	16.0
Skilled Labor	10	38.5	40.0
Unskilled Labor	2	7.7	8.0
Farming	1	3.9	4.0
No Answer/Missing	1	3.9	Missing

Table 6 Education			
Female Respondents	Frequency	%	Valid %
Primary School	1	1.1	
Some Secondary School	45	50.6	
Secondary School Graduation	21	23.6	
Some College or University	14	15.7	
University Degree	6	6.7	
Graduate or Professional Degree	2	2.2	
Male Respondents	Frequency	%	Valid %
Primary School	1	3.9	4.0
Some Secondary School	13	50.0	52.0
Secondary School Graduation	8	30.8	32.0
Some College or University	3	11.5	12.0
University Degree	0	0	0
Graduate or Professional Degree	0	0	0
No Answer/Missing	1	3.8	Missing

Table 7 Income (More than one answer permitted)

Supplements Received	Frequency	%	Valid %
Old Age Pension/Spouse's Allowance	82	82.0	
Guaranteed Income Supplement	31	31.0	
Canada Pension	73	73.0	
Other	32	32.0	

Table 8 Health Status

Female Respondents	Frequency	%	Valid %
Excellent	20	22.2	
Good	55	61.1	
Fair	14	15.6	
Poor	1	1.1	
Male Respondents	Frequency	%	Valid %
Excellent	6	21.4	
Good	11	39.3	
Fair	6	21.4	
Poor	5	17.9	

Table 9 Household Composition			
Household Composition	Frequency	%	Valid %
Lives alone	64	64.0	
Lives With spouse	24	24.0	
Lives With children	6	6.0	
Lives With Other Relatives	3	3.0	
Lives With Non-Relatives	1	1.0	
Two (extended) families	2	2.0	

Table 10 Size of Household			
Number of People	Frequency	%	Valid %
One	64	64.0	
Two	30	30.0	
Three	3	3.0	
Four	0	0	
Five or more	3	3.0	

Table 11 Dwelling Type			
Type of Home	Frequency	%	Valid %
Single Family Detached House	34	34.0	
Duplex/Row House/Townhouse	8	8.0	
Apartment	57	57.0	
Mobile Home	1	1.0	

Table 12 Current Dwelling Size

Number of Bedrooms	Frequency	%	Valid %
Bachelor Unit	1	1.0	1.0
One	35	35.0	35.4
Two	34	34.0	34.3
Three	20	20.0	20.2
Four	4	4.0	4.0
Five or More	5	5.0	5.1
No Answer/Missing	1	1.0	Missing

Table 13 Location of Current Residence

Area	Frequency	%	Valid %
Northwest Edmonton	47	47.0	
Northeast Edmonton	24	24.0	
Southwest Edmonton	9	9.0	
Southeast Edmonton	19	19.0	
Outside Edmonton	1	1.0	

Table 14 Length of Current Residence

Number of Years	Frequency	%	Valid %
1 - 4	29	29.0	29.3
5 - 14	33	33.0	33.4
15 - 24	19	19.0	19.1
25 - 34	11	11.0	11.0
35 - 44	6	6.0	6.0
45+	1	1.0	1.0
No Answer/Missing	1	1.0	Missing

Table 15 Current Tenure

Tenure	Frequency	%	Valid %
Rent	68	68.0	
Own	32	32.0	

Table 16 Type of Current Home Ownership (n=32)

Ownership	Frequency	%	Valid %
Own Property and Dwelling	31	96.9	
Own Dwelling, Lease the Land	0	0	
Condominium	1	3.1	
Shares in a Cooperative	0	0	

Table 17 Estimated Value of Current Home (n=32)

Value	Frequency	%	Valid %
\$40,000 - \$74,999	7	21.9	
\$75,000 - \$99,999	16	50.0	
\$100,000 - \$124,999	4	12.5	
\$125,000 - \$149,999	3	9.4	
\$150,000 - \$199,999	2	6.3	
\$200,000+	0	0	

Table 18 Current Mortgage Status (n=32)

Amount of Remaining Mortgage	Frequency	%	Valid %
No Mortgage	26	81.3	83.9
Up to \$14,999	2	6.3	6.5
\$15,000 - \$29,999	1	3.1	3.2
\$30,000 - \$99,999	2	6.3	6.5
\$100,000+	0	0	0
No Answer/Missing	1	3.1	Missing

Table 19 Preference for Sponsorship of Options

Type of Sponsorship	Frequency	%	Valid %
Non-profit	5	more than	
Denominational	12	one	
Public/Government	64	answer	
Private Market	42	permitted	

Table 20 Preferred Support Services in Seniors' Housing Projects

Support Services	Frequency	%	Valid %
Emergency Response System	53	more than	
Special Transportation	50	one	
Meal Service	40	answer	
Housekeeping Services	44	permitted	
Outdoor Maintenance	83		
Social/Recreational Facilities	76		
Nurse on Duty	29		
Personal Care Services	30		
Don't Need Any of These Yet	21		
None of the Above	1		

Table 21 Preferences for Design Features

	min, max.					
	4 = Like this in existing home	3 = Like this if/when I move	2 = Only install as needed	1 = Not likely to ever require	Mean	S.D.
INTERIOR OF DWELLING	frequency					
Wider halls and doorways	■ = 4	□ = 41	□ = 42	■ = 13	2.4	0.8
Patio doors that <u>swing</u> open	■ = 2	□ = 55	□ = 13	■ = 30	2.3	0.9
Lever door handles	■ = 7	□ = 52	□ = 30	■ = 11	2.6	0.8
Parcel shelf at entrances	■ = 5	□ = 66	□ = 15	■ = 14	2.6	0.8
Benches at entrances	■ = 12	□ = 62	□ = 11	■ = 15	2.7	0.9
Main floor laundry	■ = 17	□ = 75	□ = 7	■ = 1	3.1	0.5
Rocker panel light switch	■ = 6	□ = 65	□ = 19	■ = 10	2.7	0.7
Higher electrical outlets	■ = 7	□ = 70	□ = 14	■ = 9	2.8	0.7
Single lever faucets in sinks	■ = 12	□ = 62	□ = 13	■ = 13	2.7	0.8
Grab bars in bathtub	■ = 35	□ = 51	■ = 14	□ = 0	3.2	0.7
Grab bars near toilet	■ = 15	□ = 50	□ = 32	■ = 3	2.8	0.7
"Soft-tub"	■ = 5	□ = 73	□ = 4	■ = 18	2.7	0.8
Hand-held shower head in bathtub	■ = 24	□ = 56	□ = 10	■ = 10	2.9	0.9
Seat in shower	■ = 19	□ = 51	□ = 18	■ = 11	2.8	0.9
Pull-out shelving in kitchen	■ = 11	□ = 74	□ = 9	■ = 5	2.9	0.6
Lower cupboards and counters	■ = 11	□ = 36	□ = 15	■ = 37	2.2	1.1
Emergency response system	■ = 8	□ = 42	□ = 48	■ = 2	2.6	0.7
Burglar alarm system	■ = 4	□ = 44	□ = 46	■ = 6	2.5	0.7
EXTERIOR OF DWELLING						
No stairs or steps	■ = 6	□ = 36	□ = 56	■ = 2	2.5	0.6
Ramps	■ = 5	□ = 17	□ = 67	■ = 11	2.2	0.7

S.D. = STANDARD DEVIATION

What is your overall opinion regarding the importance of special design features for housing developed for older people?
