INTEREST IN A RETIREMENT HOUSING COMPLEX AS EXPRESSED BY ELDERLY RESIDENTS OF STILLWATER, OKLAHOMA

By

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PREFACE

Since my arrival at Oklahoma State University, contacts with others have altered my awareness of the depth and magnitude of the problems our world faces. I have alternated between despair at the seeming lack of solutions, and hope through growing understanding of the ways one individual can influence his environment. To be too confident of oneself can be destructive, in that overconfidence destroys the willingness to examine new ideas. As in most situations, a balance is best.

I'd like to thank Mrs. Lorene Keeler for her insight and viewpoints on aging, and the First Presbyterian Church, without whose financial assistance this type of research would not have been possible. I'd also like to thank the many older citizens, impossible to name here because of numbers, who have inspired me with their enthusiasm and perseverance.

I would like to express my deepest appreciation to the members of my committee, Dr. K. Kay Stewart, Mrs. Christine Salmon, and Dr. George E. Arquitt, for their valued assistance, encouragement and friendship. Dr. William C. Warde has my appreciation for his unerring ability to find the time to help me, as well as for the levity interjected into my bouts with the computer. I'd like to thank Dr. Robert

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Also of great importance to me is the support and encouragement my family has always supplied, and upon whom I can always depend.

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I have been deeply affected through my experiences at Oklahoma State University and through persons who have shared their time, energy, and thoughts with me. There are many persons I'd like to thank, too numerous to mention here, and for that I count myself very fortunate. Not only have I found friends, but I have had the privilege of knowing people who care about others, and who are willing to work together for the good of those in need.

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CHAPTER I

INTRODUCTION

Statement of Problem

It is fast becoming apparent that the "over 60" segment of our population is facing a social crisis which can only be overcome by well-planned, prompt action. The number of persons over age 60 is increasing steadily. According to a report prepared by the US Department of Housing and Urban Development (1972), although the proportional growth of the elderly population has stabilized, the projected population figures for those persons over age 65 in the year 2000 is 28.8 million. Pensions and other retirement income were often based on figures appropriate at a time when inflation was at a much lower level and relatively controlled. Social security funds are diminishing. The elderly person finds that his or her retirement program, so carefully calculated years before, provides insufficient income for the needs of the retired person or household. Restricted incomes often force many retired persons to remain in homes either too large or in need of rehabilitation. Due to depreciation of the property, the financial return upon selling the house would represent a loss for the elderly person. At times, the amount received for the housing or property would not be

sufficient to procure suitable new housing or housing acceptable to the retired person. All too often, even if funds are available to purchase or rent suitable housing, the appropriate housing is not available, either in terms of reasonable rates, quality of housing, or in design adequacy.

At present, a retired person living in Stillwater has the housing options of: maintaining a home, owning a mobile home, buying a condominium, living in a nursing home, or renting an apartment. A highly competitive housing market exists because of the substantial demand of the large student population. Inflated rates for housing that could be called substandard are common. The retired person, less mobile, with fewer financial resources, is at a disadvantage in the search for apartment housing in Stillwater. There is a need in Stillwater for apartment housing specifically designed to meet the needs of the elderly person. An apartment housing complex for retired persons could be a viable working concept, because of the numbers of retired persons of varied backgrounds. Stillwater has a great number of retired faculty and staff from Oklahoma State University, as well as other retired residents of the area.

Purpose of the Study

The major purpose of this study was to examine the potential market for a retirement housing complex in Stillwater, Oklahoma. The specific purposes were:

1. to provide a demographic description of retired persons living in Stillwater, Oklahoma,
2. to acquire a description of current housing and resident satisfaction with housing of the retired population,
3. to identify housing characteristics desired in a retirement housing complex if built in Stillwater, and
4. to examine relationships between characteristics of the population and characteristics of desired housing.

CHAPTER II

REVIEW OF LITERATURE

Characteristics of the Elderly

In the year 1900, there were almost three million persons aged 65 and over, in proportion to a total national population of 76 million; by 1970, the elderly population had grown to 20 million, in proportion to a total national population of 203 million ("Future of the Older American," 1971). In 1974, one of every ten persons living in the United States was 65 or over, that is to say, there were 21.8 million Americans in 1974 (US Department of Health, Education and Welfare, 1975).

The National Council on the Aging (1975) produced some additional statistics. The median annual income for those persons over age 65 was $4,800, with a racial composition that was 90% white. They had far less education (63% of those 65 and over never graduated from high school) than those persons of other age groups, and were more highly concentrated in rural areas than were younger people. Brotman (1972) prepared a report for the United States Department of Health, Education and Welfare, in which he stated that the average value of the homes of elderly persons was $15,000. In 1954 (Donahue, p. 15) it was stated that "68 percent of

the households headed by persons sixty-five or older own their own homes." This figure has not fluctuated radically in almost 20 years, as it was later stated that 70% of all heads of households over 65 own their own homes (Brotman, 1972). However, "since many older persons are not heads of households, the figure does not imply that 70% of all older persons live in a home they own" (Loether, 1967, p. 97).

Regarding health and size of household, Shanas (1962) stated that the majority of elderly people do not live alone and that they do not regard themselves as sick.

On the local level, Payne County was estimated to have a population of 49,403 in July, 1970. Of this number, 11.2 percent, or 5,510 persons were people over the age of 65 (Department of Health Studies of Oklahoma University, 1970). Stillwater's elderly population (those persons over 65) was 2,023 in 1970 (United States Bureau of the Census, 1973). This figure represented seven percent of the total population of Stillwater. It was projected that by 1980, the number of elderly persons over 65 residing in the Stillwater area would be approximately 2,392 (City of Stillwater, 1973). More recent population estimates place the total population of Stillwater in 1990 as 67,000 (Calvert, 1976). A national population pattern exists with the number of elderly persons not expected to decrease before 1990 (Loether, 1967). Therefore, the elderly population, if continuing at seven percent of the total population of Stillwater, can be expected to reach approximately 4,690 by 1990.

A study done by the City of Stillwater (1972) indicated that the supply of multi-family rental units exceeded demand, except in the low-income category. The demand for moderately and lower-priced single family units also exceeded supply. Accordingly, it must be difficult for persons of the lower income level to find either rental or self-owned housing. The median annual income for those persons over age 65 living in Oklahoma in 1970 was $3,720, which placed the majority of elderly persons in a relatively low income group (US Bureau of the Census, 1973).

In the section of Stillwater in which the greatest concentration of elderly persons reside, 15.1 percent to 28.6 percent of the housing was classed as dilapidated or in need of rehabilitation (City of Stillwater, 1971). The City of Stillwater (1972) prepared a report indicating that a major portion of the area of most heavily concentrated elderly population is also a flood plain. Of the structural condition of the homes in this area, it was said: "Structures may be categorized from derelict to substandard" (City of Stillwater, 1972, p. 54).

Stillwater has three nursing homes specifically designated for use by elderly citizens. These are congregate facilities, providing such services as food and maid service, as well as medication administration and activities programs, which are almost exclusively utilized by the physically or mentally impaired older person (Brown, 1976).

The US Public Health Service classified the types of care for the aged in the following official way:

1) Residential care - primarily room and board with limited service such as laundry, and personal courtesies such as occasional help with correspondence and shopping and a 'helping hand'
2) Personal care - in addition to the above, assistance in such personal matters as dressing, eating, getting about, including preparation of a special diet and dispensing of medicines
3) Skilled nursing care - all of the above, plus those nursing services and procedures employed in the care of the sick, which require training, skill, judgment beyond those the untrained person possesses (Garvin and Burger, 1968, p. 24).

The percentage of persons over age 65 who were inmates of institutions increased by 25 percent between 1960 and 1970 (Palmore, 1976).

> An estimated 5% of persons over age 65 (1970 estimates) are in mental hospitals, homes for aged and dependent, other institutions, and other group quarters. Of these, half (2.4%) reside in long-term care facilities variously described as nursing homes, convalescent facilities, and so forth (Loether, 1967, p. 19).

However, the reports of such low percentage of elderly residing in nursing homes is challenged by those who charge that studies which produced the four-or-five-percent figure are cross-sectional. The researchers claim that since current data are cross-sectional, not longitudinal, it is not possible to estimate how many elderly will have resided in nursing homes for any specific length of time (Kastenbaum, et al., 1973).

Housing Needs of the Elderly

The primary motivation in choice of housing is the satisfying of various needs of the potential occupant. The elderly person has many specific needs and requirements because of physical and mental changes produced through the aging process.

The needs of senior citizens were expressed as the rights and obligations of senior citizens at the White House Conference on Aging (1961). Musson (1963) suggested that (1) security, (2) independence, (3) involvement, and (4) privacy were needs to be considered in the housing of elderly people. The following have been suggested as fundamental needs highly relevant to housing for the elderly (Montgomery, 1972): (1) independence, (2) safety and comfort, (3) wholesome self-concept, (4) sense of place, (5) relatedness, (6) environmental mastery, (7) privacy, and (8) psychological stimulation. The United States Department of Housing and Urban Development (1975) identified the following need of the older segment of our population: (1) physical life support needs, i.e., food, shelter, safety, income, and (2) psychological needs, i.e., sensory experience, social interaction, privacy, new experience, predictability and self-esteem.

Of much concern in the design of housing for the elderly with regard to social interaction, has been the question of age heterogeneous versus age homogeneous populations in

housing (usually public housing) for the elderly. It is true that age heterogeneity is more typical of the average neighborhood, but support has been advanced for age homogeneity in elderly public housing projects (Carp, 1965). Messer (1967) observed that age-concentrated environments provide greater interactional opportunities for those residents inclined to take advantage of them. Rosow (1967) found that the number of friends an older person possesses varies directly with the proportion of age peers in his living environment, and so supports age-homogeneity of population in elderly housing. Proponents of age heterogeneity in housing for the elderly (also known as intergenerational housing) claimed that the scope of activities and opportunities for interaction available to the elderly person through association with other age groups is broadened through such associations (Loether, 1967; Sanderson, 1971). Montgomery (1972) reflected that some of the successes of age integrated housing on the college campus may pale or diminish as the older residents age and become disabled or as students leave upon completion of their education.

Some independent elderly persons who do not require extensive medical care or supervision have adopted the mobile home park as a housing alternative to the single family dwelling. Guidelines for mobile home units were devised:

> Barrier-free layout of the space between trailers and pathways to important common facilities should, under most conditions, be easy to attain, and not particularly costly, though barrier-free access to the mobile home unit itself would be difficult (United States Department of Housing and Urban Development, 1972, p. 27).

Joos (1975) and Knuth (1975) explored the possibility of converting dormitories on the Oklahoma State University campus into a retirement living facility for the elderly. The United States Department of Housing and Urban Development (1975, p. 29) did not reject the concept of dormitory renovation, nor that of remodelling old hotels and other buildings to serve as housing for the elderly, but warned:

> No such conversion should be countenanced without the assurance of a committed sponsor who has the capacity to take the responsibility for the quality of life of the tenants as well as their shelter.

Previously mentioned was the adaptation of buildings to suit the needs of the elderly. In more recent years, some buildings especially designed for the elderly have been constructed. High-rise and low-rise apartment structures have been built by both government-funded public housing programs as well as non-profit and limited-profit organizations. Also belonging to the category of created environment is the concept of the retirement village, where little dependence upon resources outside the household is encouraged (Musson, 1963). This type of housing for the elderly is also called proximate housing (Broom, 1972).

Newcomer et al. (1976) stated that elderly housing recently produced by private developers has been directed to upper-middle-income households. He also observed that filtering of such units requires 20 to 25 years. Concern has been shown by the Special Committee on Aging that retirement complex units may be overbuilt, as their housing market is limited.

> The almost explosive growth of retirement community development gives rise to concern on several counts. The first of these relates to the actual demand for retirement community housing. The market for housing in age-limited retirement communities is a specialized and limited market and there has been little effort to measure its size. Moreover, the number of units in retirement communities in existence and under development is not known (Special Committee on Aging, 1963, p. 38-39).

Another housing choice is congregate housing for the elderly. Congregate housing types include the nursing home, which is the most widely known type of housing for the elderly among the general population. Congregate housing facilities provide such services as food and maid service as well as health care and activities programs.

Elderly persons face the choice of renting or owning their own homes, as do most people. However, due to their stage in life, they may already own a home purchased prior to retirement, but they may also choose to live in a rented apartment or house. There are several reasons for not purchasing a home or wanting to remain in a home already owned. The Department of Health Studies of Oklahoma University (1971, p. 85) presented some of the more obvious reasons:

1. Most elderly persons feel that they would not live as long as the terms of the loan, which is usually a minimum of twenty years. To purchase something they could never pay for is contrary to the basic ideas they have lived by throughout their lives.
2. With advancing age and most dramatically at retirement, income declines. Most elderly Oklahomans are unable to prove an ability to repay a home mortgage loan. Inflation and rising construction costs have made residential home costs rise beyond what even the most farsighted individual could have projected. As a result, even those who planned carefully

for retirement find their incomes now inadequate when considering the purchase of a home.

3. Many elderly persons are unable to handle the routine maintenance of homes which are several years old. Even if they are able to pay to have the maintenance or repair work done, they have great difficulty finding someone to perform the work.
4. To many, a residential home is not conveniently located near the places they want or need to go. A home may be far from friends, shopping, or recreational activities.

The concept of moving, as seen by elderly people established in their own residences, was studied in relationship to housing needs (Nelson and Winter, 1975). Satisfaction with current housing and neighborhood, occurrences of major life disruptions, and level of personal independence were found to be associated with the consideration of moving among the elderly.

Lawton et al. (1971) found that desire to move by aged persons depends on the area of residence and current conditions. A second study observed a high relationship between housing dissatisfaction and the wish to move (Lawton, et al., 1973). However, it has also been observed that interest in aged housing may not be tied to dissatisfaction with current housing. Moreover, the same study found that elderly renters and those elderly persons living alone have the greatest preference for housing for the elderly (Winiecke, 1973). Rosow (1965) found that those who were most dissatisfied with housing were of low income level. Goldscheider (1966) observed that elderly people in small communities had no wish to move. It has also been observed (Sherman, et al., 1968) that older persons express high satisfaction with their

housing. Retirement complex living appeals to respondents who are dependent on bus transportation (Winiecke, 1973). Cutler (1972) stated that mobility restrictions are associated with low levels of life satisfaction.

Recommendations for Housing of the Elderly

Rosow (1967, p. 49) claims that what is needed in the area of housing for the elderly is "1) less housing research, 2) higher income, and 3) more housing." Kira, Tucker, and Cedarstrom (1973) pointed out that the age differences in members of the aged population may be as much as 40 years, from 60 years of age to over 90. They advocated adaptability of housing in terms of convenience and satisfaction of the residents' needs.

The Oklahoma University Department of Health Studies (1971) cited the following recommendations concerning housing for the elderly, compiled from tape recordings of community forums for the elderly by the Oklahoma Department of Public Welfare:

1. Reduce housing costs to elderly people by:
   a. Liberalizing limitations for eligibility in public housing projects and other low-income housing projects
   b. Institution rent control in non-public housing (private sector) in which older persons dwell
   c. Allow older people to be exempt from property and school taxes
2. Provide additional housing for low and moderate income groups, with special consideration toward a variety of types, conveniences of location, and inclusion of design features and special

equipment geared to needs of the elderly. Also, multi-purpose facilities and services should be incorporated in such programs.
3. Improve existing housing facilities which older people occupy (including enforcement of safety and health codes by appropriate government authority).
4. Provide an information center, or other means of publicity on housing available for older people.
5. Create an opportunity for housing, providing options for congregate cooking and/or proximity to cross-section age groups for social interaction.
6. Improve some nursing home facilities, provide lower rates, where possible, more variety in diets, insure preservation of dignity and privacy.
7. Provide foster homes for older people with special needs.
8. Provide home maintenance services, and/or provide maintainence allowances for recipients of public assistance.

Joos (1975) recommended that two-bedroom units, with a limited number of one-bedroom and efficiency units, be included in the renovation of dormitory housing at Oklahoma State University for the elderly. The sample of the study was restricted to retired and soon-to-be-retired Oklahoma State University faculty and staff. The study showed that 60 percent of the sample of 233 elderly persons preferred two-bedroom units. The same study observed that 80 percent preferred a communal dining area. Also, the years 1980-1985 were chosen as optimum years for need of retirement housing in the Stillwater area by 43 percent of the sample, indicating that the need for retirement housing for the elderly in Stillwater may intensify in the immediate future.

CHAPTER III

PROCEDURE

Description of Instrument

The interview schedule was developed by the author for the purpose of obtaining data concerning the elderly population in Stillwater, Oklahoma, and its interest in living in a retirement village built in Stillwater. In order to provide a sense of involvement with the interview process and to provide visual aids in answering some of the more difficult questions, a set of cards to be held by the respondent during the interview was devised (Appendix C).

The design of the interview schedule was based upon a theoretical model frequently employed in housing research (Figure 1). The model contains the components (a) socio-demographic characteristics, (b) current housing characteristics, (c) attitudes, and (d) expressed interest, and operates on two basic assumptions:

1. Socio-demographic characteristics interact with current housing characteristics, which interact with attitudes, which in turn influence expressed interest in new housing alternatives.
2. Not only do socio-demographic characteristics operate through current housing characteristics

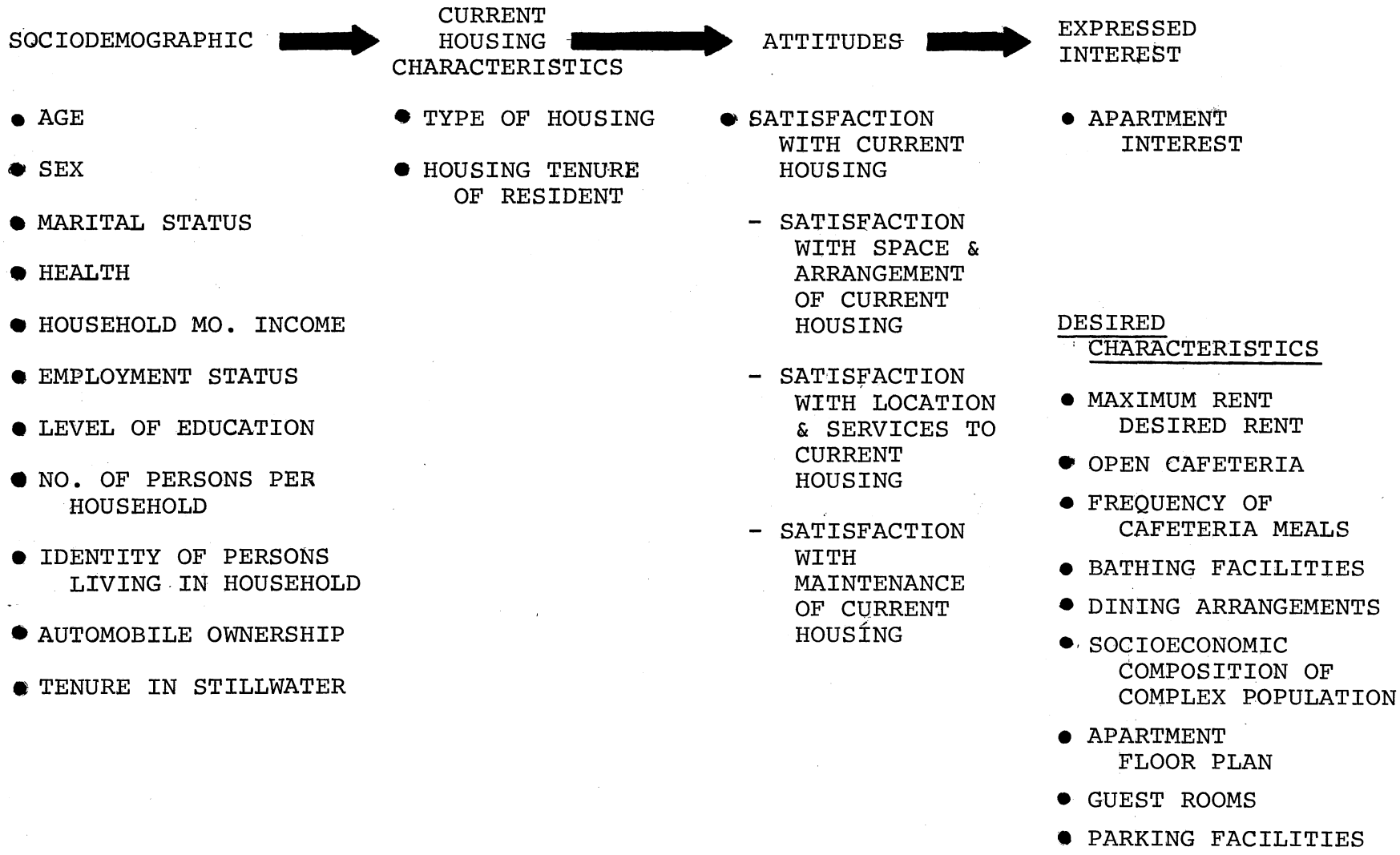

Figure 1. Theoretical Model for Variable Interaction as Determinants of Desired Housing Characteristics

and attitudes, but socio-demographic characteristics may have a direct effect upon expressed interest.

The components of this theoretical model, when interacting, determine the types of housing characteristics which are desired by the respondents.

The first section of the interview schedule dealt with demographic information as well as information concerning the current housing situation of each respondent.

The next portion of the interview schedule was designed to measure the frequency of the respondents' interaction with other people, as well as to identify some factors which may encourage interaction.

The third section of the schedule consisted of a group of questions which were used to form a scale of satisfaction with current housing. Zero order correlation coefficients were used to determine relationships among variables included in the scale (Table I).

The fourth section of the schedule was used to determine status of the respondent as to ownership and expenses of current housing.

The fifth section dealt with monthly income of the elderly person. Respondents were asked to indicate the category of income which identified their annual income and the source or sources of income.

The sixth section of the interview schedule measured the respondents' interest in moving to the retirement housing

TABLE I

CORRELATION MATRIX FOR SCALE OF TOTAL SATISFACTION WITH CURRENT HOUSING

CORRELATION COEFFICIENTS / PROB > |R| UNDER H0:RHO=0 / NUMBER OF OBSERVATIONS

	SATSIZ	SATRN	SATRA	SATMC	SATCOOK	SATEAT	SATPO	SATLOC	SATFIR	SATYAR	SATMAN	SATST	TOTSAT
SATSIZ	1.00000 0.0000 304	0.36450 0.0001 193	0.54235 0.0001 183	0.37879 0.0001 172	0.45071 0.0001 182	0.44855 0.0001 181	0.15254 0.0404 181	0.15039 0.0410 185	0.23948 0.0012 179	0.18599 0.0132 177	0.36128 0.0001 175	0.26477 0.0003 184	0.59384 0.0001 150
SATRN	0.36450 0.0001 193	1.00000 0.0000 193	0.56348 0.0001 179	0.35212 0.0001 170	0.42077 0.0001 177	0.34783 0.0001 176	0.22527 0.0028 174	0.17608 0.0184 179	0.14700 0.0550 171	0.24326 0.0013 172	0.31222 0.0001 171	0.29559 0.0001 177	0.59672 0.0001 150
SATRA	0.54235 0.0001 183	0.56348 0.0001 179	1.00000 0.0000 183	0.37480 0.0001 169	0.48309 0.0001 180	0.44183 0.0001 178	0.28755 0.0001 175	0.28308 0.0001 181	0.25236 0.0008 174	0.18512 0.0154 171	0.33540 0.0001 171	0.37561 0.0001 178	0.64412 0.0001 150
SATMC	0.37879 0.0001 172	0.35212 0.0001 170	0.37480 0.0001 169	1.00000 0.0000 172	0.35517 0.0001 168	0.34547 0.0001 167	0.29694 0.0001 165	0.31234 0.0001 171	0.26554 0.0006 162	0.20389 0.0088 164	0.47599 0.0001 164	0.29922 0.0001 168	0.61994 0.0001 150
SATCOOK	0.45071 0.0001 182	0.42077 0.0001 177	0.48309 0.0001 180	0.35517 0.0001 168	1.00000 0.0000 182	0.57071 0.0001 180	0.23527 0.0018 174	0.37621 0.0001 179	0.32954 0.0001 173	0.14842 0.0520 172	0.27073 0.0003 172	0.30576 0.0001 178	0.60526 0.0001 150
SATEAT	0.44855 0.0001 181	0.34783 0.0001 176	0.44183 0.0001 178	0.34547 0.0001 167	0.57071 0.0001 180	1.00000 0.0000 181	0.32792 0.0001 174	0.26401 0.0004 178	0.31600 0.0001 172	0.18080 0.0176 172	0.35847 0.0001 173	0.25243 0.0007 177	0.60284 0.0001 150
SATPO	0.15254 0.0404 181	0.22527 0.0028 174	0.28755 0.0001 175	0.29694 0.0001 165	0.23527 0.0018 174	0.32792 0.0001 174	1.00000 0.0000 182	0.28730 0.0001 179	0.42822 0.0001 176	0.20845 0.0051 172	0.26992 0.0004 171	0.37634 0.0001 178	0.59734 0.0001 150
SATLOC	0.15039 0.0410 185	0.17608 0.0184 179	0.28308 0.0001 181	0.31234 0.0001 171	0.37621 0.0001 179	0.26401 0.0004 178	0.28730 0.0001 179	1.00000 0.0000 186	0.38812 0.0001 177	0.25504 0.0006 176	0.39846 0.0001 174	0.26104 0.0004 182	0.50597 0.0001 150
SATFIR	0.23948 0.0012 179	0.14700 0.0550 171	0.25236 0.0008 174	0.26554 0.0006 162	0.32954 0.0001 173	0.31600 0.0001 172	0.42822 0.0001 176	0.38812 0.0001 177	1.00000 0.0000 180	0.14894 0.0519 171	0.38131 0.0001 169	0.31968 0.0001 177	0.51713 0.0001 150
SATYAR	0.18599 0.0132 177	0.24326 0.0013 172	0.18512 0.0154 171	0.20389 0.0088 164	0.14842 0.0520 172	0.18080 0.0176 172	0.20845 0.0061 172	0.25504 0.0006 176	0.14894 0.0519 171	1.00000 0.0000 178	0.47635 0.0001 173	0.30202 0.0001 177	0.50694 0.0001 150
SATMAN	0.36128 0.0001 175	0.31222 0.0001 171	0.33540 0.0001 171	0.47599 0.0001 164	0.27073 0.0003 172	0.35847 0.0001 173	0.26992 0.0004 171	0.39846 0.0001 174	0.38131 0.0001 169	0.47635 0.0001 173	1.00000 0.0000 176	0.30496 0.0001 174	0.67179 0.0001 150
SATST	0.26477 0.0003 184	0.29559 0.0001 177	0.37561 0.0001 178	0.29922 0.0001 168	0.30576 0.0001 178	0.25243 0.0007 177	0.37634 0.0001 178	0.26104 0.0004 182	0.31968 0.0001 177	0.30202 0.0001 177	0.30496 0.0001 174	1.00000 0.0000 185	0.61745 0.0001 150
TOTSAT	0.59384 0.0001 150	0.59672 0.0001 150	0.64412 0.0001 150	0.61994 0.0001 150	0.60526 0.0001 150	0.60284 0.0001 150	0.59734 0.0001 150	0.50597 0.0001 150	0.51713 0.0001 150	0.50694 0.0001 150	0.67179 0.0001 150	0.61745 0.0001 150	1.00000 0.0000 150

complex. An attempt was made to differentiate between those retired persons who were interested in living in the retirement complex and those who were interested in living in the complex if costs would not exceed one-fourth of their monthly income.

The next portion of the interview schedule was designed to gain insight into the housing needs, wants, and expectations of those retired persons interested in living in the retirement complex.

The remainder of the interview schedule was developed with the intention that all retired respondents, whether interested in moving to the retirement housing or not, indicate their preference of location in relation to community facilities, and rank, in importance, the facilities and services which should be provided in the retirement housing complex. One final open-end question was included to allow input by all retirees as to any additional ideas, thoughts, or suggestions for improvement or additions to the concept presented in the interview schedule.

The survey instrument was evaluated by thesis committee members, a city planner, a minister, and a statistician. The instrument was pretested through seven preliminary interviews.

Data Collection

Various organizations comprised of older retired citizens or those organizations having communications with retired persons were contacted and informed of the purposes of

the study. They were requested to provide membership rosters or the names and addresses of any retired persons. The Stillwater organizations which complied with the request were: The American Association of Retired Persons, The National Retired Teachers Association, The Community Action Foundation, the Stillwater Senior Citizens Center, and Oklahoma State University. A total population size of 1,252 households was collected. A card file was assembled containing the names, addresses, and organization affiliations of the sample population. A random sample size of 223 was methodically chosen, with 179 persons regarded as minimum sample size for optimum results using the data-gathering technique of the personal interview. Justification for selection of sample size is shown in Figure 2.[1]

Eight interviewers, in addition to the author, collected the data, and were paid a specific amount per interview. Qualities sought in the interviewers were honesty, interest in people, perseverance, and friendliness. Each interviewer was trained on an individual basis. They were instructed to be positive and friendly with the retired people, emphasizing their lack of desire to sell anything and showing a letter identifying the study as research affiliated with Oklahoma State University. The interviewers were also instructed to explain the purposes behind the study (Appendix A). Also,

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[1]Dr. William Warde to Hanson, September, 1976, quoted from Cochran, W. G. Sampling Techniques. New York, Wiley, 1963, p. 75.

PURPOSE: TO ESTIMATE P, THE PROPORTION OF ELDERLY PERSONS IN THE STILLWATER POPULATION (N = 2044) WHO WILL BE WILLING TO LIVE IN THE DESIGNATED APARTMENT COMPLEXES

Specify: Estimate P within $\pm$ δ with 100 $(1-\alpha)$% confidence.

Then the sample size required (n) is given by:

$$n = \frac{\left(\frac{Z_{\alpha/2}^{2} P(1 - P)}{\delta^2}\right)}{1 + \frac{1}{n}\left(\frac{Z_{\alpha/2}^{2} P(1 - P)}{\delta^2}\right) - 1}$$

Note: 'We do not know P so we can "guess" it. If no good "guess" is available, using P = .5 will give us a "safe" sample size, i.e., one which is larger than we really need.'

For: P = .5, α = .05;

δ	n	n*
.05	323.5	404.4
.04	464.2	580.25
.03	701.3	976.6

Or:

.06	236.1
.07	178.9

However: Note that these n's do not take account of non-responses.

Expect: 80% response (guessed) with non-response due to incompetent respondents, unavailable, in hospital, out of town, etc. So, the n's actually selected (n*) are given by:

$$n^* = n/.8$$

Figure 2. Sample Size Justification

the concept of bias was discussed, with expression of personal opinion on the part of the interviewer being strongly discouraged. Interviewers were instructed to contact the person named first on the card, but could interview a spouse or other member of the household if the first person was not available. The city of Stillwater was divided into four quadrants by usage of Highway 177 and Sixth Avenue as boundaries, to facilitate ease of access to addressed by interviewers. A city map provided by the Department of Housing and Community Development of Stillwater was used to locate the addresses within each quadrant.

Rural households in the sample were designated as a fifth division instead of being assigned a quadrant number. Directions to rural residences were identified through consultation with various persons at the Senior Citizens Center. The Payne County Treasurer's and Assessor's offices offered their help in locating any retired persons residing in the rural districts. Tax records were to be used to give a legal description of property owned, then county township maps were used to show location of the property and of the residence.

Thirty-two of the persons in the sample were either deceased, had moved, could not be located, refused to be interviewed, or were living in nursing homes. Those persons living in nursing homes were not included in the population from which the sample was drawn, due to a statement made by an administrator and registered nurse, asserting that the

residents of Stillwater's nursing homes are either physically or mentally impaired to the extent of requiring a nurse's care or assistance (Brown, 1976). It was concluded that these persons would not be capable of maintaining a standard of independent living necessary for apartment residence.

Data Analysis

The interview schedule was designed so that all data could be numerically coded to facilitate analysis through use of the computer. Simple frequency tables were obtained for all variables. Two-way contingency tables with chi-square tests were performed for selected variables.

Description of Variables

The variables age, sex, marital status, health, monthly income, employment status, education level, number of persons per household, and identity of persons living with the respondent were the demographic variables used in the analysis.

Age and sex were the respondents' age and sex. The variable marital status referred to one of the following categories: single, married--living with spouse, married--but not living with spouse, separated, divorced, widowed, or other. Responses were grouped into three categories of single, married, or widowed.

The variable health was a subjective response by the respondent judging his personal health as either poor, fair,

good or excellent. Responses were grouped into two categories, as poor to fair, and good to excellent health.

Monthly income was obtained by requesting the respondent to indicate one of the following categories: $0-275, $276-500, $501-1000, $1001-1500, and $1500+. Income was regrouped for purposes of analysis as $0-275, $276-1000, and $1001+.

The variable employment referred to household employment and was composed of responses from two questions of the interview schedule. One question provided categories of respondents' employment as: full-time, part-time, retired, or other. An additional question inquired whether any household income was obtained by gainful employment. Household employment status was therefore divided into two groups: those households whose members were retired or not employed, and those which possessed an employed member.

Education level was measured as the number of years of formal education completed by the respondent. For purposes of analysis, the respondents were distributed into five groups as follows: less than high school, high school, some college, baccalaureate degree, and more years of education than the baccalaureate level.

The variable called the number of persons per household is the numerical count of persons considered by the respondent as members of his unit of residence.

The identity of persons living with the respondent is the variable which indicated the relationship existing between members of the respondent's household.

Current housing characteristics were identified. The variable type of housing distinguishes the respondent's current housing as one of the following: single family, duplex, apartment - multi-family, mobile home, or other. Two groupings were made for analysis: single family dwellings and all others. Tenure of resident referred to the respondent's ownership status. Categories were owner or renter.

The variable "total satisfaction with current housing" was a scale which summed twelve variables assessing the respondent's subjective judgment of his satisfaction with selected elements of his environment. The twelve elements were satisfaction with size of rooms, number of rooms, arrangement of rooms, monthly housing cost, cooking arrangements, eating arrangements, police protection, location of housing, fire protection, amount of yard, maintenance demands, and condition of streets and avenues. For purposes of clarification of variable relationships between housing satisfaction and other variables, the total satisfaction with current housing scale was divided into three subdivisions. The first factor was satisfaction with space and arrangement of current housing. The second factor was satisfaction with services. The third factor was satisfaction with maintenance.

The variable "apartment interest" was an indicator of interest in living in an apartment in a retirement housing complex in Stillwater.

The variable "readiness to move" was an indicator of

length of time, in monthly terms, that the respondent would wait before moving.

Variables representing housing characteristics desired in a retirement housing complex by the retired persons were presented as found in Appendix B.

CHAPTER IV

FINDINGS

Description of Sample

A description of the characteristics of the 191 respondents who participated in the study is presented in Table II. The sample was 75 percent female and 25 percent male. Five percent of the sample was non-white. The majority of the respondents were heads of households (75%). The ages of the respondents ranged from 46 to 92, with the largest percentage (41%) falling in the age category 76-92 years.

The majority of the sample was retired (82%), with 10 percent still employed in some capacity. Forty-four percent of the sample were married and living with their spouse, whereas 41 percent were widowed.

Of all respondents providing information, 39 percent had a baccalaureate degree or its equivalent in years of education. Twenty-nine percent had some years of graduate study.

Concerning health, 70 percent considered themselves to be in good to excellent health, while 16 percent claimed some sort of physical disability.

Eight percent lived in households containing more than three persons. Forty-nine percent of the respondents lived

TABLE II

SOCIO-DEMOGRAPHIC CHARACTERISTICS OF SAMPLE

Characteristic N = 191	Number Participating	Percent
Sex of Respondent		
Male	48	25
Female	143	75
Total	191	100
Race of Respondent		
American Indian	1	1
White	182	95
Black	8	4
Total	191	100
Respondent's Position in Household		
Head of Household	142	75
Wife	34	18
Husband	5	3
Sister	4	2
Mother	2	1
Other	1	1
Total	188	100
NR* (3)		
Age of Respondent		
Age 46 to 65	37	21
Age 66 to 75	66	38
Age 76 to 92	73	41
Total	176	100
NR (15)		
Employment Status of Respondent		
Full-time	8	4
Part-time	11	6
Retired	155	82
Other	16	8
Total	190	100
NR (1)		
Marital Status of Household		
Single	19	10
Married, living with spouse	85	4
Married, but not living with spouse	3	2
Separated	1	1
Divorced	3	2
Widowed	80	44
Total	191	100

TABLE II (Continued)

Characteristic N = 191	Number Participating	Percent
Years of Education of Respondent		
3 to 8 years	27	14
9 to 12 years	34	19
13 to 16 years	74	39
17 years and more	52	28
Total	187	100
NR (4)		
Health Rated by Respondent		
Poor	4	2
Fair	55	28
Good	91	48
Excellent	41	22
Total	191	100
Persons Per Household		
1 person	79	47
2 persons	76	45
3 or more persons	13	8
Total	168	100
NR (23)		
Persons With Whom Respondent is Living		
Alone	82	49
With Spouse	63	38
With Children	3	2
With Friends	5	3
With Relatives	7	4
Others	7	4
Total	167	100
NR (24)		
Length of Residence in Stillwater of Respondent		
0-25 years	50	27
26-50 years	97	53
51-75 years	31	17
76-83 years	5	3
Total	183	100
NR (8)		

TABLE II (Continued)

Characteristic N = 191	Number Participating	Percent
Number of Close Friends of Respondent		
None	5	2
1-2	28	17
3-6	69	42
7-12	22	18
More than a dozen	35	21
Total	167	100
NR (24)		
Number of Persons Respondent Talked to Day Before Interview		
0-5 persons	69	42
6-12 persons	61	37
More than 12	33	21
Total	163	100
NR (28)		
Number of Persons Talked to Day Before Interview That Were Near Own Age		
0-6	107	70
7-16	34	22
18-45	11	8
Total	152	100
NR (33) - NA** (6)		
Respondents Possessing Physical Disabilities		
No	160	84
Yes	30	16
Total	190	100
NR (1)		
Household Income (per month)		
$0-275	28	18
276-500	34	22
501-1000	41	26
1001-1500	33	21
1500+	20	13
Total	156	100
NR (35)		
Automobile Ownership		
No	35	24
Yes	109	76
Total	144	100
NR (4) - NA (43)		

TABLE II (Continued)

Characteristic N = 191	Number Participating	Percent
Respondents Who Use Rides From Friends for Transportation		
No	133	72
Yes	51	28
Total	184	100
NR (7)		
Gainfully Employed		
Yes	25	14
No	156	86
Total	181	100
NR (10)		
Social Security		
Yes	150	17
No	31	83
Total	181	100
NR (10)		
Professional Retirement Programs		
Yes	95	52
No	86	48
Total	181	100
NR (10)		
Interest, Dividends		
Yes	117	64
No	64	36
Total	181	100
NR (10)		
Respondent's Spouse Employed		
Yes	11	6
No	170	94
Total	181	100
NR (10)		
Privately Owned Business		
Yes	37	20
No	144	80
Total	181	100
NR (10)		

TABLE II (Continued)

Characteristic N = 191	Number Participating	Percent
Medical Compensation		
Yes	41	23
No	140	77
Total	181	100
NR (10)		
Miscellaneous Sources		
Rental Property	39	21
None	140	77
Other	1	1
Total	180	100
NR (11)		

*No Response
**Not Applicable - Question Did Not Apply to Respondent

alone, while 13 percent lived with friends, relatives, or other.

Length of residence in Stillwater ranged from 2 to 83 years. The majority (73%) of respondents had lived in Stillwater more than 26 years. Eighty-one percent indicated having more than three friends. Concerning contacts with others, 42 percent reported they had talked to five persons or less the day before the interview. Seventy percent of the respondents stated that the persons they had talked to the day before the interview were of an age near their own.

Eighteen percent of the respondents reported a very low household monthly income of $275 a month or less.

Seventy-six percent of the respondents owned their own automobiles. Twenty-eight percent used rides from friends as transportation.

The respondents, in general, reported being quite well satisfied with their present housing (Table III). They were most satisfied with size of rooms, arrangement for eating and cooking facilities. On the other hand, they were least satisfied with yard size and requirements for maintenance. These findings are supported by the research of Sherman et al. (1968), who stated that elderly people, in general, were satisfied with their housing. However, there were different levels of satisfaction related to different aspects of present housing.

TABLE III

SATISFACTION WITH ASPECTS OF CURRENT HOUSING
OF THE RETIRED SAMPLE

Aspect	Number Participating	Percent
Satisfaction With Number of Rooms		
Very Dissatisfied	1	1
Dissatisfied	9	5
Neutral	10	6
Satisfied	59	32
Very Satisfied	102	56
Total	181	100
NR* (10)		
Satisfaction With Arrangement of Rooms		
Very Dissatisfied	1	1
Dissatisfied	6	3
Neutral	15	18
Satisfied	76	41
Very Satisfied	85	47
Total	183	100
NR (8)		
Satisfaction With Monthly Cost		
Very Dissatisfied	5	3
Dissatisfied	16	9
Neutral	28	16
Satisfied	70	41
Very Satisfied	53	31
Total	172	100
NR (19)		
Satisfaction With Cooking Facilities		
Very Dissatisifed	1	1
Dissatisfied	5	6
Neutral	13	4
Satisfied	68	37
Very Satisfied	95	52
Total	182	100
NR (9)		

TABLE III (Continued)

Aspect	Number Participating	Percent
Satisfaction With Eating Facilities		
Very Dissatisfied	3	2
Dissatisfied	8	4
Neutral	8	4
Satisfied	68	38
Very Satisfied	94	53
Total	181	100
NR (10)		
Satisfaction With Police Protection		
Very Dissatisfied	2	1
Dissatisfied	11	6
Neutral	32	18
Satisfied	68	37
Very Satisfied	69	38
Total	182	100
NR (9)		
Satisfaction With Location of Housing		
Very Dissatisfied	3	2
Dissatisfied	7	4
Neutral	28	15
Satisfied	66	35
Very Satisfied	82	44
Total	186	100
NR (5)		
Satisfaction With Fire Protection		
Very Dissatisfied	4	2
Dissatisfied	4	2
Neutral	23	13
Satisfied	67	37
Very Satisfied	82	46
Total	180	100
NR (11)		
Satisfaction With Amount of Yard		
Very Dissatisfied	7	4
Dissatisfied	16	9
Neutral	32	18
Satisfied	72	40
Very Satisfied	51	29
Total	178	100
NR (13)		

TABLE III (Continued)

Aspect	Number Participating	Percent
Satisfaction With Time and Effort Maintenance of Housing Requires		
Very Dissatisfied	2	1
Dissatisfied	9	5
Neutral	44	25
Satisfied	79	45
Very Satisfied	42	24
Total	176	100
NR (15)		
Satisfaction With Condition of Streets		
Very Dissatisfied	9	5
Dissatisfied	23	12
Neutral	24	13
Satisfied	74	40
Very Satisfied	55	30
Total	185	100
NR (6)		

*No Response

Description of Current Housing

A detailed description of the characteristics of the respondents' current housing is found in Table IV. The following are statements concerning selected characteristics of current housing of the respondents.

Of those respondents having physical disabilities, 82 percent had adapted their houses to the benefit of the disabled.

Eighty-six percent of the respondents lived in a single family dwelling, and seven percent lived in apartments.

Eight-six percent of the respondents owned or were buying their homes, and only 12 percent were renters. Of those buying homes, 31 percent made payments of $126 per month or less. Of those renting, 29 percent were paying $45 per month or less, with 66 percent paying from $60-125 per month rent. Sixty-five percent of the renters had only their stoves and refrigerators furnished, while 33 percent stated their apartment was unfurnished.

The majority of the renters reported that utility costs were not included in their rent.

Description of Desired Housing

A detailed description of the desired housing characteristics are found in Table V. Descriptive statements of selected characteristics of desired housing follow.

Twenty percent of the sample expressed a definite interest in living in a retirement housing complex in

TABLE IV

CHARACTERISTICS OF CURRENT HOUSING OF THE SAMPLE

Characteristic N = 191	Number Participating	Percent
Houses Adapted to Household's Disabilities		
No	6	18
Yes	28	82
Total	34	100
NR* (3)		
Type of Housing		
Single Family	164	86
Duplex	8	4
Apartment - Multi-family	14	7
Mobile Home	1	1
Other	4	2
Total	191	100
Respondent Housing Tenure		
Own Housing	145	78
Buying Housing	16	8
Renting Housing	22	12
Other	3	2
Total	186	100
NR (5)		
Payments Made by Buying Respondents		
$65-126 per month	5	31
$150-196 per month	4	25
$150-210 per month	4	25
$400+ per month	3	1
Total	16	100
NR (5) - NA** (170)		
Rent Payments Made by Renting Respondents		
$0-45 per month	5	29
$60-125 per month	12	66
$137 and over per month	1	5
Total	18	100

TABLE IV (Continued)

Characteristic N = 191	Number Participating	Percent
Furniture Provided With Rental Housing Unit		
None	7	33
Stove and Refrigerator Furnished	13	65
Completely Furnished	1	2
Total	21	100
NR (6) - NA (164)		
Utility Costs Included in Respondents' Rent		
No	19	87
Yes	3	13
Total	22	100
NR (5) - NA (164)		

*No Response
**Not Applicable - Question Did Not Apply to Respondent

TABLE V

DESIRED HOUSING CHARACTERISTICS OF THOSE STILLWATER RESIDENTS INTERESTED IN LIVING IN A RETIREMENT HOUSING COMPLEX

Characteristic N = 191	Number Participating	Percent
Interest in Living in Retirement Complex		
Yes	37	20
Maybe	97	51
No	55	29
Total	189	100
NR* (2)		
Maximum Rent Desired (monthly)		
$30-90	30	34
100-150	29	33
160-225	23	26
Over 225	7	7
Total	89	100
NR (59) - NA** (43)		
Persons Who Would Move to the Complex as Soon as It Was Constructed		
Yes	33	24
No	105	76
Total	138	100
NR (10) - NA (43)		
Months Persons Would Wait Before Moving		
2-6 mos.	5	14
9-15 mos.	6	17
12-36 mos.	17	49
More than 36 mos.	7	20
Total	35	100
NR (10) - NA (75)		
Rommate Preference		
Live Alone	87	60
Live With Spouse	52	35
Live With Roommate	7	5
Total	146	100
NR (2) - NA (43)		

TABLE V (Continued)

Characteristic N = 191	Number Participating	Percent
Socioeconomic Preference of Complex Population		
Same Socioeconomic Group	61	45
Mixed Socioeconomic Group	75	55
Total	136	100
NR (12) - NA (43)		
Apartment Floorplan Preference		
Efficiency	7	5
1-Bedroom	68	49
2-Bedroom	65	46
Total	140	100
NR (8) - NA (43)		
Bathing Facilities		
Shower	22	15
Tub	22	15
Both	102	70
Total	146	100
NR (2) - NA (43)		
Dining Arrangement		
Kitchen-dining room combination	76	52
Living room-dining room combination	65	45
Other	4	3
Total	145	100
NR (3) - NA (43)		
Cafeteria		
Yes	89	61
Maybe	47	32
No	10	7
Total	146	100
NR (2) - NA (43)		
Use of Cafeteria		
All meals	10	8
One hot meal at noon	43	34
One hot meal at evening	14	11
4-6 meals a week	34	27
1-3 meals a week	26	20
Total	127	100
NR (11) - NA (53)		

TABLE V (Continued)

Use of Cafeteria Open to Guests		
No	6	4
Yes	128	96
Total	134	100
NR (4) - NA (54)		
Guest Rooms Reserved for Visitors		
No	42	30
Yes	96	70
Total	138	100
NR (10) - NA (43)		
Parking Facilities		
Onstreet	1	1
Offstreet	28	26
Central Garage	77	73
Total	106	100
NR (7) - NA (78)		

*No Response
**Not Applicable - Question Did Not Apply to Respondent

Stillwater, while 51 percent indicated possible interest. Most respondents were cautious about giving a positive response, even though reassured that a positive response was not an expression of commitment, without any knowledge of the environment and atmosphere of the retirement housing complex. As previously presented, it has been observed that older persons in small, rural-oriented communities are often reluctant to move (Goldscheider, 1966). The 29 percent of the respondents who were not interested in the retirement housing were not asked to respond to questions about the characteristics which should be included in the housing.

Thirty-four percent desired a monthly rent of $90 or less, and 33 percent desired rent ranging from $100-150 per month. Twenty-six percent desired a rental range from $160-225 a month. A limited number of persons (89) responded to this question. Many who were homeowners felt they had no idea of current market rates.

Twenty-four percent of the respondents said they would move to the retirement housing complex immediately upon completion, while others preferred to observe the operation for a period of time before moving in.

The majority of the respondents (60%) preferred to live alone. Thirty-five percent preferred to live with their spouse.

Fifty-five percent of the respondents preferred to live with other elderly persons of mixed socioeconomic status.

Forty-five percent preferred to live with other elderly persons of the same socioeconomic status.

There was similarity in numbers of persons desiring one-bedroom and two-bedroom living units. Forty-nine percent of the respondents preferred a one-bedroom unit, while 46 percent preferred a two-bedroom apartment. Many persons who stated a preference for a two-bedroom unit said they would accept a one-bedroom unit if there were adequate storage facilities and guest facilities for visitors. In a study of Oklahoma State University retirees in Stillwater, 60 percent of the sample preferred two-bedroom units (Joos, 1975).

The majority of the sample preferred both a baththub and shower as bathing facilities.

Fifty-two percent of the respondents expressed a preference for a kitchen-dining room combination for preparation and comsumption. Forty-five percent preferred a living room-dining room combination.

A majority (61%) of the sample stated a desire for a cafeteria in the complex. Ninety-six percent of the respondents desired that the cafeteria be open to use by guests of the residents of the retirement housing complex. Forty-five percent of the sample stated they would use the cafeteria for one meal a day. Twenty-seven percent said they would use the cafeteria four to six times a week, while 20 percent would use the cafeteria for three meals a week or less.

The majority (76%) of the sample preferred a central

garage be used for parking of residents' automobiles, and 26 percent preferred some sort of offstreet parking.

Seventy percent of the sample desired that there be some sort of guest room facility available for visitors of complex residents.

The respondents ranked the community facilities near which they desired to live: 1) shopping, 2) church, and 3) doctor and dentist. Weighted ranking of these preferences is found in Table VI. In weighting, items ranking first received three points, second received two points, and third, one. The points were then summed. Percentages of respondents who ranked nearness to each facility as first, second, or third is shown in Table VII.

The respondents indicated their preferences for facilities to be included in the retirement housing complex by ranking a number of items. A weighted ranking of the retirement housing facilities (Table VIII) shows the retirement housing facilities preferenced in the following manner: 1) laundry, 2) activity rooms (reading, meeting, exercises, adult education classes, etc.), 3) outdoor recreation areas (picnics, horseshoes, garden, sidewalks, etc.), 4) game room (cards, games, ping pong, snooker and pool tables, etc.), 5) lounge areas, and 6) arts and crafts facilities and workshop. Weighting was accomplished through giving an item ranked first six points. Second received five points, third received four points, etc. Percentages of respondents ranking the facilities are found in Table IX.

TABLE VI

WEIGHTED RANKING OF RESPONDENTS' PROXIMITY PREFERENCE OF CERTAIN COMMUNITY FACILITIES FROM 1ST TO 3RD

Shopping	Weighting Sum	Ranking
Shopping	(321)	1
Church	(291)	2
Doctor and Dentist	(204)	3
Library	(68)	4
Senior Citizens Center	(68)	5
Oklahoma State University	(37)	6
Other	(2)	7

TABLE VII

PERCENT OF RESPONDENTS RANKING PROXIMITY PREFERENCE OF COMMUNITY FACILITIES FROM 1ST TO 3RD

Facility	1st	2nd	3rd
Church	23	36	15
Shopping	55	20	15
Doctor and Dentist	12	24	25
Theater	2	6	4
Library	2	7	13
Senior Citizens Center	6	6	7
Oklahoma State University Activities	--	1	19

TABLE VIII

WEIGHTED RANKING OF RESPONDENTS' PREFERENCE OF CERTAIN RETIREMENT HOUSING FACILITIES FROM 1ST TO 6TH

Facility	Weighting Sum	Ranking
Laundry	(902)	1
Activity Rooms	(626)	2
Outdoor Recreation Areas	(617)	3
Game Room	(417)	4
Lounge	(413)	5
Arts and Crafts Room	(377)	6

TABLE IX

PERCENT OF RESPONDENTS RANKING CERTAIN RETIREMENT HOUSING FACILITIES AS 1ST TO 6TH IN PREFERENCE

Facility	% Ranking 1st	2nd	3rd	4th	5th	6th
Outdoor Recreation Areas	14	29	19	10	16	11
Laundry	66	16	6	5	4	3
Arts and Crafts Facilities	3	6	20	22	21	27
Game Room	4	12	22	17	26	18
Activity Rooms	10	24	25	21	14	6
Lounge	3	12	8	24	18	35

Description of Relationships Between Variables

The first relationships reported are those between the demographic characteristics of education and age upon monthly income of elderly households (Table X). It was apparent that there was a high level of significance ($P < .0001$) in the relationship of education to monthly income. Those with the greatest degree of education possess the highest monthly income.

Monthly income is directly related to housing tenure, as can be seen from Table XI. Of those in the lowest income level, 66 percent own homes, while 33 percent rent. Of those in the middle income level, 86 percent owned their homes, while 14 percent rented. All of those respondents in the highest income levels were owners.

Selected characteristics of the elderly sample were examined in relation to the total satisfaction with current housing scale (Table XII). The only characteristic which was significant ($P < .01$) was marital status. No relationships were found between housing satisfaction and tenure, monthly income, housing type, health, months to wait before moving, or age.

Apartment interest was examined in relationship to selected characteristics of elderly households (Table XIII). No significant relationships were found between apartment interest and total satisfaction with current housing, sex, employment status, education, health, persons per household,

TABLE X

MONTHLY INCOME BY SELECTED CHARACTERISTICS OF ELDERLY HOUSEHOLDS

Variable	Monthly Income $0-275 (#)	(%)	$276-1000 (#)	(%)	$1001+ (#)	(%)	χ^2	Level of Sig.
Age								
65 or under	4	10	17	44	18	46		
66-75	11	18	30	49	20	33		
76+	13	23	28	50	15	27	4.953	.29
Education								
Less than high school	18	58	11	35	2	7		
High school	5	22	14	61	4	17		
Some college	1	4	22	81	4	15		
Baccalaureate	4	12	11	31	20	57		
Baccalaureate +	0	0	17	43	23	57	73.125	.0001

TABLE XI

HOUSING TENURE BY MONTHLY INCOME OF ELDERLY HOUSEHOLDS

Variable	Own #	Own %	Rent #	Rent %	χ^2	Level of Sig.
$0-275	18	13	9	47		
$276-1000	64	48	10	53		
$1001+	53	39	0	0	18.559	.0001

TABLE XII

TOTAL SATISFACTION WITH CURRENT HOUSING BY SELECTED CHARACTERISTICS OF ELDERLY HOUSEHOLDS

Variable	Satisfaction with Housing n = (xxx)	χ^2	Level of Sig.
Housing Tenure	186	3.67	.15
Monthly Income	156	5.22	.27
Type of Housing	191	3.50	.17
Health	191	2.76	.25
Marital Status	191	13.28	.01
Readiness to Move	138	2.49	.28
Age	191	1.20	.87

TABLE XIII

INTEREST IN MOVING INTO APARTMENT BY SELECTED CHARACTERISTICS OF ELDERLY HOUSEHOLDS

Variable Apartment Interest	χ^2	Level of Sig.
Total Satisfaction With Current Housing (N = 189)	1.44	.84
Sex (N = 189)	2.53	.28
Employment Status (N = 177)	.21	.89
Education (N = 189)	8.95	.35
Health (N = 189)	5.27	.07
Persons Per Household (N = 166)	2.43	.29
Status of Persons in Household (N = 165)	3.50	.47
Monthly Income (N = 156)	3.40	.49
Age (N = 189)	6.28	.18
Marital Status (N = 189)	3.98	.41
Housing Tenure (N = 185)	8.70	.01
Length of Residence in Stillwater (N = 185)	3.70	.44

status of persons in household, monthly income, age, marital status, or tenure in Stillwater. Lawton et al. (1973) found a high significance between housing dissatisfaction and the wish to move. Winiecke (1973) observed that those elderly persons living alone were most likely to be interested in housing for the elderly. The findings of this study do not corroborate the findings of the previously mentioned studies. Housing tenure was the only characteristic which appeared to be significantly associated with apartment interest at the .01 level. Winiecke (1973) found that renters had the greatest interest in housing for the elderly. Of those in the sample of Stillwater elderly, 68 percent of the owners said they were or might be interested in living in a retirement housing complex for the elderly, while 95 percent of the renters were, or might be, interested in the apartment housing.

There was also no significance noted between any of the factors of total satisfaction with current housing and apartment interest (Table XIV).

A description of the relationships between the independent variables marital status, monthly income, educational level, and apartment floorplan preference, the dependent variable, appear in Table XV. Fifty-five percent of the single elderly persons and 59 percent of the widowed elderly persons preferred a one-bedroom apartment. Joos (1975) found that 62 percent of the married persons preferred a two-bedroom apartment. A large majority (60%) of the elderly persons in the low-income level preferred a one-bedroom unit. Almost equal

TABLE XIV

APARTMENT INTEREST BY FACTORS OF TOTAL SATISFACTION WITH CURRENT HOUSING SCALE

Factor	Apartment Interest	χ^2	Level of Sig.
Satisfaction With Space and Arrangement		4.462	.35
Satisfaction With Location and Services		1.612	.45
Satisfaction With Maintenance		1.402	.50

TABLE XV

APARTMENT FLOORPLAN PREFERENCE BY CHARACTERISTICS OF MARITAL STATUS, MONTHLY INCOME, AND EDUCATIONAL LEVEL

Variable	Apartment Floorplan Preference: Effic. #	Effic. %	1-Bedr. #	1-Bedr. %	2-Bedr. #	2-Bedr. %	χ^2	Level of Sig.
Marital Status								
Single	1	5	12	55	9	40		
Married	1	2	21	36	36	62		
Widowed	5	8	35	59	20	33	11.168	.02
Monthly Income								
$0-275	4	16	15	60	6	24		
$276-1000	2	3	29	48	30	49		
$1001+	1	3	11	33	21	64	12.454	.01
Education Level								
< High School	4	14	15	52	10	34		
High School	1	4	18	78	4	18		
Some College	1	4	11	46	12	50		
Baccalaureate	-	-	14	50	14	50		
Baccalaureate +	1	3	10	28	25	69	23.098	.003

percentages (48 and 49) of the middle income level preferred one- or two-bedroom units. A considerable majority (64%) of the respondents of the highest income level preferred a two-bedroom unit.

CHAPTER V

SUMMARY AND CONCLUSIONS

The purpose of the study was to examine the interest of elderly residents in Stillwater, Oklahoma, in living in a retirement housing complex. Specific objectives were: to provide a description of the elderly residents, their housing and current housing satisfaction; to identify the housing characteristics desired by persons interested in living in a retirement housing complex and to examine relationships between characteristics of the respondents and characteristics of desired housing.

Satisfaction with current housing was examined by means of housing satisfaction scales. Both housing satisfaction and apartment interest were examined in relation to selected characteristics of the sample.

Simple frequency tables and two-way contingency tables were used to analyze the data. Chi-square was used to measure the significance of the relationship between selected variables. The study described a sample of residents of Stillwater, Oklahoma, who are largely white and over age 65. The sample had an unusually high number of persons with baccalaureate and graduate degrees. Respondents of the study were of good health, by their own judgment, and the majority

had resided in Stillwater for over 26 years. Respondents reported that they were satisfied to very satisifed with their current housing. Most persons were of middle to upper level income, and owned their own homes. Accordingly, a large majority of those interviewed lived in single family dwellings. The data revealed that a majority (71%) of the elderly persons interviewed in the study expressed some interest in living in a retirement housing complex in Stillwater. Although interested in living in an apartment housing complex, few would move immediately to the complex upon completion of the construction. Most were reluctant to give a definite answer, as they were wary of any possible commitments and wanted to reserve judgment until they had actually seen the retirement housing complex.

Few of the roommates desired a roommate, except those married persons desiring to live with their spouse. A slight preference for a mixed socioeconomic population within the complex was expressed. Respondents were almost equally divided on apartment floorplan preference between one- and two-bedroom apartments, with preference for one-bedroom apartments being slightly stronger.

Preference for both bathtub and shower in the bathing facilities was stated by the respondents. A combination kitchen-dining area was preferred to a combined living room-dining room combination. A cafeteria, open to guests as well as residents, was desired. The majority of the respondents expected their use of the cafeteria to average once a day.

This preference was affected by the desire to know more about the sort of food, quality, and atmosphere which would be available. An interest in guest rooms for visitors to the complex was expressed. Central garage facilities attracted favorable interest.

The sample ranked facilities near which they would like the apartment complex to be located as follows: 1) shopping, 2) church, and 3) doctor and dentist. Facilities most preferred within the complex were also ranked, as follows: 1) laundry, 2) activity rooms, 3) outdoor recreation areas, 4) game room, 5) lounge, and 6) arts and crafts room.

A direct relationship between education level of the sample and their income was found. As years of education increased, income increased. Also, those persons who had a higher monthly income were more likely to own their own homes.

It is recognized that distinctive differences in characteristics of respondents influenced preferences of the sample, as well as that the study reflects a random sampling and may not be truly representative of the elderly population of Stillwater.

Marital status was associated with total satisfaction with current housing. Those elderly persons who were married had a higher level of total satisfaction with current housing. No relationship between total satisfaction with current housing and apartment interest for the elderly persons was indicated. A greater percentage of elderly renters expressed

interest in living in a retirement housing complex than did elderly homeowners. Married persons preferred to live in a two-bedroom unit, while single or widowed persons preferred the one-bedroom unit. Those persons of the lowest income level preferred one-bedroom units, and those of the highest income level preferred the two-bedroom unit. Middle-income level respondents were almost evenly divided on preference for one-bedroom or two-bedroom units.

Those elderly persons with a high school education or less preferred one-bedroom units, while those with baccalaureate degrees or more education preferred two-bedroom units.

The respondents made suggestions about other things that they would like in a retirement housing complex:

Bath:	Bathroom doors designed for ease of exit
	Grab bars
Dining Area:	Cooking facilities in each apartment to allow for independence
Guest Rooms:	To be reserved prior to time of need
	To be used only by guests of residents
Storage:	Either in each apartment or in small clustered units close to the apartment
Services:	Medical staff or nurses on duty
	Drugstore
	Beauty/barber shop
	Bus - regular schedule
General Characteristics:	Lots of natural lighting (windows)
	Protected walkways
	Ramps for all floors if multi-floor structure
	Handrails
	Carpeted ramps
	Well-lighted, carpeted halls
	Area for pet exercising

Conclusions and Recommendations

From the findings of the study, it is recommended that

an apartment housing complex for the elderly be constructed in Stillwater. As previously noted (Joos, 1975), the years 1980-85 were considered optimum years for moving to retirement housing by one group of Stillwater retired residents, indicating that one segment of the retirement housing market is approaching the period when retirement housing is needed.

The findings from this study agree with those of Joos (1975), and indicate that there is a greater demand for two-bedroom than one-bedroom apartments.

Kitchen-dining room combination facilities are indicated. Although the majority of the sample expressed interest in having access to a cafeteria, they also wanted to be able to prepare some meals in their own living unit.

The findings indicated that bathing facilities should include bathtub and shower, equipped with special safety features.

Inclusion of guest facilities in the complex is warranted from the findings. Many elderly persons expressed the thought that with inclusion of such facilities, they could reduce the space needed in individual apartments.

No recommendation concerning socioeconomic composition of a retirement housing complex population can be made because of the lack of conclusive findings.

A central garage for automobiles owned by residents of the complex is indicated.

It has been suggested that two retirement housing complexes be built in Stillwater: one subsidized complex for

the low-income elderly and another facility for the elderly with greater assets and income. The rationale for this suggestion is that groups of elderly persons consist of such varying backgrounds and interests that no single housing complex can meet the needs of all. The suggestion cannot be supported or contested by the findings of this study since the elderly persons in the lower income level comprise only 14 percent of the total sample. Conclusions drawn from such a small portion of the sample were not considered to be sufficiently reliable for making any such recommendations.

Newcomer et al. (1976) stated that housing recently produced by private developers has been directed at upper-middle income level households. It has not been uncommon for housing experts to look to the filtering of housing units to lower income levels to solve housing problems. However, filtering of units built for upper-income residents to other levels of incomes averaged 20 to 25 years. Care should be taken that the needs of the elderly persons of low income are not overlooked.

It should be considered that there is a need for apartment housing for the elderly in Stillwater, and that there is, with use of cautious judgment, no immediate danger of overbuilding, as the Special Committee on Aging (1963) feared.

Recommendations for Improvement of Study

Utilization of another data collection method might be less time-consuming, possibly a series of shorter

questionnaires that could be mailed. Time consumption was a factor due to 1) length of interview schedule, 2) talkative nature of respondents, and 3) inability to locate respondents immediately.

Interviewers should be cautioned against bias. Frequent communication with interviewers and encouragement for them is recommended.

It is recommended that the number of interview schedules be pre-tested on at least 15 respondents.

A question concerning length of residence in the respondent's current housing would have been useful. Rewording of questions after more in-depth pretesting would be useful. The questions concerning housing satisfaction could be more detailed in their coverage of factors which could be determinants of current housing satisfaction.

The method used to rank locational preferences with regard to community facilities, and facility preferences within the retirement housing complex does not permit examination of the ranking data with respect to characteristic of the sample (two-way contingency tables).

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APPENDIXES

APPENDIX A

LETTER OF INTRODUCTION

Oklahoma State University

DIVISION OF HOME ECONOMICS
Department of Housing, Design and Consumer Resources

STILLWATER, OKLAHOMA 74074
HOME ECONOMICS WEST BUILDING
(405) 624-5048

Dear Friend:

The Department of Housing, Design and Consumer Resources of Oklahoma State University, in conjunction with the Roxie Weber Foundation, is conducting research into attitudes toward housing held by Stillwater residents. The Roxie Weber Foundation, a non-profit corporation, has submitted a proposal for a housing complex to be funded by the Federal Government. The data gained through this research will be used in preparing the housing proposal.

All information gained through this interview will remain confidential. Also, answering our questions implies no commitment of any kind on your part. Won't you help us by answering our questions about you and your attitudes toward housing preferences.

Thank you.

Jane Hanson
Graduate Assistant

Carl Hall, Ph.D.
Head, Housing, Design and
Consumer Resources

APPENDIX B

INTERVIEW SCHEDULE

SCHEDULE

ELDERLY HOUSING ALTERNATIVES

INTERVIEWER: _____

DATE: _____

ADDRESS: _____

INDICATE TYPE OF HOUSING:

_____1 SINGLE FAMILY

_____2 DUPLEX

_____3 APARTMENT - MULTI-FAMILY

_____4 MOBILE HOME

_____5 NURSING HOME

_____6 OTHER (SPECIFY) _____

SEX:

_____1 MALE

_____2 FEMALE

RACE:

_____1 AMERICAN INDIAN

_____2 WHITE

_____3 BLACK

_____4 MEXICAN AMERICAN

_____5 OTHER (SPECIFY) _____

1. Are you the head of this household?

_____1 No
_____2 Yes (Skip to Q. 3)

2. What is your relationship to the head of this household?

_____1 Wife
_____2 Husband
_____3 Sister
_____4 Brother
_____5 Father
_____6 Mother
_____7 Other (Specify)_____

3. Age _____

4. Employment Status

_____1 Full-time
_____2 Part-time
_____3 Retired
_____4 Other (Specify_____

5. Marital Status

_____1 Single
_____2 Married, living with spouse
_____3 Married, but not living with spouse
_____4 Separated
_____5 Divorced
_____6 Widowed
_____7 Other (Specify)_____

6. Number of years of education completed.

_____

7. How would you rate your health over the past year?

_____1 Poor
_____2 Fair
_____3 Good
_____4 Excellent

8. Do you have any physical disabilities or require special aids or equipment?

_____1 No (Skip to Q. 11)
_____2 Yes

IF YES: 9. Is your house adapted to the needs dictated by your handicap?

_____1 No
_____2 Yes (Skip to Q. 10a.)

10. What changes are needed?_____

_____

_____

10a. Please describe the adaptations you have made.

_____

_____

11. How many persons live in this household?

_____

12. How long have you lived in the Stillwater area? (Round to nearest year.)

_____

12a. How many close friends, that is, people you feel free to talk about personal things with, do you have? (If none, skip to Q. 15)

_____

13. Approximately how many people did you converse with yesterday? [PROBE: AT HOME, WORK, OTHER PLACES, ETC.]

14. I want to ask you a few things about some of these friends. I don't want to know who they are--just a few things about them. Without telling me who they are, think about your friends and pick out three that you would consider your best friends. Now taking the first .....second.....third..... (CHECK APPROPRIATE RESPONSES UNLESS OTHERWISE INDICATED.)

a. Does he (she, they) live within Stillwater's city limits?

	First	Second	Third
1 No			
2 Yes			

b. About how often do you see him (her, them)?

	First	Second	Third
1 Daily			
2 2-3 times a week			
3 Once a week			
4 2-3 times a month			
5 Once a month			
6 Several times a year			
7 Less often than once a year			

c. What kind of work does he (she, they) do?

First_____
Second_____
Third_____

d. In what way is he (she, they) like yourself and your family? (TRY TO GET RESPONDENT TO BE SPECIFIC. PROBE FOR COMPLETENESS INDICATORS: FAMILY, SOCIO-ECONOMIC, EDUCATION, JOB, ETC.)

First:

Second:

Third:

e. In what ways is he (she, they) different from you and your family?

First:

Second:

Third:

- -

Would you please attempt to rank your satisfaction or dissatisfaction with the following statements on a scale from one to five. Here is a card showing the scale we will use. (HAND CARD TO RESPONDENT AND INDICATE NEXT INSTRUCTIONS WITH FINGER.) A "1" will signify you are very dissatisfied; a "5" will signify you are very satisfied.

15. The size of rooms in your house?_____

Why?_____

16. The number of rooms in your house?_____

Why?_____

(Cont.--Answer in the same manner as Q. 15 & 16)

17. The arrangement of rooms in your house?_____

Why?_____

18. The monthly cost of your housing?_____

Why?_____

19. The arrangement you have for cooking?_____

Why?_____

20. The arrangement you have for eating?_____

Why?_____

21. The police protection?_____

Why?_____

22. The location of your house in relation to places you have to go (stores, doctors, recreation, church, etc.)?

_____ Why?_____

23. The fire protection?_____

Why?_____

24. The amount of yard you have?_____

Why?_____

25. The amount of time and effort that maintenance of your home requires?_____

Why?_____

26. The condition of streets and avenues near your home?___

Why?_____

- -

27. Which of the following describes you? Do you own, are you buying, or are you renting your home?

_____1 Own your home and it is paid for(Skip to Q. 32.)
_____2 Buying your home and still paying for it
_____3 Rent (Skip to Q. 29)
_____4 Other (Specify)_____

28. If buying, please tell us how much your payments are per month, including taxes and insurance, or per year if a yearly payment is made. (Skip to Q. 32)
$_____

IF RENT: 29. How much rent do you pay each month?
$_____Amount paid for housing

30. Does the furniture come with this dwelling?
_____1 No, nothing furnished
_____2 Stove and refrigerator only furnished
_____3 Completely furnished

31. Are your utility costs included in your rent?
_____1 No
_____2 Yes (Skip to Q. 33)

32. How much do you pay each month for utilities (water, electricity, sewer, and garbage)? $_____(approx.)

33. What is the approximate total monthly income for you and your spouse?

_____1	$0-275	_____4	$1,001-1,500
_____2	276-500	_____5	1,500+
_____3	501-1,000		

34. Does the income of you and your spouse come from any of the sources listed below? (Please place an X beside any source from which you gain income.) (Include those sources used in computing the figure in Q. 33).

_____1 Gainfully employed
_____2 Social Security
_____3 Professional retirement programs other than Social Security
_____4 Interest, dividends
_____5 Employed spouse
_____6 Farming or other privately-owned business
_____7 Medical compensation
_____8 Other (Specify)_____

- -

There is a group of people in Stillwater that wants to build some apartments for senior citizens. There would be about 100 apartments in the project, and no building would be over 3 or 4 stories tall and would have bus service to the hospital, doctors, senior citizens center, etc.
We need to know how many senior citizens in Stillwater would want to live in a housing complex like this. We're also interested in just what kinds of services and facilities should be included in the apartment.

35. If these apartments are built in a retirement housing complex, would you want to live in one?

_____1 No
_____2 Maybe
_____3 Yes

36. If these apartments were available to you at an average cost of 1/4 your monthly income, would you consider living there?

_____1 No (Skip to Q. 51)
_____2 Maybe
_____3 Yes

37. What is the maximum rent you would pay (including utilities?

$_____

38. If the apartments in the retirement housing complex became a reality--would you want to move in as soon as they were ready?

_____1 No
_____2 Yes (Skip to Q. 40)

39. How many months would you want to wait before moving in?

_____months

40. If you moved into an apartment in the complex, would you want to:

_____1 Live alone
_____2 Live with spouse
_____3 Live with another person (specify relationship)_____

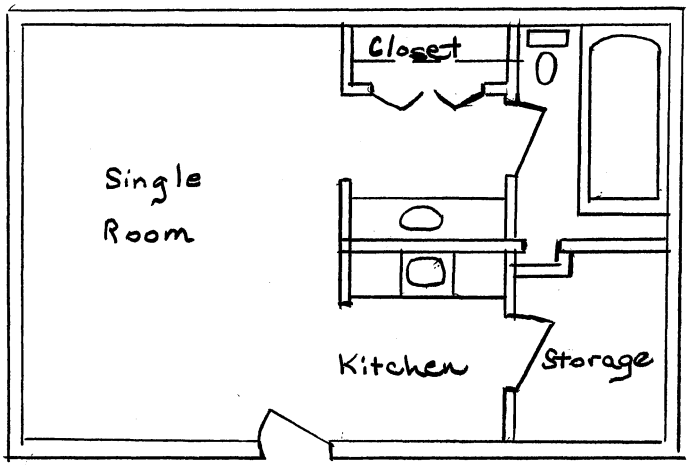
41. Who would you like to live with in a retirement housing complex?

_____1 Only people of your approximate socio-economic or income group
_____2 People of a mixture of socio-economic or income groups

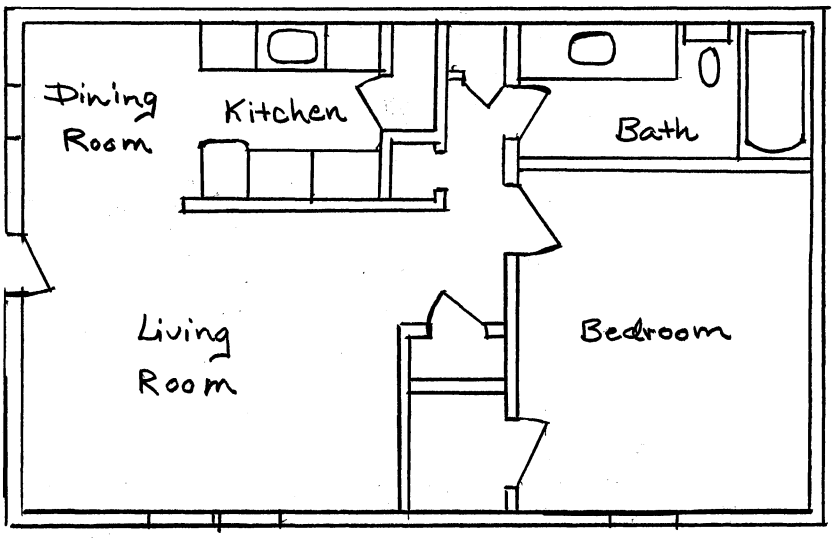
42. Which sort of apartment appeals to you most?

_____1 Efficiency apartment
_____2 1-bedroom apartment
_____3 2-bedroom apartment

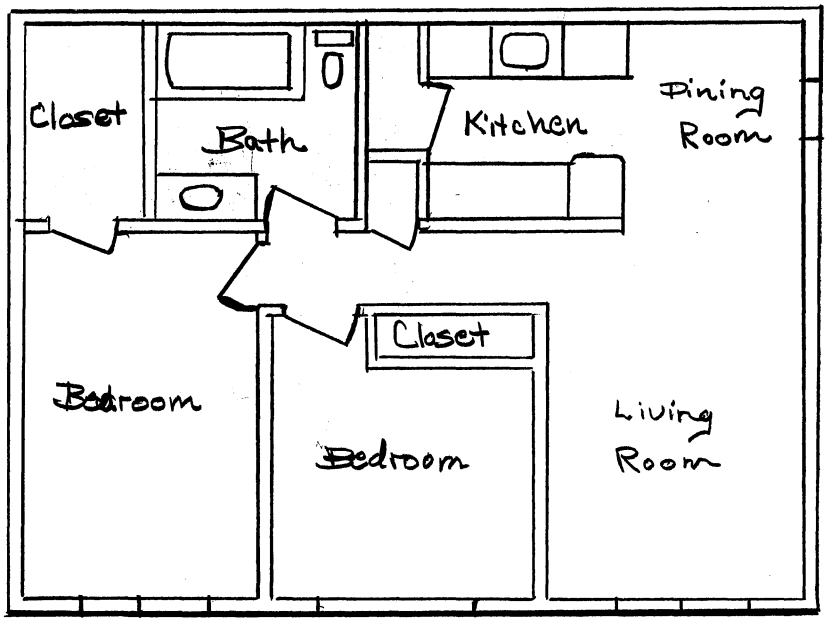
Sample Floorplans



Efficiency



One Bedroom



Two Bedroom

43. Which bathing facilities do you prefer?

_____1 Shower
_____2 Tub
_____3 Both

44. What sort of dining arrangement do you prefer in an apartment?

_____1 Kitchen-dining area
_____2 Dining-living area
_____3 Other (Specify)_____

45. If you lived in such a retirement complex, would you like a common dining area or cafeteria in the apartment complex?

_____1 No (Skip to Q. 48)
_____2 Maybe
_____3 Yes

46. How often would you want to eat in the common dining area?

_____1 All meals
_____2 One hot meal at noon daily
_____3 One hot meal at evening daily
_____4 4-6 meals a week
_____5 3 meals a week or less

47. Would you want this dining area open to your guests?

_____1 No
_____2 Yes

48. Would you want to have guest rooms in the complex where your guests could stay when they visit?

_____1 No
_____2 Yes

49. Do you drive your own automobile?

_____1 No (Skip to Q. 51)
_____2 Yes

50. If you lived in the retirement housing complex, which parking facilities would you prefer?

_____1 On-street
_____2 Off-street, unprotected
_____3 Central garage in the complex

51. How often do you use the Stillwater Mini-bus system? (approximate)

_____1 Never
_____2 1-2 times a month
_____3 3-5 times a month
_____4 More than 5 times a month

52. Do you rely on rides from friends for transportation?

_____1 No
_____2 Yes

53. If you chose to live in an apartment complex, which of the following would you most like to live near? (Please rank your first three preferences in order of importance.)

_____1 Church
_____2 Shopping
_____3 Doctor and dentist
_____4 Theater
_____5 Library
_____6 Senior citizens center and recreation areas
_____7 Oklahoma State University activities
_____8 Other (Specify)_____

54. Indicate which one of the following facilities most appeals to you as a possible facility within the apartment complex. (Please rank them all in order of preference.)

_____1 Outdoor recreation areas (Picnics, horse-shoes, garden, sidewalks, etc.)
_____2 Laundry
_____3 Arts and crafts facilities and workshop
_____4 Game room (Cards, games, ping pong, snooker and pool tables, etc.)
_____5 Activity rooms (Reading, meetings, exercises, adult education classes, etc.)
_____6 Lounge areas
_____7 Other (Specify_____

Please list any others you would care to suggest:

What other services or facilities would you want in the retirement complex?

APPENDIX C

VISUAL AIDS

HAND-HELD CARDS TO ASSIST RESPONDENTS IN REPLY

Card 1

Housing Satisfaction Scale

1	2	3	4	5
Very Dissatisfied	Dissatisfied		Satisfied	Very Satisfied

Card 2

Sources of Income

- Gainfully Employed
- Social Security
- Professional Retirement Programs Other Than Social Security
- Interest, Dividends
- Employed Spouse
- Farming or Other Privately-Owned Business
- Medical Compensation
- Other (Specify)_____

Card 3

Locational Preferences

- Church
- Shopping
- Doctor and Dentist
- Theater
- Library
- Senior Citizens Center and Recreation Areas
- Oklahoma State University Activities
- Other (Specify)_____

Card 4

Facilities Desired in

Housing Complex

- Outdoor Recreation Areas (Picnics, Horseshoes, Garden, Sidewalks, etc.)
- Laundry
- Arts and Crafts Facilities and Workshop
- Game Room (Cards, Games, Ping Pong, Snooker, Pool)
- Activity Room (Reading, Meetings, Exercises, Adult Education, etc.)
- Lounge Areas
- Other (Specify)_____

VITA

Jane Louise Hanson

Candidate for the Degree of

Master of Science

Thesis: INTEREST IN A RETIREMENT HOUSING COMPLEX AS EXPRESSED BY ELDERLY RESIDENTS OF STILLWATER, OKLAHOMA

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