

FACTORS IN RESIDENTIAL LOCATION CHOICE OF RETIRED
PERSONS MOVING TO SOUTHERN ARIZONA

by

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TABLE OF CONTENTS

	Page
ABSTRACT	v
INTRODUCTION	1
PROCEDURE	2
SUMMARY OF PERTINENT LITERATURE	5
OBJECTIVES	10
DESCRIPTION OF SAMPLE	12
FINDINGS	16
CONCLUSIONS	33
APPENDIX A. GUIDE FOR INTERVIEW	41
APPENDIX B. PLACE OF ORIGIN	43
APPENDIX C. INCOME DATA	44
APPENDIX D. EDUCATION DATA	46
SELECTED BIBLIOGRAPHY	47

ABSTRACT

Due primarily to its warm dry climate, Southern Arizona has become important as a retirement center for many elderly people. Knowing what sorts of living environments these people seek can thus be of use to community planners, particularly in this area. The information gained from open-ended, exploratory interviews with elderly persons who chose either Tucson or Green Valley as their place of retirement, pointed to some important differences between those who chose a retirement community and those who chose an age-integrated community. Different sorts of people are attracted to and satisfied with different sorts of residential environments, so no one solution will be suitable for all retired persons. The lesson for planners is that, for purposes of planning, the elderly cannot be treated as an undifferentiated, amorphous mass. There are individuals with different characteristics, needs, and desires, and planners and legislators would do well to make possible the establishment of age-segregated environments within the city for those who do not want the small town atmosphere of a retirement community and yet crave the close companionship of their peers.

INTRODUCTION

This study grew out of a general concern for the position of the elderly in American society and, more particularly, out of a desire to discover the housing alternatives available to the elderly and those factors which influence their residential location. The Tucson area seemed especially appropriate for such a study in light of the fact that Southern Arizona attracts many retired people. The study was further facilitated by the closeness of Green Valley which afforded an opportunity to compare those who retire to a city with those who choose a small retirement community.

Due to time constraints, which limited sample size, the findings of this study must be considered tentative. However, taken as a pilot study, it is hoped that this report will indicate some interesting avenues for future exploration.

PROCEDURE

The preliminary phase of this study consisted of a literature search, the purpose of this being to learn what had been done previously in the field. The search extended into a number of areas related to the elderly, in general, and to retirement communities, in particular. Also explored were the topics of planned residential environments and the sociological aspects of neighboring.

The literature search was followed by a definition of objectives, the results of the search helping to define and clarify these objectives. The literature search was helpful in pointing out areas that have been adequately researched and in confirming that this study would cover areas not yet studied.

Once the objectives of the study were defined, the next step was to develop a questionnaire to be used as a guide for interviewing. The questions were fashioned with the objectives in mind and with the intention of allowing the interviews to be rather open-ended and conversational in nature. One questionnaire, consisting of about forty questions, was designed, tested, and found to be too rigid a framework for conversation. This one was discarded in favor of a much shorter questionnaire which proved quite

satisfactory in eliciting a more free-flowing interview (see Appendix A).

Once the questionnaire was ready, the next order of business was to select samples in Tucson and Green Valley. The Tucson sample was selected with the aid of a city directory which indicated those persons who were retired. Appointments were made with those persons who had moved to Tucson from elsewhere upon retirement and who consented to submit to an interview. Similarly, the Green Valley sample was chosen at random from the telephone directory and appointments were made with those people who consented to be interviewed. In a sense, the sample was manipulated to strike a balance between single family houses, apartments, and townhouses. An attempt was also made to interview primarily couples, and, anticipating that Green Valley would be a relatively high income area, the Tucson sample was intentionally biased toward the higher income areas of the city in order that the two groups would be comparable.

The interviewing was conducted primarily during the month of July in the summer of 1972. The interviews varied in time from fifteen minutes to more than an hour, depending mainly on the rapport which was established. Thus, some interviews yielded much more objective and subjective information than did others. The interviews were tape recorded so that the interviewer did not have to interrupt the conversation with note-taking.

Once the interviewing was completed, the next job was to transcribe all the tapes and extract the pertinent information from them. Then, using this information as a resource, hypotheses were formulated and then tested against the data. That is, the hypotheses grew out of general impressions gleaned from the interviews rather than from any preconceived ideas about what the findings would be. The final step was to formulate conclusions based on the findings and on subjective personal impressions.

SUMMARY OF PERTINENT LITERATURE

There have been a number of studies done in retirement communities in the last ten years but, on the whole, these communities do not seem to have been frequent objects of study. Most of the studies which have been done deal with the morale of elderly people living in a retirement community as opposed to the morale of those living in an age-integrated community.

Bultena and Wood (1969) conducted a study in Arizona in which they compared the personal adjustment of older persons who moved to age-segregated planned communities with that of similar people who moved to regular communities. They concluded that the morale of residents in planned retirement communities was significantly higher than that of elderly residents in regular communities. They concluded, as well, that a sizeable minority of elderly people actively prefer to live in a community of age peers.

Marjorie M. Herbert did a similar study in 1966 to find out how older adults in a retirement community get along compared to older adults in the same socio-economic stratum living in urban communities. As Bultena and Wood concluded three years later, Herbert also found that older adults living in a retirement community seemed

to be getting along better than those living in the city as far as making new friends, feeling a sense of community, and being active.

Also in 1966, Michael B. Barker conducted a somewhat different study to examine the nature of retirement communities and the market which they serve. He focused on the housing needs and preferences of the elderly, and the retirement community in the municipal context. Much of the report was descriptive and he actually drew few conclusions.

There were a number of writings on the elderly in general, some theoretical in nature and some based on empirical study. Irving Rosow's (1967) Social Integration and the Aged is a book which is frequently cited in the literature in this field. Rosow contends that the more elderly people there are in an old person's environment, the more friends he will have. He states that the aged tend to form friendships with their peers and that residential proximity between young and old does not maximize social integration of the aged. His conclusion, that old people do better in age-segregated housing is an argument in favor of retirement communities.

In 1971, the White House Conference on Aging considered the topic of housing for the elderly. The report stated that the greater the homogeneity among residential populations, the higher the morale of the

group tends to be, thus supporting Rosow's contention. The report also pointed out that it is not known what type of housing older people would choose if they had adequate income and a full gamut of choices, thus indicating this as an area in which study is needed. This, in fact, provided one point of departure for the present study as, apparently, there was a need to look into the factors involved in residential choice among the elderly.

In 1967, Mark Messer, too, wrote of the advantages of age-segregated housing. He claimed that an age-concentrated environment should be more conducive to an age-appropriate normative system and higher morale.

Earlier, in 1963, Rudolph Tartler wrote in favor of the aged being integrated with other age groups. He felt that all social roles must be considered as more advantageous for the old if these roles keep him in touch with social processes and the members of other age groups and prevent the formation of an isolated world to which he may retreat. Similarly, Walter K. Vivrett wrote, in 1960, that most older people want to remain an integrated part of the community in which they spent their earlier years. However, he did mention the positive aspect of homogeneity for social interaction.

The literature is thus divided between those who favor age-segregated retirement housing and those who would oppose it, with the later writings seeming to favor it.

The theoretical position, based primarily on Irving Rosow's writings, seems to lean in the direction of favoring age-segregated retirement communities.

The literature search also turned up a number of related readings dealing with residential environments and neighboring. Robert L. Wilson, in 1962, wrote "Livability of the City." What he presented in this article was, basically, a method for determining the livability of a city from the point of view of its residents. This article, then, suggested a means by which such information could be elicited from the elderly.

Suzanne Keller wrote The Urban Neighborhood in 1968. In this book, which was only incidentally related to the aged, she nevertheless supported Rosow's proposition. She wrote that propinquity brings neighbors into contact but it is because of homogeneity that this contact is maintained on a positive basis. Thus, the human factor is critical and there is no simple mechanical determination by the physical environment, as planners might wish to believe.

It appears, then, that the research into the field of environments for retirement has been limited primarily to studies of comparative morale and friendship formation. Thus, the field was open for this study to go into the choice behavior of the elderly in selecting their place of retirement. Certainly the findings of this study can be

related to the existing literature, but, for the most part, this will be an exploration into uncharted territory.

OBJECTIVES

The primary objective of this study was to learn what kinds of residential environments elderly people prefer and how they go about choosing the place in which to spend their retirement. The areas of study were Tucson and Green Valley, so an additional objective was to uncover the reasons why one was chosen rather than the other as a place to retire. We hoped to discover the differences and/or similarities between the two groups of people, those who chose Tucson and those who chose Green Valley.

More specifically, we wanted to find out where these elderly people came from and why that was an unsuitable place for retirement. Next we wished to uncover the choice process which went into their decision. Why did they choose Arizona, and why Southern Arizona? Why did they choose Tucson rather than Green Valley, or vice versa? How did they choose their neighborhood and what were their reasons for selecting either a house, an apartment, or a townhouse?

Once having learned of the important factors which go into the choice process, we wanted to know how satisfied these people were with their choices. Finally, in order to further pin down the differences between those who chose Green Valley and those who chose Tucson, we hoped to gather

some information about the kinds of activities they participate in and the sorts of attitudes which they hold toward retirement, in general, and retirement communities, in particular. This information would be a valuable addition to the portrait of the retiree which should emerge from this study.

DESCRIPTION OF SAMPLE

The Tucson sample was selected first and, on the assumption that Green Valley would be a middle to upper-middle income community, the selection process was biased toward the middle and upper-middle income areas of the city. The Tucson sample was rather small, consisting of seventeen couples. Of these, two were apartment dwellers, nine owned single-family houses, and six resided in townhouses.

The two apartments were both in middle income areas of the city, one being a quite modest, furnished apartment and the other being a bit larger and a bit nicer, yet still a middle income dwelling. The houses ranged from the modest and unpretentious to the opulent. One was a very small, old house near the University. Three were tract houses at varying levels of the middle price range and all on the east side of town. Two more were still further east and a bit more expensive, and the remaining three were quite expensive homes in the foothills. The townhouses were all apparently in the upper-middle to upper income range. One was located in a development in the foothills of the far east side, and five were located in a single development in the foothills of the northwest side of the city. This townhouse development, called Northridge Villa, was

occupied primarily by retired people, and will be discussed in greater detail later.

Green Valley is a rather small retirement community, located approximately twenty-five miles south of Tucson, which is advertised alternatively as a retirement community, an adult community, and a resort community. In any case, the overwhelming majority of the people are, in fact, retired. Green Valley is connected to Tucson by Interstate 19 and this highway actually divides the community in half. On approaching Green Valley from Tucson, the shopping center, the apartments, and the townhouses lie on the right side of the highway and the recreation center, the houses, and the country club lie on the left side of the highway. The two sides of the town are connected by a single underpass.

The Green Valley sample was quite a bit larger than the Tucson sample, our primary interest being in the retirement community. Thirty-three interviews were conducted and all but three of these were with couples. Of the remaining three, two, a man and a woman, had never married, and one was a widower.

Twenty of the couples interviewed were house owners and thirteen were apartment dwellers. The apartments, single-story units of four attached dwellings, were all very much alike and all were located in the same area. Special laundry facilities, swimming pools, and

shuffleboard courts were provided in the apartment area and the grounds seemed to be well-maintained. The apartments were surprisingly small, the rent quite inexpensive, and the income of the apartment dwellers somewhat lower than that of the home-owners.

The houses were all quite new and many of them were built by their present occupants. There was a certain degree of uniformity in the appearance of the houses, most of them conforming to a Spanish type of architecture. Most of the houses had dark grill-work over the windows and, aside from an occasional tree, all front yard landscaping was done with natural desert vegetation. The differences only began to appear when one stepped inside the houses, some being furnished quite lavishly, others more modestly, and a few frankly shabbily. Most of the occupants would fall into the middle to upper-middle income range.

This study, then, does not pretend to deal with a representative sample of the entire population of the elderly inhabiting Southern Arizona. The sample is comprised of those who moved from another community to settle, for their retirement, in either Tucson or Green Valley. These are middle to upper-middle class people and no consideration is given, in this particular study, to the low-income or poverty-stricken elderly. This study concerns those who have the means to choose their place of retirement and the resources to implement that choice.

The sampling procedure may have introduced another slight bias into the sample in that we interviewed only those people who were willing to let us come to their homes. In other words, we contacted people by phone, explained the purpose of the study and gave them an opportunity to refuse if they did not want to participate. It is possible, then, that there may be some significant differences in attitude and general orientation of those people who did not want us to come. This bias, if indeed it is a bias, is one which we had no means of remedying.

FINDINGS

Before examining the following findings, the reader must again be reminded that these are in no way presented as conclusions. This study was an exploratory search for factors important in the residential location choice of the elderly. Therefore, the findings might equally well be labeled hypotheses, and should be viewed as possible avenues for future research.

Our first question was where these people, who retired to Tucson or Green Valley, had come from, and the not at all surprising answer was that the overwhelming majority of them had come from the northeast and the mid-west. They came, then, primarily from the states with long severe winters and hot humid summers. We encountered only two couples from the South and none at all from the deep South. One couple moved from the Washington, D.C., area and one from Oklahoma, but none came from any further south. Just a smattering of people came from the western states and a number of them had originally moved from the colder states and then moved, again, to Arizona upon retirement (Appendix B).

One hypothesis was that perhaps more people from small towns would choose to settle in Green Valley rather than Tucson, but the data proved this to be a false

suspicion. In both the Green Valley sample and the Tucson sample about thirty per cent of the people came from small towns or rural areas and the remaining seventy per cent came from large urban centers. Thus, in general, most of the sample was comprised of urban dwellers, and the couple from a small town was just as likely to choose Tucson as Green Valley.

In answer to the question, "Why was your previous place of residence unsuitable as a place to retire?" the greatest number of people replied that it was the climate that made that place unsuitable. That is, they wanted to get away from the severe winters. An almost equal number of people mentioned health as a factor, and this, of course, is also related to climate. In particular, those with arthritis or respiratory ailments fare better in a warm, dry climate. In fact, quite a number said that their doctor had specifically recommended Southern Arizona. Finally, a few claimed that it was a desire to get away from the big city which prompted their move.

In examining the choice process by which people arrived at Tucson or Green Valley, it became clear that most people chose their place of retirement quite carefully, the decision being made over a period of years. The greatest number, thirty-seven per cent, had visited Tucson or Green Valley several times before making their decision. Most of these people were winter visitors for several years

before making a permanent move. Twenty-three per cent had traveled to many places before settling on Southern Arizona as their place of retirement. Some traveled specifically to check into retirement communities around the country and quite a number of others simply purchased trailers and spent several years traveling before settling down again. One man quite beautifully expressed the feeling derived from this sort of traveling. He said, "You know, it's a wonderfully exciting thing to be free for the first time in your life. You don't have to be anywhere at any particular time. We could spend a week or five years at Santa Fe. It didn't make any difference."

A slightly smaller number of people, seventeen per cent, decided on Southern Arizona after just one or two short visits, and only fifteen per cent of the sample actually chose Tucson or Green Valley sight unseen. Virtually all of these people who moved without ever having been to Arizona before did so on a doctor's recommendation. The smallest portion of the sample, eight per cent, chose Southern Arizona as their place of retirement after having lived in the area for a number of years at some time, whether recently or in the past.

It has already been established that most of these people chose Southern Arizona because of the climate, which is the most obvious drawing card of the area. However, determining why a couple chose Tucson rather than Green

Valley, or vice versa, was a more complicated matter, the climate being almost identical in the two places.

Those who retired to Green Valley and those who retired to Tucson seemed to have differing perceptions in several areas critical to this particular choice. Because Green Valley residents must travel to Tucson to fill many of their needs, their perception of this distance must be an important factor. Tucson residents and Green Valley residents appeared to have a different perception of the distance between the two communities which, objectively stated, is about 25 miles with a legal speed limit of 75 m.p.h. Most of the Green Valley sample stated that the distance to Tucson was not far and only two of the Green Valley respondents felt that it was a long drive to Tucson. In Tucson, on the other hand, quite a few rejected Green Valley as a place to live because it was too far away from Tucson, and none expressed the feeling that the drive between Tucson and Green Valley was a short one.

The Tucson and Green Valley samples appeared to differ, as well, in their perception of community size. That is, many chose Green Valley because Tucson was too big, while many others chose Tucson because of its smallness. Many in Green Valley stated that they did not want to live in a city and even more Green Valley residents specifically mentioned Tucson as being too big. The Tucson sample, in contrast, perceived Tucson as a small city, and

some even considered it a small town. A few claimed that they had chosen Tucson because they wanted to get away from the city.

Another factor, quite closely related to this differing perception of size, was often mentioned by those in the Green Valley sample. That is, Green Valley residents perceived Tucson as a place troubled by crime, while Tucson residents did not express concern. A number of Green Valley respondents stated that they had not chosen Tucson because there was too much crime there, and almost as many people stated that they felt safer in Green Valley. In the Tucson sample, no one even mentioned crime.

We suspected that the residence location of children might be a significant factor in parents' choice of retirement area. However, children turned out to be an insignificant factor in more cases than not. In Green Valley, only twenty per cent of the respondents mentioned their children as a significant factor in their decision, while, for eighty per cent, children were not a factor. The Tucson figures were somewhat different. Forty-five per cent mentioned their children as a significant factor in their choice while, for fifty-five per cent, children were not a factor.

One possible explanation for this great difference between the two samples is that a much larger proportion of the Green Valley sample had no children. In Green

Valley, thirty-nine per cent had children and an equal number, thirty-nine per cent, had never had children while, in the Tucson sample, sixty-seven per cent had children and only seven per cent had never had children. In both cases, this information was not obtained for about twenty-five per cent of the sample, but we can assume that the proportions would have remained about the same. It seems, then, that Green Valley attracts a disproportionate number of people who have no children. This, however, is an area which needs further investigation to determine whether retirement communities, in general, are more attractive to people who have never had children. A further distinction which should be made, but which was not made in this study, is whether it was by choice that these people had no children. This distinction may be found to be an important one in understanding the choice behavior of the elderly.

Another factor which may be significant in the choice between Tucson and Green Valley, although one which was certainly not mentioned by the respondents themselves, is education. It appears that, given two groups of people with roughly comparable income, those with more education will choose Tucson rather than Green Valley. In examining the data on this point, the entire Green Valley sample was used but only the Tucson house and apartment samples were used, the townhouse dwellers having a higher income than either the house or apartment dwellers (Appendices C, D).

In Green Valley, thirty-three per cent had a bachelors degree or more, while in Tucson sixty-eight per cent had a bachelors degree or more, quite a striking contrast. In looking at the income figures, the data showed the mean income of the Green Valley resident before retirement to be approximately fifteen thousand dollars a year and, after retirement, about nine thousand dollars a year. In the Tucson sample, the mean income before retirement was about sixteen thousand dollars a year and, after retirement, about ten thousand dollars a year. Thus, the Tucson figures are slightly higher, but the difference does not seem great enough to explain the large difference in educational attainment. This again is a point which needs further investigation to determine whether the conclusion indicated here is, indeed, a valid one.

Once having determined why people located in either Tucson or Green Valley, this study next explored how these people went about choosing their neighborhood. Actually, this question was pertinent only to those who chose Tucson. For several reasons, this issue did not seem particularly relevant to the Green Valley situation. Green Valley has three separate areas, one for houses, one for apartments, and one for townhouses, so, once the dwelling type had been decided upon, there was really not much choice. In addition, apartments were usually assigned, affording the individual even less choice of location. Since this is

quite a small community, with just one shopping center, one recreation center, etc., all more or less equally accessible to all, there really did not seem to be neighborhoods to choose from.

For those who retired to Tucson, the planner's conception of neighborhood was of slight importance in choosing their homes. The greatest number of people simply found a house they liked in a neighborhood which was acceptable, but neighborhood was not really a positive factor in the decision. Some mentioned quietness and general appearance of the area, or, more particularly, the street, as important factors in their choice of location. A number of other factors were mentioned two or three times. A few looked specifically for a place in the foothills and a few chose the east side as the more desirable end of town. Some were influenced by friends, another few looked for space and privacy, and several mentioned price as a significant factor in choosing their residential location. Only one couple mentioned convenience to shopping, church, doctors, etc., as an important factor in choosing their neighborhood. Thus, for most, the location of such facilities was entirely incidental. Most, in fact, did not even know where these facilities were located until after they had moved into their homes.

The data showed, then, that the choice of house, apartment, or townhouse generally preceded any consideration

of neighborhood. This choice, however, is the last one to be considered here.

In both Tucson and Green Valley, elderly people seemed to equate home-ownership with independence and continued well-being and activity. Many of the respondents said that they would stay in a house as long as they could manage it and were still active, inferring that moving out of a house and into some other type of housing was tantamount to admitting to the disabilities of old age. An almost equal amount said that they chose to live in a house because of a desire for space and privacy. Many people said that they would feel cramped in an apartment. The implication again being that they would not move to an apartment unless such a move were made necessary by reduced capabilities. Many answered simply that they chose a house because they had always had a house, as if to say, "Is there any other way to live?" The remaining few claimed that they bought a house for tax purposes or as an investment.

If home ownership represents independence for some, apartment or townhouse living represents a different kind of freedom for others. A number did respond that a house had become too much to take care of, but even more answered that they chose an apartment or townhouse because it released them from the burdens of maintenance involved in a house, and it gave them more freedom to travel. In fact,

one homeowner admitted that he should have stayed in an apartment for this very reason. He had planned to travel but felt that the house had become an anchor because of the year-round maintenance his yard demanded.

Some of the respondents, themselves, suggested that perhaps the choice of dwelling type was related to age. That is, the older retired couple would choose an apartment or townhouse rather than a house. Those we interviewed thus further confirmed the above-mentioned hypothesis that the elderly somehow equate home ownership with a lack of the sorts of disabilities which come with age. Age, however, did not seem to be a significant variable. In this sample, the ages of those living in apartments ranged from sixty-four to eighty with an average age of seventy years, and the ages of those living in houses ranged from fifty-four to eighty-four with an average age of sixty-seven and a half years. Thus, age is, at best, only a crude indicator of well-being, self-sufficiency, and physical capability, and health is actually the crucial factor.

In exploring how happy these people were with the choices they had made, it appeared that most people were quite satisfied with their residential choice and found little in their communities to dislike. In Green Valley, quite a sizeable number said they could think of nothing they disliked, and many others mentioned things which they considered inconveniences but which would not stimulate

them to leave Green Valley. The most frequent complaints were that the medical facilities are inadequate, there is too little shopping, no restaurant, and the prices in the drugstore are too high because of a lack of competition. A few mentioned that they were unhappy about the growth of Green Valley and another few felt that the police protection was inadequate.

Some did have complaints which appeared to be more serious, and a few seemed to be quite unhappy in Green Valley. One woman viewed the distance to Tucson, to a decent hospital, and to the University, as a very great drawback of Green Valley, but she felt that she and her husband were too old to make another move. She described her husband as quite a scholarly man who, at the age of eighty-four, was writing a book, and she felt that there was very little in Green Valley to interest him. She complained, also, about the golf mania in Green Valley, saying, "Some people retire to these communities purposely more or less for this darn golf. That's all they're interested in. When they're retired they think all they have to do is have a good time, while we're interested in life and everything else. We like to advance and learn and do things."

One woman complained quite bitterly that Green Valley was culturally deprived, and several complained about the dullness of the community. One man, who owned

his own business in a small town before retiring, commented, "You have a lot of people here that have lived all their life as teachers and professors in college, or worked for companies. I haven't worked for anybody for fifty years. I always worked for myself, and at times I made a lot of money, at times I didn't make any and it was up and down, so, you know, I crave action. You know, the telephone used to ring and I had people working for me, and business. And now here I am. I got a telephone, it never rings. I got a post office box, I never get any mail. All I got is money but, hell, it won't do. I can't eat it up and I can't drink it up, so I'm in a hell of a shape." He felt that Green Valley was a comfortable place for old people, but not a good place. He complained, "I can't even get a good poker game here--no poker players anymore . . . I don't fit in here at all, but I make myself like it. I'm here now." When asked why he considered himself a misfit, he replied. "Well, I can't play golf. That's a big thing here. And bridge is the second thing. I wouldn't waste my time on a card game for nothing, for fun. . . . The things I like to do, I don't do no more."

Finally, several people found Green Valley a depressing place to live. One woman said, "Wherever you go, all you see is old people. You get old fast enough without being surrounded by old people. They're all just a bunch of old crabs who don't want any children around."

In Tucson, there were, on the whole, fewer complaints than in Green Valley. In fact, most of those interviewed could think of nothing they disliked about Tucson. A few felt that Tucson was too big, and a few mentioned that the Community Center was too expensive. Two couples felt that Tucson was unfriendly, one mentioned pollution, and one complained about high taxes. In both Tucson and Green Valley there were a few people who really hated the desert but who had to stay because of their health. However, for the most part, the Tucson retirees in the sample were quite satisfied. As one woman expressed it, "We're all rejoicing in the loveliness of the area, the freedom that we have--not striving anymore. It all registers into a picture of wonderful happiness."

To further determine whether there were real differences between those who retired to Tucson and those who chose Green Valley, we asked the people what sorts of activities they participated in. There do appear to be some quite striking differences.

The common stereotype of a retirement community pictures people playing golf and bridge and these, in fact, are the most popular activities in Green Valley. As one golfer put it, "Green Valley is the biggest bargain around. Where else can you get golf for two hundred dollars a year!" Tucson residents, in contrast, mentioned University-sponsored programs and cultural activities most

frequently while University-related activities were low on the list for Green Valley residents. A large number of both Tucson and Green Valley residents mentioned their involvement in church, and this is one respect in which the two groups closely approximate one another.

Volunteer work seemed to be quite an infrequent activity in Green Valley while, in Tucson, volunteer work was mentioned much more commonly as an activity. There also seemed to be a difference between the two samples in the types of organizations to which the people belonged. Green Valley residents mentioned Elks, Shriners, American Legion, and American Association of Retired Persons, all primarily social clubs or groups oriented toward self-interest. Tucson residents, too, mentioned Elks and Rotary which are social-service clubs. However, also mentioned were the Woman's Peace Movement, the Sierra Club, the Southern Arizona Hiking Club, the Audubon Society, and Great Decisions Discussion Groups. Thus, those in Tucson seemed to be more involved in community affairs and in issue-oriented groups while Green Valley residents lacked this sort of involvement and seemed to function more or less in their own little world, separated from the larger community.

Perhaps this difference stems from differing attitudes toward retirement itself. The following comments indicate that this may be the case but, again, the

evidence is inconclusive and more investigation is needed on this point. A retired minister in Tucson said that he would much rather be active than be "on the shelf," and he said, "One of the essentials of retirement . . . you've got to feel useful in some way." Another Tucson resident supported this contention, saying, "Involvement keeps the blood circulating."

A woman, a former teacher for the Indian Service in Alaska, summed up what seemed to be the predominant attitude in Green Valley. "You want to rest. You want to do the things you never had time to do before. As far as going to meetings and lectures and things like that, you're fed up with them. . . . When you're retired there's so few years left to play that you want to do just what you want to do, and nothing else." The differences are not as clear as they seem, however, as can be seen in the comments of one Green Valley man, a former sociology professor. "Just last week I got a monograph from one of my former graduate students, dedicated to me. How about that! So you begin to think you're dead in Green Valley, and you discover you're not, really." This man, however, had written two books since retiring and so, unlike the teacher, he was still involved in his field and had continued to contribute to it.

In any case, and as would be expected, attitudes toward retirement communities differed between those in

Green Valley and those in Tucson. In responding to the question, "Why did you choose a retirement community?," the most frequent reply of Green Valley residents was something to this effect: "We're tired of the patter of little feet." One quite representative comment came from a former math teacher. "You get to a certain age and the screaming and yelling and puppies all barking and falling over everybody's tricycles, it's just not . . . it doesn't make for quiet and serenity." Others said that you have no privacy with children around and that children are destructive. A second common reply was they they enjoyed being with people of their own age, and many commented that they liked the quiet. One man who liked the quiet, nevertheless said, "Sometimes it's so quiet I think we ought to get somebody to make some noise!" Denial was not a common response, but two people did insist that Green Valley was not a retirement community. In fact, there were a few families with children living in one section of the apartments, but most of the residents did think of Green Valley as a retirement community and most were retired.

Those interviewed in Tucson expressed unanimous distaste for the concept of the retirement community and for the thought of living in Green Valley. Their comments were variations on the theme, "We don't want to be down there with all the old people." They liked to have younger people around and they liked to have children in the

neighborhood. They felt that it was unnatural to live only with old people and said either "We're not old" or "We're not in the shuffleboard set yet." They did not want to be where people just play shuffleboard, bridge, and gossip. For them, moving to a retirement community would be an admission that their useful life was over.

CONCLUSIONS

First of all, this study certainly confirms the conclusion reached by Bultena and Wood in 1969. A sizeable minority of the elderly do prefer to live in a community of their age peers, that is, a retirement community such as Green Valley. However, despite the fact that retirement communities are chosen by some, they do not constitute a residential environment suitable for all retired people.

Green Valley is probably quite typical of retirement communities, although perhaps smaller than some. Thus, while my personal impressions refer specifically to Green Valley, they may also be applicable to other retirement communities. I convey these impressions to the reader so that he may know the biases with which I started this study, and the way in which my opinions have subsequently been affected.

For the most part, the position of the elderly in American society is not an enviable one. In our society, a person gains his identity from what he does more than from his own inner qualities. Thus, retirement may mean a loss of identity as well as a loss of any sort of institutionalized position in society. For the elderly person, the message reads, "We no longer need you," and such a message can be very ego-defeating.

The very nature of the retirement community implies acceptance of the corollary that the elderly person no longer has a useful role in society. This becomes painfully obvious upon discovering the sorts of things which a retirement community offers to its residents. Green Valley has two golf courses, a number of swimming pools and shuffleboard courts, and a recreation center offering facilities for various arts and crafts and for card playing. So the retiree is offered fun and games and physical activity rather than any sort of meaningful involvement in society. However, most of our sample had been quite successful, at least financially, and were perhaps satisfied with their past achievements and no longer wanted involvement.

Green Valley seemed, to me, very much like a resort or, perhaps, a pleasant pasture for the formerly successful, the fortunate ones of the retired population. There was something unreal about its manicured sameness. It was hard to believe that people lived there all year around when it seemed so much like a vacation from life.

One of those interviewed in Tucson commented that it was unnatural to live only with people of one's own age, and, certainly, one does get a strange, sort of disoriented, feeling in Green Valley, for there are no young people. I felt very conspicuous there and, at times, got the distinct impression that I was a major event in Green Valley. Quite

a number of those interviewed commented on what a pleasure it was to see a young face, and more than one woman dragged her husband away from a nap because, "It's not often you get to talk to a young lady in a short skirt!"

My initial feeling, then, was that the retirement community was a sick manifestation of a society which turns its elderly out to pasture. Out of sight, out of mind, so to speak. However, lest the reader be left with the impression that the retirement community has no redeeming feature, let me say that such communities do constitute an acceptable living environment for some. Many of those interviewed in Green Valley expressed great satisfaction with the community and some claimed to be happier than they had ever been. They found the life style offered in Green Valley to be a pleasant one and some found great joy in a newly discovered artistic creativity. Almost all commented on the friendliness of the people, and no one seemed to be lonely. That is, no one we interviewed seemed lonely, but some did know others who were lonely. Several mentioned, in particular, women who seemed to drop out of their social circles when their husbands died, or perhaps, more accurately, women whose friends no longer visited once they were alone.

Irving Rosow, and others writing in the field, provide another quite convincing argument in favor of the retirement community. That is, the more elderly people

there are in an elderly person's environment, the more friends that person will have. Green Valley is, if nothing else, certainly homogeneous, and it does provide an environment in which elderly people can form friendships easily. Green Valley does provide, in a sense, a society into which the retired person can be integrated, even though there is some evidence that this integration depends on a person's continued well-being. Certain people, then, can be happy in a retirement community and, as long as this is the case, such communities will continue to grow and prosper. However, they should remain only one of a number of alternatives open to the retired person.

What alternatives are available? The retirement community, physically separate and apart, is one. Such communities, however, should be opened up and become a realistic alternative for more than just the well-to-do. Another alternative open to the retired person is to secure his housing in the open market, in which case he may or may not find other retired people in his neighborhood. But are these the only two choices? What of the person who would like the quiet and companionship of the retirement community, yet wants the opportunities for involvement which are available to him in the city. A development such as the previously mentioned Northridge Villa suggests a solution: age segregated clusters within an age-integrated community.

Northridge Villa rises, starkly white, from a hilltop in Northwest Tucson. It is a cluster of approximately eighty townhouses with a swimming pool and small activity room maintained by a resident's association. This development is restricted to those over fifty, so there are no children and the area is quiet and peaceful. The residents interviewed there spoke of the good friends which they had made within the development and cited the homogeneity of their neighborhood as a factor facilitating the formation of friendships. However, many of them had also become involved in other community activities and organizations in which they had contact with people of all ages.

Northridge Villa is quite an expensive place, the mean retirement income of its residents being \$20,000 a year, so, in itself, it does not offer a viable alternative to most of the elderly. However, it does suggest a model for future development which planners and legislators should take note of. A planned unit development sort of zoning, with a designation of "adult community" could be useful in establishing such age-segregated clusters within the city. The zoning requirements within such clusters should perhaps be less rigid than they currently are so that different dwelling types might be included within a single cluster. The conventional reasons for separating different dwelling types may not apply in an "adults-only"

housing cluster, and other departures from standard building practice might also be possible. For example, they could probably be built at higher densities since noise would not be a factor and children's play space not a necessity. By increasing residential density, more space could be saved for common facilities.

There are still, however, a few questions yet to be answered, chief among them being the issues of how big these clusters should be and what their socioeconomic composition should be. A study of Green Valley indicates that the community need not be that big in order to reap the benefits of residential age-segregation cited by Irving Rosow and others. In fact, it seems that a community the size of Green Valley will begin to break down into many smaller societies. For example, there is ample evidence that the highway running through Green Valley, separating the houses from the apartments, forms a social barrier, as well, creating two more or less distinct clusters, one on each side of the highway. The fact that Green Valley does not have any real cohesion as a whole also creates a situation in which a group can drop one of its members, a widow, without any great danger of confrontation with that person.

Thus, Green Valley is perhaps too large to constitute a single cluster, but, then, is it possible to determine the minimum size which such a cluster must be in

order to be successful? Again Green Valley provides a clue. Many Green Valley residents swim regularly, some for pleasure and some explicitly for health reasons, and many expressed pleasure at not having children splashing around in the pool when they were trying to swim. This comment recurred with such regularity as to suggest an answer to the question of minimum size. An age-segregated housing cluster for the elderly should, at the least, be large enough to support a swimming pool without taking in families with children.

The question of socioeconomic composition is a more difficult one. Most elderly people are alike in being on a fixed income although, certainly, some fixed incomes are much higher than others. However, even those who seemingly had complete financial security talked of the limitations which a fixed income placed on them. The age-segregated housing cluster is an option which should be open both to the affluent elderly and the less well-off elderly, but should these two groups live together in the same cluster? In other words, is age homogeneity enough, or must there also be socioeconomic homogeneity in order for firm friendships to form. This study unfortunately does not suggest an answer, but surely it is an issue which must be resolved if such age-segregated residential clusters for the elderly are to become a reality.

A certain proportion of the elderly moving to Southern Arizona to retire will choose Green Valley simply because they have no desire to live in a city, and those people would not choose Tucson in any case. Similarly, a certain proportion of retired people choosing Tucson will be perfectly happy in the conventional age-integrated neighborhood. However, for those who are unhappy with the life style in Green Valley and those who are lonely and friendless in the age-integrated neighborhoods of Tucson, the city and its planners would do well to make possible the development of pleasant housing clusters for the elderly. Such a suggestion is pertinent not only to a retirement center such as Tucson, but, also, to any city which is interested in providing more residential alternatives for its elderly citizens.

APPENDIX A

GUIDE FOR INTERVIEW

1. Where did you come from? City, suburb? Living in house, apartment?
2. What were you doing there? Occupation, when retire, when move?
3. Why was that unsuitable as a place to retire?
4. Why did you choose Southern Arizona?
5. Why did you choose Green Valley rather than Tucson, Phoenix, etc. (In Tucson ask: Why did you choose Tucson rather than Green Valley, etc.)
6. Why did you choose a retirement community? (In Tucson ask: Why didn't you choose a retirement community?)
7. How did you choose this part of the city?
8. What sort of things were important to you in choosing your home and your neighborhood?
9. Did you consider neighborhood facilities, i.e., shopping, recreation, etc.?
10. Why did you choose a single family house, apartment, townhouse, rather than something else?
11. What were your expectations about Green Valley/Tucson before moving here?
12. Now that you're here, what do you like, dislike about living here?
13. Have you made friends easily? How and where do you meet people?
14. What sorts of activities or organizations are you involved in?

15. In Green Valley ask: How often do you go to Tucson?
For what? Shopping? Entertainment? Do you consider
it a long trip?

Personal Information

1. Age
2. Occupation
3. Income before retirement
4. Current income
5. Education
6. Marital status
7. Retirement status (fully or partially retired?)

APPENDIX B

PLACE OF ORIGIN

New York	8
Michigan	7
Pennsylvania	5
California	5
Illinois	4
Arizona	4
Ohio	3
Alaska	2
Minnesota	2
Connecticut	1
Indiana	1
Iowa	1
Maine	1
Massachusetts	1
New Jersey	1
Oklahoma	1
Virginia	1
Wisconsin	1

APPENDIX C

INCOME DATA

Green Valley

1. House Dwellers

Before Retirement

\$18,000
30,000
20,000
9,600
10,000
10,000
12,000
33,500
10,000
22,000
7,800

mean--\$16,571
median--\$10-12,000

After Retirement

\$18,000
20,000
8,400
9,600
7,000
7,000
8,000
14,000
10,000
12,000
5,200

mean--\$10,927
median--\$9,300

2. Apartment Dwellers

Before Retirement

\$12,000
10,000
7,500
14,000
12,000
19,000
7,000
20,000

mean--\$12,687
median--\$12,000

After Retirement

\$ 7,200
5,000
4,000
8,000
5,000
11,000
5,000
8,500

mean--\$6,712
median--\$5-7,000

Tucson

1. House Dwellers

Before Retirement

\$ 5,000
 25,000
 18,000
 14,000
 12,000
 6,500
 40,000
 6,000

mean--\$15,812
 median--\$12,000

After Retirement

\$ 6,000
 15,000
 6,000
 7,000
 10,000
 7,000
 20,000
 6,000

mean--\$9,625
 median--\$8,500

2. Apartment Dwellers

Before Retirement

\$16,000
 20,000

mean--\$18,000

After Retirement

\$10,000
 10,000

mean--\$10,000

3. Townhouse Dwellers

Before Retirement

\$35,000
 40,000
 21,000
 35,000
 18,000

mean--\$29,800
 median--\$28,000

After Retirement

\$28,000
 16,000
 21,000
 20,000
 12,000

mean--\$19,400
 median--\$20,000

APPENDIX D

EDUCATION DATA

The hypothesis was that people who retire to Tucson tend to have more education than those who retire to Green Valley. The following data verified this hypothesis.

Green Valley

	<u>Men</u>		<u>Women</u>		<u>Total</u>
	<u>Apt.</u>	<u>House</u>	<u>Apt.</u>	<u>House</u>	
No H.S.	-	2	1	-	3
Some H.S.	1	1	-	-	2
H.S. Grad.	4	1	3	4	12
Some College	1	6	-	4	11
BA or BS	1	3	3	4	11
Adv. Degree	<u>1</u>	<u>2</u>	<u>-</u>	<u>-</u>	<u>3</u>
Total	8	15	7	12	42

Tucson

	<u>Men</u>			<u>Women</u>			<u>Total</u>
	<u>Apt.</u>	<u>House</u>	<u>Town-house</u>	<u>Apt.</u>	<u>House</u>	<u>Town-house</u>	
No H.S.	-	-	-	-	1	-	1
Some H.S.	-	-	-	-	-	-	0
H.S. Grad.	-	1	1	-	3	1	6
Some College	-	1	-	-	1	2	4
BA or BS	3	3	1	1	2	2	12
Adv. Degree	<u>-</u>	<u>4</u>	<u>3</u>	<u>1</u>	<u>1</u>	<u>-</u>	<u>9</u>
Total	3	9	5	2	8	5	32

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