



EXECUTIVE *S*ummary

The 2002 National Older Adult Housing Survey (NOAHS) examines the choices that older adult homeowners make with respect to community amenities, home features, and living arrangements. It may be used as a reference for builders, remodelers, developers, manufacturers, marketing professionals, and members of the aging profession who are interested in providing more focused and targeted products and services to older adult consumers.

The NAHB Research Center received over 2,300 mailed surveys from respondents who represented one of five housing options:

- Homeowners in mixed-age residential communities;
- Homeowners in age-restricted or active adult communities;
- Residents of assisted living facilities;
- Adults with parents in assisted living facilities; and
- Parents who live in the homes of their adult children.

The NOAHS report analyzes responses of those living in mixed-age residential and age-restricted or active adult communities, and adult children with parents in assisted living facilities.

NOAHS queried respondents on their preference for community type. Generally, homeowners in mixed-age and age-restricted communities are satisfied with the community in which they live, choosing to age in place. The largest percentage of homeowners with no preference of community type came from mixed-age communities. The main factors influencing preferences include marital, employment, and health/mobility status. However, as homeowners age and the main factors change, housing preferences also change. Specifically, the data imply that people move to age-restricted communities when they reach retirement age.

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400 Prince George's Blvd.
Upper Marlboro, MD 20774
(800) 638-8556

A comparison of available housing features shows that age-restricted communities and residences have far more amenities and features than those of mixed-age communities. This may occur because homes in age-restricted communities are relatively newer than homes in mixed-age communities, and are intentionally designed to address the housing wants and needs of older adults. As they age, homeowners in mixed-age communities are adding many of the features that are built into age-restricted homes.

Community amenities are more prevalent in age-restricted communities than in mixed-age communities, and tend to be recreational in nature, such as planned social activities and arts and crafts. Other amenities, such as community and home safety features, are more prevalent in age-restricted communities.

The degree of benefit assigned to specific mixed-age community amenities shows changes in importance across age groups. For example, fishing, planned social activities, and planned trips increase in importance from the youngest to the oldest age groups. Having indoor pools, access to fitness centers, and walking trails decreases in importance across age groups.

Respondents were also asked what features initially attracted them to their current living situation. Features contributing to comfort and convenience top the list in both community types, such as bedrooms on the first floor and/or single-story living. Homeowners in age-restricted communities found recreational and social amenities to be initially attractive, whereas their counterparts in mixed-age communities were partial to features that help to accommodate their busy schedules, regardless of their age.

NOAHS asked respondents to list the features that they have added to their homes. Perhaps nothing better indicates what homeowners really want than what they are willing to pay for by adding to their homes. Homeowners in age-restricted communities are more likely to add features that relate to decreased mobility, such as grab bars in showers. Homeowners in mixed-age communities have added features that relate to energy-efficiency and occupant comfort, such as ceiling fans, and energy-efficient appliances and windows.

When asked which features they thought would keep them comfortable, safe, and independent in their homes, respondents in both community types unanimously cited first floor bedrooms, central heating and air conditioning, and minimal/low-step entries. The other features listed related to comfort and convenience.

Homeowners in age-restricted communities are more likely to add health-related features than their mixed-age counterparts, which is consistent with data that shows that homeowners in mixed-age communities experience fewer health conditions than homeowners in age-restricted communities. The home modifications cited most often in age-restricted communities, particularly for those age 65 and over, address reduced mobility and focus on enhanced accessibility and convenience.

The most common health-related home modifications in mixed-age communities, regardless of homeowner's age, is the installation of a new heating and air conditioning system. The other common improvements for this category address reduced mobility, and increased occupant comfort.

NOAHS data on adult children with parents in assisted living found that approximately 39 percent of children prefer this housing option for their parents. Twenty-six percent had no preference of community type, which indicates that assisted living facilities are doing a good job of providing for the needs of their residents. Moreover, medical reasons and the inability to perform activities of daily living are the primary reasons given for moving to assisted living.

These findings suggest that there are opportunities in the building and remodeling industries to meet the special needs of older adults living in both mixed-age and age-restricted communities.