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MARKET SURVEY ANALYSIS
FOR
PROPOSED RETIREMENT CENTER
IN
APPLETON, WISCONSIN

*Landmark
Research
Inc.*

MARKET SURVEY ANALYSIS
FOR
PROPOSED RETIREMENT CENTER
IN
APPLETON, WISCONSIN

PREPARED FOR
MADSEN - HOFFMAN JOINT VENTURE

PREPARED BY
LANDMARK RESEARCH, INC.

Landmark
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Inc.

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December 16, 1983

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Madison, WI 53704

Mr. Paul J. Hoffman
Contemporary Dwellings, Inc.
2019 Valley Fair Mall
Appleton, WI 54911

Gentlemen:

With this letter we are providing you with our market analysis which focuses on the scale and the character of effective demand for a retirement center designed for the independent elderly and located adjacent to the Valley Fair Shopping Mall in Appleton, Wisconsin. The population frame for the study, segmented by age and geographical area, was comprised of households headed by individuals who are 65 years and older and who reside in the Appleton, Neenah, and Menasha area. Primary data from respondents, gathered through a mail survey of a sample of persons within the population frame, was analyzed to scale the size of the potential market demand and estimate the possible market penetration a project could enjoy, given certain basic product and price specifications.

We are pleased to report that our analysis of area census data and our interpretation of 388 mail survey responses from persons 65 years and older suggest there is an opportunity to meet an effective demand level for up to 100 one- and two-bedroom apartment units in a retirement center setting described within this report. Additional supportive services would be offered for a fee on an as-needed basis.

The basic product would include a mix of one- and two-bedroom units featuring full kitchens and a limited number of kitchenettes in the smaller one-bedroom units, one or one and half bath options, a secured underground garage accessible by elevator, and common areas including a community dining room and recreational space. Pricing would include some form of a fully refundable entrance fee, basic monthly service charge and optional service charges. All of the above are more carefully detailed in our report.

Mr. Richard C. Edwards
Mr. Paul J. Hoffman
Page Two
December 16, 1983

We invite you to study our analytical approach and survey research data provided in the following report to see if you can concur with our opinion as to this excellent opportunity. It should be noted that our summary of major research findings at the beginning of this report, and our more detailed analysis and conclusions within the report, are subject to the statement of limiting conditions and assumptions found at the end of this report.

It is always satisfying to discover what seems to be a need in the market place for a product which may enjoy sufficient effective demand to operate without subsidy. We look forward to your comments and any questions you may have.

FOR LANDMARK RESEARCH, INC.

Jean B. Davis, MS

James A. Graaskamp, Ph.D., SREA, CRE
Urban Land Economist

jc

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SUMMARY OF MAJOR RESEARCH FINDINGS

1. The population of elderly persons 65 years and older, the population frame for this market study, is the fastest growing segment of the population in the study area which comprises Appleton, Neenah, and Menasha. The proposed site is centrally located in the section of the study area which has experienced the largest overall growth rate from 1970 to 1980.

The location of the proposed retirement center adjacent to the Valley Fair Shopping Mall received wide acceptance from the elderly who find the convenience of the shopping mall an extremely positive attribute. The site location is further enhanced by its proximity to census tracts which have higher than average home values and incomes and also contain a high concentration of elderly households.

2. There is wide-spread community acceptance of the retirement living concept. Before screening for financial qualifications, 75 percent of all 388 respondents who are 65 years and older found the concept appealing and 27 percent would consider moving to the proposed center in a year or so.

3. The present supply of private pay housing alternatives, especially designed for the elderly is limited. Peabody Manor, in Appleton, has three independent living apartments and St. Mark's Lutheran Church, in Neenah, has 14 apartment units,

known as Fox Cities Village, Inc., that are leased to the elderly, but have no dining room. There are a few apartment complexes that cater to the elderly, such as Lincoln Manor, Fleur de Lis, and Pulley Lane Apartments in Neenah and Menasha, but offer no special services. The only other housing alternatives are located in Oshkosh.

4. The most probable residents of a retirement center are homeowners who have the financial strength necessary to qualify for private retirement living. The married homeowner is the best qualified financially with single and widowed homeowners following a close second. Those elderly persons who rent an apartment are a small segment of the elderly population and are far less financially qualified.

Ownership of a home valued at more than \$40,000 proved to be an excellent proxy for the financial capacity to pay the entrance fee. Using a minimum annual gross income \$12,500 for homeowners and \$15,000 for renters, 33 percent of those otherwise having a high degree of interest in the project were screened from the most probable resident category.

5. A market of elderly persons seriously interested in and financially qualified for private retirement center housing presently exists in the Fox Cities area. Assuming consumer preferences for location, product design, meal plan,

combination of entrance fees and monthly service charges, and level of supportive services available are satisfied, an estimated 100 living units can be leased within the first year after opening. This estimate assumes that an active sales and preleasing program commence even before construction begins.

6. The conditions or trigger events most likely to cause elderly persons to move from the family residence to a retirement center are the burden of home maintenance, a growing awareness of declining health, and the loss of a spouse. The marketing process can assist the prospective resident in the timing of their decision to move.

7. Among those respondents who indicated they could afford one of the combinations offered, the entrance fee and monthly service charge package most frequently selected is \$20,000 to \$30,000 and \$725 to \$650 with the lower fee and higher charge of \$10,000 to \$20,000 and \$800 to \$725 a narrow second choice, especially among the 75 year and older respondents. Capture rates assumed for this project are very elastic in terms of the monthly service charge and are apparently less elastic in terms of the magnitude of the entrance fee, assuming the entrance fee is fully refundable. When considered separately, the range of monthly service charges most acceptable is from \$600 to \$700, if the choice of less than \$600 per month is disregarded.

8. By an overwhelming majority the elderly prefer a lower base monthly service charge with most supportive services provided on a fee basis as needed. Only electricity, garage space, and cable TV in the living room should be included in the monthly service charge. It is assumed that a daily meal, security, 24-hour emergency response, monthly housecleaning, social programs, and transportation are already included in the monthly service charge.

9. A majority of interested and qualified potential residents are married and the preference is for two bedroom units. Even though many single householders would prefer two bedroom units, the preference shifts to one bedroom units for the older person. The marketable unit mix of one and two bedroom units must be in a proportion which can accommodate the interested, qualified couples, but also flexible enough to accommodate the increasing number of widowed persons who will continue to reside in the retirement center.

Given the levels of entrance fees and monthly service charges found most acceptable to prospective residents, the following unit mix and accompanying charges are suggested:

UNIT TYPE	PERCENTAGE OF PROJECT	ENTRANCE FEE/ [1] MONTHLY SERVICE CHARGE
2 bedrooms, 1.5 baths	0-10%	\$30 - \$35,000/\$800 - 750
2 bedrooms, 1 bath	15-30%	\$25 - \$30,000/\$750 - 700
1 bedroom and large walk-in storage, 1 bath	15-30%	\$20 - \$25,000/\$700 - 650
1 bedroom (small), 1 bath	balance of units	\$15 - \$20,000/\$650 - 600

10. Previous studies have shown that many elderly who initially indicate a preference for two bedrooms are likely to accept a one-bedroom unit when confronted with the extra cost and when provided extra storage space in lieu of the second bedroom. These studies also indicate that the need to reduce possessions when moving from a family home to an apartment leads to a strong preference for some bulk storage within the privacy of the apartment.

11. A full kitchen was the preferred choice of the majority of qualified respondents, but the kitchenette gained favor with the elderly 75 years and older. In the 64 to 74

[1] The monthly service charge may be increased slightly for a couple to cover the additional operating expenses incurred by the second person. There also may be a small increase in the entrance fee.

year old group of prospective residents 74 percent preferred the full kitchen and in the 75 year and older group only 63 percent selected the full kitchen as preferred.

12. Over 80 percent of the most probable residents of the retirement center own and drive cars and expect to continue to do so. Although a detached, locked garage or a heated, secured underground garage are both popular, the older resident would prefer the underground garage. A secured underground garage with an elevator to the living area will provide a competitive edge in marketing the facility.

13. Overwhelmingly, potential residents prefer only one daily meal served in the central dining room. Only a small percentage of older persons preferred two or three prepared meals included in the monthly service charges. A few respondents would prefer no meals included in the monthly service charge.

14. Although the distance from the retirement center to a nursing home was unimportant, the preferred choice of a retirement center with or without a nursing home on site (and part of the center) was mixed, with the preferred edge going to the nursing home on site. An established relationship with an existing nursing home which will give retirement center residents preferred access is an important interim step until a

nursing home can be built on site as a part of the retirement center complex.

15. Peabody Manor is considered the most desirable nursing home in the Fox Cities area. Appleton Memorial Hospital and St. Elizabeth Hospital were almost equally preferred with a slight edge to Appleton Memorial.

16. From the limited evidence gathered in this study, there appears to be little interest in moving to a condominium as an interim step. The growing awareness of the need for supportive services makes the retirement center the preferred choice for ideal housing now.

I. MARKET STUDY OBJECTIVES AND METHODOLOGY

The retirement housing needs of the low-income elderly of Appleton, Neenah, and Menasha are served by eight subsidized housing projects which provide approximately 616 living units to accommodate 6 percent of the elderly 65 years and older in these communities. There are three independent living apartments designed for the elderly at Peabody Manor in Appleton and 14 apartment units at the Fox Cities Retirement Village sponsored by St. Mark's Lutheran Church in Neenah. There are no other retirement living alternatives for middle and upper income persons who prefer to live independently without the burden of home maintenance and also want the security of knowing that supportive services are available if needed.

A. Major Objectives

The major objectives of the market study for the proposed private Madsen-Hoffman Retirement Center are to evaluate the following:

1. Effective demand for independent living apartment units in a retirement center to be located south of the Valley Fair Shopping Mall near Appleton.
2. Most acceptable level of monthly service charge and entry fee for potential users.
3. Type of supportive services available and whether fees for same should be included in the monthly service charge or paid for as needed.

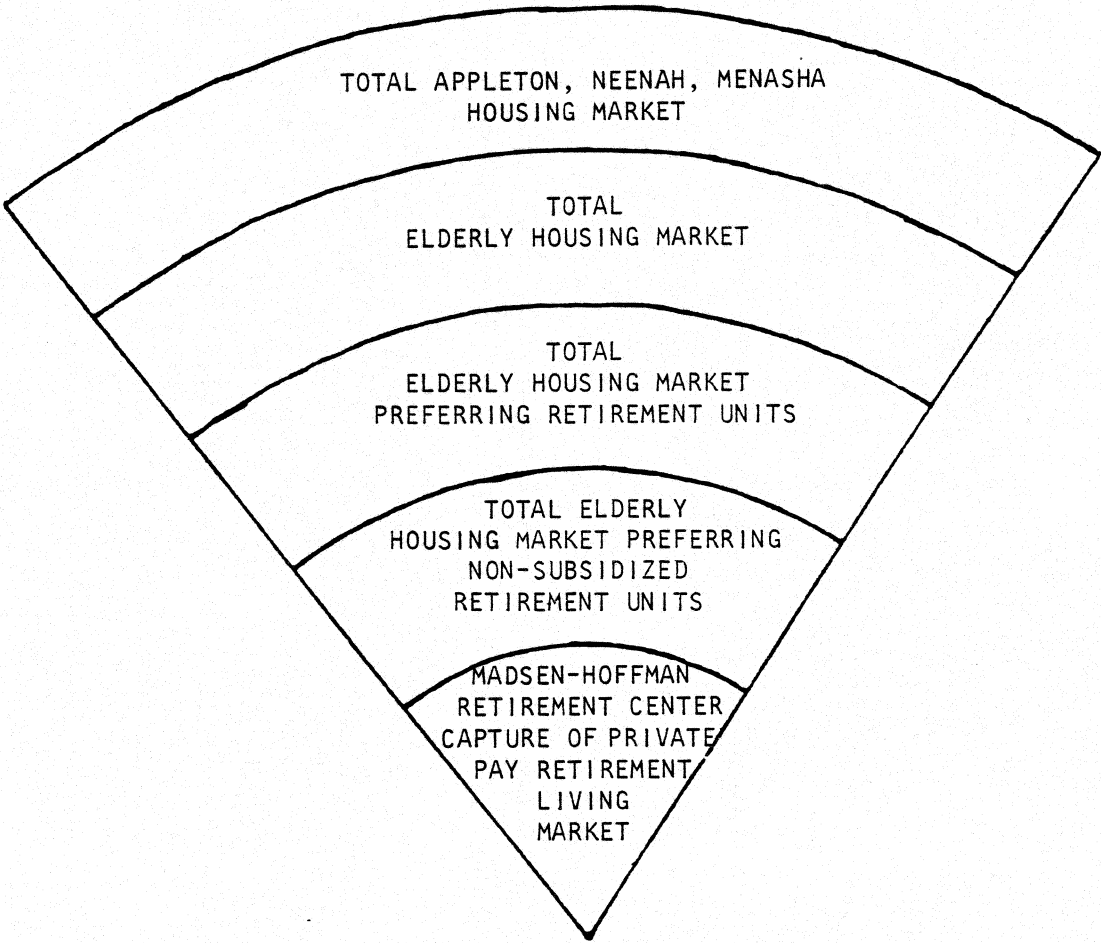
4. Acceptability of site location and desirability of proximity to shopping mall.
5. Need for garage and preference of type.
6. Most marketable unit mix of preferred unit types.
7. Preferred meal plan and type of kitchen facilities.
8. Ranking of nursing homes and hospitals in the area.
10. Consumer attitude regarding a nursing home off or on the site of the retirement center.
11. Conditions most likely to cause older adults to leave their present home and move to the retirement center.
12. Preference for condo ownership as compared to single family home ownership.

The estimate of effective demand, the primary study objective, will assist the Madsen-Hoffman Joint Venture to scale and phase the project's construction to fit the appropriate segment of demand for the retirement facility. In Exhibit 1 the total Appleton, Neenah, and Menasha housing market is segmented into the justified number of retirement living units for the first phase of the proposed Madsen-Hoffman Retirement Center.

A substantial waiting list for subsidized housing in the study area is indicative of the continuing need for more housing for the elderly who are desirous and capable of independent living, but who also want supportive services more accessible if needed. If a subsidy were available to make entrance fees and monthly service charges paid by the consumer

EXHIBIT 1

SEGMENTATION OF STUDY AREA
HOUSING MARKET



more affordable, there is no question that 150 to 200 units could be rented within a year.

There is need and there is apparent demand; the critical issue is the effective demand for units by those who can afford to pay the full costs of project construction and operation.

The estimate of effective demand is further refined by consumer preference for the desirability of the location, product design, types of supportive services and payment plans available, the meal plan offered, an acceptable combination of entrance fees and monthly service charges, ease of access to a nursing home, and the type of garage available. Among those who want and can afford private retirement living in the Fox Cities area will be those who will select another housing alternative or delay their decision. Thus the capture rate, that is, those who move into the facility, will be a percentage of those who have the income/assets and who have expressed a serious interest in the proposed project.

A secondary goal of the study is to generate a mailing list of prospective residents. By the return of a separate postcard included with the questionnaire, 183 persons are on a mailing list to receive more information about the proposed facility. Thus, approximately 11 percent of elderly households receiving questionnaires were interested enough in the retirement center concept to learn more about the

Madsen-Hoffman project as it evolves. This list of prospective residents is provided separately from this report to maintain confidentiality.

B. The Study Area

The location of the proposed site in the Town of Menasha [1] just south of Appleton is identified in Exhibit 2; the 1980 and 1982 population of each of the cities, villages, and towns located in the Fox Cities is also shown. The region which comprises the Cities of Appleton, Neenah, and Menasha, plus the Towns of Neenah and Menasha, was selected as the market research study area and as the most probable source of residents for the proposed Madsen-Hoffman Retirement Center. The study area represents 75 percent of the entire population and 82 percent of persons 65 years and older in the Fox Cities (1980 Census).

Of the 111,282 persons in the study area, there are 11,720 persons 65 years and older who comprise the population frame for this market study (1980 Census Data).

[1] It has been proposed that the City of Appleton annex this portion of the Town of Menasha, including the proposed site. The annexation process is in progress.

C. Summary of Survey Methodology

Questionnaires were mailed to a nonprobability sample of elderly households selected from the study area delineated in Exhibit 2. To reach a broad cross-section of the elderly population, several sources of names and addresses were tapped (see Appendix). Excluded from the sample were persons residing in nursing homes and in subsidized units in the study area.

Of the 1,601 questionnaires mailed, 500 were returned; the overall response rate was 31 percent, but the rate of return by source varied from 20 percent to 61 percent. Although the segment of the housing market targeted was that of elderly persons 65 years and older, (see Exhibit 1) the sample, drawn from sources of older adults, could not be prescreened on the basis of age only. Of the 500 questionnaires, 454 were completed by respondents 55 years and older and of these, 388 were completed by respondents 65 years or older. Therefore the sample size of those 65 years and older was adjusted downward proportionately to 1,242 to reflect the relationship of a desired sample of those 65 years and over to the total Census population of those 65 years and older. (See Section IV for further discussion of sample size adjustment.)

The 388 households, representative of the 65 year and older potential market for retirement center living in the Appleton, Neenah, and Menasha area, are the focus of the in-depth market

analysis. The remaining 66 respondents, between the ages of 55 and 64 years, are also evaluated, in less detail, for potential effective demand in the future.

A discussion of the sampling and survey methods, including the nature of the bias introduced from the sampling sources, is found in the Appendix.

II. CHARACTERISTICS OF THE ELDERLY POPULATION IN APPLETON, NEENAH, AND MENASHA

This market study focuses upon the elderly residents of the cities of Appleton, Neenah, and Menasha, and the towns of Neenah and Menasha as the market prototype of the potential user of the Madsen/Hoffman proposed retirement center. Since the elderly are most likely to select a retirement center located near their family, home, and life-time friends, the 65 year and older population in these municipalities is assumed to encompass the major elderly housing market from which the Madsen/Hoffman retirement center will capture its share.

The survey sample, drawn from this population, provides the source of the primary data used to estimate the effective demand for the proposed project and to determine consumer preference for price, design, and program. The secondary data from the 1970 and 1980 Census provides descriptive and quantitative information about the elderly population in the study area and forms the basis from which market estimates, based upon survey results, can be extrapolated.

Population characteristics of special interest include the total count of elderly persons, historical and projected future growth patterns in the elderly population, the count of households headed by elderly persons and elderly persons per household in the study area, the proportion of men to women within age groups, and the general economic strength of the population in the study area.

A. Change in the Number of Elderly in the
Study Market Area - 1970 to 1980

The number of elderly people in a particular location at any point in time is a function of the desirability of that location for the elderly, the birth rate 65 or more years earlier, the general group psychology regarding change in living style, and the general level of health care as it relates to longevity. According to the 1980 Census, there are 11,720 people in the market study area of Appleton, Neenah, and Menasha who are 65 years and older. This represents 10.5 percent of the total study area population of 111,282. Of the 11,720 elderly persons in Appleton, Neenah, and Menasha, 4,884 or 42 percent, are 75 years of age or older. See Exhibits 3 and 4 for the elderly population totals by age groups for the total study area.

As shown in Exhibits 5 through 9, which categorizes population changes by age for each municipality from 1970 to

Endicott Research, Inc.

EXHIBIT 3

POPULATION OF APPLETON, NEENAH, AND MENASHA
BY COMMUNITY, SEX, AND AGE GROUP 65 YEARS AND OLDER

AGE CATEGORY IN YEARS	APPLETON CITY (Calumet, Winnebago, and Outagamie Counties)			NEENAH: CITY AND TOWN (Winnebago County)			MENASHA: CITY AND TOWN (Winnebago County)			STUDY AREA TOTALS		
	MEN	WOMEN	SUBTOTAL	MEN	WOMEN	SUBTOTAL	MEN	WOMEN	SUBTOTAL	MEN	WOMEN	TOTAL
65 - 74	1,566	2,194	3,760	628	868	1,496	699	881	1,580	2,893	3,943	6,836
75 - 84	748	1,404	2,152	292	578	870	285	507	792	1,325	2,489	3,814
85 +	165	483	648	57	181	238	58	126	184	280	790	1,070
SUBTOTALS	2,479 (37.8%)	4,081 (62.2%)		977 (37.5%)	1,627 (62.5%)		1,042 (40.8%)	1,514 (59.2%)		4,498 (38.4%)	7,222 (61.6%)	
TOTALS (65 and older)			6,560 =====			2,604 =====			2,556 =====			11,720 =====
			(100%)			(100%)			(100%)			(100%)

Source: 1980 Census Data - Population By: Age, Sex, Race, and Marital Status for Winnebago, Outagamie, and Calumet Counties

Seidman Research, Inc.

POPULATION OF APPLETON, NEENAH, AND MENASHA
BY COMMUNITY, SEX, AND AGE GROUP 75 YEARS AND OLDER

AGE CATEGORY IN YEARS	APPLETON CITY (Calumet, Winnebago, and Outagamie Counties)			NEENAH: CITY AND TOWN (Winnebago County)			MENASHA: CITY AND TOWN (Winnebago County)			STUDY AREA TOTALS		
	MEN	WOMEN	SUBTOTAL	MEN	WOMEN	SUBTOTAL	MEN	WOMEN	SUBTOTAL	MEN	WOMEN	TOTAL
75 - 84	748	1,404	2,152	292	578	870	285	507	792	1,325	2,489	3,814
85 +	165	483	648	57	181	238	58	126	184	280	790	1,070
SUBTOTALS	913 (32.6%)	1,887 (67.4%)		349 (31.5%)	759 (68.5%)		343 (35.1%)	633 (64.9%)		1,605 (32.9%)	3,279 (67.1%)	
TOTALS (75 and older)			2,800 ==== (100%)			1,108 ==== (100%)			976 ==== (100%)			4,884 ==== (100%)

Source: 1980 Census Data - Population By: Age, Sex, Race, and Marital Status for Winnebago, Outagamie, and Calumet Counties

EXHIBIT 4

CHANGE IN APPLETON CITY POPULATION
BY AGE GROUP

AGE CATEGORY IN YEARS	1970 NO. OF PEOPLE	1980 NO. OF PEOPLE	INCREASE/DECREASE 1970 - 1980	% CHANGE 1970 - 1980
< 5	4,810	4,533	- 277	- 5.8%
5 - 9	6,258	4,186	- 2,072	- 33.1%
10 - 14	6,412	4,700	- 1,712	- 26.7%
15 - 19	6,027	6,066	+ 39	+ 0.6%
20 - 24	4,735	6,074	+ 1,339	+ 28.3%
25 - 29	3,518	5,433	+ 1,915	+ 54.4%
30 - 34	3,078	4,590	+ 1,512	+ 49.1%
35 - 39	2,930	3,484	+ 554	+ 18.9%
40 - 44	3,228	2,837	- 391	- 12.1%
45 - 49	3,159	2,659	- 500	- 15.8%
50 - 54	2,776	2,874	+ 98	+ 3.5%
55 - 59	2,512	2,731	+ 219	+ 8.7%
60 - 64	2,239	2,305	+ 66	+ 2.9%
Total Under 65 Yrs	51,682	52,472	+ 790	+ 1.5%
65 - 69	1,772	2,048	+ 276	+ 15.6%
70 - 74	1,545	1,712	+ 167	+ 10.8%
75 - 79	1,029	1,293	+ 264	+ 25.7%
80 - 84	657	859	+ 202	+ 30.7%
85 & over	458	648	+ 190	+ 41.5%
Total 65 Yrs +	5,461	6,560	+ 1,099	+ 20.1%
TOTAL	57,143	59,032	+ 1,889	+ 3.3%

Source: 1980 Census Data - General Population Characteristics -
Wisconsin Part 51, Page 86, Table 26

Judith A. Rasmussen, Inc.

EXHIBIT 5

CHANGE IN NEENAH CITY POPULATION
BY AGE GROUP

AGE CATEGORY IN YEARS	1970 NO. OF PEOPLE	1980 NO. OF PEOPLE	INCREASE/DECREASE 1970 - 1980	% CHANGE 1970 - 1980
< 5	2,135	1,684	- 451	- 21.1%
5 - 9	2,734	1,718	- 1,016	- 37.2%
10 - 14	2,658	1,985	- 673	- 25.3%
15 - 19	2,168	2,225	+ 57	+ 2.6%
20 - 24	1,483	2,009	+ 526	+ 35.5%
25 - 29	1,535	1,970	+ 435	+ 28.3%
30 - 34	1,394	1,636	+ 242	+ 17.4%
35 - 39	1,359	1,352	- 7	- 0.5%
40 - 44	1,392	1,160	- 232	- 16.7%
45 - 49	1,182	1,152	- 30	- 2.5%
50 - 54	1,104	1,157	+ 53	+ 4.8%
55 - 59	933	1,032	+ 99	+ 10.6%
60 - 64	858	935	± 77	± 9.0%
Total Under 65 Yrs	20,935	20,015	- 920	- 4.4%
65 - 69	629	743	+ 114	+ 18.1%
70 - 74	563	623	+ 60	+ 10.7%
75 - 79	390	483	+ 93	+ 23.8%
80 - 84	229	340	+ 111	+ 48.5%
85 & over	146	228	± 82	± 56.2%
Total 65 Yrs +	1,957	2,417	± 460	± 23.5%
TOTAL	22,892	22,432	- 460	- 2.0%

Source: 1980 Census Data - General Population Characteristics -
Wisconsin Part 51, Page 153, Table 33

EXHIBIT 6

Southwest Research, Inc.

CHANGE IN MENASHA CITY POPULATION
BY AGE GROUP

AGE CATEGORY IN YEARS	1970 NO. OF PEOPLE	1980 NO. OF PEOPLE	INCREASE/DECREASE 1970 - 1980	% CHANGE 1970 - 1980
< 5	1,350	1,129	- 221	- 16.4%
5 - 9	1,635	959	- 676	- 41.3%
10 - 14	1,688	1,109	- 579	- 34.3%
15 - 19	1,449	1,469	+ 20	+ 1.4%
20 - 24	1,150	1,656	+ 506	+ 44.0%
25 - 29	982	1,470	+ 488	+ 49.7%
30 - 34	683	1,066	+ 383	+ 56.1%
35 - 39	710	759	+ 49	+ 6.9%
40 - 44	791	586	- 205	- 25.9%
45 - 49	804	624	- 180	- 22.4%
50 - 54	831	736	- 95	- 11.4%
55 - 59	753	703	- 50	- 6.6%
60 - 64	662	689	+ 27	+ 4.1%
Total Under 65 Yrs	13,488	12,955	- 533	- 39.5%
65 - 69	521	613	+ 92	+ 17.7%
70 - 74	419	491	+ 72	+ 17.2%
75 - 79	265	347	+ 82	+ 30.9%
80 - 84	144	216	+ 72	+ 50.0%
85 & over	68	106	+ 38	+ 55.9%
Total 65 Yrs +	1,417	1,773	+ 356	+ 25.1%
TOTAL	14,905	14,728	- 177	- 1.2%

Source: 1980 Census Data - General Population Characteristics -
Wisconsin Part 51, Page 153, Table 33

CHANGE IN MENASHA TOWN POPULATION
BY AGE GROUP

AGE CATEGORY IN YEARS	1970 NO. OF PEOPLE	1980 NO. OF PEOPLE	INCREASE/DECREASE 1970 - 1980	% CHANGE 1970 - 1980
< 5	824	996	+ 172	+ 20.9%
5 - 9	1,028	958	- 70	- 6.8%
10 - 14	970	1,116	+ 146	+ 15.1%
15 - 19	672	1,247	- 575	+ 85.6%
20 - 24	477	1,112	+ 635	+133.1%
25 - 29	612	1,275	+ 663	+108.3%
30 - 34	549	1,149	+ 600	+109.3%
35 - 39	498	856	+ 358	+ 71.9%
40 - 44	433	776	+ 343	+ 79.2%
45 - 49	386	599	+ 213	+ 55.2%
50 - 54	384	498	+ 114	+ 29.7%
55 - 59	325	446	+ 121	+ 37.2%
60 - 64	225	415	+ 190	+ 84.4%
Total Under 65 Yrs	7,383	11,443	+ 4,060	+ 55.0%
65 - 69	201	279	+ 78	+ 38.8%
70 - 74	104	197	+ 93	+ 89.4%
75 - 79	83	147	+ 64	+ 77.1%
80 - 84	39	82	+ 43	+110.3%
85 & over	24	78	+ 54	+225.0%
Total 65 Yrs +	451	783	+ 332	+ 73.6%
TOTAL	7,834	12,226	+ 4,392	+ 56.1%

Source: 1980 Census Data - General Population Characteristics -
Wisconsin Part 51, Page 155, Table 33a

Southwest Research, Inc.

EXHIBIT 8

CHANGE IN NEENAH TOWN POPULATION
BY AGE GROUP

AGE CATEGORY IN YEARS	1970 NO. OF PEOPLE	1980 NO. OF PEOPLE	INCREASE/DECREASE 1970 - 1980	% CHANGE 1970 - 1980
< 5	393	173	- 220	- 56.0%
5 - 9	557	231	- 326	- 58.5%
10 - 14	498	308	- 190	- 38.2%
15 - 19	326	325	- 1	- 0.3%
20 - 24	170	183	+ 13	+ 7.6%
25 - 34	534	376	- 158	- 29.6%
35 - 44	491	465	- 26	- 5.3%
45 - 54	352	372	+ 20	+ 5.7%
55 - 59	153	135	- 18	- 11.8%
60 - 64	91	109	+ 18	+ 19.8%
Total Under 65 Yrs	3,565	2,677	- 888	- 24.9%
65 - 74	110	130	+ 20	+ 18.2%
75 +	44	57	+ 13	+ 29.5%
Total 65 Yrs +	154	187	+ 33	+ 21.4%
TOTAL	3,719	2,864	- 855	- 23.0%

Source: 1980 Census Data - General Population Characteristics
Wisconsin Part 51, Page 215, Table 39a

1980, the only age groups experiencing growth consistently are the 20 to 34 year olds and the over 60 age group. The largest percentage changes are concentrated in the 75 year and older group. A summary of the change in total population for the study area is shown in Exhibit 10.

The City of Appleton and the Town of Menasha (Exhibits 5 and 8) experienced the only overall increases in population growth of 3.3 percent and 56 percent respectively, from 1970 to 1980. But, increases in the 65 year and over groups ranged from 20 percent to 73.6 percent for all communities in the study area from 1970 to 1980. The elderly population of the Town of Menasha was 451 in 1970 and grew to 783 in 1980 for an increase of 332 persons 65 years and older.

The proposed site for the retirement center (Exhibit 2), currently located in the Town of Menasha but subject to annexation into the City of Appleton, is very favorably located in the area of greatest population growth in the last 10 years. Of the 11,720 persons age 65 and over in the study area, 62.7 percent or 7,343 are from the growth areas of either Appleton or the Town of Menasha. Another 15.1 percent or 1,773 elderly persons age 65 and older reside in the City of Menasha located just south of the proposed site.

The elderly continue to represent an ever larger proportion of the total population as growth rates for the elderly outpace

CHANGE IN THE TOTAL POPULATION OF THE STUDY AREA - APPLETON, NEENAH, AND MENASHA

	1970 NO. OF PEOPLE ALL AGES	1980 NO. OF PEOPLE ALL AGES	INCREASE/DECREASE 1970 - 1980	% CHANGE 1970 - 1980
Appleton City	57,143	59,032	+ 1,889	+ 3.3%
Neenah City	22,892	22,432	- 460	- 2.0%
Neenah Town	3,719	2,864	- 855	- 23.0%
Menasha City	14,905	14,728	- 177	- 1.2%
Menasha Town	7,834	12,226	± 4,392	± 56.0%
TOTAL	106,493	111,282	+ 4,789	+ 4.5%

EXHIBIT 10

those of any other age group. The changes from 1970 to 1980 in the elderly population proportions are shown in Exhibit 11. On the average, the 65 to 74 year old group shifted from 5.5 percent to 6.1 percent of the total population of the market study area and the 75 year old and older group which represented 3.4 percent of the total population in 1970 increased to 4.4 percent in 1980. Overall the 65 year and older population has shifted from 8.9 percent of the total population in 1970 to 10.5 percent of the 111,282 persons in the Appleton, Neenah, and Menasha area in 1980, a significant shift for demographic proportions.

Given the decreased birth rates of the past couple of decades and the increased longevity of older adults, the number of elderly will continue to increase proportionally. The projections of population growth rates by age groups, made by the State of Wisconsin Department of Administration, indicate the elderly cohort will continue to increase proportionally and absolutely for many years into the future. (See Appendix for growth projections for year 1980 to 2010 by county and by age group.)

B. The Number of Elderly Households and Elderly Persons
Per Household in the Study Area

To make inferences about housing demand from the elderly population using survey data, the population must be converted

CHANGE IN THE PROPORTION OF ELDERLY BY AGE GROUP
IN THE TOTAL POPULATION OF EACH MUNICIPALITY IN THE STUDY AREA
1970 - 1980

	TOTAL POPULATION		-----65 - 74 YEARS OLD-----				-----75 YEARS AND OLDER-----				65 YEARS AND OLDER	
	1970	1980	ELDERLY POPULATION	ELDERLY POPULATION	CHANGE IN		ELDERLY POPULATION	ELDERLY POPULATION	CHANGE IN		POPULATION PROPORTION	POPULATION PROPORTION
			1970	1980	1970	1980	1970	1980	1970	1980	1970	1980
Appleton City	57,143	59,032	3,317	3,760	5.8%	6.4%	2,144	2,800	3.7%	4.7%	9.5%	11.1%
Neenah City	22,892	22,432	1,192	1,366	5.2%	6.1%	765	1,051	3.3%	4.7%	8.5%	10.8%
Neenah Town	3,719	2,864	110	130	3.0%	4.5%	44	57	1.2%	2.0%	4.2%	6.5%
Menasha City	14,905	14,728	940	1,104	6.3%	7.5%	477	669	3.2%	4.5%	9.5%	12.0%
Menasha Town	<u>7,834</u>	<u>12,226</u>	<u>305</u>	<u>476</u>	<u>3.9%</u>	<u>3.9%</u>	<u>146</u>	<u>307</u>	<u>1.9%</u>	<u>2.5%</u>	<u>5.8%</u>	<u>6.4%</u>
TOTALS	106,493	111,282	5,864	6,836	5.5%	6.1%	3,576	4,884	3.4%	4.4%	8.9%	10.5%
TOTAL ELDERLY: 1980			6,836				4,884		= 11,720			
(65 YEARS AND OVER)			=====				=====		=====			

Source: 1980 Census Data - Population By: Age, Sex, Race, and Marital Status for
Winnebago, Outagamie, and Calumet Counties

into household units because each survey respondent represents a household.

Since the 1980 Census Data is the source of information about households in the study area, the following definitions are critical to the interpretation of the secondary data:

Household: A household includes all persons who occupy a housing unit.

Householder: One person in each household is designated the householder and is usually the owner or renter of the dwelling unit.

Family_Householder: Head of a household in which one or more other persons live who are related to the householder.

Non-Family__Householder: Head of a household who lives alone or with unrelated persons.

Exhibit 12 shows the breakdown of both family and non-family households headed by males or females in each municipality of the study area for persons 65 years and older. Persons living in nursing homes (institutions) and in group quarters are not counted as household members.

Using this data, the average number of elderly persons per household is calculated for each community with a resulting weighted average of 1.44 persons per household.

HOUSEHOLD COMPOSITION AND AVERAGE PERSONS PER HOUSEHOLD
PERSONS 65 YEARS AND OLDER
AS OF 1980 CENSUS

	APPLETON CITY	NEENAH CITY	NEENAH TOWN	MENASHA CITY	MENASHA TOWN	TOTALS	% OF HOUSEHOLDS	% OF TOTAL PERSONS
<u>HEADS OF HOUSEHOLDS</u>								
Family Householders								
Male	1,883	670	81	530	246	3,410	45%	31%
Female	319	97	4	109	26	555	7%	5%
Non-Family Householders								
Male	322	118	5	107	32	584	8%	5%
Female	<u>1,717</u>	<u>725</u>	<u>21</u>	<u>469</u>	<u>132</u>	<u>3,064</u>	<u>40%</u>	<u>28%</u>
Total Number (Heads) of Households	4,241	1,610	111	1,215	436			
						7,613	100%	
						=====		
OTHER HOUSEHOLD MEMBERS								
Spouses	1,446	495	57	411	174	2,583		24%
Other relatives	350	142	17	115	57	681		6%
Non-relatives	<u>53</u>	<u>30</u>	<u>2</u>	<u>24</u>	<u>10</u>	<u>119</u>		<u>1%</u>
Total Other Household Members	<u>1,849</u>	<u>667</u>	<u>76</u>	<u>550</u>	<u>241</u>	<u>3,383</u>		
TOTAL PERSONS IN HOUSEHOLDS	6,090	2,277	187	1,765	677	10,996		100%
						=====		=====
AVERAGE PERSONS/HOUSEHOLD	1.44	1.41	1.68	1.45	1.55	1.44		

* Excluding 704 persons in nursing homes and 20 persons in group quarters.

Source: 1980 Census Data - General Population Characteristics -
Wisconsin; Part 51 - Pages 98, 215, 163, and 165
Tables 28, 35, 39a, and 35a.

C. A Comparison of 1980 Census Data and
Survey Respondent Data in Regard to
Sex, Age, and Marital Status

The proportion of men to women in elderly households in any community provides another indicator of potential demand. Women living alone are more likely than married couples to find the care and maintenance of the single family home a burden when compounded by loneliness and a growing awareness of increasing physical difficulties. Men are subject to these same concerns, but to a lesser degree. Comparison of Exhibit 13 to Exhibit 12 emphasizes the large number of women in the non-family householder class (six times the number of men) who still maintain separate households, but many of whom will be unable to afford private-pay retirement living.

Based upon age alone, of the elderly population of 11,720 in the primary market area as of 1980, 58.3 percent are in the 65 to 74 year age group and 41.7 percent are 75 years and over. When the age categories are further subdivided, 32.6 percent of the population is in the 75 to 84 year age group and only 9.1 percent in the 85 years and over. This breakdown by age is found in Exhibit 14.

Ideally, the survey sample should replicate the proportions of men to women by age groups and by marital status, although there is no way to access this kind of data before mailing the

EXHIBIT 13

ESTIMATE [1] OF PERSONS IN HOUSEHOLDS
 BY SEX - 65 YEARS AND OLDER
 FOR APPLETON, NEENAH, AND MENASHA
 AS OF 1980 CENSUS

	<u>MEN</u>	<u>WOMEN</u>	
Family Householder	3,410	555	
Non-Family Householder	584	3,064	
Spouses	--0--	2,583	
Subtotal	3,994	6,202	
Other Relatives [1]	341	340	
Non-Relatives [1]	---59	---60	
Subtotal	---400	---400	
TOTAL	4,394 (40%)	6,602 (60%)	10,996
Persons in institutions (nursing homes) and group quarters			---724
TOTAL POPULATION 65 YRS AND OLDER			11,720 =====

[1] It is assumed that all spouses are female and that other relatives and non-relatives are evenly divided between male and female. Spouses, relatives, and non-relatives who are younger than 65 years are not included in these tabulations.

Source: 1980 Census Data - General Population Characteristics - Wisconsin; Part 51 - Pages 98, 215, 163, and 165
 Tables 28, 35, 39a, and 35a.

EXHIBIT 14

1980 POPULATION OF STUDY AREA
BY AGE

(APPLETON, NEENAH, AND MENASHA)

AGE CATEGORY	TOTAL - EACH AGE GROUP	PERCENTAGE OF TOTAL ELDERLY IN STUDY AREA
65 - 74	6,836	58.3%
75 - 84	3,814	32.6%
85 +	1,070	9.1%
	4,884	41.7%
	11,720 [1]	100.0%

[1] Includes persons in institutional (nursing homes) and group quarters.

Source: 1980 Census Data - Population By: Age, Sex, and Marital Status for Winnebago, Outagamie, and Calumet Counties

questionnaire. The comparative survey data is found in Exhibit 15.

It appears from Exhibit 15 the sample respondent group is representative of the elderly population in the study area and therefore, survey sample data, based upon these known population characteristics, can be relied upon to extrapolate estimates of demand from the elderly population.

D. Available Information Regarding the
Economic Strength of the Study Area

Ideally, there should be 1980 Census Data which gives income data by age groups. Since this is not the case, the median gross income and median home values for all households in the study area are used to get a sense of the buying power from community to community and within communities. Although the elderly, especially women, experience a sharp decline in income when retired or widowed, an indication of the economic health of an area can be assessed from general census data.

A summary of the 1980 Census Data which gives several indicators of economic strength for each of the cities in the study area is found in Exhibit 16. Only isolated data was available for the Towns of Neenah and Menasha and this is summarized in Exhibit 17.

The elderly are concentrated in the cities of the study area where the income levels and home values are lower. The

EXHIBIT 15

COMPARISON OF 1980 CENSUS DATA
AND SURVEY RESPONDENT DATA
65 YEARS AND OLDERSEX (See Exhibit 3)

	<u>1980_Census</u>	<u>Survey_Sample</u>
Males	38%	39%
Females	62%	61%

In a family household, the male was more frequently the respondent even though more females indicated a greater interest in the project before financial screens were used.

AGE (See Exhibit 14)

	<u>1980_Census</u>	<u>Survey_Sample</u>
65 - 74 years	58%	57%
75 years or older	42%	43%

Since the average age of a retirement center resident is usually over 75 years old, it would be expected that older persons in the sample would be more motivated to respond.

MARITAL_STATUS (See Exhibit 12)

	<u>1980_Census</u>	<u>Survey_Sample</u>
Married	52%	44%
Widowed/Single	48%	56%

Although the 1980 Census Data does not give a breakdown by age and marital status, an estimate can be made from the household data shown in Exhibit 12. It can be assumed that the majority of the family householders are married and the non-family householders are widowed or single. It would be expected that the single and widowed person in the sample would be more motivated to respond, as these groups have represented the primary market for retirement housing in other locales.

1980 CENSUS TRACT DATA SUMMARY
APPLETON - NEENAH - MENASHA [1]
MEDIAN INCOME AND HOME VALUE FOR ALL PERSONS AND
PROPORTION OF 65 YEARS AND OLDER IN EACH TRACT

	APPLETON CITY (Winnebago Co.)	APPLETON CITY (Calumet Co.)	APPLETON CITY (Outagamie Co.)	NEENAH CITY (Winnebago Co.)	MENASHA CITY (Winnebago Co.)
Total Tract Population	17	5,484	53,531	22,432	14,728
Total Tract Population of Persons 65 Yrs and Older	-0-	207	6,353	2,417	1,773
Percent of Persons 65 Yrs and Older	-0-	4%	12%	11%	12%
Percent of Females and Males 65 Yrs and Older	-0-	F=55% M=45%	F=62% M=38%	F=64% M=36%	F=60% M=40%
No. of Persons 65 Yrs and Older in Institutions and Group Quarters	-0-	-0-	470	140	8 [2]
No. of All Households with Social Security Income	-0-	205	5,047	2,043	1,592
Mean Social Security Income per Household	-0-	\$4,756	\$4,384	\$4,272	\$4,666
Per Capita Income - All Non-Institutional Persons	-0-	\$7,088	\$7,941	\$8,011	\$7,393
Median Value - All Owner- Occupied Housing Units	-0-	\$48,400	\$44,000	\$42,100	\$38,500
Median Income - All Households	-0-	\$22,076	\$18,835	\$19,513	\$17,741
Median Income - All Owner- Occupied Households	-0-	\$24,881	\$21,863	\$22,811	\$20,734
Median Income - All Renter- Occupied Households	-0-	\$15,272	\$12,873	\$12,507	\$12,138
Percent of Housing Units - Owner Occupied [3]	-0-	71%	68%	71%	68%

[1] Does not include summary census tract data for the Towns of Neenah and Menasha.

[2] There were 106 persons in institutions or in group quarters in the Town of Menasha in 1980.

[3] Percent is based upon ALL housing units including mobile homes, trailers, boats, tents, and vans.
In the tract by tract statistics found in the Appendix, the total housing units used as a
base exclude these housing unit types.

Source: 1980 Census Tracts: Appleton - Oshkosh, Wisconsin
SMSA - Census of Population and Housing
Pages P-64 and H-1
Tables P-11 and H-1

EXHIBIT 16

Southwest Research, Inc.

1980 CENSUS TRACT DATA SUMMARY
FOR NEENAH AND MENASHA TOWNS
MEDIAN INCOME AND HOME VALUES AND
PROPORTION OF PERSONS 65 YEARS AND OLDER

	NEENAH TOWN (Winnebago Co.)	MENASHA TOWN (Calumet Co.)
Total Tract Population	2,864	12,226
Total Tract Population of Persons 65 Yrs and Older	187	783
Percent of Persons 65 Yrs and Older	7%	6%
Percent of Females and Males 65 Yrs and Older	F=43% M=57%	F=57% M=43%
No. of Persons 65 Yrs and Older in Institutions and Group Quarters	-0-	106
No. of All Households with Social Security Income	N/A	N/A
Mean Social Security Income per Household	N/A	N/A
Per Capita Income - All Non-Institutional Persons	\$9,293	\$7,712
Median value - All Owner- Occupied Housing Units	\$58,700	\$51,900
Median Income - All Households	\$26,306	\$21,303
Median Income - All Owner- Occupied Households	N/A	N/A
Median Income - All Renter- Occupied Households	N/A	N/A
Percent of Housing Units - [1] Owner-Occupied	89%	74%

[1] Percent is based upon ALL housing units including mobile homes, trailers, boats, tents, and vans. In the tract by tract statistics found in the Appendix, the total housing units used as a base exclude these housing unit types.

Source: 1980 Census Tracts: Appleton - Oshkosh, Wisconsin
SMSA - Census of Population and Housing
Pages P-64 and H-1
Tables P-11 and H-1

EXHIBIT 17

Soudwade Research, Inc.

number and percentage of elderly below the poverty level (\$3,479/year for 1 person and \$4,389/year for 2 persons) in each community are as follows:

	No.	% of All Persons 65_Years_and_Older
Appleton - City	449	7%
Neenah - City	113	5%
Menasha - City	83	5%
Neenah - Town	7	4%
Menasha - Town	<u>27</u>	3%
TOTAL	679	

Thus in 1980, 679 elderly persons, or almost 6 percent of the 11,720 elderly population in the study area, were below the poverty level and would never be potential residents of a private-pay retirement center. The 682 elderly persons who currently reside in subsidized housing projects in the study area are assumed to be a large proportion of this low-income elderly population.

Homeowners, in the aggregate within the study area, have median income levels approximately two-thirds higher than renters, and the percentage of homeowners range from 71 percent in Neenah City to 89 percent in Neenah Town with Appleton City homeownership at almost 70 percent of all households, according to 1980 Census Data.

Of the 388 survey respondents 65 years and older, 78 percent were home or condominium owners, 20 percent were

apartment renters, and the remaining 2 percent rented a room or had other accommodations. Since homeownership is partially a function of age, it would be expected that there would be a higher percentage of elderly homeowners in the sample than in the total population. The ratio of homeowners to renters in the sample is representative of the ratio of homeowners to renters in the population. Because of the need for adequate assets and income to qualify for private-pay retirement living, it is critical that the sample proportion of homeowners be similar to the population proportion.

The same classifications of data shown in Exhibits 16 and 17 are found in the Appendix on a tract-by-tract basis for the whole study area. Certain tracts have few owner-occupied households with corresponding low median income levels and others appear to have a large majority of households with higher than average assets and income. A more detailed discussion of income and assets in relationship to the proposed site is found in Section IX.

III. SUPPLY OF RETIREMENT HOUSING IN APPLETON, NEENAH, AND MENASHA

Except for 616 units of subsidized housing available to the low-income elderly in the Appleton, Neenah, and Menasha area (see Exhibit 18), there are limited retirement housing alternatives for the middle and upper income elderly. Peabody Manor, a popular and respected nursing home has three apartments designed for the independent elderly which are fully occupied and have a waiting list.

In 1978, St. Mark's Lutheran Church of Neenah sponsored the construction of 14 two-bedroom apartments which are leased to the elderly. A large entry fee of \$36,000, termed life-lease deposit, is required, but the fee is prorated over 20 years and any remaining balance is refundable when the resident leaves. No interest is paid to the resident in the interim. The monthly rent is minimal at \$65 per month with all utilities including electric heat paid by the resident. The average monthly utility bill is \$20. There is no central dining area, and common areas are limited. A small waiting list exists, but the demand is being satisfied with the addition of 8 to 12 units; 7 units are already pre-leased at the new entrance fee of \$40,000.

In Neenah two private apartment projects, Lincoln Manor Apartments and Fleur de Lis Apartments, have a high proportion

SUBSIDIZED ELDERLY HOUSING
IN APPLETON, NEENAH, AND MENASHA
AS OF NOVEMBER 1983

NAME AND ADDRESS	TOTAL NUMBER OF RESIDENTS	NUMBER OF WOMEN	NUMBER OF MEN	NUMBER OF SINGLES	NUMBER OF COUPLES
CONWAY BUILDING 103 E. Washington Street Appleton	72	54	18	68	2
ONEIDA HEIGHTS 525 N. Oneida Street Appleton	158	133	25	148	5
RANDALL COURT 218 East Randall Avenue Appleton	104	94	10	96	4
WOODRIDGE GARDENS 3081 Green Meadows Drive Appleton	116 elderly [1]	73	43	36	40
ELIZABETH COURT 936 - 6th Street Menasha	62	58	4	58	2
LAKE SIDE COMMONS 37 Tayco Road Menasha	39	30	9	33	3
FIRESIDE COMMONS 115 Professional Plaza Neenah	67	58	9	59	4
HEARTHSIDE COMMONS 210 Haylett Street Neenah	64	55	9	52	6
	---	---	---	---	--
TOTAL	682 ===	555 ===	127 ===	550 [2] ===	66 [2] ==

- [1] Mixed elderly and family in 108 total units.
[2] The total number of units is 550 + 66, or 616.

Source: Telephone interviews with Outagamie and Winnebago Housing Authority personnel and with project managers.

Outagamie Research, Inc.

EXHIBIT 18

of elderly residents. Under construction are the Island Apartments which will target 24 one-bedroom units to the elderly in a phased development which will include apartment units for young families. The Pulley Lane Apartments in Menasha also have a high concentration of elderly in their 200 unit one-bedroom, lakeside apartments.

St. John's Catholic Church in Menasha is reported to be considering the conversion of a convent building into elderly housing. According to Don Novak, Menasha City Planner, Neenah and Menasha are doing a combined survey to determine the need for non-subsidized housing in the area; it is his opinion that pent-up demand exists and the communities would like to find some way to encourage development.

Oshkosh, 22 miles to the south of the proposed site, has several retirement type housing complexes which include the following:

1. Evergreen Manor

112 apartments
21 cottages
16 condominium units - planning stage

Entrance fee and monthly service charge for apartments and cottages.

Central dining room available.

Priority entrance to on-site nursing home.

2. Zion Lutheran

46 apartments

High entrance fee and low rental charge.
No central dining room.
No nursing home relationship.

3. Bethany Village

15 apartments - under construction

High entrance fee and low rental charge.
No central dining area.
No relationship to nursing home.
Slow pre-leasing until construction began; now units are all leased.

4. Proposed Churchfield Development - Retirement Community

110 - 116 condominium units in planning stage

No central dining area.
Building permit has not been issued.

5. Proposed Carmel Residence - Lutheran Homes of Oshkosh

30 apartments - in planning stage

Relatively high entry fee and low monthly service charge.
Central dining area.
Priority entrance to Bethel Home Nursing Home.

Given the lack of supply of competitive private retirement center apartments in the Fox Cities area which offer adequate supportive services and given the rapidly growing elderly population, it can be assumed a pent-up demand exists for some type of private elderly housing development.

A successful developer must know the preferred design, financial and program elements which will attract the qualified but presently unsatisfied, private-pay retirement housing market.

IV. ESTIMATION OF EFFECTIVE DEMAND FOR PROPOSED MADSEN-HOFFMAN RETIREMENT CENTER

To estimate the effective demand for a retirement center in Appleton, potential users, drawn from a sample of a cross section of the population in the defined study area, are surveyed to learn of their interest in the project. From their responses (the primary data), the potential market demand from the study area (see Exhibit 2) is then extrapolated from the 1980 Census Data (secondary data) available for the study area. (See Exhibit 3 for total elderly population in study area.)

The major steps of the survey research process which are necessary to estimate effective demand and determine consumer preference for location, financial requirements, design, and program are outlined in Exhibit 19.

A. Adjustments to Population Frame and Survey Sample Size

1. Population Frame

Given the rapid growth rate in the number of elderly persons in the study area, the 1980 population data must be adjusted upward to 1983. Through the use of historical growth rates, the 1983 population of elderly persons 65 years and older is estimated to be 12,672. The growth rates applied to

EXHIBIT 19

MARKET SURVEY RESEARCH PROCESS

	GOAL	KEY ELEMENTS
STEP 1	PROBLEM FORMULATION	Estimate effective demand for the proposed Madsen-Hoffman Retirement Center and determine consumer preference for financial, locational, design and service attributes of facility.
STEP 2	RESEARCH DESIGN	Primary data used to profile potential consumers and predict their behavior. Secondary data used for population description and to extrapolate demand from population within defined study area.
STEP 3	DETERMINATION OF METHOD OF DATA COLLECTION	Mail survey was conducted with option given for telephone interview.
STEP 4	DEFINITION OF FRAME OR POPULATION	Elderly (65 years and older) citizens of Appleton, Neenah, and Menasha.
STEP 5	SAMPLE TYPE NONPROBABILITY JUDGMENT/QUOTA	Several sources were used to locate cross-section of the elderly in the study area including a broker's list, the city directory, newspaper advertisements, and respondents to a survey conducted by the American Association of Retired Persons.
STEP 6	SELECTION OF SAMPLE (SIZE)	Goal = 9 - 10% of elderly (65 years and older) persons in study area (excluding nursing home and subsidized housing residents).
STEP 7	DESIGN OF SURVEY	Adjusted sample size = 1,242 elderly (65 years and older) = Adjusted population of 10,497
STEP 8	DATA COLLECTION AND ANALYSIS	Sample size = 11.8% of elderly persons in study area (excluding nursing home and subsidized housing residents) Response rate = 31.3%
STEP 9	RESEARCH REPORT CONCLUSIONS	Basis for report to Madsen-Hoffman Joint Venture

each age group by communities in the study area are found in Exhibit 20.

It is assumed that elderly persons who are either residents of nursing homes and group quarters, or of subsidized housing units, will never be potential retirement center residents so these persons are excluded from the survey sample. Therefore the population frame must also be adjusted to exclude these persons. The adjustments made to the elderly population in the study area are shown in Exhibit 21.

2. Conversion of Population into Household Units

Since the goal of the study is to estimate effective demand for a number of living units (households), the population must also be converted to households. Each respondent in the sample represents a household; if married, the household usually contains two persons and if single or widowed, the household (termed non-family) usually contains only one person. The average number of elderly persons per household in the study area population is found to be 1.44 as shown in Exhibit 12. Of the 388 respondents from the sample who are 65 years or older, there are 170 married persons and 218 persons who are either single or widowed. Thus, there are a total of 558 persons in 388 households or 1.44 persons per household among those from the survey sample who responded to the questionnaire. The

EXHIBIT 20

PROJECTED GROWTH IN ELDERLY POPULATION BY
AGE SEGMENTS AND MUNICIPALITIES IN THE STUDY AREA

AGE GROUP	AVERAGE GROWTH RATE/YR [1]	1980	1983
<hr/>			
MENASHA TOWN			
65 - 69	3.9%	279	312
70 - 74	8.9%	197	250
75 - 79	7.7%	147	181
80 - 84	11.0%	82	109
85 +	22.5%	78	131
TOTAL		783	983
MENASHA CITY			
65 - 69	1.8%	613	646
70 - 74	1.7%	491	516
75 - 79	3.1%	347	379
80 - 84	5.0%	216	248
85 +	5.6%	106	124
TOTAL		1,773	1,913
NEENAH CITY			
65 - 69	1.8%	743	783
70 - 74	1.1%	623	643
75 - 79	2.4%	483	518
80 - 84	4.9%	340	390
85 +	5.6%	228	266
TOTAL		2,417	2,600
NEENAH TOWN [2]			
65 - 74	1.8%	130	137
75 +	3.0%	57	62
TOTAL		187	199
APPLETON			
65 - 69	1.6%	2,048	2,146
70 - 74	1.1%	1,712	1,768
75 - 79	2.6%	1,293	1,394
80 - 84	3.1%	859	939
85 +	4.2%	648	730
TOTAL		6,560	6,977
TOTALS		11,720 [3]	12,672
PROJECTED AVERAGE GROWTH RATE			2.7%/yr

[1] The 1970 - 1980 growth rate, divided by 10 years, is the average growth rate applied to estimate projected growth from 1980 to 1983.

[2] The more detailed breakdown of Town of Neenah age groups is not available in 1980 Census publications on Population Characteristics for Wisconsin.

[3] Includes persons in nursing homes and other group quarters.

Source: 1980 Census Data - General Population
Characteristics - Wisconsin Part 51,
Pages 86, 153, and 155
Tables 26, 33, and 331

EXHIBIT 21

ADJUSTED 1983 ELDERLY POPULATION FRAME

Projected elderly population in study area as of 1983 (see Exhibit ²⁰ 13)	12,672
Less: Nursing home residents and persons in group quarters [1] (see Exhibit 49 for nursing home population)	(919)
Less: Subsidized housing residents (See Exhibit 18)	__(682)
TOTAL ELDERLY POPULATION IN STUDY AREA PROJECTED FOR 1983	11,071 =====

[1] It is assumed that there has been no change in the number
(20) of persons 65 years and old in group quarters since
1980.

number from this sample is identical to the number of elderly persons per household found in the population frame from the 1980 Census Data; thus, the reliability of the sample is strengthened.

Using 1.44 persons per household, the adjusted study area population of 11,071 elderly persons converts to 7,688 households ($11,071/1.44$). These households form the basis for the estimate of effective demand for the proposed retirement center.

3. Adjustment of the Survey Sample Size

Although 1,601 households constituted the survey sample, of the 500 questionnaires returned only 388 completed questionnaires came from households in which one or more persons were 65 years or older. Of the other 112 questionnaires returned, 66 were from persons 55 to 64 years of age. Data from these younger persons is analyzed separately. Of the remaining 46 respondents, 32 are from persons less than 55 years of age and 14 are so incomplete as to be considered non-responses.

The survey sample size when adjusted for the proportion of respondents under 65 years old would be 1,242 households 65 years and older. The calculations are found in Exhibit 22, and the resulting ratio implies that there would be the same proportional distribution (a conservative estimate) among the 1,101 non-responses. When this ratio of .776 ($1,242/1,601$) is

EXHIBIT 22

ADJUSTED SURVEY SAMPLE SIZE

EQUATION

$$\frac{R}{Q} = \frac{Y}{X}$$

Where:

- R = Total number of respondents (500)
- Q = Total number of questionnaires mailed (160)
- Y = Number of respondents who were 65 years and older (388)
- X = Total number of questionnaires which would have to be mailed to achieve a response equal to Y (unknown)

CALCULATION

1. $\frac{500}{1,601} = \frac{388}{X}$
2. $X = \frac{388 \times 1,601}{500}$
3. $X = 1,242$ questionnaires required for 388 completed responses if total number of questionnaires had been mailed only to persons 65 years and older

applied to the non-responses, it can be assumed that of those questionnaires received by persons 65 years and older, 854 did not respond. (388 responses plus 854 non-responses = 1,242 in survey sample 65 years and older). Thus the adjusted survey sample size of 1,242 households, in which the respondents were 65 years and older, is the basis for the estimate of effective demand.

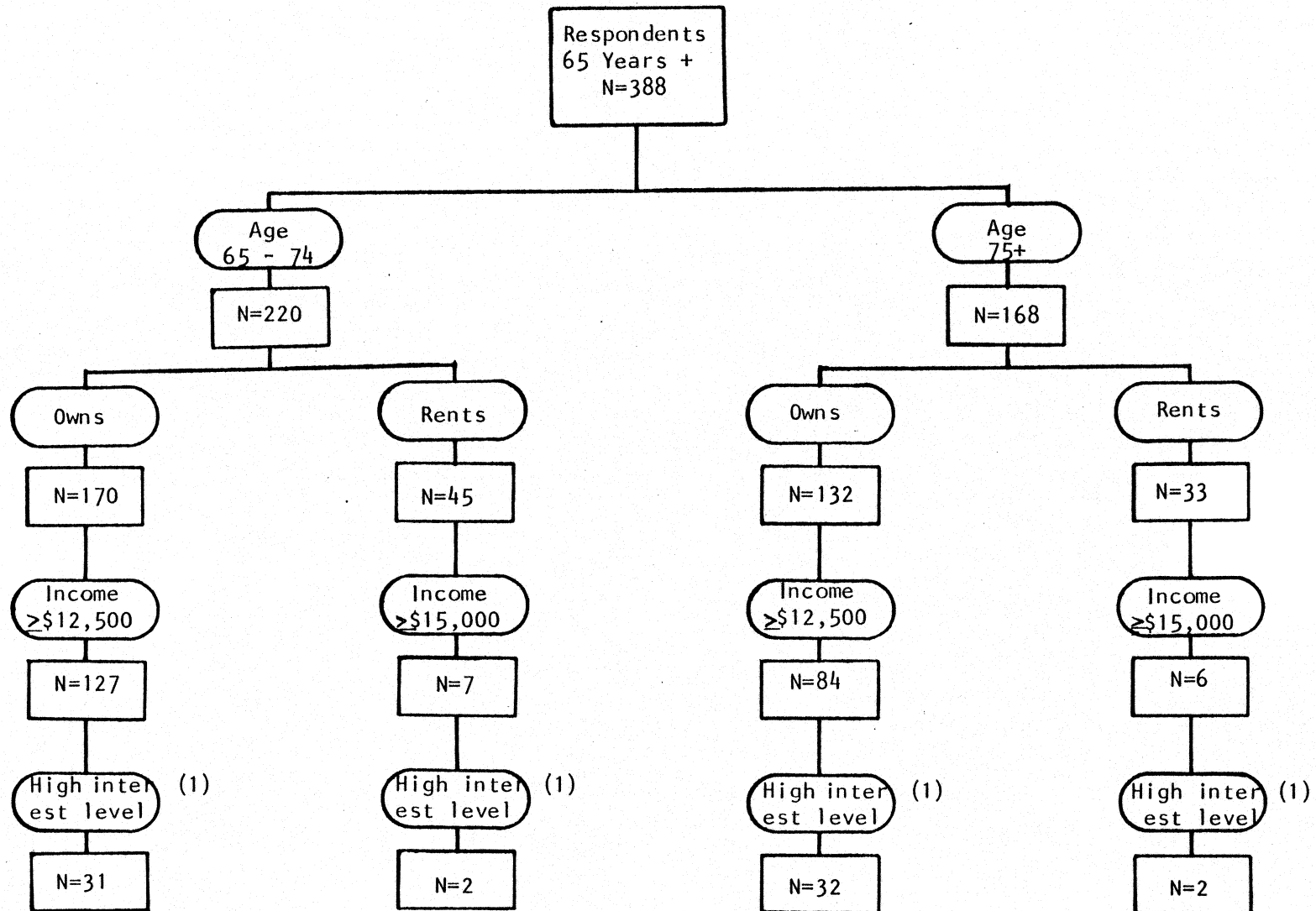
B. Analysis of Survey Results

The 388 respondents who are 65 years and older are assumed to be the prototype of the potential resident of the proposed Madsen-Hoffman Retirement Center and receive the most intensive in-depth analysis.

Because demand is a function of the degree of interest in the project and the ability to pay, the 388 respondents are grouped as shown in the diagram in Exhibit 23. (See Appendix for cumulative frequencies for all respondents 65 years and older.)

Degree of interest in the project is directly correlated to age; the average age of residents in retirement centers vary with the age of the facility, but in general, the average age of retirement center residents is in the mid to late 70s. Therefore those persons 75 years and older who qualify financially are considered to be the prototype of the most probable users of the facility and are segregated out as the

SCREENS USED TO SUBSET MOST PROBABLE USERS
OF PROPOSED RETIREMENT CENTER



(1) High degree of interest in project is defined as those who answered question #47 with a 1, 2, or 3 response. These respondents are interpreted as having serious interest now or in a year or so. See questionnaire in Appendix for exact wording of the question.

primary focus group. (See Appendix for cumulative frequencies for primary focus group.)

Those persons 65 to 74 years who qualify financially are also considered to be the prototype of potential users of the proposed retirement center, although the probability of this group becoming residents is somewhat less. This group is segregated out as the secondary focus group.

Those respondents who expressed serious interest in moving to the retirement center when completed, whether sponsored by Madsen-Hoffman or by a non-profit organization, and those who might consider living in the facility in a year or so are considered to be the major source of effective demand for the proposed Madsen-Hoffman Retirement Center. Another source of potential residents include respondents 65 years and older who rent and are financially qualified.

Respondents in the primary and secondary focus groups who expressed a more tentative interest in the facility with an "if and when needed" or "might, but wait and see" reply and respondents 55 to 64 years who are either homeowners or renters who qualify financially are considered to be the source of potential residents in the future. This group may be the source of replacement residents in the first phase of the project or the source of effective demand for the second phase of the project in three to five years from now.

The analysis of the survey results will be done by groups of respondents; first, an overview is given of all 388 respondents 65 years and older and then the primary and secondary focus groups are studied in depth.

1. Overall Interest in the Retirement Concept

Of the 388 respondents, 106, or 27 percent, expressed an interest in moving into the project now or in a year or so. The frequencies of these two sets of responses are found in Exhibit 24.

Because the elderly, like any consumer group, is strongly influenced by the opinions of its peers, it is important to examine some of the characteristics of the larger group of respondents 65 years and older. When asked if retirement living as proposed for the Madsen-Hoffman Retirement Center appealed as an alternative to their current living arrangement, 288 of the the 388 respondents, or 74 percent, answered positively. Thus there is wide community acceptance of the idea.

Price is the critical element for the elderly consumer on a relatively fixed to declining income who lives with the fear of increasing medical costs further eroding his/her financial security. Price sensitivity is a function of income and assets. Of the 106 respondents with interest in the project, now or in a year or so, four did not respond to the income question; of

EXHIBIT 24

INTEREST IN MOVING TO RETIREMENT CENTER
AND APPEAL OF RETIREMENT LIVING CONCEPT -
FREQUENCIES OF RESPONSES (N=388)

<u>Appeal of Retirement Living</u>	<u>N</u>	<u>%</u>
1. Yes, suits needs now	37	10
2. Yes, seriously explore for future	131	34
3. Yes, if and when needed	120	31
4. Don't know, it would depend upon [1] -----	54	14
5. No, it's nice but not for me	20	5
6. No, it's not for me	9	2
No responses	<u>17</u>	<u>4</u>
TOTALS	388	100%

<u>Interest in Retirement Center</u>	<u>N</u>	<u>%</u>
1. Seriously explore moving when its ready	50	13%
2. Seriously - if non-profit sponsor	13	3%
3. Might consider move in year or so	43	11%
4. Only if and when needed	172	44%
5. Might, but wait to see ho other like it	37	10%
6. Never be interested	19	5%
No response	<u>54</u>	<u>15%</u>
TOTAL	388	100%

[1] The majority of contingent reasons were cost/finance related and health status. See Appendix for list of reasons given.

the remaining 102 respondents, 74 had an annual income of \geq \$12,500 and 50 had annual incomes of $>$ \$15,000.

Of the same 106 respondents with interest in the project now or in a year or so, six did not respond either to the income or to the question of present housing type; of the remaining 100 interested respondents, the pattern of housing types and marital status by income levels is summarized in Exhibit 25. Income levels reported by respondents represents capacity to pay monthly service charges while home ownership is assumed to be a proxy for capital assets available for entrance fees (as opposed to capital invested for income).

Exhibit 25 underscores the fact that homeowners, both married and single, represent the overwhelming market base for a retirement center. Reference to Exhibit 26 indicates that of the 23 percent renters most were women and 80 percent failed to meet the \$15,000 income test and two thirds failed to meet the \$12,500 income test. On the other hand, 80 percent of the married homeowners had annual incomes in excess of \$15,000 and 60 percent of the single person homeowners had annual incomes in excess of \$15,000. Clearly, the homeowner group will be the primary source of effective demand for the proposed retirement center.

EXHIBIT 25

PATTERN OF PRESENT LIVING STYLE BY
INCOME LEVEL FOR THOSE INTERESTED IN MOVING TO
RETIREMENT CENTER

Living Style of Those Interested/Now or In Year or So	All Income Levels		N=Income ≥ \$12,500		N=Income ≥ \$15,000	
	N	%	N	%	N	%
Married Homeowners	40	40%	38	51%	32	64%
Married Renters	4	4%	3	4%	2	4%
Single/Widowed Homeowners	37	37%	25	34%	14	28%
Single/Widowed Renters	<u>19</u> 100	<u>19%</u> 100%	<u>8</u> 100	<u>11%</u> 100%	<u>2</u> 100	<u>4%</u> 100%

EXHIBIT 26

PATTERN OF PRESENT LIVING STYLE BY
INCOME LEVELS AND BY SEX FOR THOSE
INTERESTED IN MOVING TO RETIREMENT CENTER

Married Homeowners

	All Income Levels		≥ \$12,500		≥ \$15,000	
	N	%	N	%	N	%
Male	34	85%	32	84%	29	91%
Female	$\frac{6}{40}$	$\frac{15\%}{100\%}$	$\frac{6}{38}$	$\frac{16\%}{100\%}$	$\frac{3}{32}$	$\frac{9\%}{100\%}$

Single/Widowed Homeowners

	All Income Levels		≥ \$12,500		≥ \$15,000	
	N	%	N	%	N	%
Male	6	6%	5	20%	3	21%
Female	$\frac{31}{37}$	$\frac{84\%}{100\%}$	$\frac{20}{25}$	$\frac{80\%}{100\%}$	$\frac{11}{14}$	$\frac{79\%}{100\%}$

EXHIBIT 26 (Continued)

Married Renters

	All Income Levels		≥ \$12,500		≥ \$15,000	
	N	%	N	%	N	%
Male	3	75%	3	100%	2	100%
Female	$\frac{-1}{4}$	$\frac{-25\%}{100\%}$	$\frac{-0}{3}$	$\frac{-0\%}{100\%}$	$\frac{-0}{2}$	$\frac{-0\%}{100\%}$

Single/Widowed Renters

	All Income Levels		≥ \$12,500		≥ \$15,000	
	N	%	N	%	N	%
Male	1	5%	1	12%	1	50%
Female	$\frac{18}{19}$	$\frac{-95\%}{100\%}$	$\frac{-7}{8}$	$\frac{-88\%}{100\%}$	$\frac{-1}{2}$	$\frac{-50\%}{100\%}$

2. Motivation for Moving to Retirement Center

The largest percentage of the respondents who expressed any degree of interest in moving to the retirement center would consider a move only when conditions or events caused them to need to move to a more supportive environment. Since the occurrence of these events or conditions are unpredictable, it is very difficult to estimate when each of the respondents would seriously consider such a move. The majority of this tentative group constitute future market demand for the facility. Only a small percentage, especially in the 75 year and older group, would be a part of the first wave of residents. But it is important that there be an understanding of the nature of the events or conditions that respondents believe will cause them to move; the marketing effort can then be directed to assisting the elderly in the timing of this critical housing decision.

Of the 388 householders surveyed, 78 percent owned and occupied single family homes or condominiums and 20 percent rented an apartment. When the same group of householders chose the ideal housing which best suited their current needs, 50 percent would prefer to live in their own home or condo and 18 percent would prefer a private apartment either for all ages or preferably for the elderly. The other 32 percent had already

decided that a retirement center either with or without a nursing home on site would best suit their current needs.

Clearly, the increasing burden of home upkeep and accompanying health problems are the two interrelated conditions which most frequently trigger the decision to leave the family home. A ranking of the events or conditions which the respondents believed would trigger a decision to move are detailed in Exhibits 27 for all respondents (N=388) and for those in the primary and secondary focus group who expressed a high level of interest of moving into the retirement center in the near future. It is interesting to note, for purposes of validating the realism of the responses, that health moves up to a primary factor for the 75 year and older group and loss of a spouse declines, since an increasing number have already experienced the loss of a spouse.

Respondents also ranked the importance of the reasons which would motivate a move to a retirement center. Freedom from the responsibility and maintenance of home care outranked any other as the most important. The availability of support services, 24-hour emergency response, companionship with others, and a daily check system are the next four most important reasons given, but the order of importance varied with age. The least important reasons are the need for a special diet and staff help to plan leisure, finance, and future needs. The level of

CONDITIONS OR EVENTS WHICH MIGHT TRIGGER THE DECISION TO MOVE
ALL RESPONDENTS 65 YEARS AND OLDER

N = 388

MULTIPLE RESPONSES PERMITTED

EVENTS	NUMBER OF RESPONSES TO ITEM	PERCENT OF TOTAL RESPONSES	RANKING
Burden of home upkeep	240	61.9%	1
Health	238	61.3%	2
Death of a spouse	122	31.4%	3
Financial limitations	73	18.8%	4
Growing awareness of loneliness	61	15.7%	5
Opportunity to sell	50	12.9%	6
Opportunity to move into subsidized housing	39	10.1%	7
Children moving away	12	3.1%	8
Other	10	2.6%	9
Friction with relatives	-0-	-0-	-0-

EXHIBIT 27

CONDITIONS OR EVENTS WHICH MIGHT TRIGGER THE DECISION TO MOVE
SECONDARY FOCUS GROUP, 64 - 74 YEARS OLD
HOME-CONDO OWNERS WITH ANNUAL INCOME \geq \$12,500
AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 31

MULTIPLE RESPONSES PERMITTED

EVENTS	NUMBER OF RESPONSES TO ITEM	PERCENT OF TOTAL RESPONSES	RANKING
Burden of home upkeep	25	80.7%	1
Death of a spouse	19	61.3%	2
Health	18	58.1%	3
Opportunity to sell	11	35.5%	4
Financial limitations	5	16.1%	5
Growing awareness of loneliness	5	16.1%	6
Opportunity to move into subsidized housing	1	3.2%	7
Children moving away	1	3.2%	8
Other	1	3.2%	9
Friction with relatives	0	0.0%	0

EXHIBIT 27 (Continued)

CONDITIONS OR EVENTS WHICH MIGHT TRIGGER THE DECISION TO MOVE
 PRIMARY FOCUS GROUP, 75 YEARS AND OLDER
 HOME-CONDO OWNERS WITH ANNUAL INCOME \geq \$12,500
 AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 32

MULTIPLE RESPONSES PERMITTED

EXHIBIT 27 (Continued)

EVENTS	NUMBER OF RESPONSES TO ITEM	PERCENT OF TOTAL RESPONSES	RANKING
Burden of home upkeep	26	81.3%	1
Health	20	62.5%	2
Death of a spouse	15	46.9%	3
Growing awareness of loneliness	5	15.6%	4
Opportunity to sell	4	12.5%	5
Financial limitations	3	9.4%	6
Opportunity to move into subsidized housing	1	3.1%	7
Children moving away	0	0.0%	8
Other	0	0.0%	9
Friction with relatives	0	0.0%	0

importance given to each reason for moving to a retirement center are summarized in Exhibit 28 for each group of respondents analyzed.

3. The Primary Focus Group

All respondents 75 years and older who have an annual gross income of \$12,500 or more and who are home or condo owners constitute the primary focus group and are considered the prototype of the most probable users of the planned retirement center. Reference to Exhibit 23 indicates that 84 respondents qualified for the primary focus group but not all had the same motivation for moving in the near future. Their responses to two of the critical motivational questions are tabulated in Exhibit 29.

The 32 respondents who expressed the highest level of interest in moving to the proposed retirement center were separated from the larger financially qualified group, and subdivided into two groups delineated by their seriousness of interest in moving into a retirement center. Those who would seriously explore the possibility of moving into the retirement facility as soon as it is ready form one subset (N=16) and those somewhat more tentative who might consider living there in a year or so and those who are serious if it were sponsored by a church or a non-profit organization form the second subset (N=16) of 75 year and older financially qualified respondents.

RANKING OF REASONS FOR MOVING INTO A RETIREMENT CENTER
PRIMARY FOCUS GROUP, 75 YEARS AND OLDER
HOME-CONDO OWNERS WITH ANNUAL INCOME \geq \$12,500
AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 32

REASONS FOR MOVING INTO A RETIREMENT CENTER	NUMBER OF RESPONDENTS RANKING EACH ITEM	ORDER OF [1] RANKING	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT
Freedom from responsibility and maintenance of home care	31	1	83.9%	12.9%	3.2%
Availability of supportive services	29	2	58.6%	41.4%	0.0%
24 hour emergency response	27	3	70.4%	18.5%	11.1%
Companionship with others	24	4	37.5%	58.3%	4.2%
Daily check on me	25	5	68.0%	16.0%	16.0%
Nursing home on premises	26	6	50.0%	26.9%	23.1%
Nutritious meal in full- service dining room	28	7	32.1%	50.0%	17.9%
Special diet	23	8	34.8%	13.0%	52.2%
Staff help to plan leisure, finance, and future needs	25	9	16.0%	28.0%	56.0%

[1] To rank the importance of each reason, an adjusted score was calculated as follows:
the sum of the score for VERY IMPORTANT plus 1/2 the score for MODERATELY IMPORTANT
minus the score for NOT IMPORTANT. The reasons were then ranked in descending order
according to the magnitude of the score.

EXHIBIT 28

RANKING OF REASONS FOR MOVING INTO A RETIREMENT CENTER
SECONDARY FOCUS GROUP, 65 - 74 YEARS OLD
HOME-CONDO OWNERS WITH ANNUAL INCOME ≥ \$12,500
AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 31

REASONS FOR MOVING INTO A RETIREMENT CENTER	NUMBER OF RESPONDENTS RANKING EACH ITEM	ORDER OF [1] RANKING	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT
Freedom from responsibility and maintenance of home care	31	1	87.1%	12.9%	0.0%
24 hour emergency response	26	2	65.4%	23.1%	11.5%
Companionship with others	24	3	41.7%	54.2%	4.2%
Availability of supportive services	29	4	41.4%	44.8%	13.8%
Nutritious meal in full- service dining room	29	5	37.9%	41.4%	20.7%
Daily check on me	27	6	33.3%	44.4%	22.2%
Nursing home on premises	28	7	39.3%	35.7%	25.0%
Special diet	24	8	20.8%	25.0%	54.2%
Staff help to plan leisure, finance, and future needs	25	9	8.0%	36.0%	56.0%

[1] To rank the importance of each reason, an adjusted score was calculated as follows:
the sum of the score for VERY IMPORTANT plus 1/2 the score for MODERATELY IMPORTANT
minus the score for NOT IMPORTANT. The reasons were then ranked in descending order
according to the magnitude of the score.

EXHIBIT 28 (Continued)

RANKING OF REASONS FOR MOVING INTO A RETIREMENT CENTER
ALL RESPONDENTS 65 YEARS AND OLDER

N = 388

REASONS FOR MOVING INTO A RETIREMENT CENTER	NUMBER OF RESPONDENTS RANKING EACH ITEM	ORDER OF [1] RANKING	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT
Freedom from responsibility and maintenance of home care	351	1	72.9%	24.2%	2.8%
24 hour emergency response	327	2	64.2%	27.2%	8.6%
Availability of supportive services	329	3	42.9%	43.5%	13.7%
Daily check on me	318	4	50.3%	33.3%	16.4%
Companionship with others	295	5	35.3%	50.8%	13.9%
Nutritious meal in full- service dining room	325	6	39.4%	40.0%	20.6%
Nursing home on premises	312	7	37.5%	38.8%	23.7%
Special diet	287	8	25.4%	27.5%	47.0%
Staff help to plan leisure, finance, and future needs	297	9	13.5%	35.7%	50.8%

[1] To rank the importance of each reason, an adjusted score was calculated as follows: the sum of the score for VERY IMPORTANT plus 1/2 the score for MODERATELY IMPORTANT minus the score for NOT IMPORTANT. The reasons were then ranked in descending order according to the magnitude of the score.

EXHIBIT 28 (Continued)

EXHIBIT 29

COMPARISON OF APPEAL OF RETIREMENT LIVING CONCEPT
AND INTEREST IN MOVING FOR PRIMARY FOCUS GROUP

(N = 84)

Appeal of Concept

	N	%
-----	-----	-----
Yes, now	9	11%
Yes, explore	31	37%
Yes, if & when	30	35%
Don't know	4	5%
No	9	11%
No response	<u>1</u>	<u>1%</u>
TOTAL	84	100%

Interest in Move

	N	%
-----	-----	-----
Serious, now	16	19%
Serious, if non-profit	2	2%
Might, yr or so	14	17%
If & when	36	43%
Might, wait and see	2	2%
No	4	5%
No response	<u>10</u>	<u>12%</u>
TOTAL	84	100%

It is assumed that those who would prefer a non-profit sponsored retirement center can be swayed if a high level of credibility and trust can be established through the marketing and preleasing phase. A summary of attribute patterns for each subset is shown in Exhibits 30 and 31 with an accompanying statistical summary of these attributes.

A comparative analysis of the statistical summaries of each of the subsets led to the estimate of the probability that respondents will translate interest into action or, in other words, an estimate of the capture rate for that particular subset of respondents. The less interested group show a pattern of tentative responses. For example, 75 percent of the seriously interested 75 year old qualified homeowners considered private apartments for the elderly or a retirement center as ideal housing now. Only 56 percent of the 75 year old qualified homeowners in Exhibit 31 would consider the same alternative as ideal. The financial characteristics of the two groups are similar, but 81 percent of the serious group had given earnest thought to moving whereas only 56 percent of the more tentative group had done so. The more seriously interested group showed an increasing interest in one-bedroom, one-bath units, though a majority in both groups prefer two-bedroom units. Over 80 percent of the respondents for each subset live in Appleton.

PROFILE OF MOST PROBABLE USERS
FROM THE PRIMARY FOCUS GROUP
SERIOUSLY INTERESTED IN RETIREMENT CENTER

<u>AGE</u>		
Mean age of respondent	=	79 years
Mean age of spouse	=	73 years
<u>SEX</u>		
	N	%
By respondents:		
Male	9	56
Female	7	44
	16	100%
By persons in household:		
Male	9	36
Female	16	64
	25	100%
<u>MARITAL STATUS</u>		
	N	%
Married	9	56
Widowed or Single	7	44
	16	100%

<u>PLACE OF RESIDENCE</u>		
	N	%
Appleton	14	87.5
Neenah	0	0
Menasha	0	0
Other	2	12.5
	16	100%
<u>INCOME LEVEL</u>		
	N	%
\$12.5 - 15,000	4	25
\$15 - 20,000	6	38
\$20 - 25,000	1	6
\$25 - 30,000	4	25
\$35 - 40,000	0	0
> \$40,000	1	6
	16	100%
Weighted average - \$20,800/year =====		
<u>HOME VALUE</u>		
	N	%
< \$40,000	2	12.5
\$40 - 50,000	2	12.5
\$50 - 60,000	6	38.0
\$60 - 70,000	2	12.5
\$70 - 80,000	3	19.0
\$80 - 90,000	0	0
> \$90,000	1	6.0
	16	100.0%
Weighted average - \$59,000 =====		

<u>SERIOUS THOUGHT TO MOVING</u>		
	N	%
Yes	13	81
No	2	13
No response	1	6
	16	100%
<u>IDEAL HOUSING NOW [1]</u>		
CODE	N	%
1 = Single family home	3	19
2 = Condominium	1	6
3 = Subsidized housing	0	0
4 = Private apartment - all ages	0	0
5 = Private apartment - elderly	3	19
6 = Retirement center - = no nursing home on premises	3	19
7 = Retirement center - = with nursing home on premises	6	38
	16	100%
<u>UNIT MIX</u>		
	N	%
1 BR - 1 BA	6	38
2 BR - 1 BA	5	31
2 BR - 1.5 BA	5	31
	16	100%

<u>COMBINATION ENTRY FEE AND MONTHLY SERVICE CHARGE</u>		
	N	%
\$10 - 20 K/\$800 - 725	2	12.5
\$20 - 30 K/\$725 - 650	9	56.3
\$30 - 40 K/\$650 - 575	2	12.5
Can't afford	2	12.5
No response	1	6.2
	16	100%
<u>NEED TO SELL HOME</u>		
	N	%
Yes	7	44
No	9	56
	16	100%

EXHIBIT 31

PROFILE OF MOST PROBABLE USERS
PRIMARY FOCUS GROUP
MIGHT CONSIDER MOVE IN YEAR OR SO
AND SERIOUS IF NON-PROFIT SPONSOR

AGE	SEX	MARITAL STATUS	AGE OF SPOUSE	PLACE OF RESIDENCE	INCOME LEVEL	HOME VALUE	CURRENT HEALTH STATUS	SERIOUS THOUGHT TO MOVING	IDEAL [1] HOUSING NOW	APPEAL OF RETIREMENT CONCEPT	UNIT STYLE BR - BA	REASONABLE MONTHLY SERVICE CHARGE	COMBINATION ENTRY/MONTHLY	NEED TO SELL HOME	INTEREST IN RETIREMENT CENTER
81	M	Widowed	N/A	Menasha	\$25 - 30,000	≥ \$90,000	Average	Yes	1	Yes-if & when	2BR - 1.5BA	\$800 - 900	\$20-30 K/\$725-650	Yes	Might-yr or so
80	M	Single	N/A	Appleton	\$35 - 40,000	≥ \$90,000	Excellent	No	7	Yes-if & when	1BR - 1BA	\$800 - 900	\$30-40 K/\$650-575	No	Might-yr or so
86	M	Married	77	Appleton	> \$40,000	\$60 - 70,000	Fair	Yes	1	Yes-if & when	2BR - 1.5BA	≥ \$1,000	\$20-30 K/\$725-650	No	Might-yr or so
79	M	Married	77	Appleton	\$20 - 25,000	\$60 - 70,000	Fair	Yes	5	Yes-if & when	2BR - 1.5BA	N/A	\$10-20 K/\$800-725	No	Might-yr or so
82	M	Married	73	Appleton	\$25 - 30,000	\$50 - 60,000	Fair	N/A	5	Yes-explore	2BR - 1BA	N/A	\$20-30 K/\$725-650	No	Might-yr or so
77	M	Widowed	N/A	Appleton	\$12.5 - 15,000	\$50 - 60,000	Fair	Yes	7	Yes-explore	1BR - 1BA	\$400 - 500	\$10-20 K/\$800-725	Yes	Might-yr or so
77	M	Married	73	Appleton	\$15 - 20,000	\$40 - 50,000	Average	No	N/A	Yes-explore	2BR - 1BA	\$500 - 600	Can't afford	Yes	Might-yr or so
81	M	Married	72	Menasha	\$15 - 20,000	\$60 - 70,000	Average	No	4	Yes-explore	2BR - 1BA	\$500 - 600	\$20-30 K/\$725-650	Yes	Might-yr or so
81	M	Married	N/A	Appleton	\$15 - 20,000	\$40 - 50,000	Fair	Yes	5	Yes-if & when	2BR - 1BA	\$600 - 700	\$20-30 K/\$725-650	Yes	Might-yr or so
76	M	Married	75	Appleton	\$25 - 30,000	\$50 - 60,000	Fair	Yes	7	Yes-if & when	1BR - 1BA	\$600 - 700	\$10-20 K/\$800-725	No	Might-yr or so
81	M	Married	81	Appleton	\$15 - 20,000	\$50 - 60,000	Fair	Yes	7	Yes-if & when	2BR - 1BA	\$600 - 700	\$20-30 K/\$725-650	Yes	Might-yr or so
76	F	Widowed	N/A	Appleton	\$12.5 - 15,000	\$50 - 60,000	Fair	Yes	5	Yes-explore	2BR - 1BA	\$400 - 500	Can't afford	Yes	Might-yr or so
77	M	Married	N/A	Appleton	\$12.5 - 15,000	\$40 - 50,000	Fair	No	1	Yes-explore	2BR - 1.5BA	\$500 - 600	\$20-30 K/\$725-650	No	Might-yr or so
81	M	Widowed	N/A	Appleton	≥ \$40,000	≥ \$90,000	Fair	No	1	Yes-explore	2BR - 1.5BA	> \$1,000	\$20-30 K/\$725-650	No	Might-yr or so
75	F	Single	N/A	Appleton	\$15 - 20,000	\$50 - 60,000	Average	No	1	Yes-if & when	2BR - 1BA	N/A	Can't afford	No	Serious-if non-profit
79	F	Widowed	N/A	Neenah	\$12.5 - 15,000	N/A	Excellent	Yes	1	Yes-explore	1BR - 1BA	N/A	N/A	Yes	Serious-if non-profit

AGE
Mean age of respondent = 79 years
Mean age of spouse = 75 years

SEX
N %
By respondents:
Male 13 81
Female 3 19
16 100%

By persons in household:
Male 13 52
Female 12 48
16 100%

MARITAL STATUS
N %
Married 9 56
Widowed or Single 7 44
16 100%

PLACE OF RESIDENCE
N %
Appleton 13 81
Neenah 1 6
Menasha 2 13
16 100%

HOME VALUE
N %
< \$40,000 0 0
\$40 - 50,000 3 19
\$50 - 60,000 6 38
\$60 - 70,000 3 19
\$70 - 80,000 0 0
\$80 - 90,000 0 0
> \$90,000 3 19
No response 1 6
16 100%

Weighted average - \$58,000
=====

INCOME LEVEL
N %
\$12 - 15,000 4 25
\$15 - 20,000 5 31
\$20 - 25,000 1 6
\$25 - 30,000 3 19
\$30 - 40,000 1 6
≥ \$40,000 2 13
16 100%

Weighted average = \$22,700/year
=====

SERIOUS THOUGHT TO MOVING
N %
Yes 9 56
No 6 38
No response 1 6
16 100%

IDEAL HOUSING NOW [1]
N %
CODE
1 = Single family home 6 38
2 = Condominium 0 0
3 = Subsidized housing 0 0
4 = Private apartment - all ages 1 6
5 = Private apartment - elderly 4 25
6 = Retirement center - no nursing home on premises 0 0
7 = Retirement center - with nursing home on premises 4 25
No response 1 6
16 100%

UNIT MIX
N %
1 BR - 1 BA 4 25
2 BR - 1 BA 7 44
2 BR - 1.5 BA 5 31
16 100%

COMBINATION ENTRY FEE AND MONTHLY SERVICE CHARGE
N %
\$10 - 20 K/\$800 - 725 3 19
\$20 - 30 K/\$725 - 650 8 50
\$30 - 40 K/\$650 - 575 1 6
Can't afford 3 19
No response 1 6
16 100%

NEED TO SELL HOME
N %
Yes 8 50
No 8 50
16 100%

4. The Secondary Focus Group

All of the respondents 65 to 74 years old who have an annual gross income of \$12,500 or more and who are home or condo owners constitute the secondary focus group and are considered the prototype of the secondary group of most probable users of the planned retirement center. Reference to Exhibit 23 indicates that 127 respondents qualified for this group, but as in the primary group, not all had the same motivation for moving in the near future. Their responses to the two critical motivational questions are tabulated in Exhibit 32.

The 31 respondents who expressed the highest level of interest are categorized by degree of interest, as for the 75 year and older group, and the responses of each subset are analyzed in depth. A profile of the respondents in each subset is shown in Exhibit 33 and 34 with an accompanying statistical summary of the critical attributes.

A comparative analysis of these subsets with each other and with the 75 year and older subsets provide the following insights. The 65 to 74 year old group (N=8) seriously interested are more like the 75 and older (N=16) seriously interested group than their chronological counterparts who have a more tentative interest in the project. A word of caution in comparing percentages; the 65 to 74 year old qualified and

EXHIBIT 32

COMPARISON OF APPEAL OF RETIREMENT LIVING CONCEPT
AND INTEREST IN MOVING FOR SECONDARY FOCUS GROUP

N = 127

Appeal of Concept

	N	%
Yes, now	6	19%
Yes, explore	17	55%
Yes, if & when	3	10%
Don't know	2	6%
No	0	0%
No response	3	10%
TOTAL	127	100%

Interest in Move

	N	%
Serious, now	8	6%
Serious, if non-profit	7	6%
Might, yr or so	16	13%
If & when	61	48%
Might, wait and see	13	10%
No	4	3%
No response	18	14%
TOTAL	127	100%

EXHIBIT 33
PROFILE OF PROBABLE USERS
SECONDARY FOCUS GROUP
SERIOUSLY INTERESTED IN RETIREMENT CENTER

AGE	SEX	MARITAL STATUS	AGE OF SPOUSE	PLACE OF RESIDENCE	INCOME LEVEL	HOME VALUE	CURRENT HEALTH STATUS	SERIOUS THOUGHT TO MOVING	IDEAL [1] HOUSING NOW	APPEAL OF RETIREMENT CONCEPT	UNIT STYLE BR - BA	REASONABLE MONTHLY SERVICE CHARGE	COMBINATION ENTRY/MONTHLY	NEED TO SELL HOME	INTEREST IN RETIREMENT CENTER
67	F	Married	67	Appleton	\$12.5 - 15,000	< \$40,000	Fair	No	6	Yes-now	2BR - 1.5BA	\$300 - 400	Can't afford	Yes	Serious
70	M	Married	66	Menasha	\$30 - 40,000	\$80 - 90,000	Average	Yes	5	Yes-now	2BR - 1.5BA	\$900 - 1,000	\$20-30 K/\$725-650	No	Serious
67	M	Widowed	N/A	Sherwood	\$12.5 - 15,000	≥ \$90,000	Excellent	Yes	7	Yes-explore	1BR - 1BA	\$400 - 500	\$30-40 K/\$650-575	N/A	Serious
73	F	Married	79	Appleton	\$30 - 40,000	\$50 - 60,000	N/A	Yes	5	N/A	2BR - 1BA	\$900 - 1,000	N/A	Yes	Serious
69	M	Married	67	Appleton	\$20 - 25,000	\$40 - 50,000	Average	No	6	Yes-explore	2BR - 1BA	\$500 - 600	\$10-20 K/\$800-725	Yes	Serious
72	M	Married	68	Appleton	\$15 - 20,000	< \$40,000	Excellent	No	1	Yes-explore	2BR - 1BA	\$500 - 600	\$20-30 K/\$725-650	Yes	Serious
71	M	Married	72	Neenah	\$25 - 30,000	\$50 - 60,000	Excellent	Yes	6	Yes-explore	2BR - 1.5BA	\$600 - 700	\$10-20 K/\$800-725	No	Serious
68	M	Married	60	Appleton	\$15 - 20,000	\$60 - 70,000	Fair	Yes	6	Yes-now	2BR - 1BA	\$400 - 500	\$20-30 K/\$725-650	No	Serious

AGE
Mean age of respondent = 70 years
Mean age of spouse = 68 years

SEX
N %

By respondent:

Male	6	75
Female	2	25
	8	100%

By persons in household:

Male	8	53
Female	7	47
	15	100%

MARITAL STATUS
N %

Married	7	87.5
Widowed or Single	1	12.5
	8	100%

PLACE OF RESIDENCE
N %

Appleton	5	62.5
Neenah	1	12.5
Menasha	1	12.5
Other	1	12.5
	8	100%

INCOME LEVEL
N %

\$12.5 - 15,000	2	25
\$15 - 20,000	2	25
\$20 - 25,000	1	12.5
\$33 - 35,000	1	12.5
\$35 - 40,000	2	25
≥ \$40,000	0	0
	8	100%

Weighted average - \$22,800/year
=====

HOME VALUE
N %

< \$40,000	2	25
\$40 - 50,000	1	12.5
\$50 - 60,000	2	25
\$60 - 70,000	1	12.5
\$70 - 80,000	0	0
\$80 - 90,000	1	12.5
≥ \$90,000	1	12.5
	8	100%

Weighted average = \$68,750
=====

SERIOUS THOUGHT TO MOVING
N %

Yes	5	63
No	3	37
	8	100%

IDEAL HOUSING NOW [1]

CODE
N %

1 = Single family home	1	12.5
2 = Condominium	0	0
3 = Subsidized housing	0	0
4 = Private apartment - all ages	0	0
5 = Private apartment - elderly	2	25
6 = Retirement center - no nursing home on premises	4	50
7 = Retirement center - with nursing home on premises	1	12.5
	8	100%

UNIT MIX
N %

1 BR - 1 BA	1	12.5
2 BR - 1 BA	4	50
2 BR - 1.5 BA	3	37.5
	8	100%

COMBINATION ENTRY FEE AND MONTHLY SERVICE CHARGE
N %

\$10 - 20 K/\$800 - 725	2	25.0
\$20 - 30 K/\$725 - 650	3	37.5
\$30 - 40 K/\$650 - 575	1	12.5
Can't afford	1	12.5
No response	1	12.5
	8	100%

NEED TO SELL HOME
N %

Yes	4	50
No	3	38
No response	1	12
	8	100%

EXHIBIT 34

PROFILE OF PROBABLE USERS
SECONDARY FOCUS GROUP
MIGHT CONSIDER MOVE IN YEAR OR SO
AND SERIOUS IF NON-PROFIT SPONSOR

AGE	SEX	MARITAL STATUS	AGE OF SPOUSE	PLACE OF RESIDENCE	INCOME LEVEL	HOME VALUE	CURRENT HEALTH STATUS	SERIOUS THOUGHT TO MOVING	IDEAL [1] HOUSING NOW	APPEAL OF RETIREMENT CONCEPT	UNIT STYLE BR - BA	REASONABLE MONTHLY SERVICE CHARGE	COMBINATION ENTRY/MONTHLY	NEED TO SELL HOME	INTEREST IN RETIREMENT CENTER
72	M	Married	73	Appleton	\$15 - 20,000	\$40 - 50,000	Average	No	1	Yes-explore	2BR - 1BA	N/A	\$20-30 K/\$725-650	Yes	Might-yr or so
69	M	Married	73	Menasha	\$30 - 40,000	≥ \$90,000	Excellent	No	7	Yes-if & when	2BR - 2BA	\$900 - 1,000	\$30-40 K/\$650-575	No	Might-yr or so
67	F	Widowed	N/A	Appleton	\$20 - 25,000	\$40 - 50,000	Average	No	2	Yes-explore	2BR - 1.5BA	\$600 - 700	\$20-30 K/\$725-650	No	Might-yr or so
69	M	Married	65	Appleton	\$15 - 20,000	\$70 - 80,000	Average	Yes	1	Yes-now	2BR - 1.5BA	\$500 - 600	N/A	Yes	Might-yr or so
73	F	Widowed	N/A	Neenah	≥ \$40,000	≥ \$90,000	Average	No	1	Yes-explore	2BR - 2BA	N/A	\$30-40 K/\$650-575	No	Might-yr or so
73	F	Widowed	N/A	Menasha	\$12.5 - 15,000	\$50 - 60,000	Fair	Yes	1	Don't know	2BR - 1BA	N/A	Can't afford	Yes	Might-yr or so
66	F	Married	70	Appleton	\$20 - 25,000	\$80 - 90,000	Average	Yes	1	Yes-if & when	1BR - 1BA	\$800 - 900	\$20-30 K/\$725-650	Yes	Might-yr or so
71	M	Married	73	Menasha	\$25 - 30,000	\$40 - 50,000	Excellent	Yes	5	Yes-explore	2BR - 2BA	\$800 - 900	\$30-40 K/\$650-575	No	Might-yr or so
71	F	Married	67	Neenah	\$15 - 20,000	\$40 - 50,000	Fair	Yes	6	Yes-explore	2BR - 1.5BA	\$500 - 600	Can't afford	Yes	Might-yr or so
71	F	Married	85	Grand Chute	\$12.5 - 15,000	\$50 - 60,000	Fair	Yes	1	Yes-explore	2BR - 1.5BA	\$400 - 500	N/A	N/A	Might-yr or so
71	F	Widowed	N/A	Appleton	\$12.5 - 15,000	\$40 - 50,000	Fair	No	7	Yes-explore	1BR - 1BA	\$400 - 500	N/A	N/A	---
74	F	Single	N/A	Greenville	\$15 - 20,000	\$50 - 60,000	Fair	No	1	Yes-explore	1BR - 1BA	\$400 - 500	\$10-20 K/\$800-725	No	Serious-if non-profit
70	F	Widowed	N/A	Appleton	\$12.5 - 15,000	\$50 - 60,000	Average	Yes	7	N/A	2BR - 1BA	N/A	N/A	Yes	Serious-if non-profit
71	M	Married	70	Appleton	\$15 - 20,000	\$70 - 80,000	Average	Yes	6	Yes-explore	2BR - 1.5BA	\$400 - 500	Can't afford	Yes	Serious-if non-profit
66	F	Married	68	Appleton	\$15 - 20,000	\$70 - 80,000	Excellent	Yes	1	Yes-if & when	2BR - 1BA	\$300 - 400	\$20-30 K/\$725-650	Yes	Serious-if non-profit
74	F	Widowed	N/A	Appleton	\$12.5 - 15,000	\$40 - 50,000	Average	Yes	6	Yes-now	1BR - 1BA	\$300 - 400	Can't afford	No	Serious-if non-profit
65	F	Married	66	Texas	\$12.5 - 15,000	\$40 - 50,000	Average	No	3	Don't know	2BR - 1BA	\$300 - 400	Can't afford	Yes	Serious-if non-profit
73	M	Married	71	Appleton	\$15 - 20,000	\$60 - 70,000	Average	Yes	2	Yes-explore	2BR - 1.5BA	\$400 - 500	\$20-30 K/\$725-650	Yes	Serious-if non-profit
71	M	Married	67	Menasha	\$20 - 25,000	\$50 - 60,000	Excellent	No	1	Yes-explore	2BR - 1BA	\$600 - 700	\$20-30 K/\$725-650	No	Serious-if non-profit
71	F	Single	N/A	Fremont	\$15 - 20,000	\$50 - 60,000	Excellent	Yes	1	Yes-if & when	2BR - 1.5BA	\$400 - 500	N/A	Yes	Serious-if non-profit
68	F	Widowed	N/A	Appleton	\$15 - 20,000	\$40 - 50,000	Average	No	1	Yes-explore	2BR - 1BA	N/A	\$10-20 K/\$800-725	Yes	Serious-if non-profit
67	M	Married	67	Neenah	\$30 - 40,000	\$50 - 60,000	Fair	No	5	Yes-explore	2BR - 1.5BA	\$900 - 1,000	\$20-30 K/\$725-650	Yes	Serious-if non-profit
71	M	Married	73	Oshkosh	\$15 - 20,000	N/A	Fair	Yes	6	N/A	2BR - 1BA	\$400 - 500	Can't afford	No	Serious-if non-profit

AGE

Mean age of respondent = 70 years
Mean age of spouse = 71 years

SEX

N %

By respondents:

Male 9 39
Female 14 61
23 100%

By persons in household:

Male 14 38
Female 23 62
37 100%

MARITAL STATUS

N %

Married 14 61
Widowed or Single 9 39
23 100%

PLACE OF RESIDENCE

N %

Appleton 11 48
Neenah 3 13
Menasha 4 17
Other 5 22
23 100%

INCOME LEVEL

N %

\$12.5 - 15,000 6 26
\$15 - 20,000 10 44
\$20 - 25,000 3 13
\$25 - 30,000 1 4
\$35 - 40,000 2 9
≥ \$40,000 1 4
23 100%

Weighted average = \$20,000/year
=====

HOME VALUE

N %

< \$40,000 0 0
\$40 - 50,000 8 35
\$50 - 60,000 7 31
\$60 - 70,000 1 4
\$70 - 80,000 3 13
\$80 - 90,000 1 4
≥ \$90,000 2 9
No response 1 4
23 100%

Weighted average = \$56,500
=====

SERIOUS THOUGHT TO MOVING

N %

Yes 13 57
No 10 43
23 100%

IDEAL HOUSING NOW [1]

N %

CODE
1 = Single family home 11 48
2 = Condominium 2 9
3 = Subsidized housing 1 4
4 = Private apartment - all ages 0 0
5 = Private apartment - elderly 2 9
6 = Retirement center -
no nursing home on premises 4 17
7 = Retirement center -
with nursing home on premises 3 13
23 100%

UNIT MIX

N %

1 BR - 1 BA 4 17
2 BR - 1 BA 8 35
2 BR - 1.5 BA 8 35
2 BR - 2 BA 3 13
23 100%

COMBINATION ENTRY FEE AND MONTHLY SERVICE CHARGE

N %

\$10 - 20 K/\$800 - 725 2 9
\$20 - 30 K/\$725 - 650 7 30
\$30 - 40 K/\$650 - 575 3 13
Can't afford 6 26
No response 5 22
23 100%

NEED TO SELL HOME

N %

Yes 13 57
No 8 35
No response 2 8
23 100%

interested group is small (N=8) so percentages are less meaningful, but trends are of interest.

Of the seriously interested 65 to 74 year olds who are now homeowners, 82.5 percent would prefer private apartments for the elderly or a retirement center instead of a single family home or condo whereas among the more tentatively interested 65 to 74 group of homeowners, only 39 percent prefer an apartment or retirement center designed for the elderly. In the more motivated group, 63 percent had given serious thought to moving, whereas in the more tentative group, 57 percent had done so. The financial attributes of the groups and the mean age of the respondents are similar.

Included in the 65 to 74 year old group who might consider moving in a year or so (N=16) are the respondents who would be serious if the project was sponsored by a non-profit group (N=9). Concerns centered around the financial stability of a private sponsor and the belief that costs would be lower with a non-profit sponsor.

A comparison of the seriously interested respondents from the primary and secondary focus groups reveals that 88 percent of the older group live in Appleton and none are from Neenah and Menasha; 63 percent of the younger, serious respondents reside in Appleton and 25 percent are from Neenah and Menasha.

The same patterns of current residence occurs for the more tentatively interested in each age group.

For both the 75 year old and older group (N=32) and the 65 to 74 year old group (N=31), there is a fairly equal split regarding the importance of space versus costs. The comparative results are found in Exhibit 35. In contrast, in the total group of respondents 65 years and older (N=388) who are not screened for financial qualifications, the response is definitely in favor of low costs with 27 percent choosing more space and 61 percent choosing low cost and 12 percent not responding to the question.

5. Other Potential Sources of Demand

There are several other potential sources of effective demand for the proposed retirement center:

- a. Renters who are interested and financially qualified (see Exhibit 23, N=4)
- b. Respondents from the primary and the secondary focus groups who expressed a more conditional interest in moving into the retirement center based upon their undefined future needs and upon how others like it (N=112).
- c. Respondents between the ages of 55 to 64 years who expressed a degree of serious interest in the retirement center and are financially qualified. (N=11)

EXHIBIT 35

COMPARISON OF IMPORTANCE OF
MORE SPACE VERSUS LESS COST
FOR PRIMARY AND SECONDARY FOCUS GROUPS

	Secondary Focus Group Interested in Retirement Center		Primary Focus Group	
	N	%	N	%
Have as much space as possible	13	42%	14	44%
Keep costs as low as possible	14	45%	15	47%
No response	<u>4</u>	<u>13%</u>	<u>3</u>	<u>9%</u>
TOTAL	31	100%	32	100%

- d. Fox Cities residents living outside the study area. The most popular alternative location for the retirement center was on the north side of Appleton with Grand Chute also mentioned.
- e. Former Fox Cities residents who want to return to Appleton for retirement.

Only the renters are included in the group of most probable users; a profile of each respondent who passed the financial screen of $\geq \$15,000$ and expressed an interest in the project now or in the near future is shown in Exhibit 36. Because of the limited number of cases, no summary statistics are given. The capture rate for each subset is estimated and the resulting number of units are included in the total estimate.

The qualified respondents with a contingent interest in the retirement center are assumed to constitute a replacement pool of potential users for the first phase of the project and if rent-up occurs on schedule, this pool will be a source of users for a second phase. In the primary focus group 36 of the 84 respondents, or 43 percent, expressed an interest only if and when needed. In the secondary focus group 61 of the 127 respondents, or 48 percent, expressed an interest only if and when needed. In the primary group 2 of the 84, or 2 percent, were interested, but wanted to wait to see if others liked it

EXHIBIT 36

PROFILE OF MOST PROBABLE AND PROBABLE USERS PRIMARY AND SECONDARY FOCUS GROUPS RENTERS WITH ANNUAL INCOME ≥ \$15,000

AGE	SEX	MARITAL STATUS	AGE OF SPOUSE	PLACE OF RESIDENCE	INCOME LEVEL	HOME VALUE	CURRENT HEALTH STATUS	SERIOUS THOUGHT TO MOVING	IDEAL [1] HOUSING NOW	APPEAL OF RETIREMENT CONCEPT	UNIT STYLE BR - BA	REASONABLE MONTHLY SERVICE CHARGE	COMBINATION ENTRY/MONTHLY	NEED TO SELL HOME	INTEREST IN RETIREMENT CENTER
75 YEARS AND OLDER, RENTER WITH ANNUAL INCOME ≥ \$15,000 SERIOUSLY INTERESTED															
81	M	Widowed	N/A	Menasha	\$15 - 20,000	N/A	Average	Yes	7	Yes-now	1BR - 1BA	\$500 - 600	\$10-20 K/\$800-725	N/A	Serious
77	F	Widowed	N/A	Neenah	\$20 - 25,000	N/A	Average	Yes	7	Yes-now	1BR - 1BA	\$600 - 700	\$10-20 K/\$800-725	N/A	Serious
65 - 74 YEARS, RENTER WITH ANNUAL INCOME ≥ \$15,000 SERIOUSLY INTERESTED															
69	M	Married	74	Appleton	\$20 - 25,000	N/A	Fair	Yes	1	Yes-now	1BR - 1BA	\$600 - 700	\$20-30 K/\$725-650	N/A	Serious
65 - 74 YEARS, RENTER WITH ANNUAL INCOME ≥ \$15,000 MIGHT CONSIDER IN YEAR OR SO															
66	M	Married	65	Appleton	\$15 - 20,000	N/A	Average	No	5	Yes-explore	2BR - 1BA	\$500 - 600	\$10-20 K/\$800-725	N/A	Might-yr or so

and in the secondary focus group, the number was 13, or 10 percent of the group.

The timing of the combined trigger conditions of declining health and the burden of home maintenance are unknowns for the respondents who expressed interest in the facility "if and when needed." Many of this group will never choose the retirement center as a housing alternative and some will have experienced the trigger conditions between now and the time when the facility is ready for occupancy. Only a few of these respondents will be included in the estimate of demand. The "wait and see" respondents are assumed to be quite tentative, and since there are so few, their impact upon effective demand estimates would be minimal.

The respondents between the ages of 55 and 64 years old who are financially qualified and expressed an interest, constitute another future market for the retirement center. A surprisingly high percentage already had given serious thought to moving and asset levels are generally high, but their perceptions of what they can afford is somewhat lower, their interest more tentative, and their current overall health status better. The majority view an apartment for the elderly as the housing alternative best suited to their current needs. A listing of the profiles of these respondents is found in Exhibit 37.

EXHIBIT 37

PROFILE OF FINANCIALLY QUALIFIED
FUTURE USERS - 55 TO 64 YEARS OLD
HOME-CONDO OWNERS AND RENTERS
INTERESTED IN MOVING TO RETIREMENT CENTER

AGE	SEX	MARITAL STATUS	AGE OF SPOUSE	PLACE OF RESIDENCE	INCOME LEVEL	HOME VALUE	CURRENT HEALTH STATUS	SERIOUS THOUGHT TO MOVING	IDEAL [1] HOUSING NOW	APPEAL OF RETIREMENT CONCEPT	UNIT STYLE BR - BA	REASONABLE MONTHLY SERVICE CHARGE	COMBINATION ENTRY/MONTHLY	NEED TO SELL HOME	INTEREST IN RETIREMENT CENTER
63	F	Married	71	Appleton	\$15 - 20,000	\$50 - 60,000	Average	Yes	5	Yes-if & when	2BR - 1.5BA	\$500 - 600	Can't afford	Yes	Serious
55	M	Single	N/A	Menasha	\$15 - 20,000	< \$40,000	Average	No	6	Yes-if & when	1BR - 1BA	\$600 - 700	\$10-20 K/\$800-725	Yes	Serious
63	M	Married	64	Menasha	\$15 - 20,000	\$70 - 80,000	Fair	Yes	5	Yes-explore	2BR - 1BA	N/A	Can't afford	No	Serious-if non-profit
62	M	Married	63	Menasha	\$30 - 40,000	> \$90,000	Average	Yes	5	Yes-explore	2BR - 1.5BA	\$800 - 900	\$20-30K/\$725-650	Yes	Might-yr or so
61	M	Married	59	Menasha	\$30 - 40,000	\$50 - 60,000	Average	Yes	7	Yes-explore	1BR - 1BA	\$900 - 1,000	\$20-30 K/\$725-650	Yes	Might-yr or so
60	M	Married	55	Appleton	\$15 - 20,000	\$50 - 60,000	Excellent	No	3	Don't know	2BR - 1BA	\$500 - 600	\$10-20 K/\$800-725	No	Might-yr or so
54	M	Married	52	Appleton	\$20 - 25,000	\$60 - 70,000	Average	Yes	5	Don't know	2BR - 1.5BA	\$500 - 600	Can't afford	Yes	Might-yr or so
64	M	Married	56	Appleton	\$15 - 20,000	\$40 - 50,000	Excellent	Yes	1	Yes-if & when	2BR - 1.5BA	N/A	Can't afford	Yes	Might-yr or so
63	M	Married	59	Kewaunee Cty	\$30 - 40,000	\$40 - 50,000	Average	Yes	5	Yes-explore	2BR - 1BA	\$900 - 1,000	\$20-30 K/\$725-650	Yes	Might-yr or so
60	F	Widowed	N/A	Appleton	\$15 - 20,000	Renter	Average	Yes	6	Yes-explore	2BR - 1BA	\$500 - 600	Can't afford	Renter	Might-at retirement

<u>AGE</u>			<u>PLACE OF RESIDENCE</u>			<u>SERIOUS THOUGHT TO MOVING</u>			<u>COMBINATION ENTRY FEE AND MONTHLY SERVICE CHARGE</u>		
Mean age of respondent	=	61 years	N	%		N	%		N	%	
Mean age of spouse	=	60 years									
			Appleton	5	50	Yes	8	80	\$10 - 20 K/\$800 - 725	2	20
			Neenah	0	0	No	2	20	\$20 - 30 K/\$725 - 650	3	30
			Menasha	4	40		10	100%	\$30 - 40 K/\$650 - 575	0	0
			Other	1	10				Can't afford	5	50
				10	100%					10	100%
<u>SEX</u>						<u>IDEAL HOUSING NOW [1]</u>			<u>NEED TO SELL HOME</u>		
	N	%				CODE	N	%		N	%
By respondents:			<u>INCOME LEVEL</u>			1 = Single family home	1	10	Yes	7	78
Male	8	80		N	%	2 = Condominium	0	0	No	2	22
Female	2	20	\$12.5 - 15,000	0	0	3 = Subsidized housing	1	10		9	100%
	10	100%	\$15 - 20,000	6	60	4 = Private apartment - all ages	0	0			
			\$20 - 25,000	1	10	5 = Private apartment - elderly	5	50			
By persons in household:			\$25 - 30,000	0	0	6 = Retirement center -					
Male	9	47	\$30 - 40,000	3	30	no nursing home on premises	2	20			
Female	10	53	≥ \$40,000	0	0	7 = Retirement center -					
	19	100%		10	100%	with nursing home on premises	1	10			
			Weighted average = \$20,000/year				10	100%			
			=====								
<u>MARITAL STATUS</u>			<u>HOME VALUE</u>			<u>UNIT MIX</u>					
	N	%		N	%		N	%			
Married	8	80	< \$40,000	1	11	1 BR - 1 BA	2	20			
Widowed or Single	2	20	\$40 - 50,000	2	22	2 BR - 1 BA	5	50			
	10	100%	\$50 - 60,000	3	33	2 BR - 1.5 BA	3	30			
			\$60 - 70,000	1	11	2 BR - 2 BA	0	0			
			\$70 - 80,000	1	11		10	100%			
			\$80 - 90,000	0	0						
			≥ \$90,000	1	11						
				9	100%						
			Weighted average = \$58,333								
			=====								

The Fox Cities area is comprised of several communities not included in the study area. Grand Chute, Kaukauna, Combined Locks, Kimberly, and Little Chute contain 37,137 persons as of 1980; if the proportion of elderly in this population is approximately the same as it is for the study area (11 percent), there are approximately ^{2,777}4,000 more ^{households} persons 65 years and older. A capture rate of 1:100 or 1 percent would mean an ~~effective~~ demand for 40 more units from the outlying area.

Respondents, invited to return postcards to request information, also sent names of friends and relatives from other states. Three qualified respondents from other states became part of the survey sample. Even though the majority of residents will be from the immediate communities around the proposed center, word of mouth advertising will encourage and enable those who want to return to the Fox Cities area.

C. Estimate of Effective Demand

Based upon the preceding analysis of the several subsets of potential users of the proposed Madsen-Hoffman Retirement Center, the following logic and assumptions are used to estimate the effective demand for the facility during its first year.

The most probable users will be homeowners with an annual income of \geq \$12,500 and renters with an annual income of

≥ \$15,000 who have expressed a high level of interest in moving into the retirement facility as soon as it's ready or in a year or so.

1. Capture Rate Assumptions

Capture rates are based upon the results of the comparative analysis of each subset of probable users; a consistency of the several responses which indicated a strong desire and financial ability to move to the retirement center identified the respondents who are the most probable residents. The more consistency there was between interest, acceptable fee levels, and income and assets, the higher the capture rate assigned by the analyst. The capture rates used for each subset of probable users are found in Exhibit 38.

2. The Sample and the Population

The adjusted survey sample consisted of 1,242 households in which the respondents are 65 years or older. The population, adjusted to exclude nursing home residents and subsidized housing residents, consists of 7,668 households. The logic and calculations for the sample and population size are discussed more fully in the beginning of this section of the report.

3. The Estimate of Effective Demand

The extrapolation of the effective demand for the proposed retirement center from the population of elderly persons 65

EXHIBIT 38

CAPTURE RATES ASSUMED FOR EACH SUBSET OF POTENTIAL
RETIREMENT CENTER RESIDENTS

Group	Number in Sample	Capture Rate
A. 75 years and older, qualified homeowners or renters who expressed serious interest in moving	18	1:3 33.0%
B. 65 to 74 year old qualified homeowners or renters who expressed serious interest in moving	9	1:5 20.0%
C. 75 year and older qualified homeowners or renters who expressed a more tentative interest in a year or so	16	1:6 16.7%
D. 65 to 74 year old qualified homeowners or renters who expressed a more tentative interest in a year or so	24	1:8 12.5%
E. 75 year and older qualified homeowners and renters who expressed interest, but would wait and see how others liked the project	3	1:20 5.0%
F. 65 to 74 year old qualified homeowners and renters who expressed interest, but would wait and see how others liked the project	14	1:25 4.0%
G. 75 years and older qualified homeowners and renters who would be interested ONLY if and when needed	38	1:30 3.3%
H. 65 to 74 year old qualified homeowners and renters who would be interested ONLY if and when needed	65	1:50 2.0%

years and older in the study area is dependent upon the sample survey results. The logic for the calculations is shown in Exhibit 39.

Because there are different capture rates assumed for each subset of potential users, a separate calculation is made for each group. The several calculations do not imply a precision that does not exist when predicting human behavior, but merely recognizes a subjective probability for each potential user translating interest into action.

The subset of potential users are divided into two groups which distinguish the most probable market from the more tentative market as detailed in Exhibit 40. From the most probable market group it is estimated there are 312 households in the elderly population in which the respondent(s) is financially qualified and interested in moving into the facility in the near future. Of these 312 household units, it is estimated approximately 83 will move to the proposed retirement center in the first year.

From the tentative market group it is estimated that there are 714 households in the elderly population in which the respondent(s) is financially qualified and interested in moving into the facility sometime in the future. Of these 714 household units, it is estimated that another 20 will move to the proposed retirement center in the first year. Thus, there

EXHIBIT 39

LOGIC FOR CALCULATION OF EFFECTIVE DEMAND
FOR PROPOSED RETIREMENT CENTER

STEP 1:

Number of households in sample
with interested, qualified respondent(s)
----- = Sample ratio
Number of households in sample

STEP 2:

Number of households
in population
segmented by age * Sample ratio = Number of households
in population segmented
by age, income/assets,
and degree of interest

STEP 3:

Number of households in
population segmented by age
income/assets and degree
of interest * Capture rate = Estimate of number
of units proposed
project can capture
from identifiable
groups

STEP 4:

Developer must assume total unit demand will be the sum of
units estimated in STEP 3 plus some units unanticipated from
other communities and market segments.

ESTIMATION OF EFFECTIVE DEMAND
FOR MADSEN-HOFFMAN RETIREMENT CENTER

MOST PROBABLE MARKET

	SAMPLE RATIO	POPULATION POTENTIAL	CAPTURE RATE	EFFECTIVE DEMAND
75 + Nov Group a.	18/1,242 = .0145	7,668 x .0145 = 111 units	$\frac{1}{3}$.330	37 units
65-74 Nov Group b.	9/1,242 = .0072	7,668 x .0072 = 55 units	$\frac{1}{5}$.200	11 units
75 + 1-2 Group c.	16/1,242 = .0013	7,668 x .013 = 100 units	$\frac{1}{6}$.167	17 units
65-74 1-2 Group d.	24/1,242 = .019	7,668 x .019 = 46 units	$\frac{1}{8}$.125	<u>18 units</u>
Estimated Number of Units Captured From Most Probable Market Group				83 units

TENTATIVE MARKET

	SAMPLE RATIO	POPULATION POTENTIAL	CAPTURE RATE	EFFECTIVE DEMAND
75 unit Group e.	3/1,242 = .0024	7,668 x .0024 = 18 units	.05 $\frac{1}{20}$	1 unit
65 unit Group f.	14/1,242 = .0113	7,668 x .0113 = 87 units	.04	3 units
75 only Group g.	38/1,242 = .0306	7,668 x .0306 = 235 units	.033	8 units $\frac{1}{30}$
65 only Group h.	65/1,242 = .0523	7,668 x .0523 = 401 units	.02	<u>8 units</u> $\frac{1}{50}$
Estimated Number of Units Captured From Tentative Market Group				20 units
TOTAL ESTIMATE - EFFECTIVE DEMAND				103 UNITS =====

Sandwich Research, Inc.

EXHIBIT 40

appears to be an effective demand of approximately 103, say 100, units in the first year after the retirement center is ready for occupancy. At least 50 percent or 50 of the units should be pre-leased and the remainder leased during and following construction of the center.

V. CONSUMER PREFERENCE FOR ENTRANCE FEE
AND MONTHLY SERVICE CHARGE LEVELS

A difficult concept for the elderly to understand and to accept is an entrance fee as well as a monthly service charge, which is usually greater than the monthly rent of a private, market rate apartment unit. In a life care facility, the entrance fee represents an insurance policy for nursing home care at reasonable rates when needed. But in a retirement center with no nursing home on the premises, the entrance fee offers no such protection.

To sell the family home, usually a large part of a person's net worth, and to give a sizeable portion of the proceeds to a retirement center, which will provide a pleasant, secure living environment only until a nursing home is required, is not an easy concept to market to the average elderly person on a fixed income. For some, only the growing awareness of the burden of home ownership, declining physical ability often triggered by the death of a spouse, and the need to have supportive services available when needed will force a decision to sell the home and move to a retirement center.

For some elderly persons with adequate financial reserves, a move to a retirement center will be part of a long-range plan designed to promote and insure independent and secure living. The entrance fee is considered an investment in the future.

One of the major marketing goals will be to emphasize the desirability of a planned move to maximize the benefits of retirement center living.

A. Acceptable Level of Entrance Fee
and Monthly Service Charge

Survey respondents were asked the level of entrance fee and monthly service charge each would be willing and able to pay. Each was also asked to choose the combination of fee and monthly service charge most suitable from a list of three combinations which also included a category that indicated the respondent could not afford any of them.

Exhibit 41 details the responses from the total sample of elderly 65 year olds (N=388) and from each of the focus groups screened for a high level of interest in moving to the facility. As expected, the majority of all respondents selected the lowest entrance fee and monthly service charge or did not respond at all. Only in the primary focus group of most probable users 75 years and older are the fees and service charges selected above the minimum level.

Among all respondents, 63 percent either perceived they could not afford any of the combined fee/service charges or did not respond; among the interested group of 65 to 74 year olds, 42 percent could not afford or did not respond, but among the interested group of 75 year olds only 22 percent so responded.

ACCEPTABLE LEVEL OF ENTRANCE FEE AND MONTHLY SERVICE CHARGE

HOME-CONDO OWNER WITH
ANNUAL INCOME > \$12,500
INTERESTED IN RETIREMENT CENTER

ALL RESPONDENTS 65 YRS AND OLDER N=388	SECONDARY FOCUS GROUP 65-74 YRS OLD N=31	PRIMARY FOCUS GROUP 75 YRS AND OLDER N=32
--	---	--

QUESTION 46 COMBINATION ENTRANCE FEE AND MONTHLY SERVICE CHARGE

OPTIONS	N	%	N	%	N	%
\$10 - 20 K/\$800 - 725	48	12%	4	13%	6	19%
\$20 - 30 K/\$725 - 650	66	17%	10	32%	16	50%
\$30 - 40 K/\$650 - 575	30	8%	4	13%	3	9%
Can't afford any of these	165	43%	7	23%	5	16%
No response	79	20%	6	19%	2	6%
TOTAL	388	100%	31	100%	32	100%

QUESTION 45 MONTHLY SERVICE CHARGE

Under \$600	196	50%	13	42%	6	19%
\$600 - 650	59	15%	5	16%	11	34%
\$650 - 700	22	6%	5	16%	5	16%
\$700 - 750	14	4%	1	3%	2	6%
\$750 - 800	14	4%	3	10%	4	13%
Over \$800	12	3%	0	0%	2	6%
No response	71	18%	4	13%	2	6%
TOTAL	388	100%	31	100%	32	100%

QUESTION 44 ENTRANCE FEE

Under \$15,000	161	41%	12	39%	4	13%
\$15,000 - 20,000	58	15%	7	23%	8	25%
\$20,000 - 25,000	38	10%	6	19%	11	34%
\$25,000 - 30,000	13	3%	1	3%	2	6%
Over \$30,000	18	5%	3	10%	5	16%
No response	100	26%	2	6%	2	6%
TOTAL	388	100%	31	100%	32	100%

EXHIBIT 41

Since the income/asset levels of both the 65 to 74 age group and the 75 and older group are similar, it is concluded that the greater the need for the benefits of retirement center living, partially a function of age, the more willing the person is to reorder his/her financial priorities.

For those who could afford the combinations of fees/service charge offered, the preferred choice is \$20,000 to \$30,000 entrance fee and the corresponding monthly service charge of \$725 to 650.

B. Reasonable Monthly Service Charge

The survey respondents were asked to select a percentage of gross which would be a reasonable monthly service charge for the rental of the apartment, all utilities (except phone), transportation, 24-hour emergency response, monthly cleaning, and a daily main meal. Using the mid-point of the percentage range selected and the mid-point of the annual gross income given, a reasonable monthly service charge was calculated for each respondent. If the respondent did not answer either the income or percent of income question there was no response recorded. Because each range of monthly service charges did not have the same probability of being produced, the results should be examined by groups larger than one. In general, the monthly service charge the consumer deemed reasonable, based upon a percentage of income, is lower than that selected as a defined

monthly charge. The results are summarized in Exhibit 42. In the total survey sample of respondents 65 years and older, 54 percent selected levels less than \$600 per month. In the focus groups screened for interest in moving to the retirement center, 52 percent of the 65 to 74 year group and 47 percent of the 75 year and older group selected levels less than \$600 per month. But in the 75 year and older focus group only 19 percent selected monthly service charges under \$600 per month, but cumulatively, 63 percent selected levels below \$700 per month.

The main conclusions that can be drawn from this comparison are that the elderly are very price conscious and there is need to educate the potential consumer regarding the percentage of income a homeowner actually spends to maintain a shelter and to provide a similar package of services and a meal similar to that offered to the retirement center resident.

CONSUMER PERCEPTION
 REASONABLE MONTHLY SERVICE CHARGE
 BASED UPON PERCENTAGE OF GROSS INCOME

QUESTIONS 40 and 41	ALL RESPONDENTS 65 YRS AND OLDER		HOME-CONDO OWNER WITH ANNUAL INCOME > \$12,500 INTERESTED IN RETIREMENT CENTER			
	N=388		SECONDARY FOCUS GROUP 65-74 YRS OLD		PRIMARY FOCUS GROUP 75 YRS AND OLDER	
	N=31		N=32			
OPTIONS	N	%	N	%	N	%
\$300 - 399	89	23%	4	13%	1	3%
\$400 - 499	61	16%	8	26%	5	16%
\$500 - 599	59	15%	4	13%	9	28%
\$600 - 699	24	6%	4	13%	5	16%
\$700 - 799	2	1%	0	0%	0	0%
\$800 - 899	18	5%	2	6%	3	9%
\$900 - 999	8	2%	4	13%	0	0%
\$1,000 +	17	4%	0	0%	3	9%
No response	110	28%	5	16%	6	19%
TOTAL	388	100%	31	100%	32	100%

VI. CONSUMER PREFERENCE FOR LEVEL AND TYPE OF SUPPORTIVE SERVICE

The monthly service charge is related to the demand level for a variety of supportive services and to the type of payment plan for these services preferred by the user.

As the aging continuum progresses, there is often an increasing need for some level of supportive services. Depending upon the nature of the physical and/or emotional constraints, the elderly may need help with the following general categories of activities:

1. Meal service with emphasis on adequate nutrition.
2. Home care services which include cleaning, laundry, shopping, repairs, and finances.
3. Personal care such as general hygiene, bathing, and hair care.
4. Health care which includes medication, medical diagnosis and evaluation.
5. Transportation.

Exhibit 43 illustrates the relationship between the aging process, increasing dependency, the availability of supportive services, usually from family and friends, and the need for retirement living facilities. A person with a number of health problems can still maintain himself/herself in a single family home if there are concerned and able family members available, or adequate community home care service. Although this person may fit the profile of the most probable user of the retirement center, he/she will prefer to stay in the familiar surroundings of the family home.

RELATIONSHIP BETWEEN AGING PROCESS, INCREASING DEPENDENCY AND AVAILABILITY OF SUPPORTIVE SERVICES

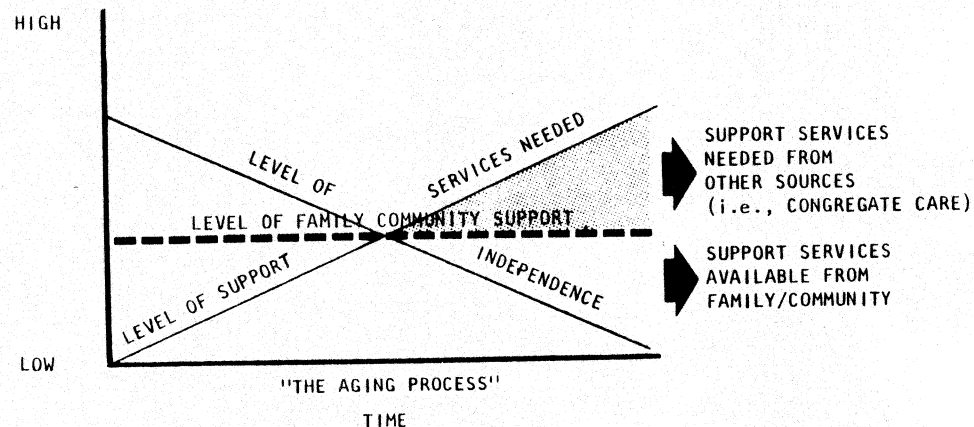
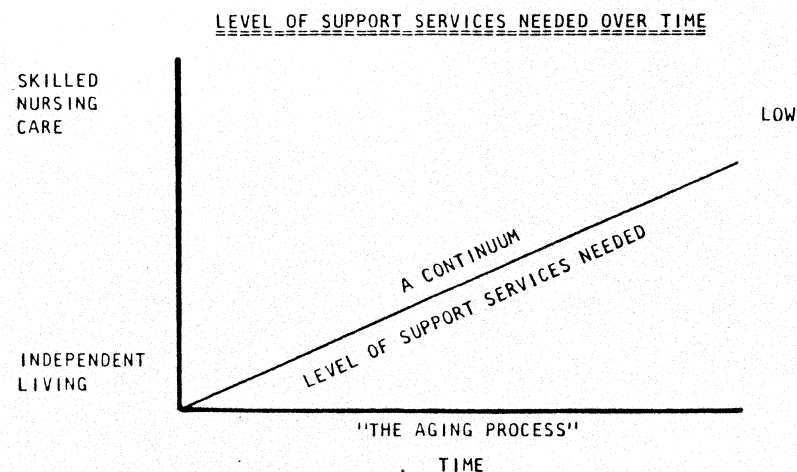
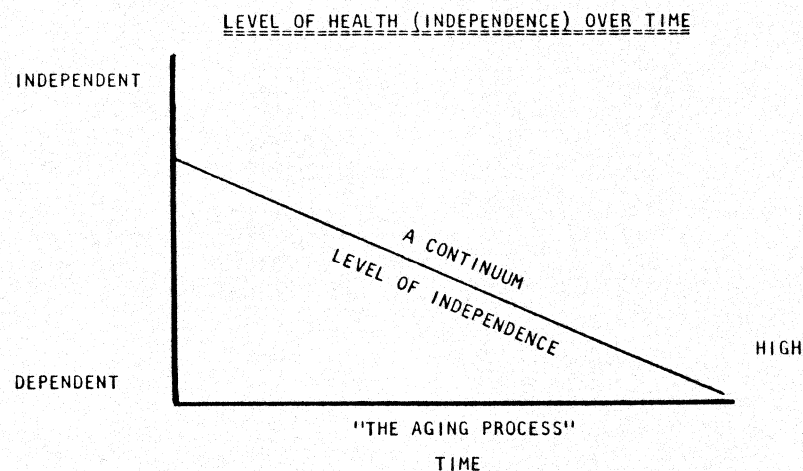


EXHIBIT 43

A. Current Use of Community Services

There is little use of community services in the households surveyed. Of the 388 households in the sample, 90 percent did not use any community support services or did not respond to the question. Of the two focus groups expressing a high level of interest in the retirement center, 94 percent in both the 75 year and older and 65 to 74 year old groups did not use community support services. Three households took meals at nutrition sites and one used telephone reassurance.

B. Preferred Source of Help for Supportive Services

The three preferred sources for supportive services are a retirement center which provides access to supportive services, the family, and hiring people in the home. The total sample group of households of persons 65 years and older preferred family, but the focus groups preferred a retirement center. The comparative results are found in Exhibit 44, which shows the responses from each of the three groups analyzed.

C. Ranking of Types of Supportive Services Desired and Preferred Payment Plan

Services to be included in the proposed Madsen-Hoffman Retirement Center are a daily meal, monthly housecleaning, 24-hour emergency response, all utilities (except phone), building security services, access to transportation, a health

PREFERRED SOURCE OF HELP FOR SUPPORTIVE SERVICES WHEN NEEDED
ALL RESPONDENTS 65 YEARS AND OLDER

N = 388

SOURCE OF HELP	NUMBER OF RESPONSES	PERCENT OF TOTAL RESPONSES	RANKING
Family	201	51.8%	1
Would prefer to live in a retirement facility where I could be closer to support services	158	40.7%	2
Would prefer to hire people to help me in my home	127	32.7%	3
Friends	101	26.0%	4
Would prefer to use community services in my home	50	12.9%	5
Church group	29	7.5%	6
Other	7	1.8%	7

EXHIBIT 44

PREFERRED SOURCE OF HELP FOR SUPPORTIVE SERVICES WHEN NEEDED
 SECONDARY FOCUS GROUP, 64 - 74 YEARS OLD
 HOME-CONDO OWNERS WITH ANNUAL INCOME ≥ \$12,500
 AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 31

SOURCE OF HELP	NUMBER OF RESPONSES	PERCENT OF TOTAL RESPONSES	RANKING

Would prefer to live in a retirement facility where I could be closer to support services	21	67.7%	1
Family	14	45.2%	2
Would prefer to hire people to help me in my home	14	45.2%	3
Friends	8	25.8%	4
Would prefer to use community services in my home	3	9.7%	5
Church group	3	9.7%	6
Other	0	0	7

EXHIBIT 44 (Continued)

PREFERRED SOURCE OF HELP FOR SUPPORTIVE SERVICES WHEN NEEDED
 SECONDARY FOCUS GROUP, 75 YEARS AND OLDER
 HOME-CONDO OWNERS WITH ANNUAL INCOME ≥ \$12,500
 AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 32

SOURCE OF HELP	NUMBER OF RESPONSES	PERCENT OF TOTAL RESPONSES	RANKING
Would prefer to live in a retirement facility where I could be closer to support services	19	59.4%	1
Family	14	43.8%	2
Would prefer to hire people to help me in my home	13	40.6%	3
Friends	6	18.8%	4
Would prefer to use community services in my home	6	18.8%	5
Church group	2	6.3%	6
Other	0	0	7

office, planned activities and programs, and coin-operated washers and dryers.

Respondents were asked to rank the desirability of some of these planned services and of other services not currently included in the plans. They were also asked to express a preference whether or not payment should be included in the monthly service charge.

The survey results were quite consistent for all groups except the majority of the focus group respondents preferred to have weekly housecleaning and linen laundry included in the options on a fee basis. All groups expressed strong preferences for garage parking and electricity charges to be included in the monthly charge. Since approximately 80 percent of all respondents own and drive cars, the garage parking fee is an important consideration in the package of services to be marketed. Personal care, personal laundry, and cable TV outlets in the kitchen and bedroom are of no interest to the majority of respondents in all three groups.

In general, the elderly would prefer to pay a lower base monthly service charge and have the majority of supportive services available on a fee, as needed basis. See Exhibit 45 for a summary of the preferences of each group of respondents.

CONSUMER PREFERENCE FOR TYPE OF SUPPORTIVE SERVICES
AND FOR PAYMENT PLAN
ALL RESPONDENTS 65 YEARS AND OLDER

N = 388

TYPE OF SERVICES	NUMBER OF PERSONS RESPONDING TO ITEM	CONSUMER PREFERENCE [1]		
		INCLUDED IN MONTHLY CHARGE	AVAILABLE FOR FEE AS NEEDED	NOT INTERESTED
Weekly Housecleaning	315	12.1%	45.7%	42.2%
Laundry - Linens	302	12.3%	41.1%	46.7%
Laundry - Personal	290	7.2%	36.6%	56.2%
Personal Care	273	1.1%	33.0%	65.9%
Scheduled Transportation	288	5.9%	44.1%	50.0%
Garage Parking	314	56.4%	23.9%	19.7%
Electricity	270	76.3%	23.7%	-0- %
Tray Service When Ill	306	13.7%	62.4%	23.9%
Cable TV Outlets				
. In Kitchen	170	4.7%	14.7%	80.6%
. In Living Room	306	39.2%	28.1%	32.7%
. In Bedroom	162	13.0%	19.1%	67.9%
Laundry Room With Washer and Dryer	339	27.1%	67.6%	5.3%

[1] The preferred consumer choice for each service is blocked in black. To determine the preferred choice the following decision process is used: (1) If more than 50% of consumers are not interested in a service, NOT INTERESTED is the preference of choice; (2) Of the remaining services, the preferred choice of payment plan is the one selected by the majority of those interested in the service.

EXHIBIT 45

CONSUMER PREFERENCE FOR TYPE OF SUPPORTIVE SERVICES
AND FOR PAYMENT PLAN
SECONDARY FOCUS GROUP, 65 - 74 YEARS OLD
HOME-CONDO OWNERS WITH ANNUAL INCOME \geq \$12,500
AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 31

TYPE OF SERVICES	NUMBER OF PERSONS RESPONDING TO ITEM	CONSUMER PREFERENCE [1]		
		INCLUDED IN MONTHLY CHARGE	AVAILABLE FOR FEE AS NEEDED	NOT INTERESTED
Weekly Housecleaning	28	3.6%	42.9%	53.6%
Laundry - Linens	24	4.2%	33.3%	62.5%
Laundry - Personal	25	4.0%	32.0%	64.0%
Personal Care	24	0.0%	37.5%	62.5%
Scheduled Transportation	25	0.0%	36.0%	64.0%
Garage Parking	27	74.1%	22.2%	3.7%
Electricity	25	64.0%	36.0%	0.0%
Tray Service When Ill	26	3.9%	61.5%	34.6%
Cable TV Outlets				
. In Kitchen	13	7.7%	30.8%	61.5%
. In Living Room	27	44.4%	25.9%	29.6%
. In Bedroom	15	20.0%	26.7%	53.5%
Laundry Room With Washer and Dryer	29	31.0%	65.5%	3.5%

[1] The preferred consumer choice for each service is blocked in black. To determine the preferred choice the following decision process is used: (1) If more than 50% of consumers are not interested in a service, NOT INTERESTED is the preference of choice; (2) Of the remaining services, the preferred choice of payment plan is the one selected by the majority of those interested in the service.

EXHIBIT 45 (Continued)

CONSUMER PREFERENCE FOR TYPE OF SUPPORTIVE SERVICES
AND FOR PAYMENT PLAN
PRIMARY FOCUS GROUP, 75 YEARS AND OLDER
HOME-CONDO OWNERS WITH ANNUAL INCOME ≥ \$12,500
AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 32

TYPE OF SERVICES	NUMBER OF PERSONS RESPONDING TO ITEM	CONSUMER PREFERENCE [1]		
		INCLUDED IN MONTHLY CHARGE	AVAILABLE FOR FEE AS NEEDED	NOT INTERESTED
Weekly Housecleaning	30	16.7%	63.3%	20.0%
Laundry - Linens	28	21.4%	35.7%	42.9%
Laundry - Personal	25	4.0%	40.0%	56.0%
Personal Care	25	0.0%	32.0%	68.0%
Scheduled Transportation	26	3.8%	46.2%	50.0%
Garage Parking	28	71.4%	17.9%	10.7%
Electricity	26	84.6%	15.4%	0.0%
Tray Service When Ill	28	21.4%	57.4%	21.4%
Cable TV Outlets				
. In Kitchen	15	13.3%	26.7%	60.0%
. In Living Room	29	48.3%	27.6%	24.1%
. In Bedroom	13	7.7%	30.8%	61.5%
Laundry Room With Washer and Dryer	29	27.6%	65.5%	6.9%

[1] The preferred consumer choice for each service is blocked in black. To determine the preferred choice the following decision process is used: (1) If more than 50% of consumers are not interested in a service, NOT INTERESTED is the preference of choice; (2) Of the remaining services, the preferred choice of payment plan is the one selected by the majority of those interested in the service.

EXHIBIT 45 (Continued)

VII. CONSUMER PREFERENCE FOR NURSING HOME ON SITE
AND RANKING OF AREA NURSING HOMES AND HOSPITALS

Before the State of Wisconsin moratorium on additional nursing home beds in the state, on-site nursing homes were a logical addition to a retirement center which provides continuing care for the elderly. And although healthy, independent elderly persons prefer not to relate to a nursing home, many prefer the security of knowing such a facility is available if and when needed.

A. Consumer Preference for Nursing Home on Site

A retirement center constructed today without an on-site nursing home received a mixed reception among respondents in the Appleton, Neenah, and Menasha study area. The question was asked in several different ways, and the results are summarized in Exhibit 46. The importance of a nursing home on site is mainly a function of age; the ideal housing for current needs shifts gradually from the single family home to apartments for the elderly and retirement housing with or without a nursing home on the premises. The desire to have a nursing home on site shifts upward from 13 percent in the 65 to 74 year old group to 28 percent of the 75 year and older group.

DESIRABILITY OF NURSING HOME ON RETIREMENT CENTER SITE

HOME-CONDO OWNER WITH
ANNUAL INCOME > \$12,500
INTERESTED IN RETIREMENT CENTER

	ALL RESPONDENTS 65 YRS AND OLDER		SECONDARY FOCUS GROUP 65-74 YRS OLD		PRIMARY FOCUS GROUP 75 YRS AND OLDER	
	N=388		N=31		N=32	
QUESTION 16	IDEAL HOUSING FOR CURRENT NEEDS					
OPTIONS	N	%	N	%	N	%
Own single family home	185	48%	12	39%	9	28%
Own condominium	9	2%	2	6%	2	6%
Subsidized housing	31	8%	1	3%	0	0%
Private apartment - all ages	21	5%	0	0%	1	3%
Private apartment - elderly	48	12%	4	13%	7	22%
Retirement center - no nursing home on premises	37	10%	8	26%	3	9%
Retirement center - with nursing home on premises	48	12%	4	13%	9	28%
Live with children	3	< 1%	0	0%	0	0%
Live with sibling	0	0%	0	0%	0	0%
Other	3	< 1%	0	0%	0	0%
No response	__3	< 1%	__0	__0%	__1	__3%
TOTAL	388	100%	31	100%	32	100%

QUESTION 17-d. IMPORTANCE OF NURSING HOME ON PREMISES AS REASON FOR MOVING TO RETIREMENT CENTER

Very important	117	30%	11	35%	13	41%
Moderately important	121	31%	10	32%	7	22%
Not important	74	19%	7	23%	6	19%
No response	__76	__20%	__3	__10%	__6	__19%
TOTAL	388	100%	31	100%	32	100%

Southwest Research, Inc.

EXHIBIT 46

EXHIBIT 46 (Continued)

QUESTION 36-6		DESIRED PROXIMITY OF NURSING HOME TO OWN HOME					
Within walking distance (2 blocks)	32	8%	5	16%	3	9%	
Within 1-2 miles	54	14%	3	10%	6	19%	
Does not matter	172	44%	17	55%	14	44%	
No response	130	34%	6	19%	9	28%	
TOTAL	388	100%	31	100%	32	100%	

Although having a nursing home on the premises ranked sixth in importance as a reason for moving into a retirement center for the primary focus group (75+) interested in moving to the project, and ranked seventh with the interested respondents in the secondary focus groups (65 to 74) in a field of nine choices, the concept was considered very important or moderately important for over 60 percent of the respondents in each group. (See Exhibit 28.)

When asked about the desired proximity of a nursing home to the respondent's home, there was very little desire to have a nursing home within walking distance. In each group of respondents, over 70 percent responded that the distance to a nursing home did not matter. It is assumed the respondent viewed this question from the point of view of a visitor rather than a potential resident.

It is recommended the developers of the Madsen-Hoffman Retirement Center seek an affiliation with an existing nursing home for the present time and take all the necessary steps in the future to build a facility on site when the moratorium is lifted to accommodate the needs of the aging residents of the center and to satisfy the pent-up demand which continues to grow in the Appleton area.

B. Ranking of Nursing Homes in the Study Area

Respondents were asked to rank the desirability of eight nursing homes in or near the study area. Clearly, Peabody Manor is the most popular among all groups of respondents. Appleton Extended Care Center ranked second with each group and Outagamie County Health Center ranked last with each group. The ratings and ranking of each facility by each group of respondents are found in Exhibit 47. A description of each nursing home is detailed in Exhibit 48, and the relationship of the site to the nursing homes is shown on a map in Exhibit 49.

C. Ranking of Hospitals in the Study Area

Because there were several respondents from Neenah and Menasha in the secondary focus groups (65 to 74 years) with a high level of interest in the retirement center, Theda Clark Regional Medical Center ranked more closely with the two more popular hospitals, St. Elizabeth and Appleton Memorial. In the primary focus groups (75+ years) in which the wide majority are from Appleton, Appleton Memorial is the most popular with St. Elizabeth a close second. The results are shown in Exhibit 50.

Being near a hospital was not of great importance to the majority of respondents in each group. (See the cumulative responses to Question 36-11 for each group in the Appendix.)

RANKING OF SELECTED NURSING HOMES IN THE FOX CITIES AREA
ALL RESPONDENTS 65 YEARS AND OLDER

N = 388

NAME AND LOCATION	NUMBER OF RESPONDENTS RANKING THIS FACILITY	ORDER OF [1] RANKING	MOST DESIRABLE	MODERATELY DESIRABLE	LEAST DESIRABLE	NOT ACQUAINTED
PEABODY MANOR 705 W. 5th Street Appleton	316	1	46.5%	8.9%	.9%	43.7%
APPLETON EXTENDED CARE CENTER 2915 North Meade Appleton	308	2	31.8%	21.4%	4.5%	42.2%
AMERICANA HEALTH CARE CENTER 1335 S. Oneida Appleton	287	3	9.8%	20.9%	10.5%	58.9%
OAKRIDGE GARDENS 1700 Midway Menasha	281	4	7.5%	11.7%	5.3%	75.4%
PARKSIDE CARE 1201 Garfield Little Chute	275	5	3.3%	6.9%	6.2%	83.6%
COLONY OAKS CARE CENTER 601 Briarcliff Drive Appleton	276	6	2.9%	9.4%	9.8%	77.9%
VAL HAVEN - FAMILY HERITAGE 125 Byrd Avenue Neenah	273	7	1.8%	4.4%	6.2%	87.5%
OUTAGAMIE COUNTY HEALTH CENTER 3300 W. Wisconsin Avenue Appleton	281	8	1.8%	8.5%	19.2%	70.5%

[1] To determine the order of rank, the sum of the MOST DESIRABLE SCORE, plus 1/2 of the MODERATELY DESIRABLE score, minus the LEAST DESIRABLE score was calculated for each nursing home. The adjusted total scores, which ranged from 50 percent to - 13 percent were used to rank the facilities.

RANKING OF SELECTED NURSING HOMES IN THE FOX CITIES AREA
SECONDARY FOCUS GROUP, 64 - 75 YEARS OLD
HOME-CONDO OWNERS WITH ANNUAL INCOME ≥ \$12,500
AND INTERESTED IN RETIREMENT CENTER NOW OR IN YEAR OR SO

N = 31

NAME AND LOCATION	NUMBER OF RESPONDENTS RANKING THIS FACILITY	ORDER OF [1] RANKING	MOST DESIRABLE	MODERATELY DESIRABLE	LEAST DESIRABLE	NOT ACQUAINTED
PEABODY MANOR 705 W. 5th Street Appleton	27	1	59.3%	7.4%	3.7%	29.6%
APPLETON EXTENDED CARE CENTER 2915 North Meade Appleton	23	2	34.8%	13.0%	0.0%	52.2%
AMERICANA HEALTH CARE CENTER 1335 S. Oneida Appleton	24	3	20.8%	16.7%	4.2%	58.3%
OAKRIDGE GARDENS 1700 Midway Menasha	22	4	13.6%	13.6%	9.2%	63.6%
VAL HAVEN - FAMILY HERITAGE 125 Byrd Avenue Neenah	21	5	4.8%	9.5%	9.5%	76.2%
COLONY OAKS CARE CENTER 601 Briarcliff Drive Appleton	22	6	4.6%	9.0%	18.2%	68.2%
PARKSIDE CARE 1201 Garfield Little Chute	22	7	0.0%	4.6%	13.6%	81.8%
OUTAGAMIE COUNTY HEALTH CENTER 3300 W. Wisconsin Avenue Appleton	23	8	4.4%	0.0%	34.8%	60.9%

[1] To determine the order of rank, the sum of the MOST DESIRABLE SCORE, plus 1/2 of the MODERATELY DESIRABLE score, minus the LEAST DESIRABLE score was calculated for each nursing home. The adjusted total scores, which ranged from 59 percent to - 30 percent were used to rank the facilities.

EXHIBIT 47 (Continued)

RANKING OF SELECTED NURSING HOMES IN THE FOX CITIES AREA
 PRIMARY FOCUS GROUP, 75 YEARS AND OLDER
 HOME-CONDO OWNERS WITH ANNUAL INCOME \geq \$12,500
 AND INTERESTED IN RETIREMENT NOW OR IN YEAR OR SO

N = 32

NAME AND LOCATION	NUMBER OF RESPONDENTS RANKING THIS FACILITY	ORDER OF [1] RANKING	MOST DESIRABLE	MODERATELY DESIRABLE	LEAST DESIRABLE	NOT ACQUAINTED
PEABODY MANOR 705 W. 5th Street Appleton	29	1	58.6%	13.8%	0.0%	27.6%
APPLETON EXTENDED CARE CENTER 2915 North Meade Appleton	25	2	24.0%	28.0%	4.0%	44.0%
AMERICANA HEALTH CARE CENTER 1335 S. Oneida Appleton	26	3	11.5%	23.1%	15.4%	50.0%
PARKSIDE CARE 1201 Garfield Little Chute	24	4	8.3%	8.3%	8.3%	75.0%
VAL HAVEN - FAMILY HERITAGE 125 Byrd Avenue Neenah	24	5	4.2%	8.3%	4.2%	83.3%
OAKRIDGE GARDENS 1700 Midway Menasha	24	6	8.3%	4.2%	16.7%	70.8%
COLONY OAKS CARE CENTER 601 Briarcliff Drive Appleton	23	7	0.0%	4.3%	8.7%	87.0%
OUTAGAMIE COUNTY HEALTH CENTER 3300 W. Wisconsin Avenue Appleton	23	8	4.3%	0.0%	17.4%	78.3%

[1] To determine the order of rank, the sum of the MOST DESIRABLE SCORE, plus 1/2 of the MODERATELY DESIRABLE score, minus the LEAST DESIRABLE score was calculated for each nursing home. The adjusted total scores, which ranged from 65 percent to - 13 percent were used to rank the facilities.

EXHIBIT 47 (Continued)

EXHIBIT 48

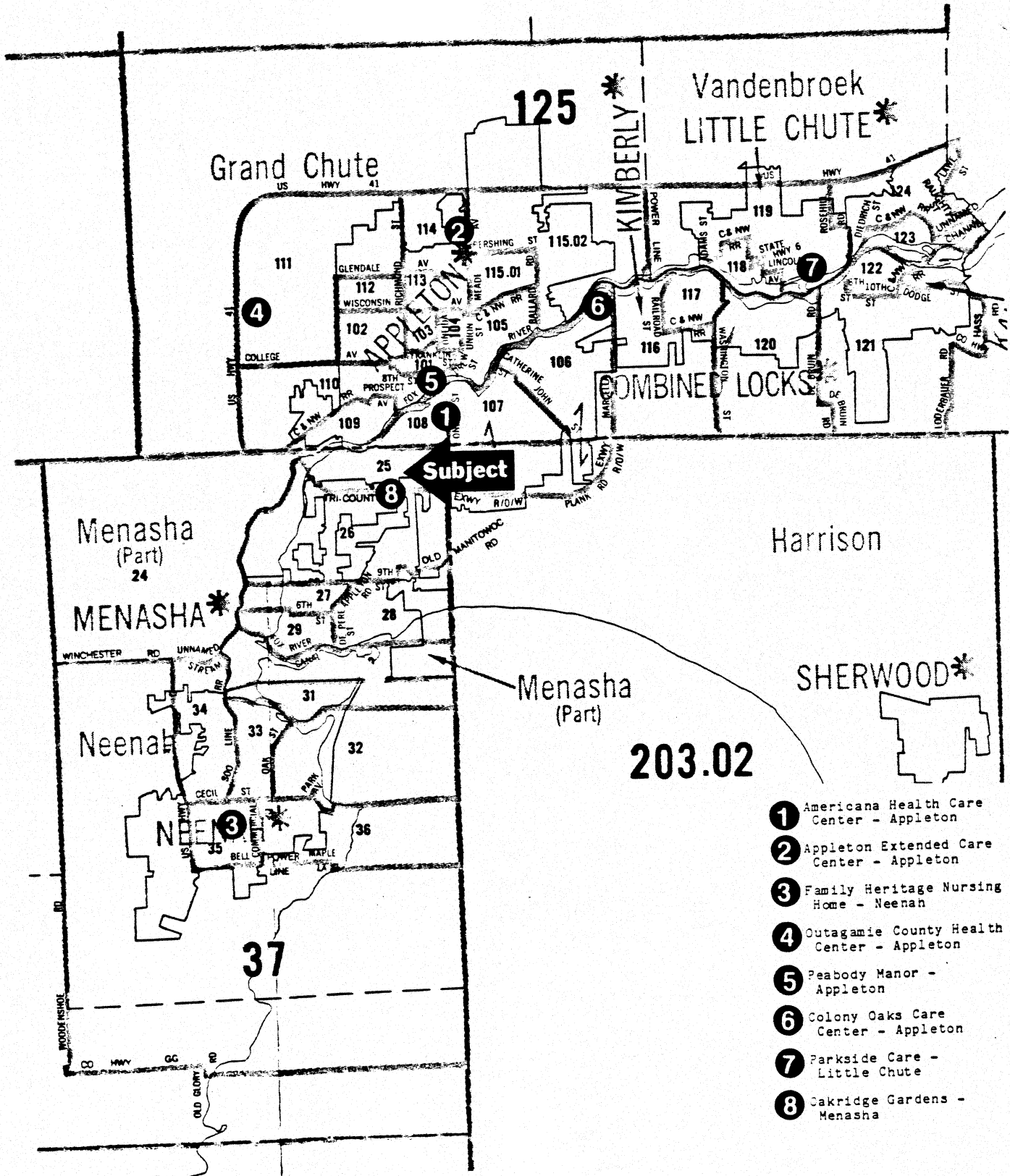
DESCRIPTION OF SELECTED NURSING HOMES
IN THE FOX CITIES AREA

NAME/LOCATION	POTENTIAL SIZE OF FACILITY	OCCUPANCY RATE	DAILY RATE PRIVATE- PAY FEE STRUCTURE	PROPORTION OF PRIVATE/MEDICAL ASSISTANCE PATIENTS	MAIN SOURCE OF REFERRALS	AVERAGE AGE OF PATIENTS	AVERAGE ADMISSION PER MONTH	OWNERSHIP ENTITY	REMARKS
AMERICANA HEALTH CARE CENTER 1335 S. Oneida Appleton	104 beds Skilled care only	95%	\$53.00 skilled	Private: 80% Assistance: 20%	Hospitals	79 yrs	25	Private Corporation	Many short term residents who improve enough return home.
APPLETON EXTENDED CARE CENTER 2915 North Meade Appleton	234 beds Mix of skilled, ICF-1, & ICF-2.	99%	\$48.00 skilled & ICF-1 \$45.00 ICF-2	Private: 50% Assistance: 50%	Hospitals	Mid 80's	Variable	Charles Barnum Appleton	---
VALL HAVEN - formerly Family Heritage Nursing Home 125 Byrd Avenue Neenah	164 beds Mix of skilled, ICF-1 & ICF-2	Variable: Short waiting list at times.	\$48.00 skilled \$46.00 ICF-1 \$44.00 ICF-2	No breakdown available.	Hospitals	> 65 yrs	12 - 14	Hill Haven Corp., Tacoma, WA	---
OUTAGAMIE COUNTY HEALTH CENTER 3300 W. Wisconsin Ave Appleton	256 beds - 104 for elderly > 62 yrs. Mix of skilled, ICF-1 and ICF-2.	98.8%	\$60.00 skilled \$55.00 ICF-1 \$50.00 ICF-2	Private: 5% Assistance: 95%	N/A	All ages; 104 patients ≥ 62 yrs.	N/A	Operated by Outagamie County	All ages; elderly developmentally disabled, chronically mentally ill, alcohol and drug abusers, and behavioral problems.
PEABODY MANOR 705 W. 5th Street Appleton	80 beds ICF-1, 2, 3, & 4	1-1/2 yr waiting list	Bldg (1961) rate: \$727.46/mo or \$23.92/day Bldg addition (1971) rate: \$801.63/mo or \$26.36/day	Private: 100% Assistance: 0%	From own residence	89 - 90 yrs	2 in last 2 yrs; prior to that 8-9% resident turn-over per year.	Non-profit corporation with 12-member board.	Residents must be ambulatory and capable of self care upon admission. If condition deteriorates, may refer to hospital or skilled care nursing home, but not a frequent occurrence.
COLONY OAKS CARE CENTER 601 Briarcliff Drive Appleton	102 beds Majority skilled ICF-1 & ICF-2	99%	\$46.00 skilled \$44.00 ICF-1 \$42.00 ICF-2	Private: 20-22% Assistance: 80-78%	Hospitals	Generally over 65	Range from 5-15 with 3-4 returning home each year.	Private ownership	New admissions come from waiting list. Only 1 bed vacant at time of interview, 9/83.
PARKSIDE CARE 1201 Garfield Little Chute	103 beds Mix of skilled and ICF	100%	N/A	Private: 30% Assistance: 70%	Hospitals and physicians	Majority over 75	N/A	Private ownership - local	Though majority die, more are returning home probably because of greater home care resources available.
OAKRIDGE GARDENS 1700 Midway Menasha	111 beds Skilled care only	87%, but at times a waiting list exists	N/A	Private: 59% Assistance: 41%	Hospitals	Generally over 65	3-6	Private ownership - Milwaukee	Work with COPS program
SUMMARY:									
TOTAL BEDS FOR ELDERLY IN APPLETON, NEENAH, MENASHA, AND LITTLE CHUTE = 1,002									
TOTAL BEDS FOR ELDERLY IN STUDY AREA (APPLETON, NEENAH, MENASHA) = 899									

Source: Telephone interviews with nursing home personnel.

EXHIBIT 49

LOCATION OF SELECTED NURSING HOMES
IN THE FOX CITIES AREA



RANKING OF LOCAL HOSPITALS

QUESTION 13	HOME-CONDO OWNER WITH ANNUAL INCOME > \$12,500 INTERESTED IN RETIREMENT CENTER					
	ALL RESPONDENTS 65 YRS AND OLDER		SECONDARY FOCUS GROUP 65-74 YRS OLD		PRIMARY FOCUS GROUP 75 YRS AND OLDER	
	N=388		N=31		N=32	
OPTIONS	N	%	N	%	N	%
St. Elizabeth Hospital	146	38%	12	39%	13	41%
Theda Clark Regional Medical Center	53	14%	7	23%	3	9%
Appleton Memorial Hospital	179	46%	11	35%	16	50%
Kaukauna Community Hospital	1	1%	0	0%	0	0%
Other	5	1%	0	0%	0	0%
No response	4	1%	1	3%	0	0%
TOTAL	388	100%	31	100%	32	100%

EXHIBIT 50

VIII. CONSUMER PREFERENCE FOR DESIGN AND MEAL PLAN

Estimates of effective demand are conditional upon the retirement center being constructed to satisfy the design and service preferences of those who would seriously consider the facility as their next home.

A. Preference for Unit Type

As previously discussed, there is a high correlation between married householders and the ability to afford retirement center living.

Of the 100 respondents who expressed a serious interest in moving to the proposed retirement center, 56 percent are single or widowed householders and 44 percent are married. When this potential market is screened for income (\geq \$12,500 for homeowners and \geq \$15,000 for renters) the ratio shifts to 40 percent single and widowed householders and 60 percent married householders. If the income screen of \geq \$15,000 were applied to all householders, the ratio would shift even more dramatically to 32 percent single and widowed and 68 percent married because so many of the single and widowed homeowners are in the minimally acceptable annual income range of \$12,500 to \$15,000.

A summary of the preference for unit type is shown in Exhibit 51. The preference for one-bedroom units doubles from

PREFERENCE FOR UNIT TYPE

QUESTION 22	ALL RESPONDENTS 65 YRS AND OLDER N=388		HOME-CONDO OWNER WITH ANNUAL INCOME > \$12,500 INTERESTED IN RETIREMENT CENTER			
			SECONDARY FOCUS GROUP 65-74 YRS OLD N=31		PRIMARY FOCUS GROUP 75 YRS AND OLDER N=32	
OPTIONS	N	%	N	%	N	%
Living room, kitchen, 1 bedroom, and 1 bath	151	39%	5	16%	10	31%
Living room, kitchen, 2 bedrooms, and 1 bath	151	39%	12	39%	12	38%
Living room, kitchen, 2 bedrooms, and 1.5 baths	55	14%	11	35%	10	31%
Living room, kitchen, 2 bedrooms, and 2 baths	16	4%	3	9%	0	0%
No response	15	4%	0	0%	0	0%
TOTAL	388	100%	31	100%	32	100%

the secondary (65 to 74 years) to the primary (75+) focus group even though the relationship of single/widowed householders to married householders does not increase as rapidly. In the secondary focus group there are 32 percent single/widowed households and 68 percent married households; although married householders continue to be in the majority in the primary focus group, the proportions are 44 percent single/widowed to 56 percent married households.

Many single/widowed householders believe they would prefer to have the extra bedroom for guests. Two of the three respondents in the 65 to 74 year old group who might consider moving in a year or so and who desired two-bedroom, two-bath units were among the most affluent of the respondents.

When respondents were asked to choose between more space or lower cost, lower cost was only slightly the more popular choice for those qualified financially and seriously interested in the project. When the choices of all respondents (N=388) are considered, *No!* *No!* irregardless of financial qualifications, lower costs are preferred by 69 percent of the respondents. (See Exhibit 35.)

When making the final decision regarding unit mix of the project, it must be remembered that the majority of elderly who are considering a move to a retirement center have been accustomed to the space of a single family home and find it

difficult to let go of that standard even though the burden of home maintenance may have triggered the need to move. Provision of adequate storage space will help to offset the need for the extra bedroom. Also, as spouses die, the demand for one-bedroom units will increase when the cost of the extra space becomes a financial burden for the survivor, usually the female, who is more likely to have less income.

On the other hand, there must be an adequate number of two-bedroom, one and one-half bath units to attract the large group of married couples currently interested in moving to the facility. A planning meeting or consumer panel with those respondents who requested more information can give the developer a better sense of the most marketable unit mix. The survey research strongly suggests an immediate need for a large number of two-bedroom units, but the developer must factor into the final design plans the changing needs of residents over time.

Given the levels of entrance fees and monthly service charges found most acceptable to prospective residents, the following unit mix and accompanying charges are suggested:

UNIT TYPE	PERCENTAGE OF PROJECT	ENTRANCE FEE/ [1] MONTHLY SERVICE CHARGE
2 bedrooms, 1.5 baths	0-10%	\$30 - \$35,000/\$800 - 750
2 bedrooms, 1 bath	15-30%	\$25 - \$30,000/\$750 - 700
1 bedroom and large walk-in storage, 1 bath	15-30%	\$20 - \$25,000/\$700 - 650
1 bedroom (small), 1 bath	balance of units	\$15 - \$20,000/\$650 - 600

B. Preference for Meal Plan and Kitchen Facilities

There was a strong preference for only one daily meal served in a central dining room and included in the monthly service charge; in the additional comments a few respondents did not want any meals included in the monthly service charge. Only 3 of the 32 respondents in the primary focus group (75 + years old) of the most probable users, or 9 percent, would prefer two or three prepared meals. In the secondary focus group of probable users, no one preferred more than one daily meal in the central dining room. The meal plan preferences are detailed in Exhibit 52 for all three groups analyzed.

[1] The monthly service charge may be increased slightly for a couple to cover the additional operating expenses incurred by the second person. There also may be a small increase in the entrance fee.

The choice of kitchen facilities followed the same pattern for this independent group of potential residents. A full kitchen was the preference of all groups with an increase of interest in the kitchenette for the primary focus group (75 + years old). The responses are summarized in Exhibit 52.

C. Preference for Garage Type

Of the 388 households responding to the survey, 306, or 79 percent, still own and drive a car. The percentage who own and drive a car was even higher for the primary and secondary focus groups who have a high level of interest in moving to the retirement center; 91 percent of the 75 year and older group and 82 percent of the 65 to 74 year old group still own and drive a car. Many wrote comments expressing the desire to retain their automobile and to have adequate parking provided.

Even though transportation would be provided, the large majority of respondents would just drive less frequently or store their car for the winter. (See Appendix for cumulative frequencies on Question 34 for each group.)

Therefore, properly designed garage facilities is a critical factor in attracting interested respondents to the retirement center. Their responses are tabulated in Exhibit 53. A detached garage which could be locked was the preference for all respondents, but when the responses of those financially qualified and interested in the project were

PREFERENCE FOR MEAL PLAN AND KITCHEN FACILITIES

HOME-CONDO OWNER WITH ANNUAL INCOME > \$12,500 INTERESTED IN RETIREMENT CENTER						
	ALL RESPONDENTS 65 YRS AND OLDER		SECONDARY FOCUS GROUP 65-74 YRS OLD		PRIMARY FOCUS GROUP 75 YRS AND OLDER	
QUESTION 25	N=388		N=31		N=32	
OPTIONS	N	%	N	%	N	%
One daily meal in central dining room included in monthly service charge	304	78%	25	81%	27	84%
Two daily meals in central dining room included in monthly service charge	20	5%	0	0%	2	6%
Three daily meals in central dining room included in monthly service charge	6	2%	0	0%	1	3%
No response	58	15%	6	19%	2	6%
TOTAL	388	100%	31	100%	32	100%

QUESTION 24	KITCHEN FACILITIES					

Full kitchen even though I may eat some meals in central dining room	239	62%	23	74%	20	63%
Kitchenette (small refrigerator and small stove) even though I would take main meal in central dining room	130	33%	7	23%	12	37%
No response	19	5%	1	3%	0	0%
TOTAL	388	100%	31	100%	32	100%

EXHIBIT 52

tabulated, it became evident that there was a preference shift to the heated and secure underground parking facility (with an elevator to apartments.) Question 35 on garage type indicated there would be a lesser monthly fee for a detached locked garage and the respondents who selected this response may have made a compromise between preference and cost. On the other hand, one respondent expressed a fear of being in underground garages. But the large majority of respondents preferred to have the garage fee included in the monthly service charge. An underground parking garage would be a significant competitive edge.

For this mobile group of prospective residents, a mix of parking facilities is needed. Visitors and service providers will need adequate, convenient surface parking and the majority of users, over time, will prefer the security and convenience of an underground parking garage if the price is right. This facility will also provide the temporary winter storage preferred by some residents.

PREFERENCE FOR GARAGE TYPE

QUESTION 35	HOME-CONDO OWNER WITH ANNUAL INCOME > \$12,500 INTERESTED IN RETIREMENT CENTER					
	ALL RESPONDENTS 65 YRS AND OLDER		SECONDARY FOCUS GROUP 65-74 YRS OLD		PRIMARY FOCUS GROUP 75 YRS AND OLDER	
	N=388		N=31		N=32	
OPTIONS	N	%	N	%	N	%
Heated and secure underground garage (for a monthly fee)	107	35%	13	45%	15	52%
Detached garage which can be locked (for a lesser monthly fee)	160	53%	14	48%	12	42%
Unsheltered surface parking lot (no. monthly fee)	25	8%	1	3%	1	3%
Other	10	3% [1]	0	0% [1]	1	3% [1]
No response	4	1%	1	3%	0	0%
TOTAL	306	100% [2]	29	100% [3]	29 [2]	100% [2]

- [1] Most preferred a carport.
 [2] Percentages are based upon the number of respondents who reported owning a car and driving.
 [3] Only 25 reported driving a car, but 29 responded to garage type.

EXHIBIT 53

IX. ACCEPTABILITY OF THE SITE

A large majority of respondents liked the location of the proposed retirement center just south of the Valley Fair Shopping Mall and the convenience of the shopping mall was listed as the most positive attribute of the location. A summary of the responses regarding acceptability of the site is found in Exhibit 54 for each group of respondents.

Those who preferred another location found the north side of Appleton, primarily, and downtown Appleton, secondarily, as the location of choice. Respondents from Neenah preferred a location in Neenah. One couple, not included in the sample because they did not complete the questionnaire, stated they were prepared to spend at least \$800 per month IF the facility was in Appleton and NOT in the Town of Menasha. A listing of other preferred sites is found in the Appendix.

The 1980 Census Tracts for the study area in Appleton, Neenah, and Menasha were analyzed to locate the higher overall income and home value areas which were most densely populated by persons 65 years and older. Those census tracts containing a high percentage of homeowners with home values of \$37,000 or more (1983 values would be \$40,000 or more) and high median incomes of \$20,000 or more for all owner-occupied households

ACCEPTABILITY OF THE SITE
PREFERENCE FOR LOCATION OF RETIREMENT CENTER

QUESTION 30	ALL RESPONDENTS 65 YRS AND OLDER		HOME-CONDO OWNER WITH ANNUAL INCOME > \$12,500 INTERESTED IN RETIREMENT CENTER			
	N=388		SECONDARY FOCUS GROUP 65-74 YRS OLD		PRIMARY FOCUS GROUP 75 YRS AND OLDER	
	N	%	N	%	N	%
Yes, I like the location	244	63%	26	84%	22%	69%
No, I do not like the location; I would prefer _____ near (Town) (cross roads)	56	14% [1]	2	6% [2]	4	13% [3]
I am not familiar with this location	34	9%	0	0%	2	6%
Other	16	4%	0	0%	3	9%
No response	38	10%	3	10%	1	3%
TOTAL	388	100%	31	100%	32	100%

QUESTION 31 POSITIVE ATTRIBUTES OF LOCATION

MULTIPLE RESPONSES

I like the central location	129	33%	18	58%	14	44%
I like the convenience of the shopping mall	272	70%	23	74%	29	91%
It is located in the neighborhood where I currently live	44	11%	6	22%	3	9%
Other	20	5%	2	6%	3	9%

QUESTION 32	NEGATIVE ATTRIBUTES OF LOCATION					
MULTIPLE RESPONSES						
I do not want to be near a shopping mall	9	2%	1	3%	0	0%
It is too far from downtown Appleton	66	17%	1	3%	5	16%
It is too far from the neighborhood where I currently live	86	22%	4	13%	6	19%
Other	37	10%	4	13%	4	13%

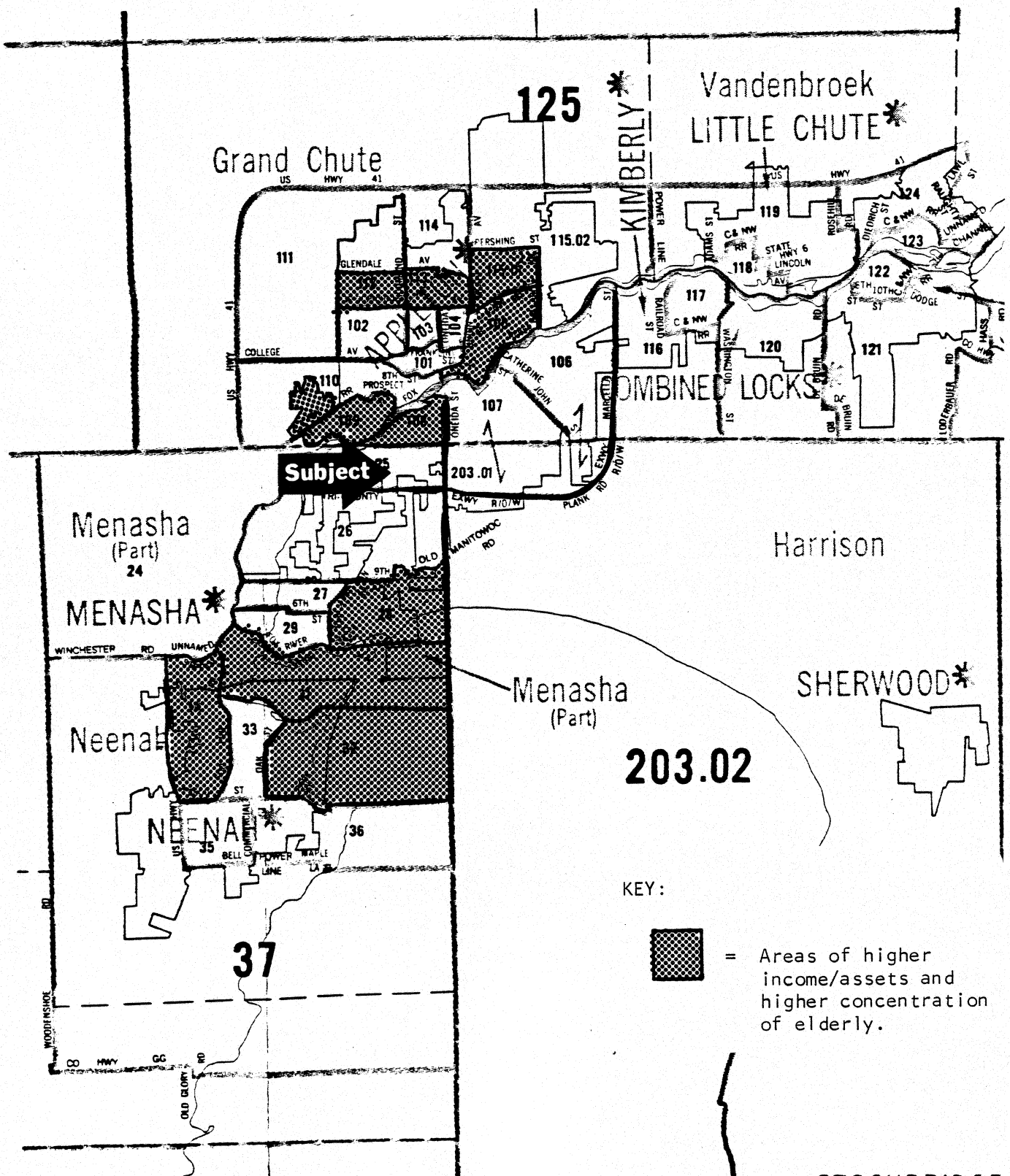
- [1] See Appendix for responses to preferred locations.
 [2] All preferred the north side of Appleton or downtown.
 [3] Preference for area of Northland Mall and for downtown.

which also had a high percentage of elderly (10 percent or more) were pinpointed to determine their proximity to the site of the proposed retirement center. The map shown in Exhibit 55 delineates those census tracts which appear to contain a high percentage (and large absolute number) of elderly who have a higher than average probability of being financially qualified to live in the proposed retirement center. The best qualified tract is Census Tract 108 just north of the site with Census Tracts 109 and 110 also well qualified. The other location of choice would be on the near north side of Appleton; this area was the preferred choice of many respondents, as well. The detailed Census Tract data for each tract in the study area is found in the Appendix.

The site, located in Census Tract 25 in the Town of Menasha, had 242 elderly persons, or 8 percent, in 1980 with a median home value of \$52,200 and a median income for all owner-occupied households of \$21,667 with 41 percent of all households owner-occupied. A majority of the population are renters with a median income of \$14,846 and 29 percent of the 66 residents in the City of Menasha portion of Census Tract 25 are elderly and the median income for all owner-occupied households is \$30,465. The absolute number of 19 persons 65 years and older does not qualify this area as a major source of

EXHIBIT 55

LOCATION OF CENSUS TRACTS MOST DENSELY POPULATED
WITH FINANCIALLY QUALIFIED ELDERLY



retirement center residents although its proximity to the site is a positive factor.

X. PREFERENCE FOR CONDOMINIUM
AS A HOUSING ALTERNATIVE

Although the question was not addressed directly, from other information it appears the survey sample respondents have little interest in moving to a condominium; the preference for a private rental apartment designed for the elderly or a retirement center is far stronger.

Of the 11 respondents out of all 454 surveyed who selected a condominium as the housing type best suited to meet current needs, 3 were already condominium residents, 7 wanted to move from a single family home to a condominium, and 1 wanted to move from an apartment. Four of the 11 also showed a strong interest in moving to a retirement center.

Respondents commented that they wanted this to be their last move so they wanted a living environment which would promote independence but provide supportive services on a fee basis when needed. It is unlikely that a condominium as an intermediate step from a single family home to retirement center would be in great demand by the group surveyed. Also, since the change in the tax law which now allows a one-time exemption of \$125,000 on the capital gain from the sale of a home, a trade to a condominium is no longer necessary to avoid the income tax on the sale proceeds of a home.

XI. RELATIONSHIP OF NEED TO SELL HOME AND COMMITMENT TO MOVE TO RETIREMENT CENTER

The majority of all respondents who answered the question (59 percent) indicated they would need to sell their home as a condition of committing to move to the retirement center. When the respondents were screened for income and assets, the majority narrowed. Of the 31 interested respondents in the secondary focus group, 57 percent would need to sell their home prior to a decision to move and in the primary focus group 47 percent would need to sell their home prior to a decision to move.

Assistance in facilitating home sales would insure a more rapid leasing of the proposed facility. However, listing and selling through a captive brokerage office would create an unacceptable conflict of interest.

As an alternative, the developer could provide non-interest financing for the entrance fee pending sale of the home.

STATEMENT OF LIMITING CONDITIONS

1. Facts and Forecasts Under Conditions of Uncertainty

- . Inferences of market demand which combine census data estimates and parameters generated from survey research are always subject to an unknown degree of error due to the time differences in underlying economic conditions and other circumstances as well as variations in definitions and research frame of reference of the two types of study inputs.
- . Primary survey research is always subject to an unknown bias in sample selection as well as potential bias in the nature of the response and non-response rates from different segments of the sample population. [In this case, the sample sacrificed a claim to random cross-sectionality in order to exploit the availability of various mailing lists which were known to represent primarily the elderly within selected census enumeration districts in a market area defined by judgments of the analysts.] Therefore traditional statistical tests of statistical inference were not considered appropriate.
- . The presentation and analysis of data in this report has been done in a craftsmanlike manner but the results suggested are only intended to scale the potential market opportunity since ultimate achievement is conditional on so many intervening factors both within and beyond the control of the developer.

2. Controls on This Market Report

- . All information regarding property sales and rentals, financing, or projections of income and expense is from sources deemed reliable. No warranty or representation is made regarding the accuracy thereof, and it is submitted subject to errors, omissions, change of price, rental, or other conditions, prior sale, lease, financing, or withdrawal without notice.
- . Information furnished by others in this report, while believed to be reliable, is in no sense guaranteed by these analysts.
- . Possession of this report or any copy thereof does not carry with it the right of publication nor may the same be used for any other purpose by anyone without the previous written consent of the appraisers or the applicant, and in any event, only in its entirety.

- . Neither all nor any part of the contents of this report shall be conveyed to the public through advertising, public relations, news, sales, or other media without the written consent and approval of the authors, particularly regarding the market conclusions, and the identity of the analysts, or of the firm with which they are connected or any of their associates.

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EDUCATION

Master of Science - Real Estate Appraisal and Investment Analysis,
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Master of Arts - Elementary Education, Stanford University

Bachelor of Arts - Stanford University (with distinctions)

Additional graduate and undergraduate work at Columbia Teachers
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PROFESSIONAL EDUCATION

Society of Real Estate Appraisers

Appraising Real Property	Course 101
Principles of Income Property Appraising	Course 201

American Institute of Real Estate Appraisers

Residential Valuation (formerly Course VIII)

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PROFESSIONAL EXPERIENCE

With a significant background in education, practiced in California, Hawaii and Wisconsin, Ms. Davis is currently associated with Landmark Research, Inc. Her experience includes the appraisal and analysis of commercial and residential properties, significant involvement in municipal assessment practices, and market and survey research to determine demand potentials.

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SREA, Senior Real Estate Analyst, Society of Real Estate Appraisers

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Ph.D., Urban Land Economics and Risk Management - University of Wisconsin
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Omicron Delta Kappa
Lambda Alpha - Ely Chapter
Beta Gamma Sigma
William Kiekhofer Teaching Award (1966)
Urban Land Institute Trustee

PROFESSIONAL EXPERIENCE

Dr. Graaskamp is the President and founder of Landmark Research, Inc., which was established in 1968. He is also co-founder of a general contracting firm, a land development company, and a farm investment corporation. He is formerly a member of the Board of Directors and treasurer of the Wisconsin Housing Finance Agency. He is currently a member of the Board and Executive Committee of First Asset Realty Advisors, a subsidiary of First Bank Minneapolis. He is the co-designer and instructor of the EDUCARE teaching program for computer applications in the real estate industry. His work includes substantial and varied consulting and valuation assignments to include investment counseling to insurance companies and banks, court testimony as expert witness and the market/financial analysis of various projects, both nationally and locally, and for private and corporate investors and municipalities.

APPENDIX A
SURVEY METHODOLOGY
INCLUDING
NAME SOURCES FOR SAMPLE

APPENDIX A
SURVEY METHODOLOGY

Secondary data supplied from the 1980 Census provided a description of the population frame from which the sample was drawn. Respondents from the sample provided the primary data for the market study. Excluded from the sample were residents of institutions (nursing homes) and group quarters and residents of subsidized elderly housing projects. It is assumed that these persons will never be potential retirement center residents. A breakdown of the secondary and primary data by number of persons, age, sex, economic status, housing type, number of persons per household, and home value enabled the analyst to check the validity of the sample and the reliability of the estimates of demand extrapolated from the data.

Since there is no cost effective way of accessing the names and addresses of the population of persons 65 years and older in the study area (a necessary step to achieve a probability sample), a non-probability quota sample was drawn from various available sources. A total of 1,601 persons were included in the sample and the sources for the names and addresses are as follows:

1. Compiler: A list of names of persons reported to be 65 years and older purchased from a list broker selected by post office zip code.

2. American Association of Retired Persons (AARP): A list of AARP members who have indicated an interest in apartment or condominium living as an alternative to their current residence.
3. City Directory: A list of persons in selected older areas of the City of Appleton reported to be retired in the 1983 Appleton City Directory.
4. Section 8 Housing: A list of persons on the Outagamie County Housing Authority (OCHA) waiting list for subsidized housing in Appleton or higher income persons who had contact OCHA.
5. Madsen-Hoffman: A list of persons who responded to a newspaper advertisement and story regarding the proposed project to request a questionnaire.
6. Postcard: A list of persons suggested by friends who had already received a questionnaire.

The response rates for each sample source are shown on the following page.

The combination of non-probability judgment/quota samples used for this market research have biases which must be recognized and accounted for when using the survey results as the basis for an estimate of potential market demand. In this case, the use of the AARP list of persons who had previously indicated an interest in alternative housing has the potential for bias. The households in this sample are already more motivated than those in a random cross-section of the population frame to respond to the questionnaire and to select a retirement center as an alternative to their present housing; and this proved to be a valid concern. The primary and

APPENDIX A
DESCRIPTION OF SURVEY SAMPLE SOURCES
AND RESPONSE RATES

SOURCE	NUMBER QUESTIONNAIRES SENT	PERCENT OF TOTAL SENT	NUMBER RETURNED	PERCENT RETURNED BASED ON SOURCE NO. SENT	PERCENT RETURNED BASED ON TOTAL SENT	PERCENT RETURNED BASED ON TOTAL RETURNED
Compiler	717	45%	153	21%	10%	31%
AARP	314	20%	159	51%	10%	32%
City Directory (Appleton)	277	17%	78	28%	5%	16%
Section 8 Housing Waiting List	164	10%	33	20%	2%	7%
Newspaper Advertisement & Article	102	6%	62	61%	4%	12%
Postcards - Referred by Friends	___27	__2%	_15	_56%	__1%	__3%
TOTAL	1,601	100%	500	N/A	~ 32%	~ 100%

secondary focus groups of qualified, interested prospective residents are comprised of a disproportionate number of respondents from AARP. Therefore the assumed capture rates for these groups is more conservative than it would have been with a more randomly selected sample. The samples composed of respondents to the newspaper advertisement and article and of persons suggested by friends via a postcard also have the potential for this bias which further suggests the use of a more conservative capture rate.

The study area included the Cities of Appleton, Neenah, and Menasha and the Towns of Neenah and Menasha. The Townships were included because the Town of Menasha is intertwined with the City of Menasha and is the more heavily populated of the two. Also, the post office zip codes for the areas used to identify the survey sample from the list broker overlap and the secondary data from the census tracts for the Towns of Neenah and Menasha are not separable.

Of the 111,282 persons in the study area (1980 Census), there are 11,720 persons 65 years and older in the population frame. The largest proportion (56 percent) of the elderly population reside in Appleton; the remaining 47 percent are almost evenly divided between Neenah and Menasha (City and Town).

Since the proposed site has an Appleton orientation both physically and in the perception of the community, it was hypothesized that the primary market would be from Appleton and the secondary market would be from the Neenah-Menasha area. The response rate and the degree of interest shown by respondents from each area confirmed the hypothesis. Of the 1,601 questionnaires mailed, approximately 1 out of every 3 sent to Appleton residents was returned whereas approximately 1 out of 4 sent to Neenah- Menasha residents was returned. Of the 67 respondents who are financially qualified and interested in moving to a retirement center, 67 percent now reside in Appleton, 21 percent in Neenah or Menasha, and 12 percent reside outside of the study area, but want to return.

A mail survey was conducted to insure the respondent's privacy and enable contact with a wide variety of elderly residents in the study area. The design of the questionnaire was critical; in this case, brevity was traded for comprehensiveness with the expectation that the majority of cooperative and interested respondents would take the time to complete the lengthy questionnaire. Those who had no interest in retirement housing, in general, would not take the time to respond anyway.

Primary concerns in questionnaire design included achieving market study objectives, consumer readability,

comprehensiveness, and adaptability of the responses to statistical analysis. The survey instrument evolved through several pre-tests and revisions.

The questionnaires were mailed on October 13 and 14 and the cut-off date was November 18. An intervening newspaper advertisement served as a reminder; no other reminders such as postcards or telephone calls were used to boost the response rate.

APPENDIX B

WISCONSIN POPULATION PROJECTIONS

1980 - 2010

FOR

CALUMET, OUTAGAMIE, AND WINNEBAGO COUNTIES

WINNEBAGO

	1980	1985	1990	1995	2000	2005	2010
MALE							
0 - 4	4576.	5130.	5203.	4824.	4323.	4185.	4323.
5 - 9	4602.	4466.	5021.	5104.	4741.	4255.	4123.
10 - 14	5300.	4609.	4482.	5049.	5139.	4776.	4289.
15 - 19	6890.	5404.	4700.	4581.	5167.	5260.	4892.
20 - 24	7003.	6659.	5240.	4567.	4458.	5035.	5131.
25 - 29	5845.	6247.	5957.	4699.	4116.	4023.	4553.
30 - 34	4934.	5252.	5635.	5387.	4258.	3735.	3655.
35 - 39	3807.	4778.	5099.	5483.	5251.	4155.	3649.
40 - 44	3218.	3717.	4677.	5002.	5389.	5170.	4095.
45 - 49	3145.	3110.	3603.	4547.	4875.	5263.	5054.
50 - 54	3104.	3016.	2993.	3481.	4407.	4734.	5116.
55 - 59	2981.	2921.	2849.	2840.	3316.	4208.	4525.
60 - 64	2616.	2689.	2651.	2600.	2606.	3052.	3877.
65 - 69	2215.	2252.	2332.	2315.	2286.	2300.	2697.
70 - 74	1675.	1771.	1822.	1904.	1906.	1891.	1905.
75 - 79	1076.	1203.	1283.	1336.	1411.	1421.	1412.
80 - 84	656.	665.	756.	819.	866.	922.	929.
85 & OVER	424.	476.	516.	587.	662.	726.	784.
TOTAL	64067.	64365.	64819.	65125.	65177.	65111.	65009.
FEMALE							
0 - 4	4227.	4856.	4923.	4563.	4090.	3960.	4088.
5 - 9	4298.	4128.	4754.	4832.	4487.	4027.	3903.
10 - 14	5056.	4387.	4217.	4861.	4942.	4588.	4118.
15 - 19	6982.	5345.	4622.	4452.	5129.	5210.	4840.
20 - 24	7372.	6789.	5217.	4519.	4359.	5028.	5112.
25 - 29	5739.	6506.	6009.	4629.	4027.	3890.	4502.
30 - 34	4765.	5196.	5919.	5481.	4230.	3685.	3563.
35 - 39	3808.	4661.	5096.	5819.	5399.	4172.	3638.
40 - 44	3318.	3740.	4591.	5032.	5758.	5351.	4139.
45 - 49	3212.	3244.	3667.	4514.	4958.	5682.	5286.
50 - 54	3371.	3120.	3160.	3582.	4421.	4864.	5580.
55 - 59	3186.	3239.	3007.	3056.	3473.	4295.	4730.
60 - 64	3123.	3005.	3066.	2857.	2914.	3318.	4109.
65 - 69	2727.	2896.	2798.	2688.	2684.	2744.	3127.
70 - 74	2345.	2491.	2662.	2586.	2664.	2498.	2555.
75 - 79	1830.	2032.	2177.	2345.	2294.	2371.	2223.
80 - 84	1259.	1424.	1607.	1747.	1907.	1877.	1939.
85 & OVER	1087.	1332.	1606.	1920.	2245.	2571.	2754.
TOTAL	67705.	68391.	69098.	69663.	69981.	70131.	70206.
TOTAL							
0 - 4	8803.	9986.	10126.	9387.	8413.	8145.	8411.
5 - 9	8900.	8594.	9775.	9936.	9228.	8282.	8026.
10 - 14	10356.	8996.	8699.	9910.	10081.	9364.	8407.
15 - 19	13872.	10749.	9322.	9033.	10296.	10470.	9732.
20 - 24	14375.	13448.	10457.	9086.	8817.	10063.	10243.
25 - 29	11584.	12753.	11966.	9328.	8143.	7913.	9055.
30 - 34	9699.	10448.	11554.	10868.	8488.	7420.	7218.
35 - 39	7615.	9439.	10195.	11302.	10650.	8327.	7287.
40 - 44	6536.	7457.	9268.	10034.	11147.	10521.	8234.
45 - 49	6357.	6354.	7270.	9061.	9833.	10945.	10340.
50 - 54	6475.	6136.	6153.	7063.	8828.	9598.	10696.
55 - 59	6167.	6160.	5856.	5896.	6789.	8503.	9255.
60 - 64	5739.	5694.	5717.	5457.	5520.	6370.	7986.
65 - 69	4942.	5148.	5130.	5183.	4970.	5044.	5824.
70 - 74	4020.	4262.	4484.	4490.	4570.	4389.	4460.
75 - 79	2906.	3235.	3460.	3681.	3705.	3792.	3635.
80 - 84	1915.	2089.	2363.	2566.	2773.	2799.	2868.
85 & OVER	1511.	1808.	2122.	2507.	2907.	3297.	3538.
TOTAL	131772.	132756.	133917.	134788.	135158.	135242.	135215.
BIRTHS	9809.	9931.	9196.	8233.	7961.	8215.	
DEATHS	5758.	5954.	6139.	6295.	6566.	6924.	
NAT INCR	4051.	3977.	3057.	1938.	1395.	1291.	
NET MIGR	-3067.	-2816.	-2186.	-1568.	-1311.	-1318.	
CHANGE	984.	1161.	871.	370.	84.	-27.	

Wisconsin Population Projections 1980-2010, Wis. Dept. of Admin., 1983

OUTAGAMIE

	1980	1985	1990	1995	2000	2005	2010
MALE							
0 - 4	5580.	6252.	6260.	5806.	5261.	5110.	5281.
5 - 9	5208.	5617.	6296.	6304.	5844.	5295.	5146.
10 - 14	5981.	5183.	5595.	6276.	6287.	5832.	5288.
15 - 19	7255.	5680.	4928.	5329.	5981.	5995.	5565.
20 - 24	6053.	6653.	5225.	4531.	4894.	4898.	5510.
25 - 29	5614.	5971.	6570.	5162.	4480.	4842.	5443.
30 - 34	4834.	5668.	6033.	6616.	5194.	4510.	4874.
35 - 39	3803.	4841.	5679.	6045.	6619.	5196.	4513.
40 - 44	3204.	3751.	4779.	5609.	5974.	6549.	5145.
45 - 49	2906.	3135.	3675.	4689.	5511.	5876.	6445.
50 - 54	2993.	2805.	3032.	3561.	4552.	5357.	5716.
55 - 59	2699.	2806.	2635.	2856.	3364.	4307.	5072.
60 - 64	2165.	2441.	2550.	2404.	2616.	3088.	3957.
65 - 69	1990.	1897.	2150.	2258.	2139.	2335.	2758.
70 - 74	1419.	1644.	1584.	1809.	1912.	1817.	1983.
75 - 79	951.	1070.	1248.	1213.	1398.	1485.	1411.
80 - 84	582.	611.	697.	824.	811.	941.	1000.
85 & OVER	354.	432.	492.	571.	683.	739.	830.
TOTAL	63591.	66457.	69428.	71863.	73520.	74772.	75937.
FEMALE							
0 - 4	5215.	5917.	5924.	5495.	4979.	4835.	4996.
5 - 9	4826.	5253.	5963.	5969.	5535.	5015.	4871.
10 - 14	5746.	4785.	5214.	5923.	5932.	5504.	4991.
15 - 19	6810.	5518.	4600.	5026.	5712.	5724.	5315.
20 - 24	6132.	6289.	5121.	4262.	4650.	5284.	5293.
25 - 29	5562.	5925.	6082.	4955.	4129.	4508.	5128.
30 - 34	4816.	5553.	5921.	6078.	4952.	4130.	4511.
35 - 39	3835.	4797.	5538.	5909.	6066.	4945.	4126.
40 - 44	3190.	3769.	4720.	5454.	5824.	5983.	4880.
45 - 49	2923.	3113.	3683.	4618.	5341.	5709.	5869.
50 - 54	3033.	2846.	3035.	3596.	4514.	5227.	5591.
55 - 59	2940.	2922.	2746.	2932.	3479.	4372.	5066.
60 - 64	2621.	2797.	2785.	2623.	2806.	3333.	4192.
65 - 69	2281.	2469.	2642.	2638.	2490.	2667.	3170.
70 - 74	1891.	2100.	2283.	2452.	2456.	2321.	2486.
75 - 79	1477.	1638.	1831.	2005.	2167.	2176.	2056.
80 - 84	1021.	1142.	1286.	1456.	1615.	1757.	1764.
85 & OVER	820.	1049.	1278.	1531.	1825.	2126.	2399.
TOTAL	65139.	67882.	70652.	72922.	74472.	75616.	76704.
TOTAL							
0 - 4	10795.	12169.	12184.	11301.	10240.	9945.	10277.
5 - 9	10034.	10870.	12259.	12273.	11379.	10310.	10017.
10 - 14	11727.	9968.	10809.	12199.	12219.	11336.	10279.
15 - 19	14065.	11198.	9528.	10355.	11693.	11719.	10880.
20 - 24	12185.	12942.	10346.	8793.	9544.	10782.	10803.
25 - 29	11176.	11896.	12652.	10117.	8609.	9350.	10571.
30 - 34	9650.	11221.	11954.	12694.	10146.	8640.	9385.
35 - 39	7638.	9638.	11217.	11954.	12685.	10141.	8639.
40 - 44	6394.	7520.	9499.	11063.	11798.	12532.	10025.
45 - 49	5829.	6248.	7358.	9307.	10852.	11585.	12314.
50 - 54	6026.	5651.	6067.	7157.	9066.	10584.	11307.
55 - 59	5639.	5728.	5381.	5788.	6843.	8679.	10138.
60 - 64	4786.	5238.	5335.	5027.	5422.	6421.	8149.
65 - 69	4271.	4366.	4792.	4896.	4629.	5002.	5928.
70 - 74	3310.	3744.	3867.	4261.	4368.	4138.	4469.
75 - 79	2428.	2708.	3079.	3218.	3565.	3661.	3467.
80 - 84	1603.	1753.	1983.	2280.	2426.	2698.	2764.
85 & OVER	1174.	1481.	1770.	2102.	2508.	2865.	3229.
TOTAL	128730.	134339.	140080.	144785.	147992.	150388.	152641.
BIRTHS	11779.	11800.	10955.	9931.	9643.	9960.	
DEATHS	5030.	5336.	5627.	5919.	6323.	6864.	
NAT INCR	6749.	6464.	5328.	4012.	3320.	3096.	
NET MIGR	-1140.	-723.	-623.	-805.	-924.	-843.	
CHANGE	5609.	5741.	4705.	3207.	2396.	2213.	

Wisconsin Population Projections 1980-2010, Wis. Dept. of Admin., 1983

CALUMET

	1980	1985	1990	1995	2000	2005	2010
MALE							
0 - 4	1330.	1525.	1583.	1528.	1394.	1301.	1293.
5 - 9	1314.	1292.	1480.	1536.	1483.	1352.	1262.
10 - 14	1605.	1311.	1289.	1476.	1531.	1478.	1347.
15 - 19	1723.	1502.	1227.	1207.	1381.	1432.	1382.
20 - 24	1341.	1542.	1347.	1098.	1077.	1233.	1276.
25 - 29	1249.	1356.	1550.	1351.	1101.	1079.	1235.
30 - 34	1122.	1317.	1430.	1612.	1399.	1139.	1114.
35 - 39	942.	1145.	1341.	1454.	1631.	1414.	1415.
40 - 44	751.	946.	1150.	1346.	1458.	1633.	1415.
45 - 49	711.	750.	944.	1148.	1343.	1455.	1626.
50 - 54	742.	697.	735.	925.	1125.	1317.	1427.
55 - 59	667.	719.	674.	711.	896.	1090.	1274.
60 - 64	593.	630.	679.	636.	672.	848.	1031.
65 - 69	506.	531.	567.	613.	576.	610.	769.
70 - 74	368.	419.	444.	477.	518.	488.	516.
75 - 79	232.	271.	311.	333.	361.	393.	371.
80 - 84	135.	148.	175.	203.	220.	240.	261.
85 & OVER	111.	118.	130.	152.	179.	203.	226.
TOTAL	15442.	16219.	17056.	17806.	18345.	18705.	18974.
FEMALE							
0 - 4	1271.	1444.	1498.	1446.	1319.	1232.	1224.
5 - 9	1262.	1236.	1403.	1455.	1405.	1281.	1196.
10 - 14	1514.	1258.	1232.	1398.	1449.	1399.	1275.
15 - 19	1678.	1422.	1182.	1161.	1317.	1365.	1318.
20 - 24	1318.	1494.	1273.	1054.	1031.	1168.	1209.
25 - 29	1230.	1329.	1500.	1276.	1055.	1031.	1168.
30 - 34	1138.	1286.	1390.	1550.	1312.	1084.	1057.
35 - 39	896.	1144.	1293.	1397.	1554.	1314.	1086.
40 - 44	720.	905.	1156.	1305.	1409.	1563.	1320.
45 - 49	731.	729.	913.	1166.	1314.	1418.	1570.
50 - 54	708.	731.	727.	911.	1163.	1309.	1413.
55 - 59	678.	699.	721.	717.	898.	1146.	1289.
60 - 64	646.	655.	676.	697.	694.	869.	1109.
65 - 69	530.	612.	621.	642.	663.	661.	827.
70 - 74	402.	487.	565.	575.	595.	616.	614.
75 - 79	304.	345.	421.	491.	503.	522.	541.
80 - 84	223.	235.	270.	334.	394.	407.	422.
85 & OVER	176.	225.	266.	316.	392.	479.	540.
TOTAL	15425.	16236.	17107.	17891.	18467.	18864.	19178.
TOTAL							
0 - 4	2601.	2969.	3081.	2974.	2713.	2533.	2517.
5 - 9	2576.	2528.	2883.	2991.	2888.	2633.	2458.
10 - 14	3119.	2569.	2521.	2874.	2980.	2877.	2622.
15 - 19	3401.	2924.	2409.	2368.	2698.	2797.	2700.
20 - 24	2659.	3036.	2620.	2152.	2108.	2401.	2485.
25 - 29	2479.	2685.	3050.	2627.	2156.	2110.	2403.
30 - 34	2260.	2603.	2820.	3162.	2711.	2223.	2171.
35 - 39	1838.	2289.	2634.	2851.	3185.	2728.	2235.
40 - 44	1471.	1851.	2306.	2651.	2867.	3196.	2735.
45 - 49	1442.	1479.	1857.	2314.	2657.	2873.	3196.
50 - 54	1450.	1428.	1462.	1836.	2288.	2626.	2840.
55 - 59	1345.	1418.	1395.	1428.	1794.	2236.	2563.
60 - 64	1239.	1285.	1355.	1333.	1366.	1717.	2140.
65 - 69	1036.	1143.	1188.	1255.	1239.	1271.	1596.
70 - 74	770.	906.	1009.	1052.	1113.	1104.	1130.
75 - 79	536.	616.	732.	824.	864.	915.	912.
80 - 84	358.	383.	445.	537.	614.	647.	683.
85 & OVER	287.	343.	396.	468.	571.	682.	766.
TOTAL	30867.	32455.	34163.	35697.	36812.	37569.	38152.
BIRTHS	2709.	2822.	2738.	2505.	2342.	2328.	
DEATHS	1206.	1283.	1374.	1463.	1581.	1725.	
NAT INCR	1503.	1539.	1364.	1042.	761.	603.	
NAT MIGR	85.	169.	170.	73.	-4.	-20.	
CHANGE	1588.	1708.	1534.	1115.	757.	583.	

Wisconsin Population Projections 1980-2010, Wis. Dept. of Admin., 1983

APPENDIX C
CENSUS TRACT DATA
FOR
APPLETON, NEENAH, AND MENASHA
CITIES AND TOWNS

1980 CENSUS TRACT DATA
CITY OF APPLETON

Statistical Research, Inc.

CENSUS TRACT NO.	0025	203.01	203.02	101	102	103	104	105	106	107	108	109	110
Total Tract Population	17	5,426	58	1,223	4,603	2,337	1,831	4,497	6,864	4,896	1,675	2,192	3,426
Tract Population of Persons 65 Yrs and Older	-0-	207	-0-	229	752	447	285	456	339	423	378	257	576
Percent of Persons 65 Yrs and Older	-0-	4%	-0-	19%	16%	19%	16%	10%	5%	9%	23%	12%	17%
Percent of Females and Males 65 Yrs and Older	-0-	F=55% M=45%	-0-	F=77% M=23%	F=61% M=39%	F=71% M=29%	F=63% M=37%	F=61% M=39%	F=60% M=40%	F=57% M=43%	F=61% M=39%	F=56% M=44%	F=67% M=33%
No. of Persons 65 Yrs and Older in Institutions and Group Quarters	-0-	-0-	-0-	-0-	-0-	-0-	1	-0-	86	5	80	4	71
No. of All Households with Social Security Income	-0-	205	-0-	188	594	415	249	390	239	418	242	172	456
Mean Social Security Income per Household	-0-	\$4,756	-0-	\$3,904	\$4,269	\$3,611	\$4,121	\$4,575	\$4,733	\$4,558	\$4,992	\$4,906	\$4,139
Per Capita Income All Non-Institutional Persons	-0-	\$7,084	\$7,443	\$6,202	\$7,102	\$5,885	\$6,684	\$6,973	\$7,804	\$7,643	\$9,345	\$11,606	\$7,677
Median Value - All Owner- Occupied Housing Units		\$48,300	\$64,000	\$38,000	\$36,200	\$32,900	\$32,800	\$39,700	\$50,600	\$41,500	\$43,800	\$56,800	\$37,000
Median Income - All Households	-0-	\$22,043	\$27,500	\$7,775	\$16,222	\$10,946	\$14,718	\$18,420	\$21,891	\$20,351	\$19,892	\$21,426	\$16,400
Median Income - All Owner- Occupied Households	N/A	\$24,862	\$27,500	\$19,038	\$17,744	\$17,821	\$16,330	\$21,204	\$23,353	\$21,743	\$21,161	\$25,337	\$19,975
Median Income - All Renter- Occupied Households	N/A	\$15,272	N/A	\$7,083	\$12,445	\$7,092	\$13,438	\$13,561	\$16,471	\$15,400	\$16,346	\$15,562	\$14,462
Percent of Housing Units Owner-Occupied	-0-	72%	100%	13%	68%	40%	45%	58%	78%	71%	85%	76%	60%

[1] 9% without nursing home

1980 CENSUS TRACT DATA
CITY OF APPLETON

CENSUS TRACT NO.	111	112	113	114	115.01	115.02	125	TOTALS
Total Tract Population	2,690	3,400	3,665	3,376	4,033	2,800	23	59,032
Tract Population of Persons 65 Yrs and Older	156	340	649	537	405	121	3	6,560
Percent of Persons in Tract 65 Yrs and Older	6%	10%	18%	[1] 16%	10%	4%	13%	11.1%
Percent of Females and Males 65 Yrs and Older	F=54% M=46%	F=56% M=44%	F=65% M=35%	F=67% M=35%	F=54% M=46%	F=62% M=38%	F=33% M=67%	F=62% M=38%
No. of Persons 65 Yrs and Older in Institutions and Group Quarters	-0-	-0-	-0-	223	-0-	-0-	-0-	470
No. of All Households with Social Security Income	136	279	514	236	370	149	-0-	5,252
Mean Social Security Income per Household	\$3,942	\$4,325	\$4,768	\$4,488	\$4,810	\$3,605	-0-	
Per Capita Income - All Non-Institutional Persons	\$7,735	\$8,869	\$7,134	\$8,917	\$9,168	\$9,312	-0-	
Median Value - All Owner- Occupied Housing Units	\$52,500 55%	\$49,900 81%	\$39,400 70%	\$50,300 77%	\$45,300 87%	\$65,800 65%	-0-	
Median Income - All Households	\$19,583	\$21,915	\$15,829	\$21,641	\$21,040	\$24,375	-0-	
Median Income - All Owner- Occupied Households	\$23,691	\$24,674	\$20,053	\$23,413	\$22,350	\$29,817	-0-	
Median Income - All Renter- Occupied Households	\$11,731	\$16,111	\$9,605	\$16,086	\$15,750	\$14,688	-0-	

1980 CENSUS TRACT DATA CITY AND TOWN OF NEENAH

CENSUS TRACT NO.	C-0031 [1]	C-0032	C-0033	C-0034	C-0035	C-0036	C-0037	T-0031 [1]	T-0032	T-0034	T-0035	T-0036	T-0037	TOTALS
Total Tract Population	2,577	2,641	3,507	4,310	2,751	2,985	3,661	-0-	-0-	267	5	404	2,188	25,296
Tract Population of Persons 65 Yrs and Older	367	392	511	478	317	228	124	-0-	-0-	-----187-----				2,604
Percent of Persons in Tract 65 Yrs and Older	14%	15%	15%	11%	12% [4]	8%	3%	-0-	-0-	-----7%-----				10%
Percent of Females and Males 65 Yrs and Older	F=62% M=38%	F=60% M=40%	F=66% M=34%	F=58% M=42%	F=73% M=27%	F=68% M=32%	F=61% M=39%	-0-	-0-	-----N/A-----				F=63.5% M=37.5%
No. of Persons 65 Yrs and Older in Institutions and Group Quarters	-0-	-0-	1	-0-	139	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	140
No. of All Households with Social Security Income	324	330	456	371	201	205	156	-0-	-0-	11 [3]	-0-	24 [3]	134 [3]	2,212
Mean Social Security Income per Household	\$4,337	\$4,932	\$4,732	\$4,588	\$3,582	\$4,451	\$4,268	-0-	-0-	\$3,596 [3]	-0-	\$5,060 [3]	\$4,862 [3]	
Per Capita Income - All Non-Institutional Persons	\$8,562	\$9,109	\$7,460	\$7,239	\$6,898	\$10,557	\$7,293	-0-	-0-	\$7,929 [3]	-0-	\$10,667 [3]	\$9,217 [3]	
Median Value - All Owner- Occupied Households	\$36,700	\$44,300	\$33,700	\$35,300	\$44,400	\$65,200	\$50,600	-0-	-0-	\$38,700	-0-	N/A	\$26,839	
Median Income - All Households	\$16,476	\$20,368	\$17,272	\$18,141	\$17,513	\$29,211	\$21,480	-0-	-0-	\$23,000 [3]	-0-	\$30,135 [3]	\$25,972 [3]	
Median Income - All Owner- Occupied Housing Units	\$20,541	\$21,976	\$20,000	\$20,206	\$21,838	\$32,397	\$24,812	-0-	-0-	N/A	-0-	\$60,700	\$55,300	
Median Income - All Renter- Occupied Households	\$10,904	\$10,938	\$13,625	\$11,802	\$14,609	\$7,763	\$15,432	-0-	-0-	N/A	-0-	N/A	\$15,909	
Percent of Housing Units Owner-Occupied	67%	84%	64%	77%	47%	84%	59%	-0-	-0-	84%	-0-	93%	93%	

[1] City of Neenah Tract

[2] Town of Neenah Tract

[3] Data from Summary Tape File 3A by Census Tract and Municipality. No breakdown by Town and by Tract in 1980 Census Tracts.

[4] Only 6 percent persons 65 years and older, if nursing home residents excluded.

Source: 1980 Census Tracts: Appleton, Oshkosh, WI
SMSA - Census of Populations and Housing
Pages H-8, H-11, and H-12. Table H-1.

1980 CENSUS TRACT DATA
CITY AND TOWN OF MENASHA

CENSUS TRACT NO.	C-0025 [1]	C-0026	C-0027	C-0028	C-0029	C-0030	T-0024 [2]	T-0025	T-0026	T-0028	T-0030	T-0034	T-0037 [3]	TOTALS
Total Tract Population	66	3,170	2,878	3,830	2,920	1,864	3,664	2,893	4,114	428	-0-	217	910	26,954
Total Tract Population of Persons 65 Yrs and Older	19	70	438	502	451	293	123	242	349	29	-0-	-----40-----		2,556
Percent of Persons 65 Yrs and Older	29%	2%	15%	13%	15%	16%	3%	8%	8%	7%	-0-	-----4%-----		9.5%
Percent of Female and Males 65 Yrs and Older	F=53% M=47%	F=54% M=46%	F=55% M=45%	F=63% M=37%	F=62% M=38%	F=59% M=41%	F=52% M=48%	F=62% M=38%	F=58% M=42%	F=55% M=45%	-0-	-----N/A-----		F=59% M=41%
No. of Persons 65 Yrs and Older in Institutions and Group Quarters	-0-	-0-	-0-	8	-0-	-0-	1	-0-	105	-0-	-0-	-0-	-0-	114
No. of All Households with Social Security Income	14	122	362	450	398	246	106	234	191	30	-0-	22 [3]	38 [3]	2,213
Mean Social Security Income per Household	\$6,668	\$5,808	\$4,828	\$4,115	\$4,635	\$4,806	\$4,546	\$4,453	\$4,514	\$3,576	-0-	\$5,297 [3]	\$3,940 [3]	
Per Capita Income - All Non-Institutional Persons	\$19,223	\$7,384	\$7,172	\$7,134	\$6,532	\$9,288	\$7,812	\$8,626	\$7,005	\$6,086	-0-	\$9,668 [3]	\$8,780 [3]	
Median Value - All Owner- Occupied Housing Units	N/A	\$50,700	\$36,100	\$38,200	\$30,500	\$39,300	\$55,700	\$52,200	\$51,230	\$40,800	-0-	\$38,700	\$55,300	
Median Income - All Households	\$30,465	\$21,016	\$18,101	\$18,056	\$14,478	\$17,118	\$24,986	\$17,301	\$21,429	\$18,083	-0-	\$21,905 [3]	\$24,878 [3]	
Median Income - All Owner- Occupied Households	\$30,465	\$24,832	\$18,899	\$20,988	\$18,226	\$20,038	\$25,974	\$21,667	\$22,482	\$17,917	-0-	N/A	\$26,839	
Median Income - All Renter- Occupied Households	N/A	\$15,000	\$15,000	\$11,058	\$10,449	\$11,357	\$16,705	\$14,846	\$16,364	\$20,417	-0-	N/A	\$15,909	
Percent of Housing Units - Owner Occupied	N/A	58%	83%	67%	45%	75%	87%	41%	84%	82%	-0-	84%	93%	

[1] City of Menasha Tract

[2] Town of Menasha Tract

[3] Data from Summary Tape File 3A by Census Tract and Municipality. No breakdown by Town and by Tract in 1980 Census Tracts.

Source: 1980 Census Tracts: Appleton, Oshkosh, WI

SMSA - Census of Populations and Housing

Pages P-8, P-11, P-12, P-71, P-74, P-75, H-8, H-11, and H-12

Tables P-1, P-11, and H-1

APPENDIX D

SUMMARY OF RESPONSES
FROM ALL RESPONDENTS

65 YEARS AND OLDER

N=388

SOURCE AND NUMBER OF RETURNED SURVEYS

SOURCE	NUMBER	PERCENTAGE OF TOTAL RETURNED
Compiler	76	20%
AARP	152	39%
City Directory	69	18%
Section 8 List	27	7%
Newspaper Ad	51	13%
Postcard	13	3%
	388	100%

FOX CITIES SURVEY

I am responding for:

287 [74] % Myself; 6 [2] % My parent(s); 1 [1] % My friend(s)
 94 [24] % No response Total = 388

BACKGROUND AND HOUSEHOLD INFORMATION

1. Which of the following best describes your present living arrangement? I live:

199	[57]	%	Alone	
165	[43]	%	With my spouse only	
6	[2]	%	With one of my children in my home	
1	[1]	%	In the home of one of my children	
1	[1]	%	With my children and my spouse	
4	[1]	%	With a friend or friends	
8	[2]	%	With relatives other than my spouse and children	
2	[1]	%	Other, please specify: _____	
2	[2]	%	No response	
<u>388</u>				

2. I live in:

301	[78]	%	Appleton	2	[1]	%	Little Chute
29	[7]	%	Neenah	3	[1]	%	Kimberly
23	[6]	%	Menasha	0	[0]	%	Combined Locks
2	[1]	%	Kaukauna	25	[6]	%	Other, please specify: _____
3	[1]	%	No response	388			

3. What is your present marital status? Are you:

52	[13]	%	Single	170	[44]	%	Married	166	[43]	%	A widow or widower
Total = 388											

4. Which of the following best describes your present housing type?

49	[13]	%	I own a single family home or a duplex:
245	[63]	%	in which I presently reside
0	[0]	%	but do not presently reside there
1	[1]	%	I own a condominium:
7	[2]	%	in which I presently reside
0	[0]	%	but do not presently reside there
76	[20]	%	I rent an apartment
2	[1]	%	I have a room in someone else's house
8	[2]	%	Other, please specify: _____
<u>388</u>			

5. How long have you lived in your present home?

6	[2]	Less than one year	31	[8]	Five to ten years
8	[2]	One to two years	71	[18]	Ten to twenty years
37	[16]	Two to five years	234	[66]	More than twenty years
1	[<1]	No response			

6. What is your age (your spouse's age)?

Your Age	220	[57]	65-74	Your Spouse's Age	110	[28]	65-74
	152	[39]	75-84		35	[9]	75-84
	16	[4]	85+		2	[<1]	85+

7. Are you:

151	[39]	Male	234	[61]	Female
3	[<1]	No response			

22	[6]	under 65
10	[28]	65-74
35	[9]	75-84
2	[<1]	85+
166	[43]	Widowed
53	[14]	No response

8. What is/was the main employment (work) for you or the head of your household over the past years?

9. Below is a list of activities that some of us may have difficulty with as we grow older. Do you have: NO DIFFICULTY, SOME DIFFICULTY, or find you CANNOT DO these activities?

	NO DIFFICULTY %	SOME DIFFICULTY %	CANNOT DO IT %	NO RESPONSE %
Cooking	327 [84]	36 [9]	4 [1]	21 [5] = 100%
Shopping	315 [81]	45 [12]	6 [2]	22 [6]
Housekeeping	287 [74]	68 [18]	7 [2]	26 [7]
Personal care (bathing)	347 [89]	19 [5]	1 [<1]	21 [5]
Hearing on the telephone	319 [82]	41 [11]	2 [<1]	26 [7]
Reading the newspaper	336 [87]	23 [6]	3 [<1]	26 [7]
Taking medication	353 [91]	6 [2]	1 [<1]	28 [7]
Going up and down stairs	272 [70]	90 [23] #	5 [1]	21 [5]
Taking care of personal finances	334 [86]	25 [6]	2 [<1]	27 [7]
Driving a car	295 [76]	10 [2]	45 [12]	38 [10] #
Walking more than two blocks	285 [74]	75 [19] #	15 [4]	13 [3]

10. If you need any help in moving about or walking at this time, do you:

22	[6]	Use a cane	3	[<1]	Use a wheelchair
2	[<1]	Use a walker	369	[80]	Need no assistance at all
52	[13]	No response	388		

11. In general, which of the following best describes your overall state of health?

	%	
70	[18]	Excellent (plenty of energy)
168	[43]	Average (good health - no problems and enough energy)
143	[37]	Fair (some health problems but able to live completely independently)
5	[1]	Need some care or assistance
0	[0]	Need full-time care and assistance
2	[1]	No response

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12. Do you currently use any of the following Community Support Services?

	%	
1	[1]	Home Aid
0	[0]	St. Elizabeth's Hospital Home Care Program
1	[1]	Home Meal Delivery Service
21	[5]	Nutrition Site Meals
9	[2]	Dial-A-Bus, American Red Cross
2	[1]	Visiting Nurse Association
3	[1]	Telephone Reassurance
2	[1]	Upjohn Health Care Services
305	[79]	No, do not use support services
10	[3]	Other, please specify: _____
44	[11]	No response

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13. If you needed to be hospitalized, which hospital would you choose:

	%	
146	[38]	St. Elizabeth Hospital
53	[14]	Theda Clark Regional Medical Center
179	[46]	Appleton Memorial Hospital
1	[1]	Kaukauna Community Hospital
5	[1]	Other, please specify: _____
4	[1]	No response

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14. If you were to need help with activities of daily living, upon whom would you depend? (Please check as many as apply.)*

	%	
201	[52]	Family
101	[26]	Friends
29	[8]	Church group
127	[33]	Would prefer to hire people to help me in my home
50	[13]	Would prefer to use community support services in my home
158	[41]	Would prefer to live in a retirement facility where I could be closer to support services
7	[2]	Other, please specify: _____

* Multiple answers possible. Percentage based on number of responses for an answer divided by total number in sample.

15. There are several nursing homes in the area. Based upon your opinion, please rank the following:

	MOST DESIRABLE	MODERA- TELY DESIRABLE	LEAST DESIRABLE	I AM NOT ACQUAINTED WITH THIS NURSING HOME	No Response
	-----	-----	-----	-----	-----
Americana Health Care Center - Appleton	[%] 28 [7]	[%] 60 [15]	[%] 30 [8]	[%] 169 [44]	[%] 101 [26]
Appleton Extended Care Center - Appleton	98 [25]	66 [17]	14 [4]	130 [34]	80 [20]
Family Heritage Nursing Home - Neenah	5 [1]	12 [3]	17 [4]	239 [62]	115 [30]
Outagamie County Health Center - Appleton	5 [1]	24 [6]	54 [14]	198 [51]	107 [28]
Peabody Manor - Appleton	147 [38]	28 [7]	3 [1]	138 [36]	72 [19]
Colony Oaks Care Center - Appleton	8 [2]	26 [7]	27 [7]	215 [55]	112 [29]
Parkside Care - Little Chute	9 [2]	19 [5]	17 [4]	230 [60]	113 [29]
Oakridge Gardens - Menasha	21 [5]	33 [8]	15 [4]	212 [55]	107 [28]

16. If you could choose a type of housing best suited for your current needs, would you:

- 185 [48] Live in my own single family house.
- 9 [2] Live in my own condominium.
- 31 [8] Live in an a government subsidized apartment, such as Randall Court, Conway Building, Oneida Heights, or Woodridge Gardens.
- 21 [5] Live in a private apartment building that rents to all age levels.
- 48 [12] Live in a private apartment building that only rents to older adults.
- 37 [10] Live in a private retirement center designed especially for older adults which provides supportive services as needed but has no nursing home on the premises.
- 48 [12] Live in a private retirement center designed especially for older adults which provides supportive services as needed and has a nursing home on the premises.
- 3 [4] Live with my children.
- 0 [0] Live with a brother or sister.
- 3 [4] Other, please specify: _____
- 3 [4] No response

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17. There are many different reasons for moving into a retirement center. How would you rank the following reasons?

	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT	NO RESPONSE
a. For companionship with others of similar interests	104 [27] %	150 [39] %	41 [10] %	93 [24] = 100% %
b. Freedom from the responsibility and maintenance of a single family home	256 [66] %	85 [22] %	10 [3] %	37 [9] %

17. How would you rank the following reasons? (Continued)

	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT	No RESPONSE
c. Availability of a nutritious meal in a full service dining room	% 128 [33]	% 130 [34]	% 67 [17]	% 63 [16] = 100%
d. Availability of a nursing home on the premises, if I, my spouse, or my friends need care	117 [30]	121 [31]	74 [19]	76 [20]
e. Security of knowing someone will check on me daily	160 [41]	106 [27]	52 [13]	70 [18]
f. Security of knowing 24-hour emergency response is available	210 [54]	89 [23]	28 [7]	61 [16]
g. Knowing supportive services such as house cleaning and personal care are available if needed	141 [36]	143 [37]	45 [12]	59 [15]
h. Need for special diet	73 [19]	79 [20]	135 [35]	101 [26]
j. Availability of staff to help plan for leisure time, finances, and future needs as required	40 [10]	106 [27]	151 [39]	91 [23]
k. Other, please specify: _____	12 [3]	3 [4]	6 [2]	367 [95]

18. Have you given serious thought to moving from your present home?

229 [59] No 148 [38] Yes. For what reason? _____

11 [3] No response

1 = HEALTH PROBLEM	9	6.1 %
2 = DEATH OF SPOUSE	0	0.0 %
3 = FINANCIAL LIMITN	15	10.1 %
4 = FRICTION W RELAT	0	0.0 %
5 = LONLINESS	8	5.4 %
6 = HOME UPKEEP	80	54.1 %
7 = CHILDREN MOVING	1	0.7 %
8 = OTHER	35	23.6 %
Total	148	100.0 %

19. If so, how soon would you want to move?

29	[7]	In less than one year
95	[24]	In one to three years
96	[25]	In three years or more
168	[43]	No response

20. Which of the following event(s) might cause you to decide to move? (Check as many as apply.) *

238	[61]	Health problem	12	[3]	Children moving away
122	[31]	Death of a spouse	56	[13]	Opportunity to sell home/farm
73	[19]	Financial limitations	39	[10]	Selection of my name for vacant apartment at government subsidized elderly housing project
0	[0]	Friction with my relatives			Other, please specify:
61	[16]	Growing awareness of loneliness			
240	[62]	Burden of home upkeep	16	[3]	

* Multiple answers

THE RETIREMENT CENTER

The Madsen-Hoffman partnership is considering the development of a private retirement living center in Appleton which would not be subsidized by the government. The proposed site is a large wooded area immediately south of the Valley Fair Shopping Mall.

The retirement center would include one and two bedroom independent living apartments for individuals and couples. The center would be secured, and a protected walk-way would connect the retirement center with the mall for the use of the residents. The main entrance to the center would be from Valley Road.

Included in the Monthly Service Charge would be the rental of your apartment, all utilities, (except phone), a daily meal served in a full-service dining room, monthly cleaning of each apartment, the security of a 24-hour emergency response system, building security and front-desk reception services, cable television hook-ups, access to transportation services, a health office, and planned activities and programs. The facility would also include such services as a beauty shop, lounge and lobby areas, coin-operated washers and dryers, a convenience mart for limited shopping, and a coffee shop.

To answer the next few questions, please PRETEND that you have the need or interest in the residential center described above. Your responses are IMPORTANT since they will be used in finalizing our plans for the proposed facility.

21. Are you familiar with this retirement living concept?
(Please check as many as apply.) *

152 [%] [39] Yes, I have visited friends who live in retirement centers.
92 [24] I am familiar with Evergreen Manor in Oshkosh and/or with the new retirement apartments at Peabody Manor.
109 [28] I am only familiar with subsidized developments such as Randall Court and Oneida Heights
162 [42] I am not familiar with this type of retirement living facility

* Multiple answers

22. What type of unit style would you prefer?
(Please check one.)

151 [%] [39] Living room, kitchen, 1 bedroom, and 1 bath
151 [39] Living room, kitchen, 2 bedrooms, and 1 bath
55 [14] Living room, kitchen, 2 bedrooms, and 1-1/2 baths
16 [4] Living room, kitchen, 2 bedrooms, and 2 private baths
15 [4] No response
388

23. How many persons would be living in your apartment?

120 [%] [31] Just myself
90 [23] Just myself, but I would want room for an occasional guest
105 [27] There would be two of us
59 [15] There would be two of us, but we would want room for an occasional guest
14 [4] No response
388

24. What type of KITCHEN FACILITIES WOULD YOU PREFER?

239 [%] [62] I'd like to have a FULL KITCHEN in my apartment even though I may eat some meals in a central dining room with friends.
130 [33] I'd like to have a KITCHENETTE (a small refrigerator and a small stove) in my apartment for preparing my breakfast and snacks even though I would take my main meal in the central dining room.
19 [5] No response
388

25. What type of MEAL PLAN would you prefer? (Keep in mind there would be a central dining room and the Monthly Service Charge would include the MEAL PLAN.)

304 ^{0%} [78] I'd prefer to have ONE MEAL PER DAY PROVIDED in the central dining room, included in my Monthly Service Charge, and the other two meals optional.

20 [5] I'd prefer to have TWO MEALS PER DAY PROVIDED in the central dining room, included in my Monthly Service Charge, and the other meal optional.

6 [2] I'd prefer to have ALL THREE MEALS PER DAY PROVIDED in the central dining room and included in my Monthly Service Charge.

⁵⁸
388 [15] No response

26. Which supportive services, facilities, and/or utilities would YOU want to have included in your Monthly Service Charge and which of these would YOU want to have available on a separate fee basis? (The more services you have included in your Monthly Service Charge, the higher the charge.)

	INCLUDED IN MONTHLY CHARGE	AVAILABLE FOR A FEE AS NEEDED	NOT INTERESTED	NO RESPONSE
	%	%	%	%
Weekly housecleaning services	38 [10]	144 [37]	133 [34]	73 [19] = 100%
Laundry service - linens	37 [10]	124 [32]	141 [36]	86 [22]
Laundry service - personal	21 [5]	106 [27]	163 [42]	98 [25]
Personal care assistance	3 [4]	90 [23]	180 [46]	115 [30]
Scheduled transportation for shopping and personal appointments	17 [4]	127 [33]	144 [37]	100 [26]
Garage parking	177 [5]	75 [19]	62 [16]	74 [19]
Electricity	206 [53]	64 [16]	N/A	118 [31]
Tray service in my room when I'm ill	42 [11]	191 [49]	73 [19]	82 [21]

26. Which of these would YOU want to have included in your Monthly Service Charge and which of these would YOU want to have available on a separate fee basis? (Continued)

	INCLUDED IN MONTHLY CHARGE	AVAILABLE FOR A FEE AS NEEDED	NOT INTERESTED	NO RESPONSE
	%	%	%	%
Cable TV outlets				
In kitchen:	8 [2]	25 [7]	137 [35]	218 [56] = 160%
In living room:	120 [31]	86 [22]	100 [26]	82 [21]
In bedroom:	21 [5]	31 [8]	110 [29]	226 [58]
Laundry room with washer and dryer	92 [24]	229 [59]	18 [5]	49 [13]

27. After thinking about retirement living as previously described, does this appeal to you as an alternative to your current living arrangement?

37 [10] Yes, this would suit my needs now
131 [34] Yes, it looks interesting and I would explore it seriously for the future
120 [31] Yes, if and when needed
54 [14] Don't know, it would depend on _____
20 [5] No, it's nice but not for me
9 [2] No, it's not for me
17 [4] No response

388

28. What do you like about this concept?

29. Is there anything you particularly dislike about this concept?

30. The proposed retirement center will be located adjacent to the Valley Fair Shopping Mall which is a central location in the Fox Cities area. IF you were ready to move from your present home, would you consider moving to this location?

%

244 [63] Yes, I like the location.

56 [14] No, I do not like the location; I would prefer a location in: _____ near _____
(Town) (Cross Streets)

34 [9] I am not familiar with this location.

16 [4] Other, please specify: _____

38 [10] No response

388

31. What do you like about this location for the proposed residential facility? (Please check as many as apply.)*

%

129 [33] I like the central location.

272 [70] I like the convenience of the shopping mall.

44 [11] It is located in the neighborhood where I currently live.

26 [5] Other, please specify: _____

* Multiple answers

32. What, if anything, do you dislike about this location? (Please check as many as apply.)*

%

9 [2] I do not want to be near a shopping mall.

66 [17] It is too far from downtown Appleton.

86 [22] It is too far from the neighborhood where I currently live.

37 [10] Other, please specify: _____

* Multiple answers

33. Do you own/drive a car?

%

306 [79] I own and drive a car

10 [3] I own a car, but I do not drive anymore

5 [1] I do not own a car, but I do drive

53 [14] I do not own a car and I do not drive

14 [4] No response

34. If you own a car, but a shuttle bus service were available from the front door of the retirement center to major service centers in Appleton, would you:

%

256 [64] Drive your own car much less frequently

22 [6] Store your car in a garage for the winter months

13 [3] Sell your car

27 [7] Other, please specify: _____

76 [20] No response

388

35. If you own a car and were to move to the proposed retirement center, which of the following would you prefer?

107 [28] A heated and secure underground garage
(for a monthly fee)
160 [41] A detached garage which can be locked
(for a lesser monthly fee)
25 [6] An unsheltered surface parking lot (no monthly fee)
10 [3] Other, please specify: _____
86 [22] No response

388

36. Ideally, how close to your home would you want each of these facilities? Please check the distance that is best for you.

	WITHIN WALKING DISTANCE (2 blocks) %	WITHIN 1 MILE FROM HOME %	WITHIN 2 MILES FROM HOME %	DOES NOT MATTER %	No RESPONSE %
Bus Stop	286 [74]	8 [2]	3 [1]	47 [12]	44 [11] = 100%
Grocery store	247 [64]	58 [15]	7 [2]	39 [10]	37 [10]
Drug store	218 [56]	59 [15]	7 [2]	55 [14]	49 [13]
Medical offices	76 [20]	76 [20]	36 [9]	129 [33]	71 [18]
Dental offices	59 [15]	78 [20]	31 [8]	137 [35]	83 [22]
Nursing home	32 [8]	28 [7]	26 [7]	172 [44]	130 [36]
Shopping center	75 [45]	58 [15]	23 [6]	76 [20]	56 [14]
Recreational facilities	75 [20]	34 [9]	12 [3]	164 [42]	103 [26]
Library	42 [11]	54 [14]	31 [8]	167 [43]	94 [24]
Churches	94 [24]	82 [21]	46 [12]	113 [29]	53 [14]
Hospital	43 [11]	66 [17]	55 [14]	139 [36]	85 [22]
Bank or Savings and Loan office	75 [19]	80 [21]	32 [8]	129 [33]	72 [19]
Other: _____ (Please specify)	3 [1]	2 [1]	1 [1]	12 [3]	370 [95]

37. People often have a number of income sources. Which of the following are your main sources of income now? (Please check as many as are appropriate.)*

	%		%	
22	[6]	Salary/wages	2	[1]
357	[92]	Social security	287	[74]
220	[57]	Pension/Annuity		
1	[1]	Assistance from family members	27	[7]
12	[3]	Other, please specify: _____		

*Multiple answers

38. IF YOU OWN A HOME, what price do you think it would sell for today? Would it sell for...

	%	
61	[16]	Less than \$40,000
93	[24]	\$40,000 to \$50,000
60	[15]	\$50,000 to \$60,000
28	[7]	\$60,000 to \$70,000
21	[5]	\$70,000 to \$80,000
12	[3]	\$80,000 to \$90,000
15	[4]	\$90,000 or more
98	[25]	No response

	Number	Percent
1 = APPRAISAL	32	13.9 %
2 = TAX ASSESSMENT	71	30.7 %
3 = INSURANCE VALUE	9	3.9 %
4 = FAIR MARKET VALU	76	32.9 %
5 = OTHER	43	18.6 %

388 How did you arrive at this figure? Total

Missing cases = 157
Response percent = 59.5 %

39. Is there still a mortgage on your home?

	%		%
15	[4]	Yes	281
92	[24]	No response	[72]

Total = 388

For statistical purposes only, we need to know your TOTAL annual income for 1982. Note: There is no way of our knowing your identity.

40. What was your household's TOTAL ANNUAL gross income for 1982?

	%	
112	[29]	Less than \$12,500
90	[23]	\$12,500 to \$15,000
60	[15]	\$15,000 to \$20,000
35	[9]	\$20,000 to \$25,000
21	[5]	\$25,000 to \$30,000
16	[4]	\$30,000 to \$35,000
23	[6]	\$40,000 or more
31	[8]	No response
388		

41. What percentage of your gross income would you consider to be a reasonable Monthly Service Charge for the rental of your retirement apartment which would also include a daily meal, monthly cleaning, all utilities (except phone), transportation, 24-hour emergency response, and other services previously described?

	%		%
108	[28]	less than 30 percent	47 [12]
119	[31]	30 to 40 percent	12 [3]
102	[26]	No response	

Total = 388

42. Are you able to pay your current ordinary living expenses each month WITHOUT going into savings?

	%	
271	[70]	Yes
12	[3]	No
17	[4]	Occasionally need to go into savings for ordinary expenses
61	[16]	Occasionally need to go into savings for major purchases, taxes, or emergencies
27	[7]	No response

388

43. A larger apartment is more expensive than a smaller unit. Which is more important to you?

	%	
105	[27]	Having as much space as possible.
236	[61]	Keeping costs as low as possible.
47	[12]	No response

388

44. The payment plan being considered includes a one-time Entrance Fee which would be REFUNDABLE when you leave and a Monthly Service Charge.

The Entrance Fee is applied to financing the construction costs which, in turn, reduces the amount of the mortgage required and the monthly interest and principal payments. A higher Entrance Fee can permit a lower Monthly Service Charge. In most cases, the resident will obtain money for the Entrance Fee payment from the sale of a home or from savings.

How much would you be willing and able to pay as an Entrance Fee to live in the proposed retirement center?

	%	
161	[41]	Under \$15,000
58	[15]	\$15,000 - \$20,000
38	[10]	\$20,000 - \$25,000
13	[3]	\$25,000 - \$30,000
18	[5]	Over \$30,000
100	[26]	No response

388

45. As currently envisioned, the Monthly Service Charge would include the rental of an apartment of your choice with all utilities provided, except telephone; a daily meal served in the main dining room; monthly housekeeping; a health office; a 24-hour emergency response and building security; cable TV hook-ups; and scheduled opportunities for transportation, social and leisure time activities.

If your Monthly Service Charge included all of the items listed above, what would you be willing and able to pay each month:

196	^{9%} [51]	Under \$600
59	[15]	\$600 - \$650
22	[6]	\$650 - \$700
14	[4]	\$700 - \$750
14	[4]	\$750 - \$800
12	[3]	Over \$800
71	[8]	No response
<u>388</u>		

46.

Sound fiscal management requires that the payment plan include both a refundable Entrance Fee and a Monthly Service Charge. Some people prefer to pay a higher Entrance Fee and a lower Monthly Service Charge while others prefer a lower Entrance Fee and a higher Monthly Service Charge. A typical one bedroom apartment in a retirement center might have the following alternative combinations. Please indicate which combination would be most suitable for you:

48	^{9%} [12]	A refundable Entrance Fee between \$10,000 and \$20,000 could result in a Monthly Service Charge between \$800 and \$725.
66	[17]	A refundable Entrance Fee between \$20,000 and \$30,000 could result in a Monthly Service Charge between \$725 and \$650.
30	[8]	A refundable Entrance Fee between \$30,000 and \$40,000 could result in a Monthly Service Charge between \$650 and \$575.

165 [43] Could not afford any of these.

79 [20] No response

388

47. If this retirement living concept appeals to you as an alternative to your present living arrangement, when would you seriously consider a move?

- 9%
- 50 [13] I would seriously explore the possibility of moving to the proposed retirement facility as soon as it is ready.
- 13 [3] I would seriously explore the possibility of moving to the proposed retirement facility as soon as it is ready if it were sponsored by a church or a non-profit organization.
- 43 [11] I might consider living in such a facility in a year or so.
- 172 [44] I would be interested ONLY if something caused me to need to move.
- 37 [10] I might be interested, but I would want to wait to see how others liked it first.
- 19 [5] I would never be interested in such a facility.
- 54 [14] No response

388

48. If you currently live in your own home, is the sale of your house critical to your decision and/or readiness to move into the planned retirement center?

- 9%
- 160 [41] Yes, the house would have to be sold before a final decision could be made to move
- 100 [26] No, the decision to move is not necessarily dependent upon the sale of my house
- 8 [2] The house would not be sold even if I decided to move to the planned retirement center
- 4 [1] Other, please specify: _____
- 116 [30] No response

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Additional Comments: _____

IF YOU WOULD LIKE TO LEARN MORE ABOUT THE PROJECT AS IT EVOLVES, PLEASE CHECK THE APPROPRIATE BOX ON THE ENCLOSED RETURN POSTCARD AND MAIL IT TO US.

Remember: DO NOT SIGN the questionnaire. Please return the questionnaire in the postage paid envelope as soon as possible.

THANK YOU FOR YOUR HELP!

APPENDIX E
SUMMARY OF RESPONSES
FROM
PRIMARY FOCUS GROUP
75 YEARS AND OLDER
N = 32

SOURCE AND NUMBER OF RETURNED SURVEYS

SOURCE	NUMBER	PERCENTAGE OF TOTAL RETURNED
Compiler	6	19%
AARP	16	50%
City Directory	3	9%
Section 8 List	1	3%
Newspaper Ad	5	16%
Postcard	1	3%
	32	100%

FOX CITIES SURVEY

I am responding for:

25 [%] [78] Myself; 0 [%] [0] My parent(s); 0 [%] [0] My friend(s)
7 [%] [22] No response

BACKGROUND AND HOUSEHOLD INFORMATION

1. Which of the following best describes your present living arrangement? I live:

[%]
14 [44] Alone
18 [56] With my spouse only
0 [0] With one of my children in my home
0 [0] In the home of one of my children
0 [0] With my children and my spouse
0 [0] With a friend or friends
0 [0] With relatives other than my spouse and children
0 [0] Other, please specify: _____
32

2. I live in:

[%]		[%]	
27 [84]	Appleton	0 [0]	Little Chute
1 [3]	Neenah	0 [0]	Kimberly
2 [6]	Menasha	0 [0]	Combined Locks
0 [0]	Kaukauna	2 [6]	Other, please specify: _____
		32	

3. What is your present marital status? Are you:

[%] 2 [6] Single 18 [%] [56] Married 12 [%] [38] A widow or widower
Total = 32

4. Which of the following best describes your present housing type?

[%]
3 [9] I own a single family home or a duplex:
27 [84] in which I presently reside
0 [0] but do not presently reside there
0 [0] I own a condominium:
2 [6] in which I presently reside
0 [0] but do not presently reside there
0 [0] I rent an apartment
0 [0] I have a room in someone else's house
0 [0] Other, please specify: _____
32

5. How long have you lived in your present home?

0 [0]	Less than one year	1 [3]	Five to ten years
0 [0]	One to two years	5 [16]	Ten to twenty years
1 [3]	Two to five years	25 [78]	More than twenty years
		32	

6. What is your age (your spouse's age)?

Your Age	32 [100]	over 75	Your Spouse's Age	66-75	9 [28]
				75+over	7 [22]
				Widowed	12 [38]
				No response	4 [12]
					32

7. Are you:

22 [69]	Male	10 [31]	Female
---------	------	---------	--------

8. What is/was the main employment (work) for you or the head of your household over the past years?

9. Below is a list of activities that some of us may have difficulty with as we grow older. Do you have: NO DIFFICULTY, SOME DIFFICULTY, or find you CANNOT DO these activities?

	NO DIFFICULTY %	SOME DIFFICULTY %	CANNOT DO IT %	NO RESPONSE %
Cooking	25 [79]	3 [9]	1 [3]	3 [9] = 100%
Shopping	27 [84]	0 [0]	1 [3]	4 [13]
Housekeeping	22 [69]	5 [15]	1 [3]	4 [13]
Personal care (bathing)	27 [84]	1 [3]	0 [0]	4 [13]
Hearing on the telephone	28 [88]	1 [3]	0 [0]	3 [9]
Reading the newspaper	28 [88]	0 [0]	0 [0]	4 [13]
Taking medication	28 [88]	0 [0]	0 [0]	4 [13]
Going up and down stairs	21 [66]	8 [25]	0 [0]	3 [9]
Taking care of personal finances	26 [81]	2 [6]	0 [0]	4 [13]
Driving a car	25 [79]	0 [0]	2 [6]	5 [16]
Walking more than two blocks	23 [72]	8 [25]	0 [0]	1 [3]

10. If you need any help in moving about or walking at this time, do you:

2 [6]	Use a cane	0 [0]	Use a wheelchair
0 [0]	Use a walker	28 [88]	Need no assistance at all
2 [6]	No response	32	

11. In general, which of the following best describes your overall state of health?

3	[7]	Excellent (plenty of energy)
14	[44]	Average (good health - no problems and enough energy)
15	[47]	Fair (some health problems but able to live completely independently)
0	[0]	Need some care or assistance
0	[0]	Need full-time care and assistance
<u>32</u>		

12. Do you currently use any of the following Community Support Services?

0	[0]	Home Aid
0	[0]	St. Elizabeth's Hospital Home Care Program
0	[0]	Home Meal Delivery Service
2	[6]	Nutrition Site Meals
0	[0]	Dial-A-Bus, American Red Cross
0	[0]	Visiting Nurse Association
0	[0]	Telephone Reassurance
0	[0]	Upjohn Health Care Services
22	[69]	No, do not use support services
0	[0]	Other, please specify: _____
8	[25]	No response
<u>32</u>		

13. If you needed to be hospitalized, which hospital would you choose:

13	[41]	St. Elizabeth Hospital
3	[9]	Theda Clark Regional Medical Center
16	[50]	Appleton Memorial Hospital
0	[0]	Kaukauna Community Hospital
0	[0]	Other, please specify: _____
<u>32</u>		

14. If you were to need help with activities of daily living, upon whom would you depend? (Please check as many as apply.)*

14	[44]	Family
6	[19]	Friends
2	[6]	Church group
13	[41]	Would prefer to hire people to help me in my home
6	[19]	Would prefer to use community support services in my home
19	[59]	Would prefer to live in a retirement facility where I could be closer to support services
0	[0]	Other, please specify: _____
<u>60</u>		

* Multiple answers possible. Percentage based on number of responses for an answer divided by total number in sample.

15. There are several nursing homes in the area. Based upon your opinion, please rank the following:

	MOST DESIRABLE	MODERA- TELY DESIRABLE	LEAST DESIRABLE	I AM NOT ACQUAINTED WITH THIS NURSING HOME	NO RESPONSE
	-----	-----	-----	-----	-----
Americana Health Care Center - Appleton	3 [9]	6 [19]	4 [13]	13 [40]	6 [19] = 100%
Appleton Extended Care Center - Appleton	6 [19]	7 [22]	1 [3]	11 [34]	7 [22]
Family Heritage Nursing Home - Neenah	1 [3]	2 [6]	1 [3]	20 [63]	8 [25]
Outagamie County Health Center - Appleton	1 [3]	0 [0]	4 [13]	18 [56]	9 [28]
Peabody Manor - Appleton	17 [53]	4 [13]	0 [0]	8 [25]	3 [9]
Colony Oaks Care Center - Appleton	0 []	1 [3]	2 [6]	20 [63]	9 [28]
Parkside Care - Little Chute	2 [6]	2 [6]	2 [6]	18 [56]	8 [25]
Oakridge Gardens - Menasha	2 [6]	1 [3]	4 [13]	17 [53]	8 [25]

16. If you could choose a type of housing best suited for your current needs, would you:

- 9 [28] Live in my own single family house.
- 2 [6] Live in my own condominium.
- 0 [] Live in an a government subsidized apartment, such as Randall Court, Conway Building, Oneida Heights, or Woodridge Gardens.
- 1 [3] Live in a private apartment building that rents to all age levels.
- 7 [22] Live in a private apartment building that only rents to older adults.
- 3 [10] Live in a private retirement center designed especially for older adults which provides supportive services as needed but has no nursing home on the premises.
- 9 [28] Live in a private retirement center designed especially for older adults which provides supportive services as needed and has a nursing home on the premises.
- 0 [0] Live with my children.
- 0 [0] Live with a brother or sister.
- 0 [0] Other, please specify: _____
- 1 3 No response

17. There are many different reasons for moving into a retirement center. How would you rank the following reasons?

	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT	No RESPONSE
a. For companionship with others of similar interests	9 [28]	14 [44]	1 [3]	8 [25] = 100%
b. Freedom from the responsibility and maintenance of a single family home	26 [81]	4 [13]	1 [3]	1 [3]

17. How would you rank the following reasons? (Continued)

	VERY IMPORTANT	MODERATELY IMPORTANT	NOT IMPORTANT	NO RESPONSE
c. Availability of a nutritious meal in a full service dining room	% 9 [28]	% 14 [44]	% 5 [16]	% 4 [12] = 100%
d. Availability of a nursing home on the premises, if I, my spouse, or my friends need care	13 [46]	7 [22]	6 [19]	6 [19]
e. Security of knowing someone will check on me daily	17 [53]	4 [12]	14 [43]	7 [22]
f. Security of knowing 24-hour emergency response is available	19 [59]	5 [16]	3 [9]	5 [16]
g. Knowing supportive services such as house cleaning and personal care are available if needed	17 [53]	12 [38]	0 [0]	3 [9]
h. Need for special diet	8 [25]	3 [9]	12 [38]	9 [28]
j. Availability of staff to help plan for leisure time, finances, and future needs as required	4 [12]	7 [22]	14 [44]	7 [22]
k. Other, please specify: -----	1 [3]	0 [0]	0 [0]	31 [97]

18. Have you given serious thought to moving from your present home?

%	No	%	Yes. For what reason?	Number	Percent
9 [28]		22 [69]			
1 [3]	No response	32			
			1 = HEALTH PROBLEM	2	9.1 %
			2 = DEATH OF SPOUSE	0	0.0 %
			3 = FINANCIAL LIMITN	0	0.0 %
			4 = FRICTION W RELAT	0	0.0 %
			5 = LONLINESS	1	4.5 %
			6 = HOME UPKEEP	15	68.2 %
			7 = CHILDREN MOVING	0	0.0 %
			8 = OTHER	4	18.2 %
			Total	22	100.0 %
			Missing cases = 10		
			Response percent = 68.8 %		

19. If so, how soon would you want to move?

	%	
1	[3]	In less than one year
24	[75]	In one to three years
5	[16]	In three years or more
2	6	No response
32		

20. Which of the following event(s) might cause you to decide to move? (Check as many as apply.) *

	%		%	
26	[63]	Health problem	0	[0] Children moving away
15	[47]	Death of a spouse	4	[13] Opportunity to sell home/farm
3	[9]	Financial limitations		
0	[0]	Friction with my relatives	1	[3] Selection of my name for vacant apartment at government subsidized elderly housing project
5	[16]	Growing awareness of loneliness		
26	[81]	Burden of home upkeep	0	[0] Other, please specify:

* Multiple responses possible

THE RETIREMENT CENTER

The Madsen-Hoffman partnership is considering the development of a private retirement living center in Appleton which would not be subsidized by the government. The proposed site is a large wooded area immediately south of the Valley Fair Shopping Mall.

The retirement center would include one and two bedroom independent living apartments for individuals and couples. The center would be secured, and a protected walk-way would connect the retirement center with the mall for the use of the residents. The main entrance to the center would be from Valley Road.

Included in the Monthly Service Charge would be the rental of your apartment, all utilities, (except phone), a daily meal served in a full-service dining room, monthly cleaning of each apartment, the security of a 24-hour emergency response system, building security and front-desk reception services, cable television hook-ups, access to transportation services, a health office, and planned activities and programs. The facility would also include such services as a beauty shop, lounge and lobby areas, coin-operated washers and dryers, a convenience mart for limited shopping, and a coffee shop.

To answer the next few questions, please PRETEND that you have the need or interest in the residential center described above. Your responses are IMPORTANT since they will be used in finalizing our plans for the proposed facility.

21. Are you familiar with this retirement living concept?
(Please check as many as apply.) *

%
20 [63] Yes, I have visited friends who live in retirement centers.
11 [34] I am familiar with Evergreen Manor in Oshkosh and/or with the new retirement apartments at Peabody Manor.
9 [28] I am only familiar with subsidized developments such as Randall Court and Oneida Heights
9 [28] I am not familiar with this type of retirement living facility

* Multiple responses possible

22. What type of unit style would you prefer?
(Please check one.)

%
10 [31] Living room, kitchen, 1 bedroom, and 1 bath
12 [38] Living room, kitchen, 2 bedrooms, and 1 bath
10 [31] Living room, kitchen, 2 bedrooms, and 1-1/2 baths
0 [0] Living room, kitchen, 2 bedrooms, and 2 private baths
32

23. How many persons would be living in your apartment?

%
8 [25] Just myself
6 [19] Just myself, but I would want room for an occasional guest
12 [37] There would be two of us
6 [19] There would be two of us, but we would want room for an occasional guest
32

24. What type of KITCHEN FACILITIES WOULD YOU PREFER?

%
20 [63] I'd like to have a FULL KITCHEN in my apartment even though I may eat some meals in a central dining room with friends.
12 [37] I'd like to have a KITCHENETTE (a small refrigerator and a small stove) in my apartment for preparing my breakfast and snacks even though I would take my main meal in the central dining room.

25. What type of MEAL PLAN would you prefer? (Keep in mind there would be a central dining room and the Monthly Service Charge would include the MEAL PLAN.)

27 [35] I'd prefer to have ONE MEAL PER DAY PROVIDED in the central dining room, included in my Monthly Service Charge, and the other two meals optional.

2 [6] I'd prefer to have TWO MEALS PER DAY PROVIDED in the central dining room, included in my Monthly Service Charge, and the other meal optional.

1 [3] I'd prefer to have ALL THREE MEALS PER DAY PROVIDED in the central dining room and included in my Monthly Service Charge.

2 [6] No response

32

26. Which supportive services, facilities, and/or utilities would YOU want to have included in your Monthly Service Charge and which of these would YOU want to have available on a separate fee basis? (The more services you have included in your Monthly Service Charge, the higher the charge.)

	INCLUDED IN MONTHLY CHARGE	AVAILABLE FOR A FEE AS NEEDED	NOT INTERESTED	NO RESPONSE
	%	%	%	%
Weekly housecleaning services	15 [47]	9 [28]	6 [19]	2 [6] = 100%
Laundry service - linens	6 [19]	10 [31]	12 [38]	4 [12]
Laundry service - personal	1 [3]	10 [31]	14 [44]	7 [22]
Personal care assistance	6 [0]	8 [25]	17 [53]	7 [22]
Scheduled transportation for shopping and personal appointments	1 [3]	12 [38]	13 [40]	6 [19]
Garage parking	20 [63]	5 [16]	3 [9]	4 [13]
Electricity	22 [68]	4 [13]	N/A	6 [19]
Tray service in my room when I'm ill	6 [19]	16 [50]	6 [19]	4 [12]

26. Which of these would YOU want to have included in your Monthly Service Charge and which of these would YOU want to have available on a separate fee basis? (Continued)

	INCLUDED IN MONTHLY --CHARGE--	AVAILABLE FOR A FEE AS_NEEDED	NOT INTERESTED	NO RESPONSE
Cable TV outlets	%	%	%	%
In kitchen:	2 [6]	4 [12]	9 [28]	17 [54] = 100%
In living room:	14 [44]	8 [25]	7 [22]	3 [9]
In bedroom:	1 [3]	4 [12]	8 [25]	19 [60]
Laundry room with washer and dryer	8 [25]	19 [60]	2 [6]	3 [9]

27. After thinking about retirement living as previously described, does this appeal to you as an alternative to your current living arrangement?

7 [22] Yes, this would suit my needs now
 17 [53] Yes, it looks interesting and I would explore it seriously for the future
 8 [25] Yes, if and when needed
 0 [0] Don't know, it would depend on _____
 0 [0] No, it's nice but not for me
 0 [0] No, it's not for me
32

28. What do you like about this concept?

29. Is there anything you particularly dislike about this concept?

- 184

35. If you own a car and were to move to the proposed retirement center, which of the following would you prefer?

%
 27 [85] A heated and secure underground garage
 (for a monthly fee)
 1 [3] A detached garage which can be locked
 (for a lesser monthly fee)
 1 [3] An unsheltered surface parking lot (no monthly fee)
 3 [9] Other, please specify: _____

32

36. Ideally, how close to your home would you want each of these facilities? Please check the distance that is best for you.

	WITHIN WALKING DISTANCE (2 blocks)	WITHIN 1 MILE FROM HOME	WITHIN 2 MILES FROM HOME	DOES NOT MATTER	NO RESPONSE
	%	%	%	%	%
Bus Stop	27 [85]	1 [3]	1 [3]	3 [9]	0 [0] = 100%
Grocery store	21 [66]	5 [16]	1 [3]	4 [13]	1 [3]
Drug store	18 [56]	5 [16]	1 [3]	6 [19]	2 [6]
Medical offices	7 [22]	6 [19]	6 [19]	10 [31]	3 [9]
Dental offices	5 [16]	6 [19]	6 [19]	10 [31]	5 [16]
Nursing home	3 [9]	3 [9]	3 [9]	14 [44]	9 [28]
Shopping center	15 [47]	6 [19]	5 [16]	5 [16]	1 [3]
Recreational facilities	7 [22]	1 [3]	2 [6]	13 [41]	9 [28]
Library	3 [9]	5 [16]	2 [6]	14 [44]	8 [25]
Churches	5 [16]	9 [28]	7 [22]	7 [22]	4 [13]
Hospital	5 [16]	5 [16]	6 [18]	11 [34]	5 [16]
Bank or Savings and Loan office	6 [19]	11 [34]	1 [3]	10 [31]	4 [13]
Other: _____ (Please specify)	1 [3]	0 [0]	0 [0]	0 [0]	31 [97]

37. People often have a number of income sources. Which of the following are your main sources of income now? (Please check as many as are appropriate.)*

%			
2 [6]	Salary/wages	0 [0]	Public assistance
30 [74]	Social security	29 [91]	Interest/dividends on investments
18 [52]	Pension/Annuity	2 [6]	Income rental property
0 [0]	Assistance from family members		
0 [0]	Other, please specify: _____		

* Multiple Responses Possible

38. IF YOU OWN A HOME, what price do you think it would sell for today? Would it sell for...

%	
2 [6]	Less than \$40,000
5 [16]	\$40,000 to \$50,000
11 [36]	\$50,000 to \$60,000
6 [19]	\$60,000 to \$70,000
3 [10]	\$70,000 to \$80,000
0 [0]	\$80,000 to \$90,000
4 [13]	\$90,000 or more

1 [1] No Response

32 How did you arrive at this figure?

1 = APPRAISAL	4	12.5 %
2 = TAX ASSESSMENT	10	31.3 %
3 = INSURANCE VALUE	0	0.0 %
4 = FAIR MARKET VALUE	7	21.9 %
5 = OTHER	3	9.4 %

Total

Number	Percent
4	12.5 %
10	31.3 %
0	0.0 %
7	21.9 %
3	9.4 %
24	100.0 %

Missing cases = 8
Response percent = 75.0 %

39. Is there still a mortgage on your home?

%		%
0 [0]	Yes	32 [100] No

For statistical purposes only, we need to know your TOTAL annual income for 1982. Note: There is no way of our knowing your identity.

40. What was your household's TOTAL ANNUAL gross income for 1982?

%	
0 [0]	Less than \$12,500
8 [25]	\$12,500 to \$15,000
13 [41]	\$15,000 to \$20,000
2 [6]	\$20,000 to \$25,000
5 [16]	\$25,000 to \$30,000
1 [3]	\$30,000 to \$35,000
3 [9]	\$40,000 or more

32

41. What percentage of your gross income would you consider to be a reasonable Monthly Service Charge for the rental of your retirement apartment which would also include a daily meal, monthly cleaning, all utilities (except phone), transportation, 24-hour emergency response, and other services previously described?

%		%	
6 [19]	less than 30 percent	4 [12]	40 to 50 percent
16 [50]	30 to 40 percent	0 [0]	50 percent or more
6 [19]	No response		
		32	

42. Are you able to pay your current ordinary living expenses each month WITHOUT going into savings?

%	
28 [88]	Yes
0 [0]	No
0 [0]	Occasionally need to go into savings for ordinary expenses
4 [12]	Occasionally need to go into savings for major purchases, taxes, or emergencies
32	

43. A larger apartment is more expensive than a smaller unit. Which is more important to you?

%	
14 [44]	Having as much space as possible.
15 [47]	Keeping costs as low as possible.
3 [9]	No response
32	

44. The payment plan being considered includes a one-time Entrance Fee which would be REFUNDABLE when you leave and a Monthly Service Charge.

The Entrance Fee is applied to financing the construction costs which, in turn, reduces the amount of the mortgage required and the monthly interest and principal payments. A higher Entrance Fee can permit a lower Monthly Service Charge. In most cases, the resident will obtain money for the Entrance Fee payment from the sale of a home or from savings.

How much would you be willing and able to pay as an Entrance Fee to live in the proposed retirement center?

%	
4 [13]	Under \$15,000
8 [25]	\$15,000 - \$20,000
11 [34]	\$20,000 - \$25,000
2 [6]	\$25,000 - \$30,000
5 [16]	Over \$30,000
2 [6]	No response
32	

45. As currently envisioned, the Monthly Service Charge would include the rental of an apartment of your choice with all utilities provided, except telephone; a daily meal served in the main dining room; monthly housekeeping; a health office; a 24-hour emergency response and building security; cable TV hook-ups; and scheduled opportunities for transportation, social and leisure time activities.

If your Monthly Service Charge included all of the items listed above, what would you be willing and able to pay each month:

- 6 ² [9] Under \$600
- 11 [34] \$600 - \$650
- 5 [16] \$650 - \$700
- 2 [6] \$700 - \$750
- 4 [13] \$750 - \$800
- 2 [6] Over \$800
- 2 ² [6] No response
46. ³² Sound fiscal management requires that the payment plan include both a refundable Entrance Fee and a Monthly Service Charge. Some people prefer to pay a higher Entrance Fee and a lower Monthly Service Charge while others prefer a lower Entrance Fee and a higher Monthly Service Charge. A typical one bedroom apartment in a retirement center might have the following alternative combinations. Please indicate which combination would be most suitable for you:
- 6 ² [9] A refundable Entrance Fee between \$10,000 and \$20,000 could result in a Monthly Service Charge between \$800 and \$725.
- 16 [50] A refundable Entrance Fee between \$20,000 and \$30,000 could result in a Monthly Service Charge between \$725 and \$650.
- 3 [9] A refundable Entrance Fee between \$30,000 and \$40,000 could result in a Monthly Service Charge between \$650 and \$575.
- 5 [16] Could not afford any of these.
- 2 ² [6] No response
- 32

47. If this retirement living concept appeals to you as an alternative to your present living arrangement, when would you seriously consider a move?

- %
- 16 [50] I would seriously explore the possibility of moving to the proposed retirement facility as soon as it is ready.
- 2 [6] I would seriously explore the possibility of moving to the proposed retirement facility as soon as it is ready if it were sponsored by a church or a non-profit organization.
- 14 [44] I might consider living in such a facility in a year or so.
- 0 [0] I would be interested ONLY if something caused me to need to move.
- 0 [0] I might be interested, but I would want to wait to see how others liked it first.
- 0 [0] I would never be interested in such a facility.

32

48. If you currently live in your own home, is the sale of your house critical to your decision and/or readiness to move into the planned retirement center?

- %
- 15 [47] Yes, the house would have to be sold before a final decision could be made to move
- 17 [53] No, the decision to move is not necessarily dependent upon the sale of my house
- 0 [0] The house would not be sold even if I decided to move to the planned retirement center
- 0 [0] Other, please specify: _____

32

Additional Comments: _____

IF YOU WOULD LIKE TO LEARN MORE ABOUT THE PROJECT AS IT EVOLVES, PLEASE CHECK THE APPROPRIATE BOX ON THE ENCLOSED RETURN POSTCARD AND MAIL IT TO US.

Remember: DO NOT SIGN the questionnaire. Please return the questionnaire in the postage paid envelope as soon as possible.

THANK YOU FOR YOUR HELP!

APPENDIX F
RESPONSES TO OPEN-ENDED QUESTIONS
OTHER RESPONSES,
AND ADDITIONAL COMMENTS

SUMMARY OF OPEN-ENDED QUESTIONS
ALL RESPONDENTS 55 YEARS AND OLDER

N = 454

QUESTION #28 - WHAT DO YOU LIKE ABOUT THIS CONCEPT?
(RETIREMENT LIVING)

	<u>NO. OF RESPONSES</u>
1. Availability of services/help when needed	65
2. Freedom from responsibility/ burden of home care	56
3. Needed, like it, good idea, want it when I need, alternative to subsidized housing	55
4. Security	53
5. Location near shopping, and/or where I live now	40
6. Companionship, other adults, community living	26
7. Independence and privacy	25
8. Transportation available/near bus stop	5
9. Avoids/postpones high cost of nursing home care	4
10. Nursing home on premises	1

SUMMARY OF OPEN ENDED QUESTIONS
ALL RESPONDENTS 55 YEARS AND OLDER

N = 454

QUESTION #29 - IS THERE ANYTHING YOU PARTICULARLY DISLIKE ABOUT
THIS CONCEPT?

NO. OF RESPONSES

1.	Too expensive	52
2.	Too far from downtown and churches (big concern was distance from church)	19
3.	Don't want meals in monthly service charge	15
4.	Lacks enough privacy	7
5.	Too restrictive - too many planned activities	6
6.	Near too many old people/strangers	6
7.	Prefer to live at home, or at Bethany in Waupaca [1]	5
8.	Prefer private laundry facilities	4
9.	Too many services in monthly service charge	3
10.	Lacks security to mall	2
11.	No pets allowed	2
12.	Need hobby room	2
13.	Concerned about lease requirements	2
14.	No garden area	1
15.	Lack of storage space	1
16.	Too small	1

QUESTION #29 - IS THERE ANYTHING YOU PARTICULARLY DISLIKE ABOUT
THIS CONCEPT? (Continued)

	<u>NO. OF RESPONSES</u>
17. Too wooded	1
18. Too elaborate	1
19. Concern about fireproofing	1

OPEN-ENDED QUESTIONS

N = 454

QUESTION #30-B - NO, I DO NOT LIKE THE LOCATION; I WOULD PREFER
A LOCATION:

NO. OF RESPONSES

Appleton - North side and downtown, in particular	59
Neenah	3
Menasha	2
Little Chute	1
Near Manitowoc	1
Kimberly	<u>1</u>
TOTAL	67

OTHER RESPONSES
65 YEARS AND OLDER

N = 388

QUESTION #2 - I LIVE IN: (Other)

NO. OF RESPONSES

Town of Grand Chute	4
Grand Chute	2
Oshkosh	2
Other Wisconsin Communities	5
Outside of Wisconsin	<u>7</u>
	20

OTHER RESPONSES
65 YEARS AND OLDER

N = 388

QUESTION #27 - AFTER THINKING ABOUT RETIREMENT LIVING AS
PREVIOUSLY DESCRIBED, DOES THIS APPEAL TO YOU AS
AN ALTERNATIVE TO YOUR CURRENT LIVING
ARRANGEMENT?

NO. OF RESPONSES

DON'T KNOW, IT WOULD DEPEND ON:

1. Costs, finances	25
2. My/our health	14
3. Future conditions/many things	7
4. No reason given	7
5. If no meals are included	1
TOTAL	54

ADDITIONAL COMMENTS

Can total care facilities be incorporated into plan?

Sounds great!

Think government units will be scarce.

Interest would be greater if independent way of life changes.

Probably too expensive.

What happens to entrance fee if partnership bankrupts?

Suits me fine!

Good idea for elderly.

Very nice.

Interesting and good without having to search for what you want.

Not ready to leave home.

Wonderful.

Would like provisions for two cars, small freezer, and microwave.

Concern for traffic noise - early a.m. or late night.

Any air conditioning?

Quality of meals questioned.

Believes landscaping and quality of building important.

Allowance if away for several months in winter.

Has a young wife (51) and he's 73 - she's not ready.

Good if 70 or older.

Should be able to cut costs of meals because there are so many meal sites - could deliver food and cut out central kitchen and dining room.

ADDITIONAL COMMENTS (Continued)

My income wouldn't last long with these costs.

Can live in own home and hire people for much less money.

Good move to make after losing mate and after years of family home.

Would choose a neighborhood for its beauty - trees important.

Cannot visualize.

Would like to buy in as a condominium.

Seems like nursing home.

Good if costs less than \$300/month.

Entrance fee would reduce income.

Appleton/Neenah/Menasha could use something like this.

Old people are always complaining - there are all old people in project.

Appear to be for higher income, not middle class.

Just what I want.

Cheaper to keep own home.

Would give independence as I grow older.

Do we receive interest on the money? (Entrance fee)

Bus service very desirable.

Need savings used for entrance fee for additional income.

Nice apartments available for 1/2 the price.

Would like a craft area.

Any arrangement for time (winter/summer) away?

ADDITIONAL COMMENTS (Continued)

Estimates sound high. Several facilities I have visited with hospital facilities in a separate building have a \$10,000 entrance fee and \$500/month service charge. Most are beautiful, well kept, and in a nice location. (M/H source)

Sounds interesting but not until knowledge of monthly charge.

We need this type of establishment - but it must be suited to middle income or single spouse after loss of mate. The low income people are cared for, the high income have no worries.

Our health would determine possibility of moving to a retirement apartment maybe one or two years - maybe longer.

Many were difficult to answer now as I am a recent widow and also have some unresolved financial obligations to my family.

Monthly fee does not specify if it is for a couple or single. Should a couple rent and then a spouse die, would there be any adjustment in the monthly fee?

