

Exhibit “I” - Senior Housing Survey



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SENIOR HOUSING SURVEY

FEBRUARY, 2015

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Executive Summary

In May 2014 during the Directions workshop a discussion regarding aging in place and the availability of affordable senior housing were discussed by the Village Council. It is estimated that 10% of the Village of Wellington's population consists of residents who are aged 62 or older. Nationally, Florida has a higher than average senior population which is expected to increase. In an effort to determine housing needs of the senior population within the Village, staff developed a senior housing survey that was mailed to a sample population of 1,400 residents within the Village age 55 and older. Over 21% of the residents surveyed responded providing information on their current and future housing needs. The following report outlines the results of the survey.

Research Background and Objectives

The Village of Wellington Community Services Department is developing a plan to address the needs of the senior community. Specifically, the Village of Wellington seeks to identify the current and future housing needs for the senior adult population. To assist with developing this plan, a survey was conducted to obtain the following information:

- Current living situation
- Length of residency
- Anticipated future needs
- Housing requirements and preferences
- Demographics

Research Methodology

- The Village developed and sent a total of 1,400 surveys via mail to the adult population in Wellington ages 50+.
- 289 surveys were completed; 21% response.
- Surveys were collected during December 2014.
- Wellington's Community Services Department was identified as the survey sponsor.
- Radius Global Market Research processed the data from the surveys. This report serves to present the key findings.

Key Findings

- Of the residents who responded to this survey, 87% live in single family homes. Homeowners in this group account for 94% and 93% live in the village year round. They typically cite location as the most appealing aspect of their home.¹
 - The vast majority do not feel that their current residence needs major repairs (89%), nor do they think there is a need for modifications to accommodate their aging.
- When looking to their future housing needs, cost is a top concern among these residents. While most do not anticipate moving in the next five years, downsizing and costs are cited as top reasons among those who would move. Additionally, cost is primarily cited as a possible reason for moving out of the Village of Wellington.
- When it comes to their total housing costs, the majority of these residents are comfortable with paying between \$1,000-\$2,000 on a monthly basis (including mortgage payment or rent, utilities, homeowner insurance, association fees).
- Most of these residents' preferences for their future housing mirror their current situation; most would prefer to buy instead of rent, and single family homes are cited most often as being preferred, followed by condominiums and senior apartment complexes.
- If there are plans to build more multi-unit housing that targets these residents, the following are considered key features to include:
 - Having a washer/dryer in unit
 - Full kitchen
 - Parking
 - Two-bedroom floor plan
- Among these respondents, the most highly desired service requested in a retirement community is home maintenance services. Other services, such as recreation programs, transportation, in-home health, housecleaning / laundry, and meals service are considered highly important among those age 80+, but less among those ages 50-64.

¹ This may be a function of how survey participants were selected

Demographics

Location

The majority of survey respondents reside in these neighborhoods:

- Sugar Pond
- VillageWalk
- GreenView Shores
- Buena Vida
- Paddock Park
- Palm Beach Polo Golf and Country Club
- Binks Forest Golf Club
- Lakefield
- Grand Isles
- Meadow Wood

Age

- 50 to 64 years old.....44%
- 65 to 79 years old.....45%
- 80 years old and up10%
- Refused1%
- **Mean Age..... 66 years old**

Employment

- Unemployed.....3%
- Retired56%
- Working part-time8%
- Working full-time32%
- Refused2%

Transportation (multiple responses accepted)

- Bus2%
- Walk27%
- Drive.....95%
- Bicycle16%
- Other5%
- Refused1%

Number of Family Members Living at Home

- Live alone15%
- 264%
- 312%
- 45%
- 53%
- 6 and more1%
- **Average.....2.2**

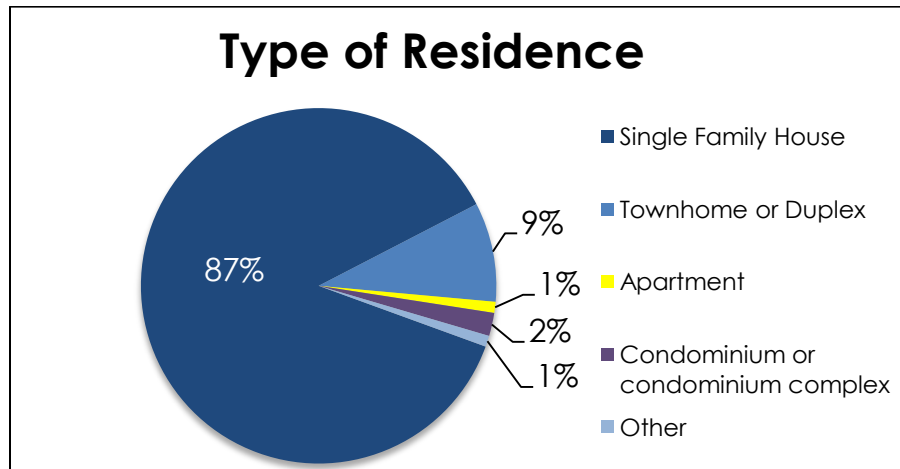
Annual Household Income

- Under \$20,000.....4%
- \$20,000 - \$29,9995%
- \$30,000 - \$39,9995%
- \$40,000 - \$49,9997%
- \$50,000 - \$59,9997%
- \$60,000 - \$69,9998%
- \$70,000 or more52%
- Refused13%
- **Mean income.....\$68,200**

Current Housing Situation

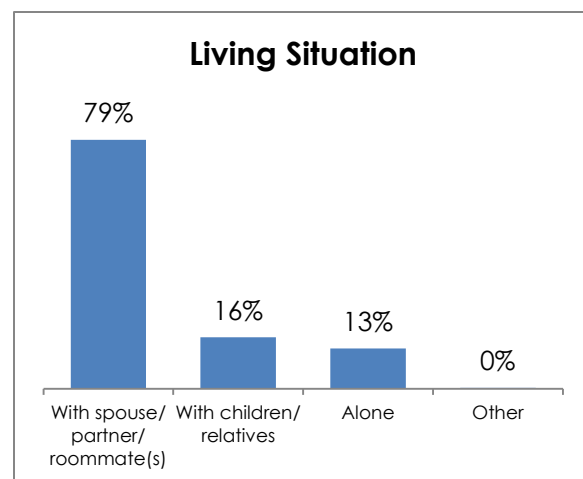
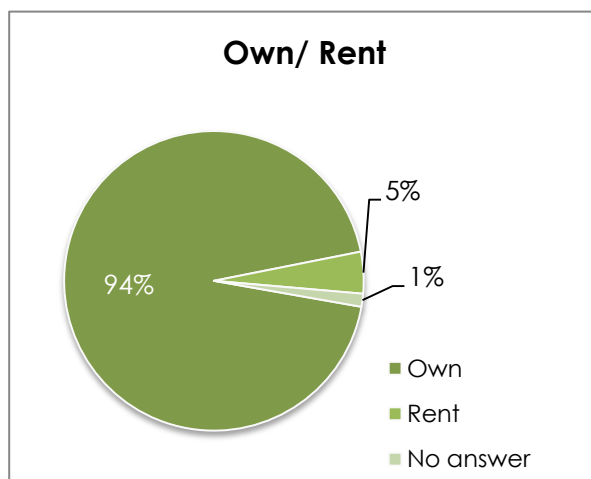
Type of Residence

- Single family homeowners account for 87% of respondents, with townhomes/duplexes at 9%. A very small minority of respondents live in condominiums at 2% or apartments 1%.
 - No survey respondents cited residing in an assisted living facility.



Current Living Situation

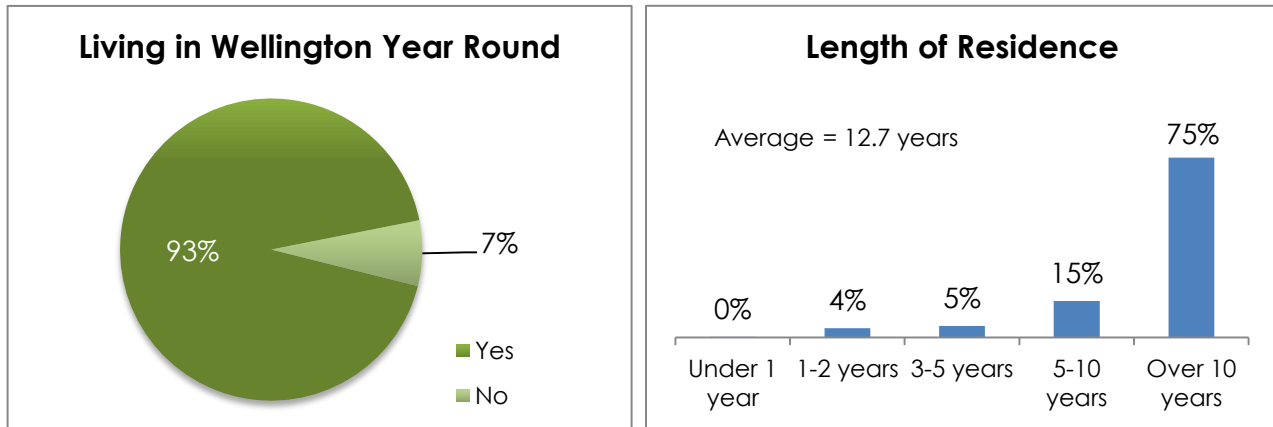
- The vast majority of these respondents currently own their residence at 94%.
- Of the residents surveyed 79% live with their spouse/partner/roommate(s) with only two members in the house; 16% live with relatives/children and 13% live alone.



Multiple responses accepted

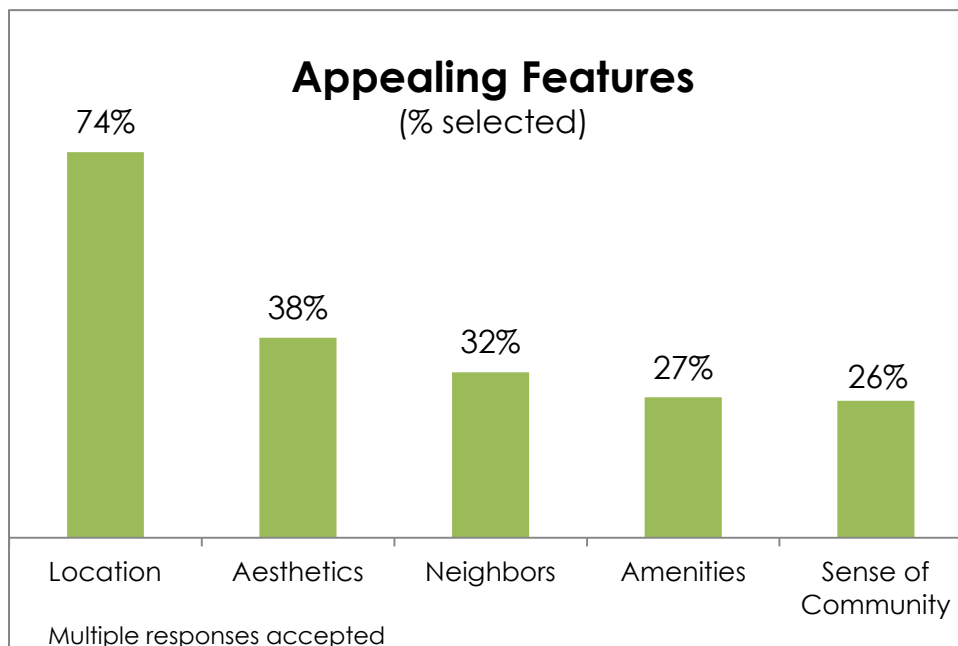
- Almost all of these respondents live in Wellington year round (93%).

- Three-quarters of respondents have lived in Wellington over ten years. 15% have lived in Wellington between 5-10 years, 5% have lived there between 3-5 years, and 4% have lived there between 1-2 years.
 - No survey respondents cited living in Wellington less than one year.



Appealing Features of Current Home

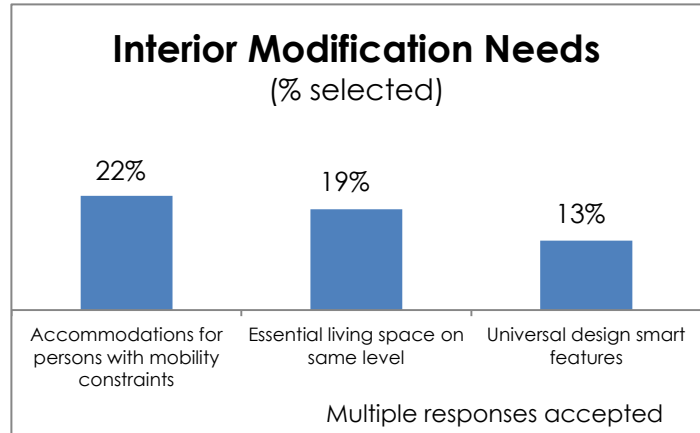
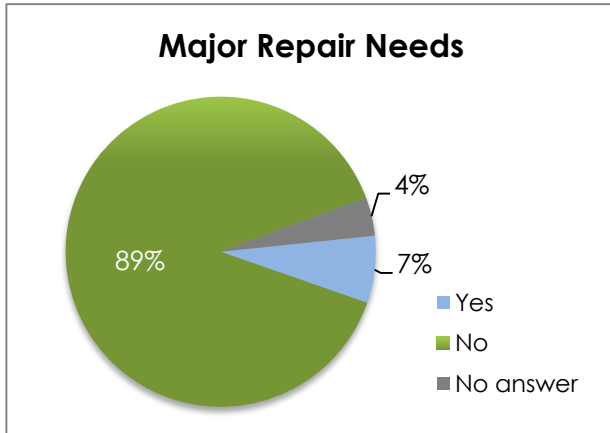
- These respondents were most likely to cite *location* (74%) as the most appealing feature of their current home, followed by *aesthetics* (38%), and *neighbors* (32%). *Amenities* (27%) and a *sense of community* (26%) were cited less frequently.



Repairs and Modifications to Current Home

- The vast majority of these respondents do not feel that their current residence needs major repairs (89%). Only 7% cited the needs for major repairs.

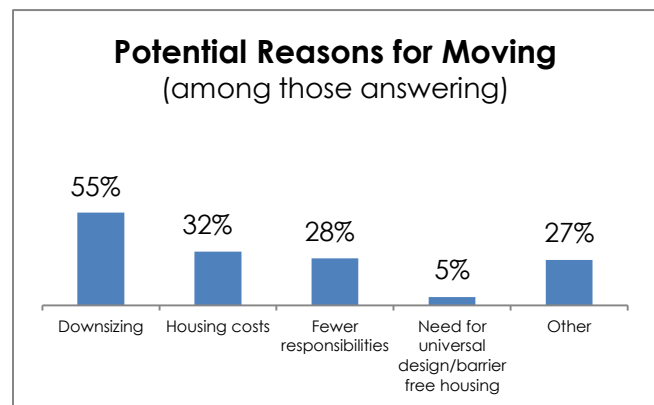
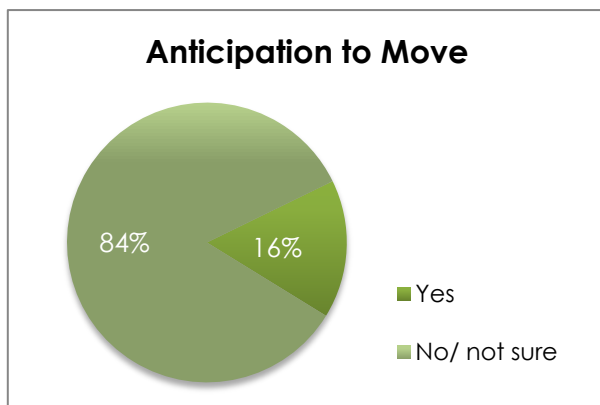
- The need for interior home modifications is also fairly low. 22% of respondents indicated that there is need to modify their home to *accommodate for persons with mobility constraints*, 19% indicated a need to *provide essential living space on same level*, and 13% indicated a need to *install universal design smart features*.



Future Housing Needs

Moving from Current Residence

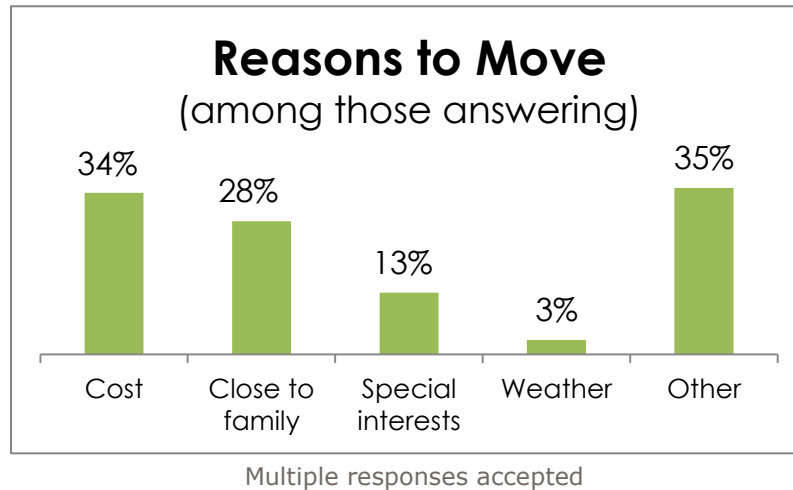
- Only 16% of surveyed residents anticipate moving from their current home in the next five years. Those under the age of 65 are more likely to anticipate moving in the next five years (23%) than those between 64 and 74 (13%) and those age 80+ (0%)
- Among those who do anticipate moving, *downsizing* is the most commonly cited reason (55%), followed by *housing costs* (32%) and *fewer responsibilities* (28%).
 - Need for universal design/barrier free housing was only cited by 5%.



Multiple responses accepted

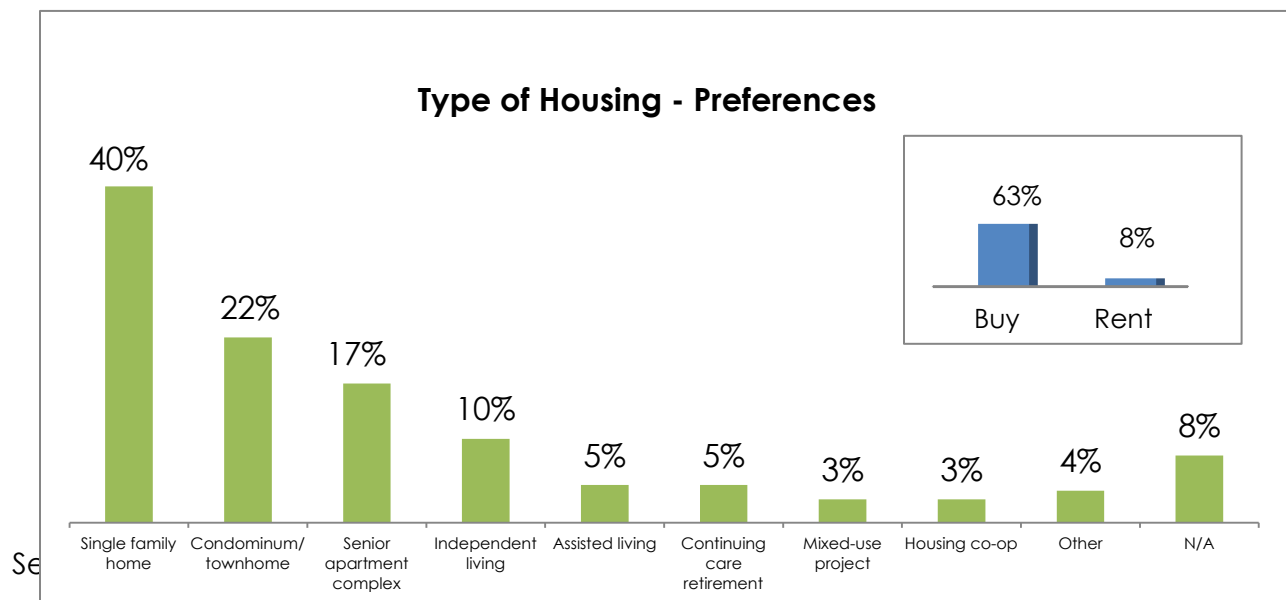
Moving away from Wellington

- Cost (34%) and moving closer to family (28%) are cited most frequently as reasons why these respondents would move away from Wellington.
- Special interests (13%) and weather (3%) are cited less frequently.



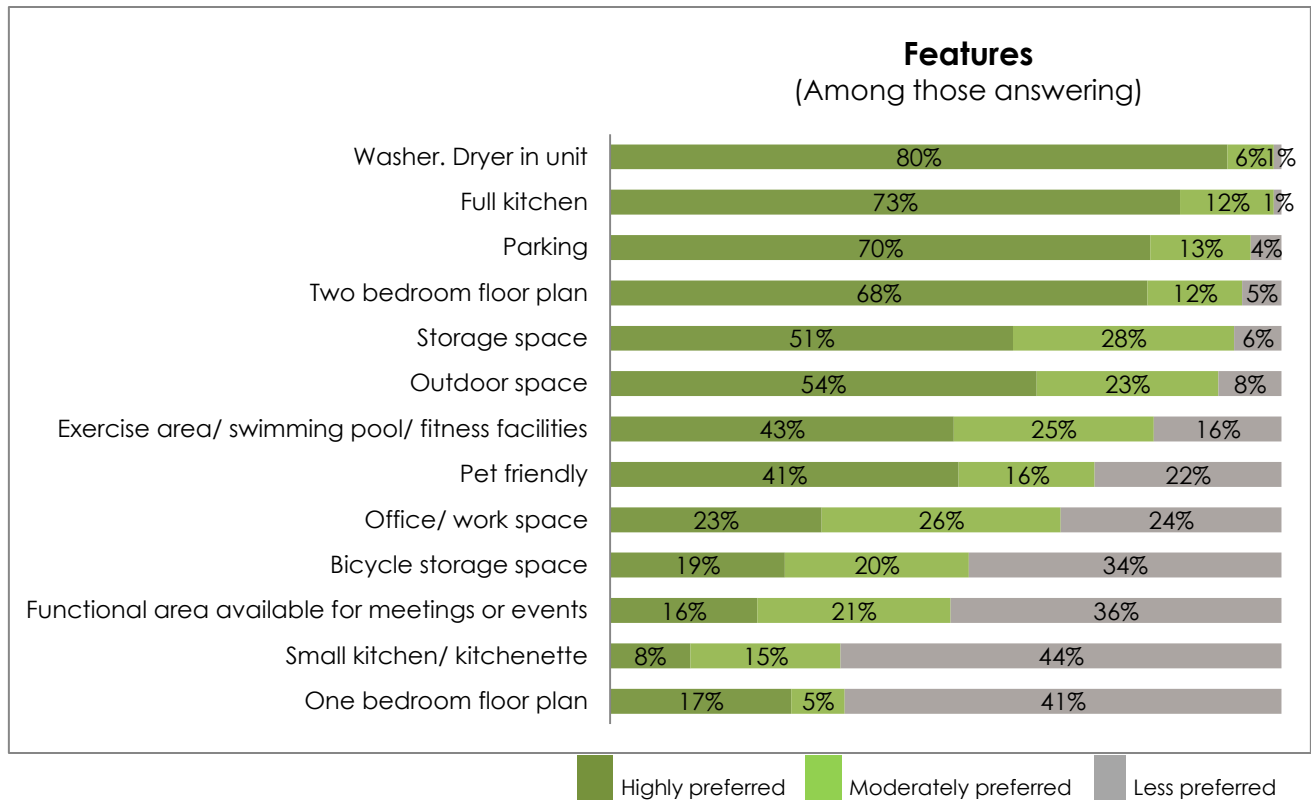
Housing Preferences

- If they were to move in the next five years, most of these surveyed residents would prefer to buy (63%) instead of rent (8%).
- When it comes to their preferred housing type, single family homes are preferred by four-in-ten, followed by condominiums (22%) and senior apartment complexes (17%).
- Almost half of surveyed residents stated that they are *willing and/or able to pay* between \$1,000 and \$2,000 for their total housing costs on a monthly basis.
 - Thirty percent stated that they are willing and/or able to pay more than \$2,000.
 - The average amount these residents are willing to pay is about \$1,700.



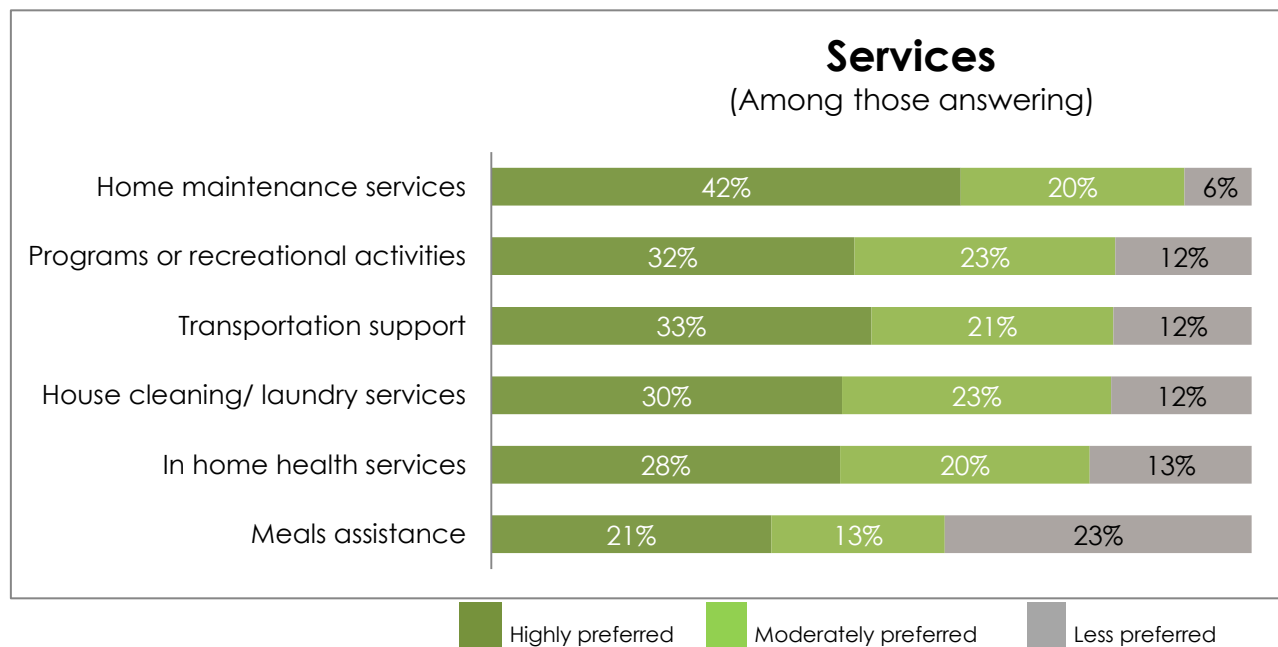
Multi-Unit Housing Complex Feature Preference

- The most important attributes of a multi-unit housing complex are: having a washer/dryer in unit, full kitchen, parking, and two-bedroom floor plan.
 - The least preferred features for a multi-unit housing complex are: a small kitchen/kitchenette and one bedroom floor plan.



Retirement Community Service Preference

- The most highly desired service to include in a retirement community is home maintenance services; preferred by 62% of respondents.
 - Other services, such as recreation programs, transportation, in-home health, housecleaning/laundry, and meals service are considered highly important among those over the age of 64, but less among those ages 50-64.
 - Meals assistance is the least preferred service. Only 21% of respondents cited this as a highly preferred service in a retirement community.



Selected Respondent Comments, Suggestions, and Concerns

- “We would love to eventually move to a “luxury” continue care community in Wellington vs. PGA (Devonshire). Ideal would be a detached house vs. apartment.”
- “My current home in Village Walk already has many of the features that will allow my wife and me to stay here as we get older. Everything is on one level, most doors are wide and the floor plan is open. I love Wellington.”
- “Major concern is for ONE LEVEL LIVING as we age. Many townhouses now being built do not have a master bedroom on lower level.”
- “If I can no longer drive, I would like to have ability to access some of my activities and church.”
- “Would very much like an upscale facility like LaPosada or Devonshire with all levels of care. Wellington is great, but needs this.”
- “I really like living in Wellington. My concern is that I’ll be able to continue living here in housing that I can afford.”
- “Wellington could definitely move towards providing senior living accommodations - whether independent to assisted to full care.”