



# New Residents Survey

October 2012

Conducted by:

LWCC Public Relations Advisory Committee

# Overview

- Study Objective
  - Learn about awareness and deciding factors for new residents
  - Develop profile of prospective residents
  - Develop communication message points
- New Resident Survey
  - Mailing to 1,131 new residents since 2010 (1/1/10 – 5/31/12)
  - Survey conducted from 8/31/12-9/3/12
  - 303 respondents (28% response rate)



# Key Findings

- 75% Retired
- 75% from Baltimore-Washington metro
- Average age of new residents early 70s
- #1 Reason to select LW: Safety and Security
- Other priorities include:
  - being near friends and family
  - beauty of the grounds\*
  - affordability\*
  - ability to purchase rather than rent

\*key points for working residents



# Key Findings

- Not much Community info needed by responding Residents
  - More than half familiar due to proximity
  - Referrals from friends important
  - Internet not a key referral source
- High satisfaction rates after moving in
  - 32% rate higher than expectations
  - 64% met expectations
  - Working residents less satisfied than new residents
- 65% not involved in community committees
- Working residents less likely to be involved



# Survey Categories

- Discovering Leisure World
- Reasons for choosing Leisure World
- Satisfaction levels
- Realtor profile
- New Resident Profile
  - Demographic profile of respondents
  - Work status
  - Previous living situation



# Discovering Leisure World

- Three quarters (74%) knew about Leisure World before (moving in) search started

Knew a great deal	24%
Knew some information	50%
Knew very little	26%



# Discovering Leisure World

- 44% reported looking at other communities

Riderwood	24%
Asbury	12%
King Farm	5%
Ingleside	4%
LW VA	4%
Greenbriar, Greenbelt MD	3%
Name Specified (16 names each representing 1%)	16%
No Name Specified	28%



# Discovering Leisure World

- Majority familiar with Leisure World due to proximity
- Significant number learned from word of mouth
- Internet not a key referral source

Lived in the area	56%
Friends who live here	39%
Friends who recommended	23%
Suggested by adult children living in the area	17%
Realtor recommendation	14%
For active adult only communities	11%
Internet search for all properties available in area	9%
Other	9%
For all retirement communities	9%
Read article in Newspaper	5%





# Reasons for Choosing Leisure World

Extremely important to respondents:  
(Top importance)

- Security
- Beauty of grounds
- Closeness to family
- Ability to purchase
- Affordability

	Extremely Important
Security of community	53%
Beauty of grounds/overall look	46%
Close to children/grandkids	44%
Able to purchase rather than rent	44%
Unit price	42%
Unit variety/selections size	36%
Close to friends/previous home	25%
Unified community feel	24%
Public transportation at entrance	23%
Transportation inside the community	22%
Swimming Facilities	20%
Fitness Center	20%
Medical Center	19%
Classes	17%
Restaurant on site	16%
Clubs	14%
Garden plots	6%
Golf course	6%



# Reasons for Choosing Leisure World

Extremely/Very Important:

- Beauty of grounds
- Unit variety
- Affordability
- Security

Not important:

- Garden plots
- Golf course
- Clubs
- Public transportation

	Extremely/ Very Important	Not a Factor/ Unimportant
Beauty of grounds/overall look	94%	6%
Unit variety/selections size	90%	10%
Unit price	87%	13%
Security of community	91%	9%
Able to purchase rather than rent	78%	22%
Unified community feel	73%	27%
Close to children/grandkids	67%	33%
Fitness Center	62%	38%
Swimming Facilities	58%	42%
Restaurant on site	55%	45%
Transportation inside the community	52%	48%
Medical Center	54%	46%
Classes	54%	46%
Close to friends/previous home	58%	42%
Pubic transportation at entrance	51%	49%
Clubs	53%	47%
Golf course	20%	80%
Garden plots	18%	82%

# Reasons for Choosing Leisure World

- 27% indicated Safety and Security as #1 reason for moving to Leisure World

Safety and Security	27%
To be near friends and family	15%
Affordability	14%



# Satisfaction levels

- Exceeding expectations for nearly one third of new residents
- Meeting expectations for nearly two thirds

Exceeded Expectations	32%
Met Expectations	64%
Not met expectations	4%



# Satisfaction Levels

- Most new residents not involved in community committees

Club/Activity	28%
Mutual	15%
LWMC	3%
Not at this time	65%



# Suggested Improvements

160 respondents wrote in suggested improvements. Most frequent mentions:

- Security
- Fees
- Food quality
- Evening activities
- Traffic enforcement

Categories	# Mentions
Security	10
Lower fees	10
Food/restaurant quality	8
(More) evening activities	8
Traffic enforcement/speed limit	7
(More) benches	4
(More) parking	4
(Eliminate) golf course	3
(Reduce) pool fees	3
(Expand) pool hours	3
(More) buses	3
Naming	3
Younger residents	2
Handicap access	2
Storage	2
Trim trees	2

# Realtor Profile

- On-site agency Weichert sold 60% of all respondent homes

Weichert	60%
Long & Foster	17%
Remax	9%
Cathy Gilmour	8%
Llewelyn	4%
Coldwell Banker	2%
Century 21	1%
Other	9%



# New Resident Profile

## Demographics

- Respondents 60% female 40% male

Male	40%
Female	60%

- Average age is 72

Less 50 years of age	1%
50-59	9%
60-69	28%
70-79	43%
80+	21%
Average Age	72





# New Resident Profile

## Demographics

- Majority of respondents live alone

Single person household	56%
Two person household	44%
Three plus person household	1%

- Before LW 42% lived alone and nearly half lived with the person they live with now

Alone	42%
With same adult as now	47%
Living with other relatives	11%



# New Resident Profile

## Demographics

- Among respondents, living companion more likely to be female

Male	37%
Female	63%

- Living companion averages 70 years old

Less than 50 years of age	1%
50-59	15%
60-69	27%
70-79	40%
80+	17%
Average Age	70



# New Resident Profile

## Work Status

- Three quarters are retired

Retired	76%
Working full-time	18%
Working part-time	7%

- More than 50% retired more than 10 years ago

Past year	8%
More than year, less than two years	6%
2-5 years	17%
5-10 years	17%
More than 10 years	52%



# New Resident Profile

## Previous Living Situation

- Nearly 70% moved from a single family home

In a Single Family Home	68%
Owned Coop	2%
Owned Condo	11%
Rental home	4%
Rental apartment	14%
Rented Coop or Condo	3%

- Three quarters do not have second homes

Yes	25%
No	75%



# New Resident Profile

## Previous Living Situation

- Three quarters came from Maryland

Maryland	75%
Virginia	5%
Other – States reporting 5: PA; 4: FL, AZ, 3 from SC, IL; 2 from NY, MI, MN, NC, and NM; Singles reported from AL, CA, CT, IA, MA, ME, NJ, TX and WV	20%



# New Resident Profile

## Previous Living Situation

- Most previously lived nearby

Silver Spring	26%
Rockville	11%
Gaithersburg	5%
Potomac	5%
Olney	3%
Bethesda	3%
Derwood	2%
Washington	2%
Laurel	1%
Other Communities	42%



# Where do we go from here?

1. Brief LWCC Board, Exec Committee, and Advisory Committee Chairs
2. LW News article
3. Make additional presentations -- groups, organizations, mutuals, etc
4. Brief management team on survey results (buyer priorities & satisfaction issues)
5. Continue new resident survey on a regular basis; initiate realtor survey
6. Develop community fact sheet
7. Develop geographic public relations campaign
8. Based on the data, focus on high-priority new resident decision factors
9. Develop internal information program due to existing resident influence
10. Develop realtor education program
11. Integrate name change