

With a median age of 42.9, Vermont has the third oldest state population after Maine and New Hampshire.² The U.S. Census projects that the number of people sixty or older in Vermont will increase by 100,000 in the next decade.³ By 2030, the number of Vermonters who are eighty-five and older is expected to double.⁴

Philanthropy

Multiple studies have shown that older people are more likely to give to charity. A study by the Charities Aid Foundation and Boston University in the United Kingdom shows that those over the age of sixty are twice as likely to give to charity as those aged under thirty. Additionally, those over the age of sixty are six times more generous, defined as giving as a percentage of total spending, than those under thirty.

⁵ These findings are corroborated by a survey by the Blackbaud Institute, which found that more than 40 percent of

¹ U.S. Census Bureau, QuickFacts Vermont, 2015, accessed April 15, 2019,

money donated, as reported by study participants, comes from Baby Boomers (defined as those born between 1945 and 1965 in this report) while more than twenty-five comes from those born before 1945, even though these groups together represent only 31 percent of the U.S. population.⁶ Additionally, Baby Boomers report donating an average of \$1,212 to between 4 and 5 charities each year, which is more than twice the average for younger donors.⁷ Moreover, a study using a sample of people between five and seventy-five or older years of age found that older participants were more likely to donate money than younger adults.⁸

Volunteering

As of 2015, U.S. citizens 65 and older make up almost 25 percent of all volunteers, despite making up only 14.9 percent of the total population.⁹ According to the Bureau of Labor and Statistics, the most popular organizations that Americans volunteer at are (1) religious, (2) educational or youth service related, and (3) social or community service organizations.¹⁰ For those over 65, 42.7 percent volunteer mainly for religious organizations. Those over 65 who have less education or who are single are less likely to volunteer.

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use NORC community services are the frailer portion of the population; that is, people who are older, female, have less education, and are more alone are more likely to use services."¹² Additionally, this study concluded that as retirees grow older, there will be an increased demand for these transportation services and that providers will have to adjust their offerings accordingly.¹³ The data collected in these studies suggests that while retirement communities do have an increased need for transportation services, most of these services are provided through private groups, and that retirement communities do not place significant str

Wake Robin Survey

To help understand the impact that retirees have on Vermont, we conducted a survey at the Wake Robin Life Plan Community in Shelburne, Vermont.²⁹ We asked residents what their home state was, what their career was, why they chose to retire in Vermont, why they chose Wake Robin, how they got around, how they participate in their local community, and if they donated to any organizations (for full questionnaire see Appendix A). The survey was distributed with the help of a resident, who took our surveys, delivered them to people's mailboxes, and collected them to return to us. Due to the nature of the survey and its distribution, the population we surveyed was a convenience sample, as we took the responses of anyone who had been given a survey by the resident assisting us. We received 108 responses and used the data acquired to expand on the research described in earlier sections.

Reasons for Retiring in Vermont

One of the survey questions gathered information on why retirees at Wake Robin chose Vermont as a place to retire. Forty-seven percent of respondents from the Wake Robin Survey lived in Vermont before they retired, the other 53% chose to move to Vermont for their retirement. Due to the high rate of retirees in the state, the reasons for a large portion of the elderly coming to Vermont for their retirement is noteworthy. The biggest reason cited for migration to the state was the Vermont culture, such as outdoor activities, local communities, and the scenery. Only one resident checked off tax incentives as a reason. Several other residents wrote around the Tax Incentives answer their anger or general unhappiness with the current tax laws for retirees. Another popular answer, filled in to the "other" option, was that residents chose Vermont specifically for Wake Robin and

Philanthropy

We asked whether the retirees donated to non-profit organizations. Three options were given: national organizations (Habitat, Red Cross) etc., Vermont Organizations (Jump, Common Good, etc.), and local organizations (Local YMCA, churches, etc.). One hundred and eight of the 109

Figure 3: Number of Retirees Participating in Local Community on

Transportation

A vast majority of residents at Wake Robin drive themselves around. Those who do not drive themselves typically use Wake RobinMTc 0.0m3g.23 0 e6allelvs

Appendix A: Wake Robin Survey

This survey is part of an effort by the Vermont Legislative Research Service to explore the impact of retirement communities in Vermont at the request of Representative Kathryn Webb (D- Chittenden 5-1). All answers will remain completely anonymous (please do NOT put your name on the survey).

Kindly return this completed questionnaire to the box in the Community Center Lobby

Please answer the following questions as accurately as you can, filling in the blank space or checking off the boxes next to any answers that apply.

Where did you live before you retired?

What was your job/career?

- Professional and Business Services
- Financial Services
- Educational Services
- Health Care and Social Assistance
- Federal/State Government Position
- Manufacturing
- Agriculture
- Retail
- Other (please specify):

What was the reason you chose to retire in Vermont? Please check all that apply.

- To move closer to family.
- Tax incentives.
- I'm originally from Vermont.
- For the Vermont culture (outdoor activities, local communities, etc.)
- Other (please specify):

What was the reason you chose this retirement community? Please check all that apply.

- Cost.
- Proximity to family.
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How do you participate in the local community? Please check all that apply.

- a I am not able to participate/I do not participate.
- a Volunteering.
- a Attending local entertainment events.
- a Participating on boards (hospital, corporate, city, etc.)
- a Other (please specify):

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Do you donate money to non-profit organizations? Please check all that apply.

- a Yes, I donate to organizations in my community (local theaters, food shelves, etc.)
- a Yes, I donate to organizations in Vermont (State Humane Society, JUMP, etc.)
- a Yes, I donate to organizations in the United States (Habitat, Red Cross, etc.)
- a No, I do not donate any money to non-profits.

Thank you very much for your time and participation in this survey. Your responses will be very valuable in understanding the impact that retirement communities have on Vermont, as per Representative Webb's request.

Kindly return this completed questionnaire to the box in the Community Center Lobby