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*Research on Aging* 1980 2: 141

DOI: 10.1177/016402758022003

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# *Why Older People Move*

## *Theoretical Issues*

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The theory of elderly migration lags well behind the state of empirical knowledge. Further development is needed to integrate present findings and direct future research. The intent of this article is to stimulate theory development and to suggest ways in which such development might proceed. Two conceptual models are presented: One is a behavioral model which views the migration process as a staged set of interrelated decisions; the second is a typology of migration which includes involvement motivations, migrant characteristics, and migration outcomes. Also discussed are numerous suggestions for further research.

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*The study of residential change* in later life has become increasingly important in recent years since older Americans have been in the vanguard of the most notable demographic trends of the 1970s. Sunbelt migration, metropolitan-to-nonmetropolitan movements, and the growth of retirement communities are altering the demographic structure of many localities (Biggar, 1979; Tucker, 1976; Longino, 1980). Natural growth in the elderly cohort will further intensify the impact of these movements (Wiseman and Roseman, 1979).

As might be expected in a rapidly growing area of research, theoretical development is weak. The theory that is emerging focuses almost entirely on the unique aspects of elderly migration: the ways elderly migration differs from that of the general population. To a large extent this is appropriate, for, as Lee suggested (this issue), and as

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AUTHOR'S NOTE: The research for this article was made possible by grant 1 R01 AG00702 from the National Institute on Aging. The author wishes to acknowledge the assistance of Curtis Roseman, Valorie Preston, and Sally Hoover in developing many of the ideas presented here.

RESEARCH ON AGING, Vol. 2 No. 2, June 1980 141-154  
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empirical study demonstrates, migration in later life is substantially different from that of earlier ages (Wiseman, 1979). However, by embracing this view, our studies often lack a developmental perspective which the study of aging implies and which social gerontological theory often prescribes. It also tends to ignore the wealth of conceptualization developed for general migration which can be readily employed to accelerate and extend the development of elderly migration theory.

This article seeks to advance the development of migration theory. It approaches the subject from several directions. First, a brief description is presented of what appears to be the prevailing conceptualization. Next, two conceptual models are presented which represent different views of theory construction. They are compared and, to the extent possible, integrated. Throughout the article there are suggestions for further research which would contribute to a more coherent and comprehensive understanding of elderly migration.

### *General Conceptualization*

The popular image of elderly migration is that some older people move for sun and fun into luxurious retirement communities, others relinquish a single-family home for an inner-city apartment or condominium to reduce housing space and maintenance needs, while still others who can no longer care for themselves move into nursing homes. It is true that many elderly people move to Sunbelt states, but many also are moving to states such as Washington, Ohio, and even to the upper portions of the Great Lakes states (Flynn, 1979). Furthermore, only 14% of all residential change among older persons involves interstate movement (Longino, 1979a). It is true that many older people reside in the inner city and many in apartments, but tenure shift from single-family homes to apartments is only slightly higher among older individuals than among younger persons (Golant, 1972). In addition, former renters predominate among elderly movers, and approximately 70% of all intraurban elderly relocation results in movement away from rather than toward the city center (Golant, 1972; Wiseman and Viriden, 1977). It is true that many older people require care and assistance, but at any one time less than 5% reside in institutions. This image obviously requires sharper focus.

The general conceptualization which appears to be emerging from the literature builds upon the popular image mentioned above. It holds that those who are economically and otherwise robust tend to migrate to retirement communities in search of climatic and recreational amenities,

while those deficient in such resources remain residentially stable until forced to relocate locally in search of assistance.

This view is indirectly supported by examining mobility rates as seen in Figure 1a. Relative to other age categories, the old age period is characterized at all points by low rates. The high level of residential stability is generally attributed to a lack of desire for residential change. However, a low mobility rate does not mean that elderly migration is a small or inconsequential phenomenon. During the five-year period between 1965 and 1970 more than one-quarter (28%) of all Americans over the age of 64 changed residences at least once (Flynn et al., 1979). As Lee pointed out earlier in this issue, two periods in old age are characterized by increasing rates, 60-69 and beyond the age of 75. The earlier increase occurs during peak retirement years. It may be due to a desire to improve residential amenities. The last increase is generally attributed to a need for assistance generated by the many losses which characterize the last years of life, such as loss of health and spouse (Pastalan, 1975). Distance of move, as seen in Figure 1b, is consistent with this scenario. Long-distance moves are more likely to occur at the time of retirement, while short-distance moves are more likely at very old ages.

The conceptualization is more directly supported by a wealth of empirical study. The amenity reason for long-distance migration can be seen in analyses of net migration rates among states and the spatial patterns of interstate movement which reveal the concentration of migration destinations in states characterized by climatic, scenic, and recreational amenities (Barbsy and Cox, 1975; Wiseman, 1979; Flynn, 1979). The variation in individual resources can be seen in socioeconomic differentials found among long-distance migrants, local movers, and the residentially stable elderly. Interstate migrants are younger, wealthier, better educated, and more often married than nonmovers, who in turn are wealthier and healthier than local movers (Biggar, 1980). The lower SES profile of local movers corroborates the notion of assistance-motivated local moves. More direct evidence is provided by studies which show that declining health and the need for assistance are among the most frequently cited reasons for local relocation (Goldscheider, 1966; Lenzer, 1965; Lawton et al., 1973).

These same studies, however, reveal other reasons for moving. At the local level, housing and neighborhood dissatisfaction are often reported, as is the obverse—a desire for improved residential amenities. Some cite the need for cost-of-living reductions as the prime consideration for residential change. In studies of long-distance migration there is growing evidence that the desire to return to one's state of birth is

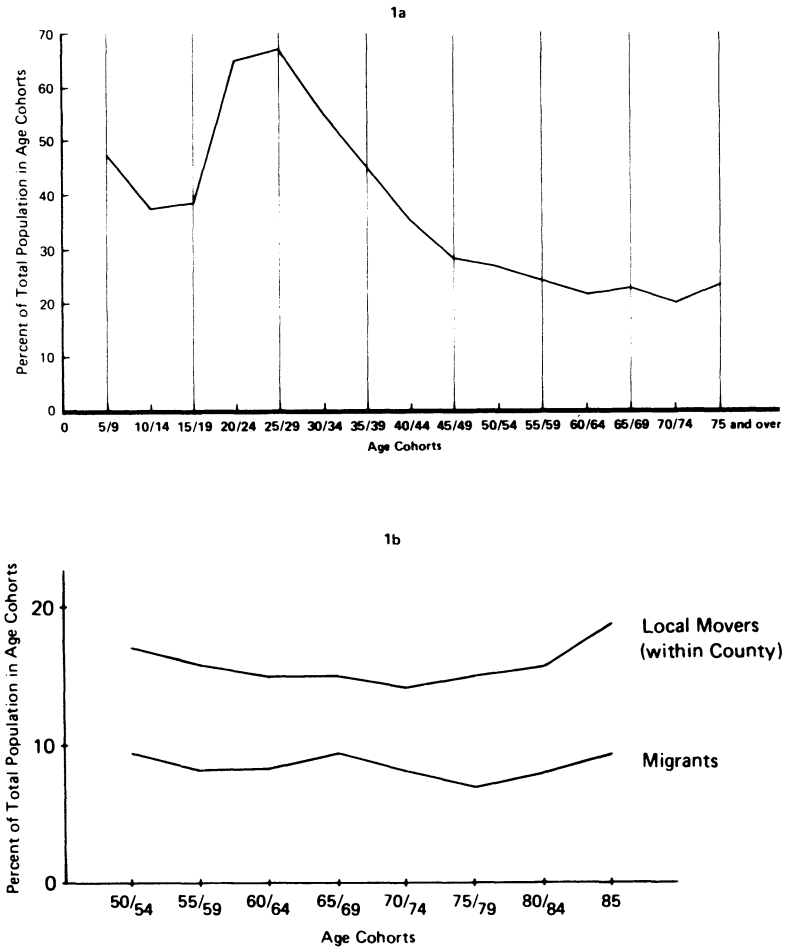


Figure 1: Mobility Rates Over the Life Span

a very important aspect of elderly migration (Longino, 1979b). Thus, while it is helpful in its general outline, the conceptualization described above is too limited to frame present knowledge. Greater specificity is needed to recognize both the diversity known to exist among elderly migrants and the wide range of reported reasons for moving.

This can also be seen when one searches the literature for factors known or thought to be significantly related to the most fundamental element in the migration process—the decision to move. The decision-making aspects of the migration process are modeled in Figure 2.

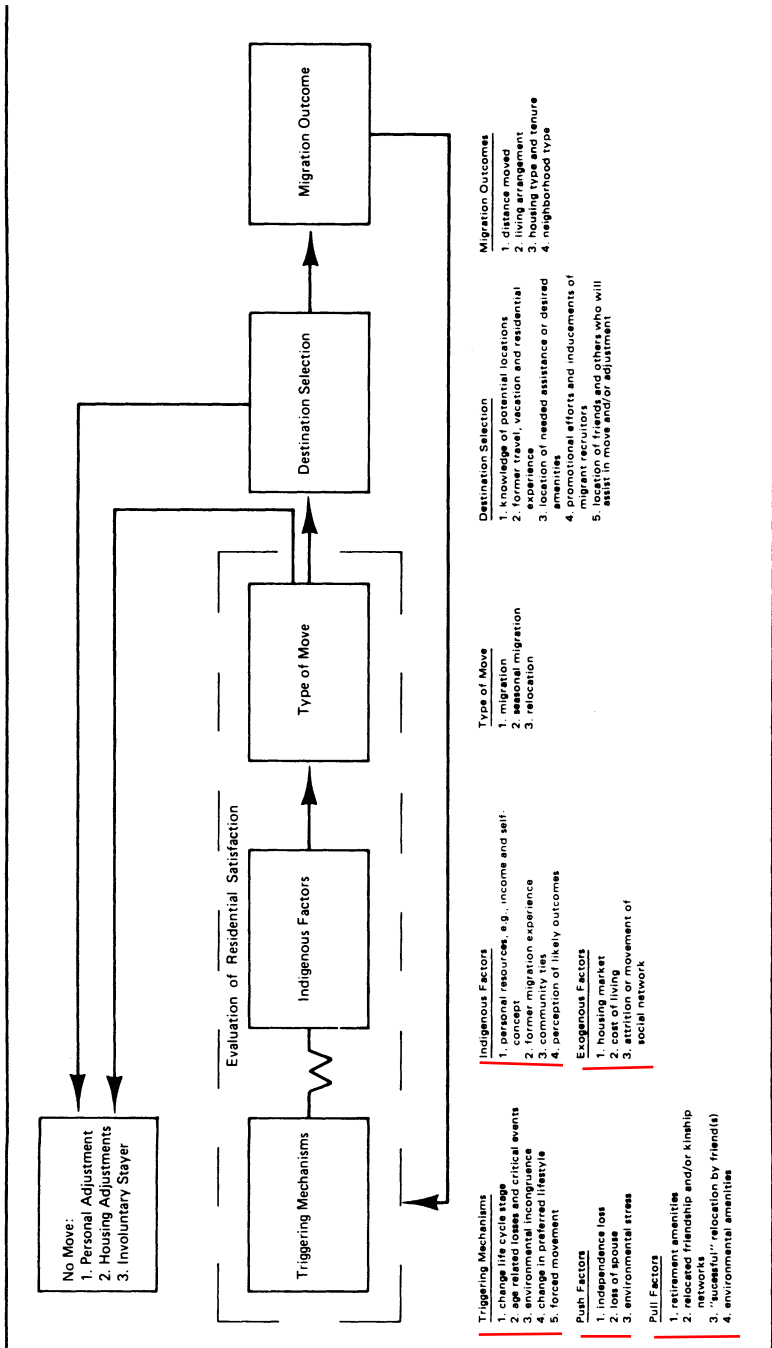


Figure 3: Theoretical Model of Elderly Migration Process

### *A Behavioral Model Of Elderly Migration*

The model depicted in Figure 3 is described more fully in an earlier formulation (Wiseman, 1979). It encompasses several related decisions: the decision to move, the decision of where to move, and the decisions about housing unit type and living arrangements. The model assumes that all people are potential migrants and that individuals continuously reevaluate their residential situation with respect to their needs, desires, resources, and perceptions of potential outcomes. It is similar to other decision-based models developed for characterizing residential change within the general population (Brown and Moore, 1970).

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Consideration of residential change can be stimulated by one or more of several triggering mechanisms. These include change in the life-cycle stage (Rossi, 1955; Yee and Van Arsdol, 1977) change in preferred lifestyle, critical life events, the shrinking of one's primary support network, and environmental incongruities (Lawton, 1975; Kahana, 1975). The mechanisms are comprised of various push-and-pull factors, such as the pull of amenities and the push of environmental stress. The triggering mechanisms, singly or in combination, can cause an individual to reevaluate his or her residential situation.

The decision to move is strongly influenced by a number of factors which can both facilitate and impede actual movement. Chief among the endogenous factors is a set of personal resources, such as health and income. For some, high income facilitates a move to enjoy recreational amenities, while low incomes constrain many from such a move. Others, however, with very low incomes may be relocated due to inflation and rising home maintenance costs. Similarly, former residential experience has a variable influence on the decision to move. The memory of successful moves may encourage mobility, while long-term stability may exert a negative influence. In addition, a set of factors exogenous to the individual, such as housing market conditions, can also facilitate or inhibit movement as they are factored into the decision process.

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The decision to move, then, can be viewed as a process of continuous or periodic reevaluation of residential satisfaction where the various push-and-pull factors of the triggering mechanisms are weighted in the balance of needs and desires, countervailed by perceived outcomes and influenced by facilitating and inhibiting factors.

The outcome of the model thus far is the decision to move or not to move. This outcome can be further characterized as being voluntary or involuntary. Normally, those who have greater satisfaction than dissatisfaction with their present residence do not move. Others may not

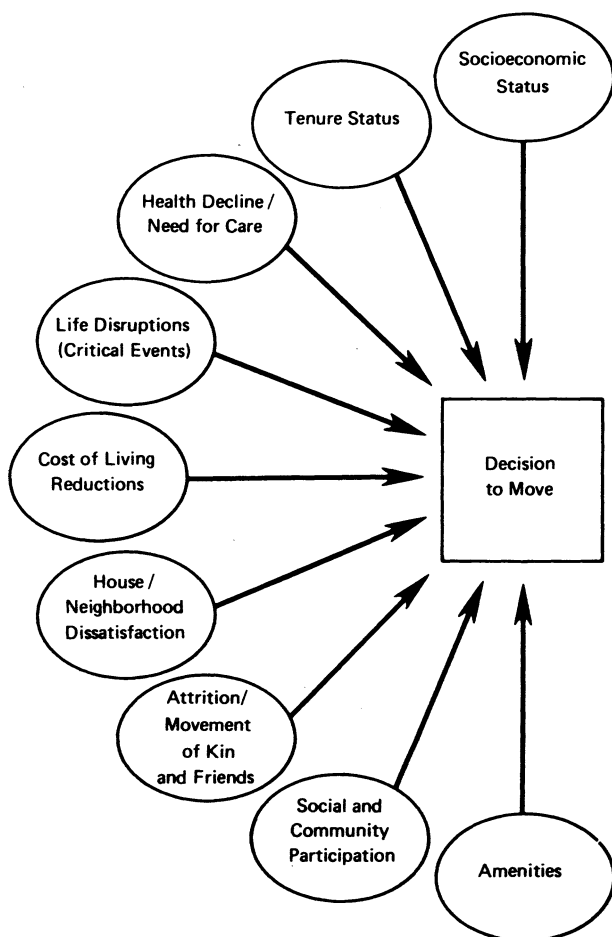


Figure 2: Conceptual Model of Decision-to-Move Factors

move despite great dissatisfaction. Some of these might improve their residence or make personal adjustments, such as changing the values assigned to the various factors. In such cases another evaluation would yield net satisfaction. All nonmovers with net satisfaction could be characterized as voluntary stayers. Those who do not move but who on balance are dissatisfied constitute a group of involuntary stayers. Low mobility rates among the elderly suggest that this could be a fairly large group. Involuntary stayers, likely constrained by low resource levels, continue to have a high relocation potential. Furthermore, despite an *Rester de manière involontaire.*



obvious group of voluntary movers, there exists an unidentified number of involuntary movers. Given a choice, they would prefer not to move because of net satisfaction at the present residence. Some push factors, such as reduced functional health, are so strong as to overwhelm the desire to remain in place. Others are simply evicted.

Another part of the decision-making process is the selection of a La destination destination. For some, the selection of a destination is determined by the decision to move. Those who are migrating to be near primary kin or friends have a singular destination in mind. However, for others who decide to move, a search process begins. It ends with an evaluation of potential destinations. It is obviously influenced by those who provide information on the availability of opportunities to achieve residential satisfaction. Former vacation and residential experiences are very important (Roseman, 1978). [For example] a study of older migrants to an Ozark community reveals that a majority had former vacation or residential experience in the area (Shelly, 1979). Seasonal migration such as "snowbirding" allows some to gradually stage a migration. Almost totally overlooked in elderly migration studies are the promotional and recruitment efforts of departments of tourism, of residential developers, and of fraternal organizations, civic clubs, and other community boosters. Such groups provide information and, in some cases, direct inducements to potential migrants. For many this activity may lead to long-range planning several years prior to retirement. One's kin or friends who have already moved to a specific area will often provide information aimed at recruitment. Information flows and the recruitment efforts of developers as well as friends, repeated thousands of times, establish a highly channelized migration stream between a particular origin and destination. Lien entre le lieu de départ et celui de destination. The stream is perpetuated by the flow of information, knowledge of the successful adjustments of others, and the expectation that friends could aid in one's own adjustment to the move.

The search process may prove unsuccessful, leading to a reconsideration of the decision to move and ultimately personal or residential adjustments. For those who select a new location, however, there follows a set of decisions relating to other migration outcomes. Most obvious are the determination of specific neighborhood, type of dwelling unit, and living arrangements. Here lifestyle and housing preferences, resource endowment, information, and local opportunity level are all influencing factors. At the present time relatively little is known about these outcomes beyond the fact that housing conditions are generally improved after a move (U.S. Dept. of Housing and Urban Development, 1979). Even less is known about the factors important to these decisions.

The model described above is not only much more specific than the conceptualization presented earlier, but by structuring knowledge in terms of the interrelated decisions inherent in the process of migration it immediately raises questions for further research. For example, how do preretirement conditions, such as travel and planning, affect long-distance migration? For some who have migrated as a couple, loss of spouse might soon lead to return migration. For others, secondary relocation may occur only after health declines. Under what conditions does environmental stress surpass inertial forces and result in residential relocation? How much movement is involuntary? What adjustments are made by involuntary stayers? To what extent do other people influence the various decisions of movers?

The model is useful in other ways as well. Its structure and specificity call attention to the complexity of this phenomenon, suggesting the need to disaggregate future study and to develop a set of theoretical statements rather than a single theory. The model also suggests that, whatever disaggregation is undertaken, the process of residential change should be viewed in a holistic fashion. The following typology is a disaggregation which focuses upon motivations for moving. It suggests how sets of decision-related factors might be employed to identify salient patterns of elderly migration.

### *A Typology Of Elderly Migration*

There appear to be three primary types of long-distance migration motivations—amenity, assistance, and return migration. For many amenity migrants the decision to move may be made well before retirement. The primary triggering mechanism is probably a desire to change lifestyle to a more leisure- and recreation-oriented way of life. The pull of recreational and climatic amenities is paramount. Also important are the earlier migrations of primary kin and friends, prior vacation experience, and the activity of other information sources. The locational outcomes of this type of migration are channelized flows heavily concentrated in retirement communities.

Another major motivation, the need for assistance, also might be described as a move to be near kin, especially children. Although motivated by a perceived or anticipated need for assistance, the stated reason for this type of move often might be to reside near kin. Such moves may exhibit a very different spatial configuration than the highly concentrated destinations of amenity-type moves. Assuming that the kin are more likely to reside in than outside a metropolitan area, it

would follow that most assistance moves, where nearness to kin is an objective, would be moves to a metropolitan area. It could be expected, therefore, that more assistance moves would be found among those moving from small towns or rural locations to metropolitan areas than the reverse. Assistance moves also may account for a significant portion of counterstream migration away from popular amenity locations to areas from which many migrants come.

3 Since the Census Bureau asks for state of birth, return migration has come to be defined as return to one's state of birth. This is a narrow definition and underestimates the incidence of actual return migration in the population. At least as popularly understood, return to state of birth may not be nearly so elemental to its meaning as returning to the town where one grew up. This may or may not be in one's state of birth. Yet, even return to state of birth is frequent among older interstate migrants. In the 1965 to 1970 migration period, a fifth were returning. When those leaving their state of birth are subtracted from the base, leaving only those interstate migrants who could be returning, the proportion rises to a third (Longino, 1979b). It is difficult to consider return migration as a clearly separate type of move from amenity and assistance moves. Native-born migrants return in very high proportions to retirement states such as Florida, California, and Arizona (Serow, 1978). Many are no doubt making amenity moves. Yet, on the whole, return migrants, are negatively selected, when compared with other interstate migrants, suggesting there are more assistance moves among return migrants collectively. Finally, there is evidence to suggest that some amenity moves are followed later by assistance moves, many of which are to the migrants' state of birth (Longino, 1979b). At this time the distinct component of return migration which is separate from amenities and assistance has not been clearly identified.

At the local level, several types of moves also might be identified, each having a fairly distinct motivation and attendant characteristics relating to either facilitating or inhibiting factors or to migration outcomes (Golant, 1972).

First, there are local amenity moves. These may be similar in motivation to long-distance amenity moves. Age, in fact, may have little to do with a large portion of these moves. "Better homes and gardens," not to mention better neighborhoods, motivate most local movement throughout the adult years. For others there may be the strong desire to change lifestyle, as is the case with many amenity migrants. In this case, local availability of activities and social contact needed to sustain a leisure-oriented retirement lifestyle also would make long-distance moves seem unnecessary.

Another type of local movement results primarily from environmental push. This mover might have a lower resource level than local amenity movers and would probably relocate to a similar type of dwelling unit and neighborhood, with the obvious exception of a change in the environmental condition that was stressful at the former location (Wolpert, 1965; Huff and Clark, 1978).

The third type is highly involuntary and results principally from the need for assistance. Chronic health problems or fixed income in the face of inflation exemplify this type of situation. Low resource levels, particularly poor functional health and widowhood, characterize these movers (Wiseman and Peterson, 1979). Movement outcomes might range from health care institutions to congregate housing situations offering limited assistance, and to residence with or near to primary kin.

Two other types of local movement also might be specified: chronic and forced movements. There is no reason to believe that those who have moved frequently in earlier years do not continue to do so in later life. This type of relocation might be especially prevalent among renters. Similarly, forced movement among the low-income elderly might be fairly common. Gentrification and the urban revival movements of relatively affluent young adults are displacing lower income groups through increased rents and condominium conversions. In addition, there have long been forced relocations due to eviction, fire, and other factors.

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### *Toward A Theory Of Elderly Migration*

In the quest for theory it is important to note that the behavioral model and the typology complement each other. The behavioral model focuses upon the individual mover and seeks to describe how the factors of migration are employed in the decisions of older people who become the movers within the various groups of the typology. Its primary utility rests in the explanation of the process of migration. The model suggests how the triggering mechanisms provide motivations which interact with resources—that is, the characteristics of the migrants—in producing a set of movement outcomes, such as housing type and living arrangements. However, without benefit of the typology or a similar model which specifies types of movement, the development and testing of behavioral models is severely restricted, since the importance of migrant characteristics and potential outcomes is obscured or confounded in the mixture of motivations. Similarly, an understanding of causal connec-

tions among motivations, characteristics, and outcomes in the typology can best be understood by employing behavioral models.

The utility of such models derives from their structure. Besides complementing each other, their structures could be integrated more directly. It is easy to envision a matrix which has typological categories specified primarily by motivation arranged along the side, thus identifying the rows, and decision elements from the behavioral model across the top, labeling columns (for example, see Wiseman and Roseman, 1979). More precise characterization of typological groups could be obtained by determining the presence, absence, or level of decision-related factors for each row. Associational equations stating relationships among the elements of each row would comprise a set of theoretical statements characterizing migration. A framework such as this could be useful in organizing present knowledge, identifying needed research, and ultimately developing a body of theory.

Theoretical advance also can be gained from examination of the conceptual literature dealing with migration in general. For example, the literatures on relocation and change in preferred lifestyle or housing preference and choice structures have obvious implications for studying relocation in later life. But theoretical cross-pollination can be mutually beneficial. A more complete understanding of amenity migration must be developed for a theory of elderly migration to inform the general literature directly. The fact that older people are in the vanguard of migrants to the Sunbelt and to nonmetropolitan areas makes amenity migration a worthwhile component of migration research. In addition, general theory which focuses upon environmental stress can profit from studies of that segment of the elderly population with low resources. They are the most susceptible to the influence of environmental stress as a motivation for migration. Similar knowledge gained from studies of forced, involuntary, and assistance movement among the elderly can expand understanding of all residential change, since such movement occurs with varying frequency among all age groups.

Pertinence  
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