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Relocation remembered: Perspectives on senior transitions in the living environment

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Abstract The experience of aging may necessitate transitions in living environments, either through adaptations to current residences or relocations to more supportive environments. For over a half century, the study of these transitions has informed the work of researchers, health and mental health providers, policymakers, and municipal planners. In the 1970s and '80s, knowledge about these transitions advanced through Lawton & Nahemow's ecological theory of competence and environmental press, Wiseman's behavioral model of relocation decision-making, and Litwak & Longino's developmental perspective on senior migrations. This paper revisits influential theoretical frameworks which contribute to our understanding of senior transitions in living environments. These seminal works are shown to inform recent studies of relocation and gerontology. This paper concludes with a call for a view on housing transitions that reflects the contemporary context.

Keywords housing, theory, transition, relocation, aging in place

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INTRODUCTION

The contributions of celebrated intellectual innovators in every field of study continue to frame the evolving theories, research questions and methodologies of scholarship. As this Special Issue celebrates foundational contributions to the study of gerontology, we offer a contemporary view on seminal scholarship relevant to understanding residential transitions among older adults. Scholars have addressed this topic by studying the factors that motivate a change in residence and by examining migration patterns, which could be viewed as seasonal or permanent movement across communities, states, and countries. Thus, we have incorporated the terms relocation, migration, and residential transitions into our effort to identify seminal scholarship in this area. The theories of relocation we address in this paper were selected by reviewing many relevant studies of relocation and identifying prevalent theoretical frameworks that appear to inform this body of inquiry.

To fit with the theme of this Special Issue we have named these contributions among the key *Foundational Theories* in this area of study, and believe that each enhances our understanding of relocation in late life. First, we discuss the contributions of Lawton and Nahemow's (1973) theory of environmental press. Next we review Wiseman's (1980) model of decision-making about relocation. Finally, we summarize Litwak and Longino's (1987)

model of typologies of relocation. These theories about residential transitions, and the scholarship they inspired over subsequent decades, are significant because they have shaped our understanding of broader issues that are important in late life, such as adaptations to changing physical, social, and psychological needs and abilities. In keeping with the suggested format for contributions to this Special Issue, we briefly review these contributions, then highlight several contemporary issues relevant to relocation and gerontology, and finally discuss how the foundational theories may continue to inform the work of researchers, policymakers and practitioners in the field of gerontology. While the abundance of material related to the topics described above cannot be thoroughly discussed in this brief review, we have taken care to cite highly relevant sources to guide the reader who seeks further depth of knowledge.

FOUNDATIONAL THEORIES

Lawton & Nahemow

In the early 1970s, Lawton and Nahemow began promoting ecological theories to explain the interactions of older adults with their environments (1973). This theoretical framework defines aging as a transactional process of continual adaptation to changes in both the external environment and internal capabilities and functioning. Lawton and Nahemow's model of aging presents five key components:

Individual Competence Varying levels of competence among older adults are described in terms of distinct domains, such as cognitive abilities, physical health, the capacity for psychological adjustment, and other qualities.

Environmental Press Interactions with forces in an individual's environment will evoke behavioral and affective responses.

Adaptive Behaviors Behaviors exhibited in response to Environmental Press are understood as external representations of an individual's competence. Factors that determine if a particular behavior is adaptive include both social norms and personal values.

Affective Responses Internal emotional states represent the inner reactions to the transactions occurring between environment and behavior. Lawton and Nahemow's examination of these Affective Responses calls attention to the importance of each person's subjective interpretation of their experiences of, and responses to, the environment as they age.

Adaptation Level The potential impact of a new stimulus is contextualized by the cumulative history of an individual's reactions to previous similar stressors. The Adaptation Level is a theoretical average level of adaptation for all people with a certain level of competence while experiencing some particular environmental press. Environmental demands that are slightly higher or lower than this mean adaptation level are predicted to be experienced with positive affect, but stimuli beyond this range are likely to cause feelings of discomfort. This is an important concept that explains the transactions between individual competence, environmental press, adaptive behaviors, and affective responses.

In this framework, adaptation levels explain the feelings of older adults in response to environmental demands, which, in turn, drive people to make changes that either lower the environmental press or increase their own competence. As such, various objective components of the environment, as well as the subjective experiences of those environmental components, partially determine the behaviors of older adults (Lawton, 1971). This original ecological theory of Lawton and Nahemow has been described as "decidedly interactionist" (Scheidt & Norris-Baker, 2003, p. 45) and underscores the importance of examining the interface of person and environment, rather than focusing on either individual factors or the environment as the primary site of analysis. As individual competence is reduced for some people in late life, strategies for reducing environmental press may include adapting one's current residence or relocating to a more supportive environment.

While the ecological model of aging does not directly speak to the relocation process, it is included in this review because many studies and subsequent theories of relocation

have focused on the interactions between individual competence and environmental press, as well as the resulting adaptations and outcomes. Concepts such as the voluntariness of adaptation, (Lawton, 1998) and the hierarchical nature of needs in determining individual competence (Carp & Carp, 1984) have expanded the application of this model over time. Recent scholarship in this area has focused less on causality and more on the transactions between individual and environmental factors, as well as on the importance of addressing the temporality and processes of adaptation, and the potential for an integrated application of Lawton & Nahemow's ecological model with some of the lifespan developmental models like the Selective Optimization with Compensation model put forth by Baltes & Baltes in 1990 (Scheidt & Norris-Baker, 2003).

Wiseman

Wiseman's theoretical model of the elderly migration process (1980) is a behavioral model positing that the critical consideration in relocation decisions is the individual's satisfaction with the current residence. Wiseman outlined decision-to-move factors that are confronted in late life, beginning with a triggering event that motivates older adults to evaluate their residential satisfaction. Triggers may be anticipated events, like a change in preferred lifestyle, as well as critical life events that force an abrupt change. Triggering events differ contextually and may be described as either push or pull factors. Functional changes, loss of partner or other care supports and environmental stressors are push factor that may lead to relocation. Conversely, pull factors may attract seniors to new settings. These include retirement-focused amenities like recreational leisure activities, the availability of social networks, or environmental attributes like warmer climates.

While deciding whether or not to relocate, older adults will examine both indigenous and exogenous factors (Wiseman, 1980). These factors can be summarized as the presence or absence of tangible and intangible resources. Tangible resources include health, wealth, social supports, the state of the housing market and costs of living. Intangible resources are ties to the current community, intrapsychic resources, and perceptions of the likely outcomes of a move. Another important decision-to-move factor in Wiseman's model is the type of move itself, differentiated as a full-time migration to a new community, seasonal migrations between homes in different climates, or relocation to a new type of residence within the same general area.

An additional contribution from Wiseman is the distinction between voluntary and involuntary moves (1980). Involuntary movers are forced to leave their current living situation against their wishes due to changes in their functional abilities, financial resources or care support options. Wiseman introduced the concept of involuntary stayers as well—those individuals unable to relocate despite significant concerns about care and environmental needs related to physical and financial limitations. These concepts have

been informative for scholars seeking to understand the apparent disconnect between housing attributes and the needs and desires of older residents. Haas and Serow (1993), who were arguably influenced by the ideas of Litwak and Longino described below, expanded on Wiseman's model to describe a more nuanced contemplative process leading up to the initial move and viewed living transitions as an iterative process of contemplation and relocation.

Litwak & Longino

In *Migration Patterns Among the Elderly: A Developmental Perspective*, Litwak and Longino (1987) proposed that decisions about relocation occur within individual, familial and social contexts and are strongly influenced by life events. Litwak and Longino used a developmental perspective in explaining the variability of relocation experiences. Prior to this work, demographers primarily focused on the relocations of younger and middle aged adults as necessitated by the demands of an increasingly mobile workforce. Litwak and Longino responded to significant shifts in the age profile of the population by unpacking the complex forces that interact to promote relocations among older adults and creating a developmental model of migration for those older adults who move.

The three types of move generally occurring after retirement, as described by Litwak and Longino (1987), include the first move that occurs upon retirement, a second relocation that accompanies moderate functional decline, and a final transition necessitated by major disabilities. For recent retirees, relocations may fulfill aspirations to upgrade residential amenities, whereas more frail or disabled seniors tend to relocate for increased physical or social support. The first relocation in this typology, the *amenities move*, involves migrations to locations that enhance lifestyle or improve access to friends and other peers. The second and third moves are necessary adaptations to increased needs, and typically involve relocations that bring older adults closer to family or under the care of formal service providers. More specifically, the third move necessitates institutional support because routine care needs of the older adult exceed the abilities or availability of kin. This foundational contribution of Litwak and Longino framed late life relocations as circumstantial adaptations to changing personal priorities and the evolving needs of older adults, and set the stage for many valuable studies on the economic, social, and policy implications of elder migration. Scholars continue to explore the interaction of the environment with climate, community characteristics and "person" ties (Longino, Perzynski & Stoller, 2002).

CONTEMPORARY ISSUES OF RELOCATION AND GERONTOLOGY

These theoretical contributions have collectively shaped our understanding of the processes through which older adults analyze their interactions with their physical, psychological and social environments, and subsequently select to adjust their own expectations, make adaptations to the current lived environment, or relocate to another setting. In order to demonstrate this progress, we mention here a small selection of compelling areas of study which highlight recent developments that enhance our understanding of the contexts and experiences related to late life relocation.

Late Life Relocation Contexts

In Litwak and Longino's original study, moves were examined in terms of larger geographical distance (e.g., interstate moves). Present scholarship also examines local, intra-community moves (Perry, 2012). In addition, relocation researchers have been assessing how relocation rates vary in relation to the units of analysis (i.e., individuals or families) (Lin, 1997). For example, relocation trajectories of individuals may be different than those for couples or households. Elena Portacolone's recent study of older adults in the San Francisco area highlighted the "precariousness" of older adults who live alone, describing the extensive energy required for older adults to live independently (2013). Relocations have recently been examined in terms of caregivers' proximity to the older adult (Van Diepen & Mulder, 2009), and while the mobility and location of kin may factor into relocation decisions (Longino, Bradley, Stoller & Haas, 2008) the quality of parent/child relationships is also important in determining how families meet the needs of older relatives (Ha, Carr, Utz & Nesse, 2006).

Wiseman's description of intangible resources (1980) continues to inform not only the study of elder relocation but also the more broadly focused study of the social networks of older adults. As one might expect, high levels of caregiver burden and family dysfunction, as well as lower levels of social support, have been shown to increase a caregiver's desire to institutionalize an older relative with dementia (Spitznagel, Tremont, Davis & Foster, 2006). A compelling area of current gerontological scholarship focuses on knowledge about available services when making caregiving and relocation decisions (Tang & Lee, 2011). Older adults and caregivers access service-related information differently, given the progress in information technologies in the past two decades (Bulot, 2004; Czaja, Sharit, Nair & Lee, 2009). Knowledge and other related factors have been shown to contribute to expectations of relocation (Sergeant, Ekerdt & Chapin, 2010).

Lawton & Nahemow's ideas on adaptive behavior (1973) have informed a large area of scholarship on late life adaptation. Adaptation, or *behavioral plasticity*, can

be viewed as a proxy for a person's ability to deal with diverse demands (Baltes, 1987; Coper, Janicke & Schulze, 1986; Pickard, Tan, Morrow-Howell & Jung, 2009). Thus, the adaptive capacity of older adults as they face physical and cognitive changes has become an important focus of research (Freund & Baltes, 2002) and informs our understanding of late life decisions regarding relocation. For example, scholars have developed models for predicting institutionalization among specialized populations, such as older adults who lack adaptive capacity because of cognitive and functional decline (Andel, Hyer & Slack, 2007; Gaugler, Duval, Anderson & Kane, 2007).

Late Life Relocation Experiences

Qualitative explorations of older adult relationships with their homes and their belongings, as well as their feelings about the processes of relocation, continue to deepen our understanding of the intrapersonal meaning of relocation (Ekerdt, Luborsky & Lysack, 2012; Luborsky, Lysack & Van Nuil, 2011). Recent ethnographic work on the moving experiences of older adults demonstrates the complexity of late life transitions, which challenge older adults to make projections of a future self and to anticipate their future emotional, medical and financial needs (Marcoux, 2001; Perry, 2012). Environmental gerontologists continue to explore the definitions and meanings of *place making* for older adults, which refers to the transference of belongings and attention to historic habits and routines (Oswald & Rowles, 2006). Importantly, scholarship built upon the life course model of environmental experiences examines the processes of creating a sense of being in time and place, and its relationship to well-being (Rowles & Watkins, 2003). Golant (2011) argues that older adults aim to achieve "residential normalcy" (p. 194), which may occur when older adults reframe their thoughts about their current housing, especially when relocation might be unachievable.

Health and Mental Health Factors

Lawton and Nahemow's concepts of environmental press and adaptive capacity (1973) have helped gerontological scholars to better understand how functional losses and disease symptoms challenge older people's independence, disease management, treatment compliance, service utilization, and ability to remain in private homes. Older adults make decisions about relocation when facing acute, chronic and progressive illnesses that cause cognitive or functional decline (Hays, 2002). Functional losses and illness-based impairments can easily be framed as *push factors* that compel older adults to evaluate their ability to remain in the current home or their need to relocate to a more supportive environment. Progressive conditions, like Alzheimer's disease, require a gradual increase in informal care and formal services, and for many people an eventual move into a skilled nursing facility (Kaplan and Andersen, 2013).

The relocation process itself has been linked to the emergence of physiologic and psychosocial disorders such as *Relocation Stress Syndrome* (Bekhet, Zauszniewski & Nakhla, 2009). Maintaining a sense of control over the relocation decision making process is critical to positive post-relocation adaptation (Deborah, Rutman, & Jonathan, 1988) and involuntary relocation increases mortality and adverse relocation adjustment (Bekhet, Zauszniewski & Wylke, 2008). Anticipatory conversations about future moves can aide in these transitions and reduce relocation trauma (Oswald & Rowles, 2006).

Senior Housing Issues

While home modifications programs (e.g., installation of ramps) have been shown to delay relocation (Hwang, E. Cummings, Sixsmith, & Sixsmith, 2011), other factors may compel older adults to remain in their homes (Bekhet, Zauszniewski & Nakhla, 2009), including an inability to sell one's home or decreased home values that would make another housing option unattainable. Scholars are asserting that some older adults are therefore stuck in place (Erickson, Call & Brown, 2012; Torres-Gil & Hofland, 2012), mirroring Wiseman's *involuntary stayer* concept. Conversely, neighborhood and community characteristics are being studied as important determinants of the ability to remain in the present location, or age in place (Scharlach, Graham & Lehning, 2011). Some communities are now adopting large-scale improvement efforts that support the housing and transportation needs of older adults (Lehning, 2011).

Choices for late life relocation have expanded to include Continuing Care Retirement Communities (CCRCs) that offer a range of health and social care facilities within a campus of neighboring buildings, as well as senior-oriented housing communities which have been designed to bolster social opportunities and reduce maintenance demands (Brecht, Fein, & Hollinger-Smith, 2009; Transportation Research Board, 2008). Concepts related to environmental design are also improving our assessment of senior care environments with the goals of improving social, physical and intellectual engagement, health, and quality of life for older adults. For example, Zeisel and colleagues have developed a model of critical health-related environmental design features that link environmental factors with behavioral health outcomes in settings for people with Alzheimer's disease (Zeisel et al., 2003). The expansion and improvement of housing options has altered the landscape of relocation in the US. However, while research has shown that supportive housing options such as assisted living facilities can deter entrance to skilled nursing facilities (Zimmerman et al., 2003), the transitions between levels of care are perceived by movers as "final" and "disempowering" (Shippee, 2009, p. 418), and these transitions remains an important focus for research.

LOOKING AHEAD

The landscape upon which relocation studies and gerontological research has been built continues to shift. Improved health and mental health interventions and community-based supports may decrease the extent to which traditional triggering events, like the onset of disability, will actually initiate relocation. For example, the delivery of health care through the Medical Home model is bringing collaborative teams of providers into the homes of elderly patients. Advances in gerontechnology hold promise in improving compensation and optimization techniques to assist with late life adaptations, through the use of robotics and ambient, imbedded technologies, for example, to aid with task performance and social connectivity (Rogers & Fisk, 2010). In addition, due to evolving cultural concepts of family and demographic changes household makeup, including the progressing social views and legal options for marriage, intimate partnership, and cohabitating friendships, relocation studies must account for the social diversity of older adults.

Lawton and Nahemow's ecological model of aging examines the intersections of environment and an individuals' abilities, behaviors and feelings, and therefore remains important even as advancements are seen in supporting older adults through improved service programs and technological achievements. Wiseman's behavioral model of the migration process comprehensively incorporates several types of influential factors at the individual and environmental levels. This model should be applied to the examination of relocation decisions related to our most complex late life challenges such as living with multiple chronic illnesses or dementia, building on important scholarship on integrative models of care (Weisman, 2003). Litwak and Longino's concept of *amenity moves* will continue to inform studies of relocation as new amenities are created to meet the emerging needs of older adults who are likely to exhibit unique interests and new adaptive techniques for maintaining independence.

Many modifications to these theoretical frameworks have been developed to address the social, medical, and economic changes that have come to pass in recent decades and which will continue to evolve as the Baby Boomers redefine much of what we know about aging. With emerging discourses addressing "experience-driven belonging" and "behavior-driven agency" (Wahl, Iwarsson & Oswald, 2012, p. 308), and the congruency of residential spaces and experiences of mastery (Golant, 2011), new conceptual models are also being proposed to understand contemporary attributes of living environments (Gitlin, 2003), temporal and activity pathways occurring in living environments (Golant, 2003), and the different functions of residences (Lawton, 1989). In addition, future scholarship should respond to the challenge of operationalizing these models (e.g. person-environment press).

In this special issue we are encouraged to remember how the seminal contributions of our academic ancestors

influenced today's gerontological scholarship. We propose that the foundational frameworks cited in this report have shaped the study of late life relocation over the past few decades and remain relevant in the examination of the evolving social contexts that impact relocation. Social trends, healthcare developments, and housing innovations in the new millennium demand our ongoing effort to further refine and improve upon our explanatory models, and a proliferation of contemporary scholarship reveals compelling areas for further inquiry.

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