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THE EXPRESSION OF AN EXPECTATION OF A FUTURE
DESIRE TO MOVE BY OLDER COMMUNITY-DWELLING ADULTS

A thesis submitted in partial fulfillment of the
requirements for the degree of Master of Science at Virginia
Commonwealth University.

By

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Abstract

THE EXPRESSION OF AN EXPECTATION OF A FUTURE DESIRE TO MOVE BY OLDER COMMUNITY-DWELLING ADULTS

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Empirical evidence in the gerontological literature supports the commonly held belief that older adults, overwhelmingly, prefer to remain in their own homes. Despite this fact, older adults residing in the community often express an expectation that they will move in the future.

There is a paucity of empirical findings on those factors which are most influential on the expression of an expectation of a future desire to move. Logistic regression was used to analyze data from the third wave of a longitudinal study of elderly Massachusetts residents residing in the community to identify possible antecedents to the expression of an expectation of a future desire to move. The perception that income was not adequate to meet expenses decreased the likelihood of expressing an expectation of a future desire to move for all respondents and for those with children in the area. A living arrangement which was other than alone or with a spouse only

was significantly related to the expression of an expectation of a future desire to move for all respondents and for those without children in the area. Positive self-perceived health was found to increase the likelihood that an expectation of a future desire to move would be expressed.

A knowledge of the most important factors which contribute to the decision of an older community-dwelling adult to move from their comfortable, familiar surroundings should facilitate the implementation of programs and services which would obviate the need for some unnecessary moves and, consequently, make it possible for them to enjoy a wholesome life in the community for as long as possible.

CHAPTER 1
INTRODUCTION

Gerontological research indicates overwhelmingly that the majority of older adults wish to stay in their own home and never move (American Association of Retired Persons [AARP], 1990; Pynoos, 1989; Rabushka & Jacobs, 1980). In spite of this preference, some older people do express an expectation that they will move in the future (AARP, 1990). While the growing number of people over age 65 has prompted empirical studies to identify the positive and negative factors which lead to relocation by older adults (Carter, 1988; Wiseman, 1980; Wiseman & Roseman, 1979; Yee & Van Arsdol, 1977), there has been little research with regard to the factors which impact the expression of future expectations of moving. In addition to understanding why moves by older people have taken place, it is important to understand the factors which cause an older community-dwelling adult to begin expressing an expectation that they will need or want to move at some point in the future.

Between 1965 and 1970, 28 percent of the population over age 65 relocated at least once (Biggar, Cowper & Yeats, 1984). Approximately four times as many people over age 65

move locally as migrate to other states (Wiseman, 1986). A national survey by AARP (1990) found that while 84 percent of the respondents expressed the desire to remain in their homes and never move, only 70 percent indicated that their current residence was where they would always live. These findings indicate that older people may feel that there will be circumstances beyond their control which will eventually cause them to relocate. There is a general perception that relocation by people in the over 85 age group is usually institutional in nature, but there is empirical evidence that a disproportionate number of people in this age group make non-institutional moves (Colsher & Wallace, 1990). This age group has tripled in size since 1960 and is expected to double in the next twenty years (U.S Department of Health and Human Services, 1987) thus making it the fastest growing segment of the population. The rapid growth of this age group makes it particularly important to know as much as possible about the antecedents of their relocation in order to determine whether there is a need to develop policies or interventions which would prevent or delay relocation.

Much of the existing literature on relocation of older adults has tended to focus on determining who among them relocated, but there is a paucity of empirical evidence regarding what causes some older adults to expect that they will want to move and others to expect that they will want

to remain in their homes. This study is expected to show that the expectation of the latter group is based on a perception that their current needs and resources are balanced and will continue to remain in balance.

The availability of informal support is one of the key elements to an older person being able to continue to reside at home once they begin to experience disabilities. This support has traditionally been provided by a spouse or female family members. As a result of the increasing number of young and middle-aged women working outside of the home, the traditional support provider will be less available than has historically been the case. The projection is that by 1995, 70 percent of women aged 45 to 54 and 83 percent of women aged 35 to 44 will work outside of the home (U.S. General Accounting Office, 1988). The second factor which will significantly affect the availability of support is the projected increase in the number of older people living alone. A projection of future living arrangements by people over age 65 indicates that the number of people living alone will increase from 12.2 percent in 1990 to 18.6 percent in 2010 and 30.9 percent in 2030 (Zedlewski, Barnes, McBride, & Meyer, 1989).

An understanding of the contemporaneous factors which are important to the expression of an expectation of a future desire to move by older adults will improve the possibility of effective intervention strategies.

Information regarding the desire of older adults to relocate will also facilitate the development of viable housing options for older adults in the coming years.

STATEMENT OF THE PROBLEM

Although the research which has analyzed the characteristics of older individuals who have actually moved is instructive, such retrospective analysis provides an incomplete picture of the role of expectation in the relocation decisionmaking process among older adults. If an older adult would prefer to remain in his/her home, but, nevertheless, expresses an expectation that he/she will want to move in the future, it follows that he/she may perceive that there has been a diminution of their control in the decisionmaking process.

Although there has been some research regarding the consideration of moving (Nelson & Winter, 1975), that construct differs from an expectation of a future desire to move in that the consideration of moving is much broader and implies even less commitment. Consideration of moving may be the first step in the decisionmaking process, but the expression of an expectation of a future desire to move may indicate that the balance between needs and resources has been tipped. As a result of this imbalance the older adult may feel that it is more likely than not that they will

actually relocate. This "fulcrum" in the decisionmaking process has not received any attention in previous research. Previous theoretical and descriptive research studies have viewed the process as the result of an accumulation of negative factors, but this cumulative view has only been examined retrospectively. It is important to identify the antecedents of the expectation of a future desire to move in order to compare them to the factors which have been found to prompt older adults to begin considering relocation and those which have been found to result in relocation by older community-dwelling adults. Differences among these constructs would contribute to an understanding of the decisionmaking continuum.

It is critical to a thorough understanding of relocation by older community-dwelling adults that the research be based on a representative sample of the elderly population. Most of the previous research regarding consideration of moving (Nelson & Winter, 1975) and desire to move (Goldscheider, 1966; Lawton, Kleban & Carlson, 1973) has involved either an inappropriately small sample and/or the sampling of specific groups such as urban dwellers. In addition, the data for most of the previous research were collected in the 1960's and early 1970's and, therefore, may be subject to influences of those particular cohorts. There is a need for research based on data from a recent large randomly selected sample in order to obtain more

comprehensive information on the precursors to relocation. The source of the data for the present analysis was a large, random sample which should yield findings that are more generalizable than those of earlier research.

PURPOSE

The primary objective of the present inquiry was to examine the factors which appear to have an impact on the expression of an expectation of a future desire to move in order to determine whether these factors are possible antecedents of the expression of an expectation of a future desire to move by older community-dwelling adults. For those which were found to be significant, it is believed that they are antecedents and are part of the decisionmaking process for relocation. It was also a goal of this research to demonstrate the utility of logistic regression in explaining the relative impact of each antecedent on the expression of an expectation of a future desire to move by older community-dwelling adults.

SIGNIFICANCE

By examining the factors present at the time an older adult is expressing an expectation of a future desire to

move, but may not have made the decision to move, this investigation will contribute to a fuller understanding of an interim step in the relocation decisionmaking process. An exploration of the factors which contribute to an expectation of a future desire to move will assist those involved in the development of housing options and service provision for older adults to more accurately focus on addressing needs which the older adult perceives to be unmet or anticipates will be unmet in the near future. Thus, equipped with such knowledge, case managers, family members, service providers, and policy makers can all work together to create an environment wherein community-based elders can be fulfilled and enjoy the highest quality of life possible.

The use of secondary data in the present inquiry posed some limitations in terms of the ability to analyze data specifically gathered to examine this construct and the antecedents. As is often the case when using secondary data, information is obtained to satisfy the objective of the original study and accordingly does not permit as thorough an examination of variables as would be desired. Specifically, there were few variables which permitted an examination of the psychological and anticipatory aspects of the expression of an expectation of a future desire to move. Although this dimension is deemed to be quite important to a thorough understanding, it is not critical to the initial exploration of this construct which was the intent of the

present inquiry. This study should serve to provide significant groundwork for the exploration of this new construct and its antecedents.

THEORETICAL FRAMEWORK

There are both positive and negative reasons for moving. The expectation of a future desire to move is most likely an expression of an older adult's conclusion that an imbalance between needs and resources will exist at some point in the future. The theoretical framework for this inquiry consists of the two aspects of an older adult's life which are the most important for autonomy and continued community residence: needs and resources.

It is often the case that as we get older, physical decline causes an increase in both functional and psychological needs. The functional needs include the activities of daily living (ADL), such as walking, bathing, dressing or grooming as well as the instrumental activities of daily living (IADL), such as housekeeping, transportation, food preparation, grocery shopping, and personal business affairs. The functional status of the individual is the primary determinant of the level of these needs although the older adult's perception of their health status could also contribute to the degree of need. This

perception of functional ability as well as factors such as social isolation, the presence or absence of feelings of closeness, and experiencing losses such as the death of peers also contribute to the level of psychological need. In some instances there are sufficient resources available to match the needs of the older adult. However, in cases where there is a deficit of resources, the result is some level of unmet needs. The presence of any level of unmet needs may prompt the older adult to begin contemplating whether relocation will be necessary or appropriate in the future. The higher the level of unmet needs, the more likely it is that an older community-dwelling adult would express an expectation of a future desire to move.

Functional and psychological needs can be met by either intrinsic or extrinsic resources. The degree to which an older adult has the intrinsic resources to handle their own needs is largely determined by their level of physical and psychological functioning. Intuitively, one would expect older adults with high intrinsic resources to have few unmet needs. An extrinsic resource refers to someone, other than the older adult, handling some or all of these needs. An extrinsic resource can be informal, such as a family member or friend, or formal, such as a community or governmental organization. In some instances one resource, such as a child or spouse, may address both functional and psychological needs, while other resources, such as a

government program, may only address one or more functional needs.

The older adult's appraisal of the balance of needs and resources could be based on actual or anticipated circumstances. For example, the conclusion that extrinsic resources have decreased could be based on circumstances such as an adult child moving away or the illness of a spouse. Similarly, the older adult's observation of their own declining self-sufficiency, or that of their peers, could result in the conclusion that intrinsic resources will decrease at the same time that personal needs increase. If the older community-dwelling adult is experiencing a decline in physical functioning along with friends and loved ones, he/she may simultaneously view it as an individual and a collective experience. However, if an older community-dwelling adult has not experienced a decline in physical functioning, but their friends or loved ones have, then he/she is likely to anticipate what his/her own situation will be like in light of what their friends or loved ones have experienced.

It was expected that, through this study, empirical evidence would be found to support the contention that as long as the older adult perceives that there are adequate intrinsic or extrinsic resources available to address his/her personal needs, and there is no reason to anticipate a change in resources, the expression of an expectation of a

future desire to move should be relatively low. However, if the older adult believes that either the resources will decrease or the needs will increase, the expectation is likely to increase. It was also an expectation of this inquiry to demonstrate that negative changes in the older adult's financial resources, which would threaten the provision of fundamental needs, would also affect the expectation of moving. Inferences about older community-dwelling adults' expectation of a future desire to move were based on an examination of actual rather than anticipatory circumstances.

With respect to assessing the level of needs of older adults who express a future expectation of moving, this study will examine current objective and subjective factors. Some of the objective factors examined include age, need for assistance with specific ADL's and IADL's, functional ability, and degree of social isolation. Subjective factors include self-rated health status, comparison of current health status to health status of five years ago, experiences with the death of peers, and feelings of closeness to family and friends. The objective health status and functional ability factors comprised the assessment of functional needs. Objective health status was measured by using a proxy variable which indicated whether the respondent had a bothersome health problem. The basis for using the proxy was the assumption that the

identification of such a health problem was an indication that the individual had identified the problem and had most likely sought a medical diagnosis. The factors related to subjective health, social isolation and experience of loss comprised the psychological needs component.

Among the factors considered in assessing the level of resources were marital status, living arrangement, geographic proximity of children, other relatives and friends, frequency of contact with children, other relatives and friends, and perceived adequacy of income.

RESEARCH HYPOTHESES

Part of the theoretical framework of this study was the belief that an expression of an expectation of a future desire to move differs both from the expression of a consideration of moving and from the expression of a decision to move. The expression of a consideration of moving is the first step in the decisionmaking process. It is very preliminary in nature and is not necessarily indicative of any serious anticipation or plans to relocate. Conversely, the expression of a decision to move represents the culmination of the decisionmaking process and indicates definitive relocation plans. The decision to move often involves the perception of having a choice and, in such instances, is considered positive. It is further believed

to be associated with an imminent move.

The expression of an expectation of a future desire to move is the step between the consideration of moving and the decision to move. At this point, an older adult may expect that they will "want" to move in the future if they do not perceive that there is an alternative. In this case they may express an expectation of a future desire to move as a result of their perception that such a choice will improve their living situation and bring their needs and resources more in line. The present research concentrated on those community-dwelling older adults who expect to want to move in the future as a result of an anticipated imbalance between needs and resources. It was anticipated that those who express an expectation of a future desire to move are more likely to be older, female, live with someone other than their spouse only and have a lower income. It was further anticipated that they would have fewer support resources, lower self-rated health, fewer personal contacts with family or friends, and be more socially isolated than those who did not express such an expectation.

Since the concept of the expectation of a future desire to move has not been defined in the literature, it was necessary to examine research with respect to the decisionmaking process of older adults contemplating a move and the characteristics of older adults who express an intent to move or who have actually relocated.

The following hypotheses served as the basis for this inquiry.

Hypothesis 1:

The expression of an expectation of a future desire to move by older community-dwelling adults is correlated with an expression of needs.

Hypothesis 2:

The probability of an older, community-dwelling adult expressing an expectation of a future desire to move is related to the level of social isolation and the availability of informal social support.

Hypothesis 3:

The expression of an expectation of a future desire to move is related to gender, age, living arrangement, and marital status.

Proposition 1.

Female community-dwelling older adults will be more likely to express an expectation of a future desire to move.

Proposition 2.

The expression of an expectation of a future desire to move will increase as age increases.

Proposition 3.

Older community-dwelling adults who live with someone other than their spouse only will be more likely to express an expectation of a future desire to move than those living alone or with spouse only.

Proposition 4.

Older widows will be more likely to express an expectation of a future desire to move than women who are divorced, separated, or never married.

Hypothesis 4:

The expression of an expectation of a future desire to move is directly correlated with poor health in older community-dwelling adults.

PRACTICAL IMPLICATIONS

A clearer understanding of the factors which predispose an older adult to expect to want to move in the future should assist in the development of housing alternatives and service resources for older community-dwelling adults. Such an understanding allows planners to focus on the most significant factors and target resources more efficaciously.

OVERVIEW OF REMAINING CHAPTERS

The succeeding chapters will include an examination of empirical findings related to relocation decisions of older community-dwelling adults and an analysis of data which will shed further light on the relocation decisionmaking process. Specifically, Chapter 2 contains a review of the literature. A description of the data used in the present inquiry, the identification of the variables, and an explanation of the statistical methods used are presented in Chapter 3. In Chapter 4 the results of the inquiry and a discussion of the findings are offered. Observations regarding directions for future research, limitations of the data, and implications of the findings are contained in Chapter 5.

CHAPTER 2

LITERATURE REVIEW

There has not been a tremendous amount of research regarding relocation of older adults, but most of that which has been undertaken has focused on migration patterns and the differences in short and long distance moves (Biggar, 1980; Biggar, Cowper & Yeats, 1984; Biggar, Longino & Flynn, 1980; Litwak & Longino, 1987) as opposed to factors which influence decisionmaking. A notable exception is the decision model developed by Wiseman (1980).

Wiseman's Theoretical Model of Elderly Migration is a multi-staged decision model which examines the course of the decisionmaking process from the triggering mechanism which begins the process to the final outcome. According to Wiseman's model, these triggering mechanisms are either "pushes" or "pulls". Pulls are positive reasons for considering relocation such as to obtain increased environmental and residential amenities, to follow the course of "successful" relocation by friends, or to relocate closer to friends or family for social reasons. Pushes are the negative reasons. These include reduced functional abilities, losses such as that of a spouse or close friend,

and environmental stress such as social isolation or an imbalance between abilities and demands. The positive reasons are most frequently associated with voluntary moves and the negative factors with involuntary relocation. The actual decision to move involves an evaluation of the pushes and pulls in conjunction with other factors such as personal resources, community ties and the older adult's perception of likely outcomes. Although this model does not specifically address the expectation of a future desire to move, it is relevant to the present inquiry for two reasons. First, it provides a conceptual framework for making the distinction between the expression of a decision to move and the expression of an expectation of a future desire to move. Secondly, the model shows that a preponderance of pushes is associated with involuntary moves and, therefore, with an increased probability of an expression of the expectation of a future desire to move.

The Wiseman model involves several decisions, including housing type, living arrangement, and location. The expression of an expectation of a future desire to move is less likely to include specific considerations regarding the actual move since a hypothetical future situation is often involved rather than an imminent move. There is an inherent assumption in the Wiseman model that the person moving is also the decisionmaker. In the case of an older adult who expresses an expectation of a future desire to move, the

older adult's fear of not being the person making the decision or analyzing the situation could be a significant factor in their expression of such an expectation. The older adult's perception of their situation, with respect to their level of control, dependence and alternatives, is believed to be an integral component of the expression of an expectation of a future desire to move.

It is believed that the expression of an expectation of a future desire to move is affected by numerous factors which serve as "pushes" to either predispose the older adult to expect to move or cause an actual change in the balance of needs and resources. Among the factors considered were: the older adult's age, gender, income, level of unmet needs, functional status, self-perceived health status, marital status, living arrangement, and availability of informal social support.

The Importance of Age and Functional Status to Relocation Decisions

Increasing rates of relocation by older adults are found during two specific periods: ages 60-69 and beyond the age of 75 (Lee, 1980). The first period of movement is generally attributed to a desire to improve residential amenities upon retirement. The second period is most often due to the need for assistance resulting from the onset of physical disabilities and/or losses, such as the death of a spouse (Lawton, 1983; Litwak & Longino, 1987; Pastalan,

1975). Moves during the second period are related to "pushes" or negative factors as opposed to the "pulls" associated with moves by younger movers. Within the theoretical framework suggested in this inquiry, an expression of an expectation of a future desire to move is the result of pushes. This study was expected to show that the likelihood of an older adult expressing such an expectation increases with age. This anticipated relationship seemed reasonable in light of the fact that the probability that an older adult has either experienced a disability which would prompt the consideration of a move, or has observed a peer making an undesired, disability-related move, also increases with age. A study of migration patterns for older adults moving to and from retirement destinations, such as Florida, indicates a strong correlation between increased age and movement away from the retirement location presumably to a more supportive environment (Litwak & Longino, 1987).

There are several potential factors which could mitigate the effect of increased age on an expression of an expectation of a future desire to move. Empirical evidence indicates that expressed satisfaction with personal circumstances, such as housing, increases with age (Lawton 1980; Rabushka & Jacobs, 1980). Satisfaction with their housing situation may alter an older person's appraisal of their needs and resources. For instance, although their

home may be objectively appraised as being inadequate to handle current or future disabilities, the older adult may have a different perception. As they age, the older adult may become more "secure" with the familiar surroundings of their own homes and, therefore, may be less likely to express an expectation of a future desire to move.

Although inaccurate appraisal of resources by an older adult could decrease the expression of an expectation of a future desire to move in some instances, it is not believed that such a potential offset is sufficient to negate the effect of increased age and its associated "pushes" on the expression of the expectation of a future desire to move. Consequently, the findings of this study were expected to indicate that there is a positive correlation between age and the expression of an expectation of a future desire to move. There is a paucity of empirical findings in the literature which address the relationship between age and an expression of an expectation of a future desire to move. The current inquiry is expected to make a contribution to the literature in this regard.

The Role of Income, Gender, and Race in Relocation

Older people with higher incomes are more likely to express an intent to move (Colsher & Wallace, 1990) and an expectation of moving (AARP, 1990). However, those with lower incomes are more likely to actually move (AARP, 1990;

Colsher & Wallace, 1990). One possible explanation for these findings is that older adults with higher incomes may more readily express the intent or expectation of a move because they may perceive that they have more options. They may also be less threatened by the idea of leaving their home if it does not represent their entire financial security. It is not surprising that older adults with lower incomes are more likely to actually move since they are also more likely to have fewer financial resources available to maintain their needs at home.

Previous research has demonstrated that long distance amenity-related moves are related to higher incomes and local disability related moves are related to lower income (Biggar, 1980; Carter, 1988; Litwak & Longino, 1987; Wiseman, 1986). Since the expression of an expectation of a future desire to move is associated with disability, it is more likely that it is likewise associated with disability-related moves and therefore with lower incomes.

In a study of elderly relocation patterns, Biggar (1980) found that local (intracounty) movers were more likely to be from a lower socioeconomic strata and be part of a household involving dependent living arrangements and income sources than were migrant (intercounty and interstate) movers. Biggar further found that the distance of the move was positively correlated with a higher socioeconomic level. Similarly, a study of the

characteristics of older interstate migrators found that those moving to the amenity-rich state of Florida were younger, more independent and had greater financial resources than those who were moving out of Florida (Litwak & Longino, 1987). These findings support Litwak and Longino's conclusion that there are three types of moves. Each of these three types is associated with the older adult's level of dependency. The move to Florida represents the first type, which is an amenity move and usually involves people with higher financial resources. The second type of move could be the move away from an amenity-rich location such as Florida or it could be a local move, but it is a disability-related move and involves people with fewer financial resources. This move is most often made to a location in closer proximity to the older adult's children. The third type of move, which is likely to be local, would be the result of further and usually chronic debilitation. This move is almost always associated with relocation to an institution.

Any examination of the effect of income on the expression of an expectation of a future desire to move must also take gender and racial characteristics into consideration since both women and minorities are overrepresented in the category of low income older adults. Older women tend to be much poorer than older men. Therefore, it would be expected that women would be more

likely than men to state that they expect to want to move. This greater likelihood of expressing an expectation of a future desire to move by women is, presumably, a result of limited alternatives when a disability occurs. Recent research confirms that older movers tend to be female and white (Biggar, 1980; Biggar, Cowper & Yeats, 1984).

In addition to a lack of financial security, the cohort of women currently over the age of 65 has also been found to exhibit greater physical dependence levels than their male counterparts (Branch & Jette, 1983; Wiseman & Roseman, 1979; Zyzanski, Medalie, Ford & Grava-Gubins, 1989). In a study of living arrangements and well-being of older adults, Zyzanski, et al., (1989) found that the characteristic profile of an older adult residing with a child is an older, widowed female with below average social resources, physical health, and mental health. This study was expected to support the contention that financial insecurity and physical dependence are associated with an imbalance of needs and resources and therefore with a higher expectation of a future desire to move. It would follow, then, that older women would be more likely to express an expectation of moving.

It is important to note that the amount of emotional, social, and instrumental support received by older women is quite different depending upon their marital status (Johnson & Catalano, 1981; Longino & Lipman, 1982; Longino & Lipman,

1985). Longino and Lipman (1985) found that, unlike married, divorced or widowed older women, those who were never married did not receive a lot of support from their families. Although this finding is not unexpected, in that never married women do not have a spouse and may not have children to provide support, it has significance to the present inquiry when viewed in conjunction with findings which indicate that this group of women maintains higher self-sufficiency and instrumental independence in old age (Peterson, 1981). Any consideration of the effects of income and gender on the expression of an expectation of a future desire to move would be remiss if marital status was not included. Marital status must be considered for its possible influence on issues related to dependence.

Insofar as race is concerned, because non-whites tend to already reside in an extended family environment (Hofferth, 1984) and, therefore, have fewer unmet needs, it is less likely that they would express an expectation of a future desire to move. This conclusion is supported by the results of a cohort analysis of actual migration patterns among older black and older white males (Pitcher, Stinner & Toney, 1985) which found that the propensity to migrate declined steadily over the life course of black males; whereas, white males exhibited a gradual increased propensity to migrate with age until a peak at about age 65, at which time a gradual decline began.

The Relationship Between Living Arrangement and Dependence

Recent research indicates that an individual's living arrangement is a significant factor in understanding elderly relocation issues. For example, Beland (1987) found that an older person living with a spouse only or living alone was more likely to prefer to move than one living with a child, relative or friend. Beland further found that older adults living alone expressed a strong preference for living with someone other than their children if it became necessary for them to combine households. Older people who live alone are more likely to actually move (Biggar, 1980; Carter, 1988; Colsher & Wallace, 1990; Litwak & Longino, 1987). In a study of U.S. Census data, Carter (1988) found that among people over age 65 who make local moves, the percentage of those who live alone has increased significantly in the three cohorts from 1960 to 1980. This group is also more likely to express an intent to move (Colsher & Wallace, 1990). The above concepts of preference toward moving and/or intent to move are different from the theoretical concept of expectation of a desire to move. However, these concepts have important implications for the present inquiry. Although findings from the works of Beland (1987) and Colsher and Wallace (1990) suggest that an older adult living alone or with a spouse is most likely to express an intent to move and a preference for moving, they would not necessarily be more likely to express an expectation of a

future desire to move. An expression of an intent to move or a preference for moving may have a stronger association with Wiseman's pulls while the expression of an expected future desire to move is more likely a result of pushes. Since older adults who reside with someone other than a spouse are likely to have made such arrangements due to inadequate financial resources, it follows that they would be more likely to express an expectation of a future desire to move.

The reasons for the differences in relocation preferences, by older adults in various living arrangements, are not entirely clear. However, older people who live with their children have been found to be the most functionally dependent (Branch & Jette, 1983; Shanas, 1979; Zyzanski et al., 1989) as well as to have the poorest physical and mental health (Zyzanski et al., 1989). Functional dependence could serve as a strong push to expect to move even if the older adult has already made at least one move to relocate with another household. In fact, it may be that having made one move as a result of disability, the older adult would be more likely to expect that it could happen again and to express that expectation.

Older adults living with children, relatives or friends are more likely to have experienced some degree of autonomy loss than those living alone or with a spouse (Branch & Jette, 1982). Consequently, they may perceive that they

have limited control in decisionmaking related to relocation and that they will be moved when their needs again outweigh the available resources or they become a "burden". It is believed that when such a perception of "powerlessness" is held by older, community-dwelling adults it results in a higher likelihood that an expression of an expectation of a future desire to move would be made.

The significance of living arrangement in the expression of an expectation of a future desire to move is clearly seen in terms of need. Thus the expression of an expectation of a future desire to move was expected to be less likely for older adults living with a spouse or those who live alone, and are functionally independent. Those who live alone and are functionally dependent or those who live with family members, other than a spouse, would be most likely to express an expectation of a future desire to move. The literature to date indicates that living arrangement can be used as a means of targeting the needs of older community-dwelling adults, however, previous research has not addressed whether living arrangements influence an older person's perception that they are in a stable situation. This inquiry will shed some light on the relationship between living arrangement and the expression of an expectation of moving.

The Significance of Informal Support in Relocation Decisions

The literature on long distance and local moves by older adults suggests that "young-old" (ages 60-70) interstate movers are more likely to make moves away from children to warmer and more amenity rich locations (Litwak & Longino, 1987; Longino, 1986). In a study of migration patterns of older community-dwelling adults moving between Florida and four Northern states, Litwak & Longino (1987) found that those moving to Florida were younger, more physically independent, and less likely to be institutionalized than those moving out of Florida. Litwak and Longino (1987) and Longino (1986) found that those over age 75 are more likely to relocate near family in order to enrich their social support system, especially that support related to access to and acquisition of community-based long-term care services. In a study of older community-dwelling adults over 65, Kivett (1985) found that proximity to kin was the strongest predictor of functional assistance being received. Although older adults may have friends and neighbors who provide social support, the literature suggests that their own disabilities and their lack of internalized commitment make it unlikely that they will be a source of instrumental assistance (Cantor, 1979; Siegel, 1985; Litwak, 1985; Litwak & Longino, 1987). The significance of distance from family members has important implications for the present research because people over

age 75 who do not live near family members may be more likely to express an expectation of a future desire to move as they realize the limitations imposed by geographical distance.

There is no empirical evidence in the literature which addresses the way age and actual distance from family affects the expression of an expectation of a future desire to move. However, it was anticipated that older adults who do not live near family members would be more likely to express an expectation of a future desire to move than those located close to extrinsic sources of support. In effect, they are pushed to expect to relocate in order to ensure that they will be able to balance needs and resources.

The fact that intent to move has been associated with higher levels of depressive symptoms (Colsher & Wallace, 1990) emphasizes that the issue of relocation involves a strong emotional component. A negative emotional situation could cause the older adult to negatively appraise their needs and resources. Such an appraisal could cause the individual to have a higher expectation of a future desire to move as a result of a perception of a lack of options. Older adults' ties with close friends and relatives have been more strongly related to emotional support than have ties to their children (Seeman & Berkman, 1988). In their study of social networks, Seeman and Berkman (1988), found that the presence of a confidant was strongly associated

with both the availability and perceived adequacy of emotional support. The importance of the confidant for emotional support was greater for those without a spouse and without children. A number of studies have found that friendships are important to a sense of well-being and the affirmation of an older adult's self-worth (Atchley, 1980; Adams, 1985; Cantor, 1979; Chown, 1981). For example, a study by Adams (1985) of older women in age-segregated and age-integrated settings, found that there was a strong positive relationship between well-being and the number of emotionally close, local friends. In addition to the benefits of receiving friendship, Mancini (1980) found that being able to offer physical assistance to a friend and feeling competent in the friend role were important factors in the morale of older adults.

Although there has been research related to the role of friends as support providers and the importance of friendship to well-being, there has not been any which focuses on whether non-child support groups have a bearing on the older person's relocation considerations. It has been shown that the availability of a support network, in general, significantly enhances the ability of an individual to cope with both psychological and physical stressors (McCubbin, Sussman & Patterson, 1983), but the nature of this coping process as related to older adult relocation issues remains unexplored.

It was anticipated that the presence of a friend or neighbor support group would decrease the older adult's expression of an expectation of a future desire to move by mitigating some of the "pushes". The availability of a friend or neighbor may be sufficient to actually help the older adult to restore or maintain the balance between needs and resources. In addition, they may increase the older adult's perception that they have "extra" extrinsic resources available in the event that an existing resource is diminished. It was expected that adults who have strong friend and neighbor supports will be less likely to express an expectation of a future desire to move because they would have a strong sense of well-being and extended resources.

The loss of a close friend or family member represents a diminution of available psychological and instrumental support and, therefore, may play a role in the expression of an expectation of a future desire to move. There has been some research which indicates that older people who experience a loss, such as the death or serious illness of a close friend or family member are more likely to consider moving than those who had not (Colsher & Wallace, 1990; Nelson & Winter, 1975). The loss could clearly be seen as a "push", but it may be that although it prompts an older person to consider moving, it may not have a long term impact which would result in them actually expecting that they will want to move in the future. The recency of the

loss is thought to be critical to the impact (Nelson & Winter, 1975).

As noted previously, the availability of extrinsic resources for assistance with personal needs is one of the most critical components in an older adult's appraisal of their ability to remain in their home. The availability of instrumental support serves to lessen the pushes which could cause an older adult to expect to relocate. A review of the literature on independence of community-dwelling older adults reveals a general consensus that the majority of such instrumental support is provided by family members (Branch & Jette, 1983; Cantor, 1975, 1983; Stephens & Bernstein, 1984). On the basis of those findings, it would follow that the older adult's expression of an expectation of a future desire to move would increase if family members were not available to provide extrinsic support.

The question of how to determine the availability of support is a difficult one. A recent study by Seeman and Berkman (1988) found that the support group characteristics which were associated with actual availability of adequate instrumental and emotional support were not all associated with the older adult's perception that adequate support was available. They found that network size, the number of face-to-face contacts and the number of geographically proximal supports were associated with a greater availability of actual support, but the only characteristic

significantly associated with adequacy, as perceived by the older adult, was the number of face-to face contacts.

Similarly, Branch and Jette (1983) found that the use of instrumental support increased as the number of children to whom the older adult felt personally close increased.

It appears that the older adult's feeling of closeness to a family member is quite important to their tendency to accept assistance and to appraise that a support resource is available. Geographical proximity, in the absence of such a feeling of closeness, does not appear to be an appropriate indicator of perceived adequacy or availability.

It was anticipated that older adults who have more reported personal contact with family members would be less likely to express an expectation of a future desire to move as a result of their perception that extrinsic resources are adequate and available. Hence, it was believed that there would be an inverse relationship between the expression of an expectation of a future desire to move and an older adult's perception of the adequacy of extrinsic resources to meet their needs.

Previous research has not considered whether the perceived availability and adequacy of instrumental support affects an older adult's expression of an expectation of a future desire to move. In the present inquiry, the size of the support network, number of weekly contacts with family and friends and the presence or absence of feelings of

closeness were examined to determine whether they affect the expression of an expectation of a future desire to move.

Research Hypotheses

A review of the literature on relocation of older community-dwelling adults reveals that there is a dearth of empirical studies which have attempted to identify and explain the antecedents of undesired relocation. The focus of much of the research on elderly relocation has been voluntary, amenity-related moves by the "young-old". As the number of "old" and "old-old" community-dwelling adults increases so does the need to understand the factors associated with an older adult's expression of an expectation of a future desire to move when their preference is to remain in their home. An understanding of these factors could be of help in determining how older adults assess their resources and needs. It could also assist in targeting and developing appropriate supports for older adults who fear that they will have to move involuntarily.

The following hypotheses have been derived from the literature and were the basis for this inquiry.

Hypothesis 1:

The expression of an expectation of a future desire to move by older community-dwelling adults is correlated with an expression of needs.

This hypothesis was tested using logistic regression to determine the impact of ADL needs, IADL needs, functional status, household income, and perceived adequacy of income to meet expenses on the expression of an expectation of a future

desire to move.

Hypothesis 2:

The probability of an older, community-dwelling adult expressing an expectation of a future desire to move is related to the level of social isolation and the availability of informal social support.

This hypothesis was tested using logistic regression to determine the impact of social isolation, number of children in the area, number of children contacted weekly, number of relatives in the area, number of relatives contacted weekly, number of friends in the area, and number of friends contacted weekly on the expression of an expectation of a future desire to move.

Hypothesis 3:

The expression of an expectation of a future desire to move is related to gender, age, living arrangement, and marital status.

Proposition 1.

Female community-dwelling older adults will be more likely to express an expectation of a future desire to move than older community-dwelling males.

This proposition was tested using logistic regression to determine whether the sex of the respondent has an impact on the expression of an expectation of a future desire to move.

Proposition 2.

The expression of an expectation of a future desire to move will increase as age increases.

This proposition was tested using logistic regression to determine whether the age of the respondent has an impact on the expression of an expectation of a future desire to move. Separate regression equations will be estimated, treating age continuously and categorically to further clarify its impact on the expression of an expectation of a future desire to move.

Proposition 3.

Older community-dwelling adults who live with a spouse only will be less likely to express an expectation of a future desire to move than those living in any other household combination.

This proposition was tested using logistic

regression to determine whether living with a spouse or living with a person or persons other than spouse only have an impact on the expression of an expectation of a future desire to move, compared to living alone.

Proposition 4.

Older community-dwelling widows are more likely to express an expectation of a future desire to move than older community-dwelling women who are divorced, separated, or never married.

This proposition was tested using logistic regression to determine whether either being widowed or having a marital status of divorced, separated, or never married has an impact on the expression of an expectation of a future desire to move, compared to being married.

Hypothesis 4:

The expression of an expectation of a future desire to move is directly correlated with poor health in older community-dwelling adults.

This hypothesis was tested using logistic regression to determine whether the respondent's perception of his/her current health status compared to five years ago, perception of current health status, or the presence of a current physical health problem have an impact on the expression of a future desire to move. Separate regression equations were estimated in order to clarify the respondents' perceptions of their health on the expression of an expectation of a future desire to move.

The comparative health status measure was used to determine whether the respondent's perception that his/her health is better or worse than it was 5 years ago has an impact on the expression of an expectation of a future desire to move when compared to the perception that his/her health has remained the same.

The current health status measure was used to determine whether the respondent's perception that his/her health is excellent, fair, or poor has an impact on the expression of an expectation of a future desire to move when compared to the perception that his/her health is good.

CHAPTER 3

METHODS

This chapter contains a description of the data, the operationalization of the variables used in this research, and a discussion of the statistical methods used to analyze the data. As was discussed in Chapter 2, most of the extant literature on the relocation of community-dwelling older adults has focused on who has actually moved and whether the move was local or long distance. While it is indeed important to know about the migration patterns of the elderly, it is also important to identify and understand the factors and conditions which precipitate a move. Specifically, there is a need to understand the factors and circumstances which would lead to the expression of an expectation of a future desire to move by community-dwelling elders. A framework for the exploration of the factors and conditions which precipitate the expressed expectation of a future desire to move is presented in this chapter.

Description of Data and Panel Characteristics

The data for this inquiry come from the third wave of the Massachusetts Health Care Panel Study (MHCPS), a

longitudinal investigation of the social and health needs of older community-dwelling adults. The MHCPS was undertaken by the Massachusetts Department of Public Health in order to establish a reliable basis by which Medicare and Medicaid benefits for community-based older adults could be coordinated and the services maximized in Massachusetts.

The first wave of the study was conducted in 1974 with a representative sample of 1,625 non-institutionalized adults over the age of 65 residing in Massachusetts. There were no substitutions of people or housing units. At the time of the second wave in 1976, interviews were conducted with 1,479 of the original respondents. When the third wave was conducted in 1981, there were only 825 respondents willing, available, and able to be interviewed. According to Branch and Jette (1984), this number is the result of 317 mortalities, 60 nursing home admissions, 82 refusals to participate, ten language or health related problems, and 50 who could not be contacted among the 1,344 eligible respondents remaining from wave 2. There were 135 respondents in wave 2 who were deemed ineligible.

The respondents in Wave 3 were almost entirely Caucasian and 65% female. By the time of the third wave of interviews, all of the panel members were over the age of 70. Over one-third of the panel (36%) was between the ages of 71 and 74 and over half (52%) was between the ages of 75 and 84. Only 12% of the panel members who were interviewed

during the third wave were 85 years old or older. Less than half of the panel members interviewed during the third wave of interviews were married (44%). Forty-five percent reported that they were widowed, nine percent reported never being married, and two percent reported being separated or divorced (Branch and Jette, 1983). As reported by Branch and Jette (1983), 37% resided in a household with only their spouse and 26% lived with children, relatives, or a combination of family and friends.

Although the majority of respondents reported having healthy children or other relatives, many of the respondents reported that these relatives did not live near them. Forty-one percent of those with children and 35% of those with other relatives reported that their children or other relatives did not live in the immediate geographical area. Twelve percent of all respondents reported having no friends, 22% had no living children, and ten percent had no other living relative (Branch & Jette, 1983).

Reduction of the Sample Size

For this analysis, the Wave 3 sample size of 825 was filtered to include only the observations which contained valid responses to the dependent variable, expectation of the desire to move in the future (MVELIKLY). There were 806 observations remaining after this process. A further filtering out of the missing values among the independent

variables resulted in a data set of 701 observations. A description of the characteristics of this reduced sample is presented in Appendix A.

Endogenous Variable

The endogenous variable for this inquiry is a respondent's expression of an expectation of a desire to move in the future. This variable (MVELIKLY) is based on a respondent's answer to the question "How likely is it that you will want to move in the next few years?" The possible responses were: very likely, somewhat likely, and not at all likely. These were combined into a dichotomous response representing the expression or lack of expression of an expectation of a future desire to move. Responses of very likely and somewhat likely were coded "yes" and the response of not at all likely was coded "no". The specific wording of this question is significant in that it implies an expectation of moving rather than simply a consideration of moving. The distinction is important because consideration is more likely to be the first stage of the decision to move process; whereas expectation is more likely to be a later step in the decisionmaking process.

Exogenous Variables

Demographic Characteristics

Gender is a dichotomous variable (GENDER) with male

coded as zero and female coded as one. Of the 701 respondents in this analysis, 446 (63%) were female and 255 (37%) were male.

Respondent age at Wave 3 (AGE) is a continuous variable. The minimum age was 71 and the maximum age was 94. The mean age of respondents at Wave 3 was 77 years.

Income

Information regarding household income was obtained by having respondents indicate their total gross income on a scale which had categories consisting of ranges of \$999 up to \$10,000 and subsequent categories with ranges of \$4,999. These fifteen categories were then collapsed into seven categories as follows: (1) <\$5,000 (2) >\$5,000 <\$10,000 (3) >\$10,000 <\$15,000 (4) >\$15,000 <\$20,000 (5) >\$20,000 <\$25,000 (6) >\$25,000 <\$50,000 and (7) >\$50,000. After determining that over 50% of the respondents had household incomes of less than \$7,000, it was decided to combine the categories into one variable (INCOMLOW), with incomes less than \$10,000 coded as 1 and incomes above \$10,000 coded as zero. In this way the effect of income on the expression of an expectation of a future desire to move could be determined by comparing those with lower incomes to those with higher incomes.

In addition to actual household income, a variable which reflected the responses to whether the respondents

considered their household income to be sufficient to meet their current monthly expenses (INCOMEOK) was also used. The assumption was that the respondent's perception of the adequacy of their income was critical to their appraisal of the adequacy of their resources. An answer of "yes" was coded as zero and an answer of "no" was coded as one. The majority (80%) of the respondents considered their income to be adequate to meet their current expenses.

Living Arrangement/Marital Status

Respondents were asked to specify their living arrangements with regard to whether their household included a spouse, children, other relatives, friends, or unrelated individuals and to indicate the specific combination (i.e., spouse only, spouse and children only, children and sibling(s), etc.). These categories were combined into three artificial variables which represent living arrangement: live alone (ALONE=1), live with spouse only (SPOUSE=1), and live in a household of some other combination (OTHCOMBO=1). The respondents' living arrangements were very equally distributed, with 39% living with spouse only, 36% living alone, and 24% living in some other combination. It was necessary to combine the six categories which comprised the other combination category because none of them were large enough to obtain statistical significance.

The question regarding marital status included the categories of married, widowed, separated, divorced, and never married. The category of married was made into the variable MARRIED (1= married) and the category of widowed was made into the variable WIDW (1= widowed). Although there are likely to be significant differences between people who are divorced, separated, or never married, there were too few respondents in any of these three categories to obtain statistical significance. Accordingly, these three categories were combined into one variable, OTHM (1= divorced, separated or never married).

Functional Status

The scale to measure functional status consists of three items which indicate the respondent's ability to perform heavy work (HEAVYWRK), walk up and down stairs (WLKSTAIR), and walk one-half mile (WALKMILE). Respondent's answered either that they were able to perform the task (yes= 0) or that they were not able to do so (no= 1). A score of three on the functional status scale corresponds with low functional status while a score of zero corresponds with high functional status. The mean functional status score for the respondents in the reduced sample was 0.83.

Activities of Daily Living

There were initially five tasks used to construct the

ADL scale. These items consisted of the respondent needing assistance in bathing (HELPBATH), eating (HELPEAT), grooming (HLPGROOM), dressing (HLPDRESS), and walking across a small room (HELPWALK). The need for assistance with eating and walking across a small room were omitted from the scale because there were no respondents who required assistance with these activities. A person requiring assistance with all three of the remaining tasks would have a score of three, while a person requiring no assistance with any of the tasks would have a score of zero. The analysis revealed an unusually healthy group of respondents, with a mean ADL score of 0.18.

Instrumental Activities of Daily Living

The IADL Scale consisted of three items with which the respondent would need assistance. These items are: cleaning the house (H LPCLEAN), handling personal business affairs (HLPBUSNS) and transportation (TRANPROB). As with the ADL Scale, a score of three would indicate the lowest level of IADL functioning and, consequently, a higher level of dependence. The mean IADL score was 0.45, again indicating a low level of compromised IADL functioning in this sample of community-dwelling elders.

Social Isolation

The social isolation scale consisted of four items: the

frequency of outings away from home (GETOUT), membership in clubs or civic organizations (ORGMEMBR), having someone to call in an emergency (CALLHELP), and having someone to whom they feel close (FEELCLOS). All of the items were dichotomous except for the frequency of outings (GETOUT) for which there were four categories: almost daily, a few times per week, weekly, and less than weekly. A social isolation score of seven indicated extreme social isolation and a score of zero indicated that the respondent is not isolated. Mean isolation score for the reduced sample was 2.16.

Objective Health Status

In the absence of an objective measure of health status, another variable was used as a proxy. This variable was the response to the question of whether respondents had a health problem which bothered them (HLTHPROB). A response of "yes" was coded as one and "no" was coded as zero for this analysis. The basis for using the proxy was the assumption that the identification of a health problem which bothered them could be an indication that the individual had perceived the problem to be bothersome enough to seek a medical diagnosis. Of the 701 respondents, 431 (61%) reported having one or more health problems that bothered them.

Self-perceived Health Status

Two variables were used to measure self-perceived health status. Respondents were asked to rate their current health status (RATEHLTH) as either excellent, good, fair or poor. Dummy variables were created as follows: excellent health (EXLCHLTH), good health (GOODHLTH), fair health (FAIRHLTH), and poor health (POORHLTH). Each variable was coded with "yes" as one and "no" as zero. Sixty-three percent of the respondents rated their health as either excellent or good. The reference group was those who responded that their health was good (GOODHLTH).

Respondents were also asked to compare their current health status to their general health five years ago (COMPHLTH) and indicate whether it was better, the same, or worse. Again, dummy variables were created to represent each of these categories (HLTHBETR, HLTHSAME, and HLTHWRSE). An answer of "yes" was coded as one and "no" was coded as zero. The majority of respondents (68%) rated their health as better or the same as it had been five years ago. Those who responded that their health was the same as it was five years ago (HLTHSAME) were used as the reference group.

Experiencing Death

Respondents were asked whether they had experienced the death of a close relative or friend within the past five years (EXPDEATH). An answer of "yes" was coded as one and

"no" was coded as zero. Only 212 (30%) of the respondents had not had such an experience.

Extrinsic Support Resources

A series of questions was asked about each of the respondent's living children, as well as the relatives and friends with whom they are most frequently in contact. In response to these questions, continuous variables were developed which indicated: the number of children (AREACHLD), relatives (AREAREL), and friends (AREAPALS) located in the respondent's geographic area. In order to analyze those respondents who had no apparent informal support available, a combined variable (NOSUPPT) was developed to indicate respondents who answered "none" to all of the above three categories. If the respondent had no children, relatives, or friends in the geographic area, NOSUPPT was coded one. Since only 18 of the respondents (2.6%) had no apparent informal support in the immediate geographic area, this variable was not used in the analysis.

Similarly, the variables indicating the number of children (SEECHILD), relatives (SEERELS), and friends (SEEPALS) with whom the respondent has weekly face-to-face or telephone contact were also combined so that an answer of "none" to all of the categories would indicate that the respondent has no weekly informal support contact (NOCONTAC). In that event, NOCONTAC was coded as one. The

lack of weekly support contact was deemed an important factor in light of the previously mentioned literature which indicates that frequency of contact is related to perceived adequacy of social support. This group was found to have a high level of informal support contact, with only 1.6% indicating that they had no weekly contact. Accordingly, this variable was not used in the analysis.

Analysis

The Logistic Regression procedure of the Statistical Analysis System (SAS) software package (version 6) was used to determine the relative impact of each exogenous variable on the expression of an expectation of a future desire to move. Logistic regression is the appropriate regression technique because it takes into account the binary nature of the dependent variable and allows the investigation of the relationship between the response probability and the explanatory variables. As Agresti (1984) notes, the logit model "describes the dependence of one variable on another and disregards the structural relationships among the explanatory variables."

In logistic regression based on logit models, the residuals of the predictors generate a chi-square distribution. Parameter estimates are interpreted in terms of their contribution to a change in the probability of the occurrence of the event in question. When standardized

estimates are used it is possible to talk about the strength of association of a particular explanatory variable relative to that of another explanatory variable. However, as Agresti (1984) notes, unlike the typical case of ordinary Least Squares Regression, wherein it is possible to examine structural relationships among the explanatory variables, logistic regression (using the logit model) permits one to determine the dependence of one variable on another, one at a time.

CHAPTER 4

RESULTS

The results of this inquiry are presented in this chapter. Six logistic regression equations will be discussed as they relate to the stated hypotheses. The analysis consisted of estimating the regression equations based on 1) the entire sample, 2) the respondents with children in the area, and 3) the respondents without children in the area. Two different measures of self-perceived health status were used: RATEHLTH which is the respondent's self-perceived health status and COMPHLTH which measures comparative self-perceived health status for a five year period. These two self-perceived health status measures were used in consideration of the longitudinal and cross-sectional dimensions of self-perceived health as it relates to the expression of an expectation of a future desire to move. The decision to consider respondents with and without children in the area was based on the generally accepted concept that the presence of children in the area is critical to the amount of informal social support available to older community-dwelling adults (Kivett, 1985; Penning, 1990; Shanas, 1979; Stoller & Earl, 1983). As a

primary resource, the presence of this support is deemed to be of major importance in terms of the balance between needs and resources as defined in this inquiry.

Logistic Regression for the Entire Sample

Table 1 presents the results of the logistic regression involving the entire sample and including the cross-sectional health variable RATEHLTH. The results of the logistic regression involving the entire sample and including the longitudinal variable COMPHLTH are shown in Table 2.

Of the variables used to measure expressed needs, ADL needs score (ADLSCOR), IADL needs score (IADLSCOR), functional status (FUNCSTAT), income under \$10,000 (INCOMLOW), and adequacy of income to meet expenses (INCOMEOK), only the perception of adequacy of income to meet expenses was significant. This was true for both of the self-perceived health measures.

Those respondents who perceived that their household income was not adequate to meet expenses were less likely to express an expectation of a future desire to move than those who considered their income adequate. These findings do not support Hypothesis 1 which stated that the expression of

Table 1
Logistic Regression Results Using
Cross-Sectional Variable of Self-Perceived
Current Health Status (RATEHLTH) for Entire Sample
(N=701)

Dependent Variable = MVELIKLY (1=YES, 0=NO)

<u>Independent Variable</u>	<u>Standardized Regression Coefficient</u>	<u>Standard Deviation</u>
Intercept		1.7476
AGE	0.087930	0.0214
AREACHLD	0.170377*	0.1361
SEECHILD	-0.012024	0.1096
AREAREL	0.047881	0.0981
SEEREELS	0.021250	0.0959
AREAPALS	-0.054299	0.1296
SEEPALS	0.067634	0.1323
FUNCSTAT	0.055343	0.1380
ADLSCORE	0.004256	0.2354
IADLSCOR	-0.065218	0.1679
SOCISOL	-0.007724	0.1007
EXPDEATH	-0.044223	0.2163
INCOMEOK	-0.137824*	0.2371
GENDER	0.040573	0.2250
EXCLHLTH	0.077217	0.3175
FAIRHLTH	-0.029952	0.2396
POORHLTH	-0.114105*	0.3815
HLTHPROB	0.004194	0.2300
SPOUSE	0.176922	0.4059
OTHHC	0.198601**	0.2892
WIDW	0.100724	0.3885
OTHM	0.044891	0.4699
INCOMLOW	0.054821	0.2238

* p < .05

** p < .01

-2 Log L Chi-Square 38.99 (23 df, p = 0.0199)

Table 2
Logistic Regression Results Using Longitudinal
Variable of Self-Perceived Comparative Health
Status (COMPHLTH) for Entire Sample
(N=701)

Dependent Variable = MVELIKLY (1=YES, 0=NO)

<u>Independent Variable</u>	<u>Standardized Regression Coefficient</u>	<u>Standard Deviation</u>
Intercept		1.7548
AGE	0.103950	0.0215
AREACHLD	0.168498*	0.1366
SEECHILD	-0.013734	0.1088
AREAREL	0.055550	0.0992
SEERELS	0.017290	0.0967
AREAPALS	-0.047943	0.1283
SEEPALS	0.063892	0.1308
FUNCSTAT	-0.001357	0.1371
ADLSCORE	0.001016	0.2345
IADLSCOR	-0.067893	0.1678
SOCISOL	-0.032617	0.0987
EXPDEATH	-0.045547	0.2154
INCOMEOK	-0.142065*	0.2363
GENDER	0.036252	0.2246
HLTHBETR	0.141322*	0.3877
HLTHWRSE	0.041212	0.2361
HLTHPROB	-0.031996	0.2266
SPOUSE	0.187032	0.4083
OTHHC	0.201360**	0.2902
WIDW	0.126092	0.3920
OTHM	0.064039	0.4730
INCOMLOW	0.034165	0.2213

* p < .05

** p < .01

-2 Log L Chi-Square 38.14 (22 df, p = 0.0177)

needs would increase the likelihood of an older community-dwelling adult expressing a future expectation of a desire to move. It would, however, tend to support the belief that those who believe their income is not adequate or whose income is actually at a lower level may be less comfortable expressing a future expectation of a desire to move because they perceive that they have fewer options and less control over the future move. The finding regarding income adequacy is not inconsistent with previous findings related to those with higher incomes being more likely to express an intent to move (Colsher and Wallace, 1990) and an expectation of moving (AARP, 1990).

The failure to find significance between the dependent variable and the ADL and IADL needs scores must be viewed in connection with the fact that the sample population was an unusually healthy group. Although all of the respondents were over 70 years of age, 38% indicated that they had no physical health problem (HLTHPROB), 85% needed no help with ADL's (ADLSCORE) and only 37% expressed a need for assistance with IADL's (IADLSCOR).

No significance was found for the variable indicating household income (INCOMLOW). No statistically significant differences in the likelihood of expressing an expectation of a future desire to move were found for those with lower incomes versus those with higher incomes. It appears that, for this panel of older community-dwelling adults, household

income should not be considered in the same vein as expressed needs where the expression of an expectation of a future desire to move is concerned.

The variable used to indicate social isolation (SOCISOL) was not significantly related to the expression of an expectation of a future desire to move. This finding may be the result of the fact that the sample had an unusually low degree of social isolation. Ninety-five percent of the respondents reported that they had someone to call in an emergency (CALLHELP), 92% had someone to whom they felt close (FEELCLOS), and 86% got out either daily or a few times a week (GETOUT).

Although the number of relatives (AREAREL) and the number of friends (AREAPALS) in the area did not significantly impact the likelihood of expressing an expectation of a future desire to move, having children in the area (AREACHLD) did increase the likelihood that such an expectation would be expressed. This finding is interpreted to indicate that older adults are more likely to express an expectation of a future desire to move when they feel that they will have available instrumental support if such a move becomes necessary. It may reflect their willingness to express the expectation rather than necessarily reflecting their belief that they will need to move. The fact that having children in the area is significantly related to the expression of a future desire to move lends support to

Hypothesis 2 which stated that the availability of informal social support is related to the probability of such an expectation being expressed.

Gender was not found to be significantly related to the expression of an expectation of a future desire to move. It was anticipated that there would be a link between gender and marital status in that women who were widowed would be more likely to express an expectation of a future desire to move. This relationship was not found. Recency of widowhood may be a more appropriate factor affecting an expression of an expectation of a future desire to move than the link between gender and marital status. It is presumed that the loss of a spouse would more readily be felt as a "push" in the period immediately following the loss, thus increasing the likelihood that an older community-dwelling adult would express an expression of an expectation of a future desire to move. This same line of reasoning may also account for the failure to find a significant relationship between the loss of a close friend or family member (EXPDEATH) and the dependent variable in that the measure did not necessarily reflect recent losses.

The small number of respondents represented in the divorced, separated, and never married categories prevented an examination of the impact of these groups separately. It is believed that the length of time one is divorced or separated is significant to an understanding of the impact

of being unmarried on the expression of an expectation of a future desire to move. Furthermore, those who are divorced or single for a long period of time are likely to closely resemble persons who were never married insofar as their likelihood of expressing an expectation of a future desire to move. These findings do not support Proposition 1 of Hypothesis 3 which anticipated that females would be more likely to express an expectation of a future desire to move. Nor do they support Proposition 4 of Hypothesis 3 which anticipated that widows would be more likely to express such an expectation.

Similarly, no support was found for Proposition 2 of Hypothesis 3 which stated that the expression of an expectation of a future desire to move would increase as age increased. It was felt that the impact of age on the expression of an expectation of a future desire to move could be seen if age was treated as a categorical versus a continuous variable. The respondents were separated into the "old-old" (over age 84) and the "old" (under age 84), but no significance was found. The oldest panel members were not found to be any more likely to express an expectation of a future desire to move than their younger counterparts.

As anticipated, those respondents who lived in households with someone other than their spouse only were more likely to express an expectation of a future desire to

move when compared to those who live alone. This was a statistically significant finding. It may be that those who live in other households already have a perception of an imbalance of needs and resources or have already made a dependency-related move and, therefore, are more likely to expect that an additional or future move will be necessary. Conversely, those community-dwelling older adults who live alone may have become accustomed to managing their needs and have a stronger feeling of self-sufficiency which would make them less likely to anticipate the need for a future move. These findings support Proposition 3 of Hypothesis 3.

With respect to the health measures, the results of the logistic regression using the longitudinal self-perceived health variable (COMPHLTH) are similar to those using the cross-sectional variable (RATEHLTH). As shown in Table 2, it was found that, when compared to the reference group of those who perceived that their health was the same as it was 5 years ago (HLTHSAME), those who thought their health was better (HLTHBETR) were more likely to express a future expectation of moving. It is rather interesting that those who perceived their health to be worse than it was 5 years ago were not found to be statistically significantly different from the reference group with respect to the expression of a future desire to move. It was anticipated that the older community-dwelling adult's perception that their health was declining would be a "push" which would

increase the likelihood that they would express an expectation of a future desire to move. Although this finding is not consistent with an imbalance of needs and resources, it lends credibility to the significance of the psychological component of the expression of an expectation of a future desire to move. It may be that older adults who perceive that their health has improved are more likely to express an expectation of a future desire to move because they feel that they will be in control of the move if it becomes necessary. Similarly, it was found that those who perceived their health as poor (POORHLTH) were less likely to express an expectation of a future desire to move than the reference group who perceived their health as good (GOODHLTH). Although both of these findings support the expectation that there is a direct association between health and the expectation of a future desire to move by older community-dwelling adults, the association is not as anticipated in Hypothesis 4. It was expected that poor health and the perception of poor health would increase the likelihood of an expression of an expectation of a future desire to move because it would indicate increased needs and therefore, the presence of a "push".

Logistic Regression for Respondents With Children in the Area

The decision to perform a separate analysis for respondents with children in the area was based on the

assumption that the balance between needs and resources is critical to an understanding of the expression of an expectation of a future desire to move. Since children are the primary providers of informal support for older adults, and therefore represent the most significant resource, it was felt that the presence of children in the immediate geographic area would mitigate some of the negative factors or "pushes" which were significant to such an expression. Specifically, it was believed that the presence of children would decrease the significance of factors such as the perception of poor health and adequacy of income to meet expenses, and the functional status of the respondents. Accordingly, two logistic regression analyses were performed to determine whether, in fact, having children in the area decreases the impact of "push" factors on the expression of an expectation of a future desire to move.

The results of logistic regressions for respondents with children in the area are presented in Tables 3 and 4. Table 3 uses the cross-sectional self-perceived health measure and Table 4 uses the longitudinal self-perceived health measure. As with the analysis of the entire sample, the analysis which used the comparative health measure for those with children in the area (Table 4), found that the only measure of expressed needs significantly related to the expression of an expectation of a future desire to move was the perception of income adequacy (INCOMEOK). Those

Table 3

**Logistic Regression Results Using Cross-Sectional
Variable of Self-Perceived Current Health Status
(RATEHLTH) for Respondents with Children in the Area
(N=306)**

Dependent Variable = MVELIKLY (1=YES, 0=NO)

<u>Independent Variable</u>	<u>Standardized Regression Coefficient</u>	<u>Standard Deviation</u>
Intercept		3.0805
AGE	0.035291	0.0370
SEECHILD	0.004821	0.1444
AREAREL	-0.090026	0.1531
SEERELS	0.034511	0.1648
AREAPALS	0.015887	0.2851
SEEPALS	-0.042311	0.2936
FUNCSTAT	-0.048027	0.2221
ADLSCORE	0.264076*	0.5050
IADLSCOR	-0.169522	0.2856
SOCISOL	-0.015688	0.1656
EXPDEATH	-0.090757	0.3777
INCOMEOK	-0.147965	0.3878
GENDER	-0.106631	0.3665
EXCLHLTH	-0.071272	0.5164
FAIRHLTH	-0.053249	0.4243
POORHLTH	-0.161422	0.6032
HLTHPROB	0.139469	0.3949
SPOUSE	0.138909	0.6885
OTHHC	0.142545	0.5217
WIDW	0.151490	0.6522
OTHM	-0.123360	1.1317
INCOMLOW	0.030238	0.3861

* $p < .05$

-2 Log L Chi-Square 23.42 (22 df, $p = 0.3783$)

Table 4

Logistic Regression Results Using Longitudinal Variable
of Self-Perceived Comparative Health Status (COMPLTH)
for Respondents with Children in the Area
(N=306)

Dependent Variable = MVELIKLY (1=YES, 0=NO)

<u>Independent Variable</u>	<u>Standardized Regression Coefficient</u>	<u>Standard Deviation</u>
Intercept		3.1057
AGE	0.036358	0.0371
SEECHILD	-0.005300	0.1423
AREAREL	0.063643	0.1554
SEERELS	0.006960	0.1683
AREAPALS	-0.020229	0.2893
SEEPALS	-0.037485	0.2965
FUNCSTAT	0.068748	0.2194
ADLSCORE	-0.224731	0.4985
IADLSCOR	-0.173330	0.2850
SOCISOL	-0.009835	0.1626
EXPDEATH	-0.081887	0.3737
INCOMEOK	-0.171393*	0.3930
GENDER	-0.100975	0.3643
HLTHBETR	0.222384	0.8104
HLTHWRSE	0.008654	0.4053
HLTHPROB	0.140674	0.3848
SPOUSE	0.206714	0.7114
OTHHC	0.156772	0.5282
WIDW	0.215322	0.6751
OTHM	-0.100068	1.1361
INCOMLOW	0.036674	0.3779

* $p < .05$

-2 Log L Chi-Square 23.66 (21 df, $p = 0.3096$)

respondents who perceived that their income was not adequate to meet expenses were less likely to express an expectation of a future desire to move than those who perceived their income to be adequate. The measures for ADL needs, IADL needs, functional status, and household income did not show a significant relationship to the expression of the expectation of a future desire to move when the comparative self-perceived health measure was used. Older community-dwelling adults who believe their resources are inadequate and who have children in the area may be reluctant to express an expectation of a future desire to move if they do not consider moving in with a child to be a positive option. With inadequate financial resources, they may think this is their only option and simply choose not to express the expectation of a negative situation. As Beland (1987) found, living with children is not a desired situation for most older adults.

The results in Table 3 of the analysis which used the cross-sectional self-perceived health measure (RATEHLTH), indicate that as the expressed need for ADL assistance (ADLSCORE) increases the likelihood of expressing an expectation of a future desire to move increases significantly. This finding is consistent with the anticipated result that increased needs would be related to the expression of an expectation of a future desire to move, but it does not support the belief that a higher level of

needs in conjunction with decreased resources would increase the likelihood of such an expression. If the latter contention was true, the relationship between a need for assistance and the expression of an expectation of a future desire to move would be stronger among older community-dwelling adults without children in the area rather than those with children in the area.

As in the analysis for the entire sample, no relationship was found between gender and the expression of an expectation of a future desire to move. Similarly, no relationship was found for either age or living arrangement for respondents with children in the area. With respect to living arrangement, the presence or absence of others in the household to provide support may be less significant when there are children in the area. The children may actually be providing support, which makes the older adult less inclined to anticipate a move, or it may be that the mere geographical proximity provides sufficient assurance that support will be available if it is needed.

Logistic Regression for Respondents Without Children in the Area

Since the presence of children in the area was believed to decrease the impact of negative "push" factors on the expression of an expectation of a future desire to move, it was expected that the absence of children in the area would exacerbate some or all of those factors. It was felt that

Table 5

Logistic Regression Results Using Cross-Sectional
Variable of Self-Perceived Current Health Status
(RATEHLTH) for Respondents Without Children in the Area
(N=395)

Dependent Variable = MVELIKLY (1=YES, 0=NO)

<u>Independent Variable</u>	<u>Standardized Regression Coefficient</u>	<u>Standard Deviation</u>
Intercept		2.2931
AGE	0.106334	0.0281
SEECHILD	0.041595	0.1468
AREAREL	0.137617	0.1353
SEERELS	0.013318	0.1201
AREAPALS	-0.063045	0.1573
SEEPALS	0.077452	0.1575
FUNCSTAT	0.097983	0.1915
ADLSCORE	-0.122974	0.2963
IADLSCOR	-0.037548	0.2213
SOCISOL	0.039259	0.1378
EXPDEATH	-0.018598	0.2820
INCOMEOK	0.114024	0.3184
GENDER	0.089529	0.2934
EXCLHLTH	0.185482*	0.4387
FAIRHLTH	-0.004604	0.3022
POORHLTH	-0.118906	0.5350
HLTHPROB	-0.073333	0.3012
SPOUSE	-0.205881	0.5402
OTHHC	0.272853**	0.3738
WIDW	0.103005	0.5272
OTHM	0.127831	0.5987
INCOMLOW	0.067739	0.2886

* p < .05

** p < .01

-2 Log L Chi-Square 36.76 (22 df, p = 0.0251)

Table 6

Logistic Regression Results Using Longitudinal Variable
of Self-Perceived Comparative Health Status (COMPLTH)
for Respondents without Children in the Area
(N=395)

Dependent Variable = MVELIKLY (1=YES, 0=NO)

<u>Independent Variable</u>	<u>Standardized Regression Coefficient</u>	<u>Standard Deviation</u>
Intercept		2.2666
AGE	0.126827	0.0279
SEECHILD	0.039454	0.1458
AREAREL	0.138970	0.1365
SEERELS	0.023658	0.1197
AREAPALS	-0.060737	0.1529
SEEPALS	0.069017	0.1519
FUNCSTAT	0.033789	0.1902
ADLSCORE	-0.105615	0.2948
IADLSCOR	-0.037392	0.2187
SOCISOL	0.004046	0.1327
EXPDEATH	-0.027987	0.2775
INCOMEOK	-0.106929	0.3131
GENDER	0.088279	0.2915
HLTHBETR	0.101253	0.4619
HLTHWRSE	-0.025600	0.3087
HLTHPROB	0.121066	0.2993
SPOUSE	0.198050	0.5278
OTHHC	0.262386**	0.3701
WIDW	0.114440	0.5190
OTHM	0.141010	0.5929
INCOMLOW	0.038435	0.2827

* p < .05

** p < .01

-2 Log L Chi-Square 30.51 (21 df, p = 0.0822)

the unavailability of the primary resource for informal support would increase the imbalance between needs and resources. Specifically, it was expected that the perception of poor health, income inadequacy, and unmet needs would be more significant for this group.

The results of the logistic regression analysis for respondents with no children in the area are shown in Tables 5 and 6. Table 5 uses the cross-sectional variable and Table 6 uses the longitudinal variable. The only measure which was found to be significant for both analyses was the respondent's living arrangement. As shown in Tables 5 and 6, when compared to the reference group of those who lived alone, those who lived in household combinations other than spouse only were more likely to express an expectation of a future desire to move. Although it was anticipated that living arrangement would be significantly related to the expression of an expectation of a future desire to move for the entire sample, it is not surprising that the relationship is strongest for those respondents without children in the area. Older adults who reside with someone other than a spouse may have made such arrangements due to inadequate financial resources. The absence of children in the area as an available support resource does make them more vulnerable to the potential need to relocate in the future. While this finding is consistent with the needs and resources imbalance upon which this inquiry is based, it is

somewhat in conflict with the other findings in this inquiry which indicate that the perception of options and control is more significant to the expression of an expectation of a future desire to move.

As shown in Table 5, those respondents who perceived their health to be excellent were more likely to express an expectation of a future desire to move compared to the reference group of those who perceived their health to be good. This suggests that older community-dwelling adults who do not have children in the area, may be more willing to express an expectation of a future desire to move when they perceive that their health is excellent. Again, this appears to be related to the perception of control and options. For example, an older adult who perceives that his/her health is less than excellent and who has no children in the area may be afraid to express an expectation of a future desire to move because the options may seem less positive.

As with the results of the other logistic regression models, neither age, marital status or gender were found to be significantly related to the expression of a future desire to move for respondents without children in the area. It is interesting that the cross-sectional health variable showed significance, but the longitudinal variable did not.

Summary of Results from Logistic Regression Models

Expressed Needs It was expected that a higher level of expressed needs would be related to an increased likelihood of expressing an expectation of a future desire to move. Older community-dwelling adults who expressed a need for more income, a need for assistance with ADL's or IADL's, or an inability to perform tasks associated with functional status were expected to be more likely to express an expectation of a future desire to move because these needs would be "pushes" which would prompt the expectation of moving. It was further believed that for those without children in the area, the expression of needs would be more significant because the absence of the most frequent source of informal support would indicate a greater imbalance of needs and resources. The findings indicate that the perception of income being inadequate to meet expenses is significantly related to the expression of an expectation of a future desire to move for the panel of all respondents and for those respondents with children in the area. This is an inverse relationship rather than a direct relationship as was anticipated. The only other expressed needs measure which was found to be significantly related to the expression of an expectation of a future desire to move was the need for assistance with ADL's among respondents with children in the area. There is limited support for Hypothesis 1 which stated that the expression of needs is

associated with the expression of an expectation of a future desire to move.

Social Isolation, Informal Support, and Loss The level of social isolation and the availability of informal social support were believed to be related to the expression of an expectation of a future desire to move. Either a high level of social isolation or a low degree of available informal social support were expected to increase such an expression. It was felt that the presence of both circumstances would further increase the likelihood of expressing an expectation of a future desire to move because it would represent a very low level of available resources, thus exacerbating any "push" factors which were present. Social isolation was not found to be significant for any of the regression analyses. The fact that the panel had an unusually high degree of social integration may have bearing on this finding.

Of the measures for availability of social support, only the presence of children in the area was significantly related to the expression of an expectation of a future desire to move in the analysis involving all of the respondents. The likelihood of expressing an expectation of a future desire to move increased as the number of children increased. This finding is consistent with most of the literature which indicates that although friends and other family members provide emotional and some instrumental support, the primary source of informal support for older

community-dwelling adults is provided by children. The relationship between the availability of informal social support was not the one which was expected. It was anticipated that the likelihood of expressing an expectation of a future desire to move would be increased by the absence rather than the presence of children in the area. This relationship tends to support the belief that the perception of control and available options is more important to the expression of an expectation of a future desire to move than is the availability of support. It is possible that the presence of children in the area represents an alternative housing option if necessary, but since most older adults prefer not to move in with their children, it may be that the presence of children offers comfort that instrumental support will be available in another housing situation if it became necessary. In either event, it appears that the presence of children may increase the willingness of the older community-dwelling adult to express an expectation of a future move.

The loss of a close friend or family member within the past five years was not significantly related to the expression of an expectation of a future desire to move for any of the groups analyzed. It was expected that such a loss would represent a decreased psychological and instrumental resource and, therefore, be directly related to an increased likelihood of expressing an expectation of a

future desire to move. It is likely that the loss would have to have occurred more recently in order to have an impact on relocation decisions. In addition, the fact that only 30% of the respondents in the entire panel had experienced such a loss also must be taken into account in considering the results.

Gender, Age, and Marital Status No support was found in any of the analyses for Propositions 1, 2 or 4 of Hypothesis 3, which stated that being female, older, or widowed would increase the likelihood of expressing an expectation of a future desire to move. It appears that, when considered alone, these demographic measures are not significant to the expression of an expectation of a future desire to move. The inability to specifically consider whether being divorced, separated or never married were important factors may account, in part, for the lack of significant findings with respect to marital status.

Living Arrangement Support was found for Proposition 3 of Hypothesis 3 which stated that those who live with someone other than their spouse would be more likely to express an expectation of a future desire to move than those who live alone or with their spouse only. This relationship was found in both of the analyses of the entire sample as well as both of the analyses for respondents without children in the area. It is unclear why no relationship was found for respondents with children in the area, but it may

be that the presence of available children makes living arrangement less significant because the children are considered part of an extended living arrangement.

Although functional status was not found to be significant in this sample, it is likely that in a sample with a more normal distribution of functional disability, the presence of disability there would be a significant relationship between the expression of an expectation of a future desire to move and functionally dependent seniors either living alone or with someone other than a spouse.

Health As stated in Hypothesis 4, it was expected that those in poor health or perceived poor health would be more likely to express an expectation of a future desire to move since this would be a significant "push". Although health was found to be related to such an expression, the relationship revealed by the analyses was to a positive rather than a negative health assessment by the individual. Findings were similar for two of the three analyses which included the cross-sectional self-perceived health measure. For the analysis of the entire sample, it was found that those in poor health are less likely than those in good health to express an expectation of a future desire to move. For respondents without children in the area, it was found that the perception of one's health as excellent increased the likelihood that the expectation of a future desire to move would be expressed. No significant relationship was

found between self-perceived health, measured cross-sectionally, and the expression of an expectation of a future desire to move among respondents with children in the area. It may be that the absence of children in the area makes those who appraise their health as other than excellent less inclined to express an expectation of a future desire to move because an appraisal of less than optimum health would imply the need for assistance when none was available.

The only analysis using the longitudinal self-perceived health measure which showed significance to the dependent variable was the analysis of the entire sample. In that analysis, those who perceived their health to be better than it was five years ago were more likely to express an expectation of a future desire to move than those who perceived that their health had remained the same.

These results indicate that the perception that one's health is good or has improved increases the likelihood of expressing an expectation of a future desire to move. The availability of children in the area appears to decrease the significance of self-perceived health as related to such an expression.

CHAPTER 5

CONCLUSIONS

There has been little attention paid to what this inquiry considers the interim stage in the decision to move by older community-dwelling adults. The initial consideration of moving is often precipitated by a specific event or circumstance such as the loss of a spouse, retirement, loss of income or a change in health status. This stage is more of a contemplative situation where the individual may begin to consider alternatives and have a rather nebulous conception of alternatives. Conversely, the final decision to move often comes about when it is perceived that there are no alternatives, either due to significantly diminished health or financial resources or the lack of available support alternatives. The period during which an older adult begins to express an expectation that they will want or need to move in the future is important because it is a point at which intervention may be more effective. During this time, the individual may be unnecessarily projecting the need to move when, perhaps, the move could be delayed or avoided if the concerns and

perceptions of the individual could be identified and addressed.

The primary objective of this inquiry was to begin to explore this aspect of the decisionmaking process by identifying factors which may be antecedents to the expression of an expectation of a future desire to move. The results indicate that the factors which are likely to be antecedents are: the presence of children in the area, the perception that income is adequate to meet needs, self-perceived health status, and living arrangement. The findings also indicate that demographic characteristics such as gender and age are not significant to the expression of an expectation of a future desire to move.

Limitations of the Study

The primary limitation of this study is the fact that the sample population was unusually healthy and socially integrated for persons over age seventy. It is likely that some of the anticipated relationships, such as expressed needs as indicated by functional status, ADL, and IADL scores, were not found to be statistically significant as a result of the unusual characteristics of this panel of community-based elders. It is important that future studies continue to consider the impact of functional status and expressed needs as they relate to the expectation of moving.

The results indicate that the psychological dimension

is critical to a thorough understanding of the expression of an expectation of a future desire to move. There may be a significant difference between the actual expectation of a future desire to move and the expression of such an expectation. It is likely that an understanding of the psychological components of the construct would provide a means of distinguishing these aspects. There was little data to permit an exploration of factors such as: how the respondents felt about the expected desire to move, their perception of their own emotional well-being, and whether their responses were based on their current situation or on anticipated events. This limitation of the data prevented an examination of the psychological dimension. Future research should focus extensively on this aspect because it would offer tremendous insight into the decisionmaking process, thereby providing opportunities for intervention, particularly in instances where the basis of the expectation is unfounded.

The data used in this study, as well as much of the research upon which this study was based, failed to make distinctions which are critical to a thorough understanding of the decisionmaking process. Specifically, it is important to determine whether the individual expects to make a local or a long distance move. Findings in the literature clearly indicate that there are different socioeconomic and health factors associated with each type

of move. The failure of future research to distinguish between the types of moves, will make it very difficult, if not impossible, to identify those factors which may explain the differences in the motivation behind the decision to move. In the present inquiry, it would have been important to know whether the individual expected to make a local or long distance move in order to determine whether or not individuals with a lower income moving locally would be more likely to express an expectation of a future desire to move, as anticipated, since that would be seen as a "push" related move. The inability to distinguish between whether the expected future move was believed to be positive or negative is a critically important factor.

Similarly, research on relocation and decisionmaking has not employed a consistent description of the ages which comprise older movers. For instance, the AARP (1990) study which reported findings on the expectation of moving used a sample consisting of people over the age of fifty-five. The literature clearly indicates that the expectations and needs of older individuals change dramatically during specific age ranges. Older adults in the "young-old" category are much more likely to be considering a move as a result of "pulls" than those in the "old-old" age group. The failure to use consistent age ranges renders the findings much less generalizable and also makes it more difficult to compare findings from one study to another.

It appears that the expression of an expectation of a future desire to move may be more closely related to a perception of control and options rather than an imbalance between needs and resources as hypothesized in this inquiry. However, without the ability to clearly screen for the above factors, the findings must be viewed as preliminary.

Future Research

It is important that future research be conducted into the process through which older community-dwelling adults arrive at a decision to move. Too often the research has been retrospective, thus preventing an understanding of the decision as an ongoing process. Such an understanding offers much more opportunity for efficacious intervention before the decision is made.

Future research should focus on the psychological dimension of the decisionmaking process in order to ensure that the construct being measured is the actual expectation of moving as opposed to the willingness of an individual to express such an expectation. It is likely that both of these constructs are part of the decisionmaking process, but each needs to be considered separately. Instruments which measure self-esteem and perceived control will be important tools in this area of research. Clearly, the more pragmatic factors such as available income and level of physical and cognitive functioning will be extremely important, but they

must be balanced with an understanding of the older community-dwelling adult's perception of their control and options.

The factor which showed the most statistical significance in this inquiry was living arrangement. Consequently, this area deserves attention in future research. This is particularly true since the nature of living arrangements is one of the demographic factors which is undergoing significant change. Increasingly, older adults are more likely to reside in households consisting of other than the traditional spousal relationship. These "other" living arrangements need to be considered in terms of their duration and specific composition in order to determine the amount of instrumental support which can or can not be expected to be available. Since the increasingly mobil nature of our society makes it less likely that immediate family members will reside in close geographical proximity, the complexion of what is viewed as instrumental support options is also likely to change.

The findings in this inquiry that living with someone other than a spouse was not significant for community-dwelling adults with children in the area, but was for those without children in the area, is worthy of further exploration. It may be that the specific composition of the household rather than the presence or absence of children will be important to this relationship.

The interrelationship between living arrangements, marital status, and available instrumental support is a complex and integral part of future research into housing for older community-dwelling adults. An understanding of these factors will be critical to assessing the need for supportive services and the types of housing options both desired and needed by older adults. It will be important to conduct research which specifically considers whether relocation decisionmaking differs for older community-dwelling adults who are divorced, separated or never married. There are an increasing number of older adults in these categories and it is quite probable that the length of time for which an older adult has been divorced or separated or the fact that he/she has never been married will have a significant impact on his/her expectations, needs, and desires with respect to relocation decisions. For individuals who are widowed, divorced or separated, the recency of the marital status change is likely to be quite important to their feelings of independence and competency, their willingness to express expectations about moving, and their ultimate decision to move or to remain where they currently reside.

The urban/rural dimension of relocation decisionmaking by older adults should also be included in future research. It is likely that there are significant differences in the expectations of people who reside in rural versus urban

communities with respect to the availability of both formal and informal support services as well as housing options.

Policy Implications

It is clear that most older people prefer to remain in their own homes as long as possible and that concern over the need for an undesired future move is a source of stress. By understanding the factors which cause an older community-dwelling adult to expect to move in the future, it will be possible to develop methods of determining whether the concerns are valid. It is likely that a case manager or service provider who is able to identify factors which lead to a concern over the need to move can allay the fear by making the individual aware of service options either for current or future use. With the current emphasis on providing supportive services in a home setting, both from a cost-saving and quality of life perspective, it is important to have information on the factors which prompt older adults to expect that they will need to leave their homes in order to receive needed support.

An understanding of these factors will also be helpful to policy makers in the process of developing housing options for older community-dwelling adults. Knowledge of why an older adult expects to move will provide direction in terms of where purpose-built senior housing should be located and what type of services are necessary. It is

likely that much of the "concern" over moving is based on the lack of attractive alternatives. By understanding these concerns, housing providers can design more appropriate senior housing and develop more effective alternative housing concepts for community-dwelling adults.

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APPENDICES

APPENDIX A

Characteristics of Respondents in Terms of Selected Variables

A. Categorical Variables

<u>Description</u>	<u>Name</u>	<u>Categories</u>	<u>Frequency</u>	<u>Percent</u>
Dependent Variable				
Likelihood respondent will want to move in next 5 years	MVELIKLY	0=No	554	79.0
		1=Yes	147	20.9
Social Isolation Variables				
Someone to call in emergency	CALLHELP	0=Yes	671	95.7
		1=No	30	4.3
Someone to whom feels close	FEELCLOS	0=Yes	648	92.3
		1=No	53	7.6
How often gets out	GETOUT	1=Almost daily	460	65.6
		2=Few times/week	146	20.8
		3=Weekly	60	8.5
		4=Less than weekly	35	5.0
Belongs to clubs or civic organizations	ORGMEMBR	0=Yes	340	48.5
		1=No	361	51.5
ADL Variables				
Needs assistance with dressing	HELPDRES	0=No	690	98.4
		1=Yes	11	1.6
Needs assistance with bathing	HELPBATH	0=No	671	95.7
		1=Yes	30	4.3

Needs assistance with grooming	HLPGROOM	0=No	619	88.3
		1=Yes	82	11.7

IADL Variables

Has problems with housecleaning	HLPCLEAN	0=No problem	686	97.9
		1=Problem	15	2.1
Problem getting where needs to go	TRANPROB	0=No problem	557	79.5
		1=Problem	144	20.5
Needs help with personal affairs	HLPBUSNS	0=No	547	78.0
		1=Yes	154	22.0

Perceived Health Variables

Rating of current health	RATEHLTH	1=Excellent	108	15.4
		2=Good	333	47.5
		3=Fair	209	29.8
		4=Poor	51	7.3
Comparison of health to 5 yrs ago	COMPHLTH	1=Better	75	10.7
		2=Same	402	57.3
		3=Worse	224	32.0

Objective Health Variable

Has physical health problem(s)	HLTHPROB	0=No	270	38.5
		1=Yes	431	61.5

Functional Status Variables

Able to perform heavy work	HEAVYWRK	0=Yes	359	51.2
		1=No	342	48.8

Able to walk up and down stairs	WLKSTAIR	0=Yes	645	92
		1=No	56	8.0
Able to walk half mile	WALKMILE	0=Yes	521	74.3
		1=No	180	25.7
Income Variable				
Income adequate to meet expenses	INCOMEOK	0=Yes	561	80.0
		1=No	140	20.0
Marital Status Variables				
Currently married	MARRIED	0=Unmarried	381	54.3
		1=Married	320	45.7
Widowed	WIDW	0=Not widowed	400	57.0
		1=Widowed	301	43.0
Divorced/separated/never married	OTHM	0=Married/Widowed	621	88.7
		1=Not married/widow	80	11.3
Household Composition Variables				
Living arrangement - alone	ALONE	0=Lives w/others	446	63.6
		1=Lives alone	255	36.4
Living arrangement - spouse	SPOUSE	0=Lives alone or with others	426	60.8
		1=Spouse only	275	39.2
Living arrangement - other	OTHHC	0=Lives alone or with spouse only	530	75.5
		1=other combination	171	24.5

Other Variables

Death of close friend or relative in last 5 years	EXPDEATH	0=No 1=Yes	212 489	30.2 69.8
Respondent's gender	GENDER	0=Male 1=Female	255 446	36.4 63.6

B. Continuous Variables

<u>Description</u>	<u>Name</u>	<u>Mean</u>	<u>Std. Dev.</u>	<u>Min</u>	<u>Max</u>
Respondent's age in years	AGE	77.1	5.07	71	94
Number of children in the area	AREACHLD	.74	1.05	0	5
Number of children contacted weekly	SEECHILD	1.24	1.24	0	5
Number of relatives in the area	AREAREL	1.17	1.25	0	4
Number of relatives contacted weekly	SEERELS	1.29	1.27	0	4
Number of friends in the area	AREAPALS	2.14	1.33	0	4
Number of friends contacted weekly	SEEPALS	2.01	1.31	0	4
Functional status scale (Sum of HEAVYWRK, WLKSTAIR, WALKMILE)	FUNCSTAT	.83	.92	0	3

ADL score (scale) (Sum of HELPDRES, HELPBATH, HLPGROOM)	ADLSCORE	.18	.45	0	3
IADL score (scale) (Sum of HLPCLEAN, TRANPROB, HLPBUSNS)	IADLSCOR	.45	.64	0	3
Social Isolation (scale) (Sum of GETOUT, ORGMEMBR, CALLHELP, FEELCLOS)	SOCISOL	2.16	1.16	0	7

APPENDIX B

Original and Reduced Sample Sizes

<u>Analysis</u>	<u>N</u>	<u>% of Original Panel</u>
Wave 1	1,625	100
Wave 2	1,317	81
Wave 3	825	51
Current Analysis	701	43

VITA

