

**MOVING AWAY FROM SUN CITY: WHY SOME OLDER ADULTS RELOCATE  
AWAY FROM A RETIREMENT COMMUNITY**

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**By**

**Melanie C. Harper, B.A.**

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## DEDICATION

This thesis is dedicated to my grandmothers, who approached life in divergent ways but who found common ground in family, faith, food, and humor. By modeling different forms of strength and through living different lifestyles, my grandmothers taught me much and gave me courage to seek my own path.

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## ABSTRACT

### MOVING AWAY FROM SUN CITY: WHY SOME OLDER ADULTS RELOCATE AWAY FROM A RETIREMENT COMMUNITY

by

Melanie Claire Harper, B.A.

Southwest Texas State University

May 2001

Supervising Professor: Stella Kerl

For older adults, the decision to relocate can be difficult. While some situations and concerns hold older adults rooted to their current homes, desires often associated with an improved sense of well-being push older adults to relocate. Further forces pull the older adults in the direction of a new location. Amidst these often conflicting pressures, a number of older adults make the decision to relocate. Some of these older adults choose to relocate to a retirement community, where the environment appears to promote the well-being of its residents. Occasionally, people who relocate to a retirement community later decide to leave that environment, relocating yet again to a new environment. This report and its associated study explores the concept of well-being, the contributors to well-being in older adulthood, the factors that are involved in the older adult's decision to relocate, the effects of relocation on the older adult, and the reasons why some older adults move to and later away from a retirement community.

## CHAPTER I

### INTRODUCTION

The decision to relocate at any age involves consideration of whether to move and of where to move. Individuals who choose to relocate do so because they anticipate the move will enhance their sense of well-being, deter the deterioration of their sense of well-being, or both enhance their sense of well-being and deter the deterioration of their sense of well-being. Some factors pull them to another location while other factors may push them away from their current location. Many of the factors that push and pull older adults in their decisions to relocate are factors that have been associated with well-being. The weighing of these factors varies among individuals and circumstances. Unlike earlier relocation decisions, older adults sometimes face unique considerations. Among these considerations is the option of relocating to a retirement community, a setting designed specifically for older adults. Occasionally, older adults who have relocated to retirement communities later decide to move yet again. In an effort to better understand why people who have relocated to a retirement community later choose to relocate again, this study explores the factors that contribute to well-being in older adults, the trends toward relocation later in life, and the current environment of retirement communities.

#### Well-Being in Older Adults

Well-being has been defined and operationalized in many ways. The more specific ways, such as objective measures of mental and physical health, do not adequately take



into consideration the individual's perceptions and feelings. For this study, well-being is defined as the current level of personal subjective life satisfaction.

Considerable research on well-being in older adulthood has yielded numerous contributing factors. Some of the factors associated with well-being are related to personality and lifelong patterns of functioning. Other factors include situations and circumstances that develop slowly or quickly and that the individual often feels incapable of controlling or changing. The final category of factors that influence well-being is more immediately controllable through conscious choices of how the older adult chooses to spend time on a day-to-day basis.

#### Personality and Lifelong Patterns of Functioning

According to Johnson (1995), aging well, or well-being, is not determined by the older adult's environment or life circumstances but by the older adult's "social-psychological interpretation of whatever one encounters through the aging process" (p. 126). Regardless of circumstances or activities, the older adult can enjoy a sense of well-being if the adult interprets circumstances in a positive manner.

Glover (1998) and Barer (1994) further describe successful aging as at least partly a result of flexibility and adaptability. Humor has also been tied to a sense of well-being (Lilley & Jackson, 1993; Solomon, 1996). Positive attitude, flexibility, adaptability, and a sense of humor often are long-standing aspects of an individual's personality rather than skills the older adult newly learns in order to cope with aging. Adding to these aspects of the older adult's personality, general past experiences and functional or dysfunctional ways of coping help shape the person and how that person perceives life and views well-being (Glover, 1998).

### Situations, Circumstances, and Transitions

Some situations, circumstances, and transitions have been shown to impact well-being in older adults. The older adult's health status (Choi, 1996; Colston, 1994; Glover, 1998; Latimer & Sheahan, 1998; Mookherjee, 1998), living arrangements (Barer, 1994; Choi, 1996; Colston, 1994; Latimer & Sheahan, 1998; Mookherjee, 1998; Rubinstein, Lubben, & Mintzer, 1994; Solomon, 1996; Sugar & Marinelli, 1997), level of family involvement (Adams & Blieszner, 1995), socioeconomic status (Choi, 1996; Goldman, Sanders, & Weinstein, 1994; Latimer & Sheahan, 1998; Mookherjee, 1998), relationship status (Barer, 1994; Goldman et al., 1994; Mookherjee, 1998), loss of a significant person (Barer, 1994; Colston, 1994), loss of autonomy and self direction (Colston, 1994; Solomon, 1996), experience of ageism (Glover, 1998; Sugar & Marinelli, 1997), and gender (Barer, 1994; Latimer & Sheahan, 1998) have been implicated as factors that may help shape the older adult's view of personal well-being.

### Day-to-Day Choices

Day-to-day choices about how the older adult spends time impact the individual's sense of well-being. Physical exercise (Brown, 1992; Lilley & Jackson, 1993), creative activities and continued learning (Lilley & Jackson, 1993), involvement in religious and spiritual activities (Colston, 1994; Lilley & Jackson, 1993), familial and social activities providing interpersonal relationships (Adams & Blieszner, 1995; Goldman et al., 1994; Latimer & Sheahan, 1998; Lilley & Jackson, 1993; Mookherjee, 1998; Rubinstein et al., 1994; Solomon, 1996; Stacey-Konnert & Pynoos, 1992; Sugar & Marinelli, 1997), and employment, volunteerism, and active community support (Colston, 1994; Mookherjee, 1998) have been shown to contribute to the well-being of older adults. Activities such as

these have been linked with reduction of anxiety and depression and increased or maintained physical and mental capabilities (Lilley & Jackson, 1993), thus impacting the older adult's perception of quality of life and well-being.

Barer (1994) described the overall style of participation in daily activities as either active or passive. Passive adults take what comes as it comes, and active adults plan their schedules so that their needs and desires are met. If the individual's health and environment support participation in a wide variety of activities, the older adult can impact the personal sense of well-being through adopting an active style of participation in life.

One of the choices that older adults can make in an effort to improve their satisfaction with life is the decision to relocate to an environment that better supports their needs and desires. Although the choice to relocate is not a day-to-day choice, it is a decision that can reflect an overall active style of participation in life. By seeking out a more satisfactory living environment, older adults may be indicating that they are searching for a greater level of well-being.

### Relocation in Later Adulthood

Two distinct relocation trends appear to occur in later adulthood: relocation during the early years of retirement and relocation later in retirement. During the early years of retirement, relocation is more heavily influenced by amenity factors such as warmer temperatures (Newbold, 1996). In the later years, relocation in order to be closer to children or other kin or to be nearer assistance services becomes more important (Newbold, 1996; Choi, 1996).

Among the 70 years and older participants in the Longitudinal Study of Aging (LSOA) conducted between 1984 and 1990, Choi (1996) determined that 15% of the sample relocated during the study period. Of the participants who moved, 16.6% moved out of state and 83.4% moved within their state.

#### Pushes Toward Relocation

Unwanted circumstances can push older adults into deciding to relocate. Health difficulties, financial difficulties, and the death of a spouse are key issues that sometimes factor into the decision to relocate (Choi, 1996; Loomis, Sorce, & Tyler, 1989). Redfoot (1987) asserts that “economic factors play a larger role for the lower and working class, while health concerns and widowhood appear to be more important to the middle class” in providing a crisis environment that pushes the older adult to relocate. Environmental concerns such as crime, pollution, high cost of living, and crowding also push older adults toward relocation (Serow, 1988).

The size of the older adult’s current house affects relocation decisions early in retirement (Johnson-Carroll, Brandt, & McFadden, 1995; Loomis et al., 1989). If the house is perceived as being too large for retirement purposes, the older adult’s propensity to move at retirement increases. Similarly, difficulties with house design, such as stairs or a high requirement for maintenance, further push older adults into a decision to relocate.

#### Pulls Toward Relocation

Some needs and desires tug at older adults and pull them into deciding to relocate. The desire for kinship is one of the main reasons for moving (Choi, 1996). In the LSOA study of adults 70 and older, the desire for kinship was identified as the primary reason for moving by 41.5% of participants who relocated out of state and 20.0% of participants

overall. Another 10.3% of the participants gave a desire to live close to children or other kin as a secondary or tertiary reason for relocating. Other factors that pull older adults into relocation are remarriage, the desire to age in the company of a similar population, and a desire for amenities such as improved living conditions, housing location or arrangements, and climate (Cohen, Tell, Batten, & Larson, 1988; Loomis et al., 1989; Newbold, 1996; Serow, 1988).

### Factors that Inhibit Relocation

Some factors work to offset the forces that push and pull on older adults to relocate. These factors either keep the individuals aging in place or make their decisions to move more difficult. Individuals who view their home as part of a family tradition, or as a family homestead, are less likely to relocate than people who do not view their home in this way (O'Bryant & Murray, 1987). For older adults who live near family members, close friends, and supportive neighbors, Loomis et al. (1989) found that leaving this established network is difficult. Likewise, Loomis et al. found that giving up one's home and familiar surroundings, paring down possessions, reducing living space, and actually making the physical move are difficult tasks that deter some older adults from relocating. Concerns about adjustment after moving also can inhibit the decision to relocate (Loomis et al.).

### Effects of Relocation on the Older Adult

The effects of relocation are varied and studies have revealed contradictory data. Pastalan (1983) compared the data from several studies concerning relocation among older adults, and found that choice, control, and predictability had positive impacts on relocation effects. Voluntary relocation between homes appeared to be helpful when the new home environment was an improvement. Pastalan also found that healthy older adults

fared better after relocation than older adults who were not healthy. Pastalan also noted that individual counseling seemed to aid older adults in adjusting to a new location.

Among the specific effects of relocation identified in a study done by O'Bryant and Murray (1987), older adults who relocated after living in a neighborhood for many years stated that they missed their former neighbors and that their new neighbors had provided less support than their old neighbors formerly provided. Although many participants in this study moved closer in proximity to relatives, in most cases the perception of actual contact and support from the relatives did not increase significantly. With decreased support from neighbors and a lack of significantly enhanced support from relatives, the relocated person may experience a decrease in their personal sense of well-being. In this study, however, the participants reported that although they were not more active or significantly happier after their relocation, they were not as "unhappy" as they were before their relocation.

A study by Stoller (1998) focused on Finnish Americans who relocated to a retirement community in Florida suggests that older adults who move often do not receive the same amount of support from their new neighbors as from their former neighbors. This study found that the migrants were likely to experience a decreased level of informal emotional support from non-kin in the retirement community in contrast to their counterparts who remained in their pre-retirement homes away from the retirement community.

Taking into consideration all of the changes involved in relocation, these changes can increase the level of stress and anxiety in an older adult's life. This increased level of

stress may be related to the decline in health and well-being that some people experience just before or soon after relocation (Danermark & Ekström, 1990).

### Retirement Communities

Retirement communities are as varied as traditional communities. The term “retirement community” has been used to describe a variety of planned and unplanned residences that are occupied primarily by older adults. These residences include towns (Hartwigsen, 1987), condominium complexes (Covan, 1998), recreational vehicle communities (McHugh, 2000), and life care communities (Parr, Green, & Behncke, 1989) or continuing care communities (Cohen et al., 1988). Life care and continuing care communities often include an array of residences such as independent living units, assisted living facilities, and nursing care facilities. Further confusing the meaning of the term “retirement community,” Stoller (1998) uses this term to describe ethnically similar older adults who have migrated to a new area and who are “scattered residentially throughout a large standard metropolitan statistical area but are linked through informal networks and ethnic organizations” (p. S289).

Some retirement communities are planned specifically for older adults and other retirement communities develop more haphazardly as younger people move away and older adults take their places (Morrison, 1990). When a retirement community is planned and marketed to older adults, the community is designed and sold as a lifestyle, not just as an assortment of residences occupied by older adults (Laws, 1995). This lifestyle is portrayed as one that contains elements ensuring, or at minimum promoting, the well-being of its residents.

### Impacts of a Retirement Community on the Surrounding Area

Migration of a significant population of older adults to a retirement community or to a specific locale can have a profound impact on a region. Although a desire for improved living conditions may pull many of the older adults to the region, the increased population can stretch the community's resources and change the nature of the area in such a way that the original charm is lost and the quality of the living conditions is reduced (Bennett, 1996; Glenn, 1999). Bennett includes population growth, increased traffic congestion, increased demands on medical services, reduced availability of low cost housing, increased cost of living, negative impact on the natural environment, and displacement of local businesses and residents as some of the changes experienced in areas where retirement communities have developed.

Bennett (1996) further describes the impact of retirement migration by explaining that property values sometimes rise in response to population growth, and property taxes increase in order to satisfy the new demands on the infrastructure of the community. The property value and tax increases impact both the new older adult residents and the longtime local residents. According to Bennett, the increased costs associated with owning property in or near a retirement community can force longtime residents to sell their property, further changing the composition of the community and possibly dividing the views of the residents concerning the evolution of the community. Faulkenberry, Coggeshall, Backman, and Backman (2000) assert that these changes can lead to a shift in roles for the indigenous residents in the region. This shift in roles moves many of indigenous residents into a place of "servitude" to the tourists and retirement community residents.



The impacts of a retirement community on the surrounding area are partly positive. Besides increasing the money coming into the area, the retirees frequently channel their energies into charitable work and cultural activities that benefit the region (Faulkenberry et al., 2000).

### Retirement Community Environment

A significant body of literature has emerged exploring the environment in retirement communities. This research includes explorations of informal support, activity involvement, and the composition of married couples versus single residents in retirement communities.

#### Informal Support

Several researchers have explored the level and type of informal support available in retirement communities. Retirement community residents may experience a decreased amount of support from their new retirement community neighbors in comparison to the support they received from their previous neighbors outside the retirement community (O'Bryant & Murray, 1987; Stoller, 1998). Sullivan (1986) explored support expectations within retirement communities and found that although "mutual support is clearly the norm in a retirement community" (p. 263), there is a "widespread reluctance of retirement community residents to view any of their primary group members as potential sources of long-term assistance" (p. 263). Sullivan explained that the reluctance toward long-term assistance from family and friends is significantly greater in retirement communities than in the general older adult population.

### Active Environment

Many older adults who chose to live in a retirement community select a retirement community that provides an environment abundant in activities. Parr et al. (1989) explored the features and services that were desired by older adults and found that many of the features and services that the participants indicated were important to them in retirement housing were related to an active lifestyle. Some of these features and services include kitchens, transportation, shaded walkways, social and recreational activities, walking distance to shopping, a nearby library, and nearby cultural opportunities.

Williams and Montelpare (1998) found that amidst planned activities retirement community residents want opportunities to continue learning. When they looked at what the residents of one retirement community expressed were their desires for educational opportunities, they found that the residents wanted a variety of learning opportunities offered through the local university and that most of the residents wanted those opportunities to be available conveniently on the premises of the retirement community.

Many retirement community residents also are active in the larger community. Faulkenberry et al. (2000) referred to charitable work and cultural activities as ways that the retirement community residents extend their energies out into the surrounding region.

### Widows and Married Couples

The ratio of married couples versus single residents varies in different retirement communities and can impact the well-being of the retirement community residents. Hong and Duff (1994) explored the well-being of widows and found that widows living in a retirement community containing a majority population of single residents might be more active and more satisfied with life than widows living in a retirement community

containing a majority population of married couples. When exploring retirement communities Hong and Duff suggest that widows examine the “married-to-widow ratio” of the communities before making a relocation decision.

With the community environment significantly impacting the well-being of the residents and with retirement communities being greatly varied, knowledge about a specific retirement community is necessary in order to better understand why some older adults move to and away from the community.

### Sun City Texas

The retirement community that this study focuses on is the Sun City community in Georgetown, TX, a planned retirement community of single-family homes. Although Del Webb has developed several Sun City communities, throughout this report the term Sun City, unless otherwise specified, refers to the Sun City community in Georgetown, TX.

Sun City contains a variety of facilities, organized activities, and opportunities that are designed to support the physical and mental health of the Sun City residents by encouraging and facilitating creative, artistic, educational, and athletic endeavors and religious and spiritual practices. The community environment is designed to acknowledge and accommodate family involvement, assist in building social support networks, and encourage community and social contributions. Besides using these facilities and activities as a marketing tool, usage of the facilities and participation in the activities are encouraged through the monthly Sun City publication Sun Rays.

Sun City is a rapidly expanding but relatively new retirement community. The sale of the first house in this community closed in 1996, and currently Sun City is home to more than 3,500 residents. Eventually, the population of Sun City is projected to reach an

approximate 17,000 residents housed in a total of up to 9,500 homes. Despite the community planning, continuing growth, and newness of Sun City, “home for sale” signs have appeared in some yards. Why are such new residents choosing to relocate again, this time away from their retirement home?

### Rationale for the Study

Although many of the reasons associated with relocation in later adulthood are also factors that impact the individual’s sense of well-being, very little is known about why older adults relocate from retirement communities that are designed to promote the well-being of their residents. By better understanding the relocation decision processes and concerns of older adults, counselors who work with older adults and with their families may be more effective in providing guidance concerning older adult relocation. This information also might benefit retirement communities by providing those communities with information concerning how they may better meet the needs and expectations of their residents.

In order to understand why older adults relocate from retirement communities, understanding why they originally moved to a retirement community is critical. This study is designed to explore the relocation decisions to and from Sun City by exploring the following questions:

- What concerns contribute to deciding to move away from a retirement community?
- How do these concerns compare with the reasons for moving into a retirement community?
- How does the decision process for relocating away from a retirement community compare with the decision process for relocating into a retirement community?

## CHAPTER II

### METHODOLOGY

Although many of the reasons associated with relocation in later adulthood are also factors that impact the individual's sense of well-being, very little is known about relocation from retirement communities that are designed to promote the well-being of their residents. This study was designed to explore relocation decisions both to and from a retirement community. For researcher convenience, participants in the study were limited to persons who relocated to and subsequently have begun or completed the relocation process from the Sun City community in Georgetown, TX.

#### Qualitative Design

Because little is known about relocation from retirement communities and about the people who relocate to and from retirement communities, a phenomenological qualitative format was chosen for the study. The study was designed to gather broad information about the characteristics of the participants, the factors that impacted their decisions to move to and from Sun City, their decision making processes associated with their relocation experiences, and their subjective views concerning their relocation experiences.

#### Procedure

The researcher used semi-structured interviews to explore the relocation decision making processes of former residents of Sun City and current residents who are preparing to move from that community. The first interview was a prototype interview. After

analyzing the data from that interview and receiving feedback from the prototype interview participants, the interview structure was refined. Each of the study participants then joined in one of six subsequent interviews. The data from those subsequent interviews were analyzed by exploring the interview content for common and divergent themes. All interviews were audio taped after written permission for the study participation and the audio taping had been acquired from the study participants. The content of the audiotapes was transcribed, and the data were organized and evaluated with the aid of NUD\*IST, a qualitative research software tool.

### Participant Selection

Participants were selected with the assistance of a real estate broker who handles resale properties in Sun City. The real estate broker provided the researcher with a pool of 14 contact names from households that had sold their Sun City homes or that were actively trying to sell their Sun City homes. The researcher attempted to contact members of these households in order to obtain permission to perform interviews. The first couple who agreed to participate in the study became the pilot interview participants. An additional name of a possible participant was supplied by the pilot interview participants and added to the participant pool. From the 15 households in the participant pool, one household served as pilot interview participants, six households were interviewed as study participants, six households declined an invitation to participate in the study, two households were not reachable, and one household was not contacted.

### Data Collection

Data were gathered from audio recorded interviews with the study participants. Each participant was involved in an interview that lasted between approximately 40

minutes and 90 minutes. In general, the longer interviews were conducted with couples, and the shorter interviews were conducted with individuals. Two couples chose to be interviewed as a unit, and four individuals chose to be interviewed as representatives of the couple. All interviews occurred in February 2001.

Participants living in or near Georgetown were given the option of participating in the study through either a telephone interview or an in-home interview. Two of the Georgetown participants and the pilot interview participants chose to participate through in-home interviews. All other participants participated through telephone interviews.

Prior to performing the interviews, the participants were presented copies of a consent form to sign and were given the opportunity to ask questions concerning the content of the consent form. APPENDIX B contains a copy of the consent form that was provided to participants. Participants who agreed to in-home interviews were given the consent form at the time of the interview. Participants who agreed to telephone interviews were sent the following items through U.S. Express Mail: consent cover letters, consent forms, and prepaid U.S. Express Mail return envelopes. After the consent forms were returned, the telephone interviews were scheduled.

The semi-structured interviews focused on gathering data about the participants, the factors they considered influenced their relocation decisions, their relocation exploration and decision making processes, and their satisfaction level with their relocation experiences. APPENDIX A contains a complete list of the base research questions that were used to construct customized questions during the interviews.

### Data Analysis

Transcriptions of the interviews were created by a transcriptionist and verified with the audiotapes by the researcher. Following verification, the transcripts were imported into NUD\*IST, and the data analysis began. Sections of the interview transcripts were coded according to various participant characteristics, relocation motivators, and relocation exploration and moving experiences. This initial coding was done at a granular level, and later the coding was refined to combine subthemes that contained similar qualities. High-level groupings of internal and external motivators were constructed. As the analysis continued and the themes refined, careful consideration of the relocation motivators yielded an understanding that many motivators consist of both internal and external motivational qualities. Pushes and pulls emerged as the new high-level themes of relocation motivators, and status quo reinforcers emerged as a theme describing the forces that the participants had to overcome in order to respond to the pushes and pulls through relocation. APPENDIX C provides a complete listing of the final themes and subthemes that were established as the data were analyzed. Although the data from the pilot interview are not reported as part of the study, the information obtained through the pilot interview follows similar themes and subthemes reported by the other study participants.

### Limitations of Design

The qualitative style of the study limits the generalizability of the data and increases the possibility of researcher and participant bias. The small size of the study combines with the qualitative style to reduce the generalizability of the data and of the data analysis. Although the information can be useful in recognizing and better understanding such older adult relocation factors as motivators, decision making styles, satisfaction levels, and



experiences, no statistical analysis was undertaken that facilitates the understanding of the probability of what other older adults will encounter or how they will respond when faced with relocation decisions.

Although bias is present in any research, bias can play a larger role in a qualitative study. The researcher's awareness of possible bias throughout the project led to a decision to conduct the interviews in a semi-structured manner, taking cues from the participants as to the wording of questions and to the order that the questions were presented. Whenever possible, the researcher tried to use the language of the participants during the interviews, thus reducing the bias in the participants' answers. Similarly, clarification was used liberally in the interviews to verify that the researcher understood both the text and the subtext of the participants' statements. During interview, data analysis, and documentation phases of the study, the researcher used journaling and self-reflection to further examine possible areas of researcher bias.

### Participant Characteristics

Throughout this report, the names of the participants and their spouses are changed in order to protect their identities. All participants described themselves as married, with the exception of Bonnie, who explained that she became a widow following her and Bob's relocation from Sun City. Table 1 on page 19 provides overview information about the couples who participated in the study. Italics font in the "Couple" column identifies the actual participants who were interviewed as part of the study. If only one member of the couple participated in a study interview, that person reported information about the couple's relocation experiences.

Table 1  
Overview of Participant Characteristics

Couple	Age	Years Married	Children	Religion	Education	Years at Sun City
<i>Alice Allen</i>	79 79	60	3	Presbyterian	Bachelors+ Bachelors+	0.5
<i>Bonnie Bob</i>	83 85 (at death in 2000)	60	2	Methodist	High School+ High School+	4.0
<i>Catherine Carl</i>	70 79	49	2	Methodist	Masters Bachelors	3.5
<i>Diane Dave</i>	70 72	49	2	Catholic	Bachelors+ Bachelors+	3.0
<i>Elaine Edward</i>	64 62	40	4	Presbyterian	High School+ High School+	2.8
<i>Frieda Frank</i>	73 74	52	2	Lutheran	High School Bachelors+	1.1+

All participants except one described their and their spouse's race as Caucasian and their primary ethnic backgrounds as European — mostly Irish, English, and Germanic. The remaining participant, Edward, described his and Elaine's racial and ethnic background as "just a good American."

Information about socioeconomic status was not gathered directly for this interview because of the difficulty in accurately determining this information as it relates to older adults. Some hints as to socioeconomic status were provided by the participants during the course of the interviews and are relayed in the participant quotations contained in "CHAPTER III. RESULTS" on page 23.

### Relocation History

The relocation history of the participants was varied. Dave described having moved once after retirement and before relocating to Sun City. This original post-retirement move brought Dave and Diane to the Austin area to be closer to their children. Frank described moving “every eight or nine years.” After his retirement, Frank and Frieda moved to Frank’s hometown, where they were close to his mother. Other participants described their relocation to Sun City as their first move following retirement. These participants reported having lived in their pre-Sun City homes for between 20 and 40 years.

### Work History

All of the participants who worked outside of the home reported being retired from their careers before moving to Sun City. Although retired, some of the participants have continued to work. Catherine described working occasionally while she lived in Sun City, and “part time four days a week” after her post-Sun City relocation. Edward described having his “own business,” which he started “just before we moved to Sun City.” Edward explained that his business grew significantly while he was living in Sun City. Frank described having retired multiple times: “The first time I retired in 1992, and then the next time I retired in `94, and the next time I retired in `96.” Since the last retirement, Frank said that he has done some substitute teaching and that he plans to do more substitute teaching following his and Frieda’s post-Sun City relocation.

### Individual Versus Couple Interviews

All participants were given the option of being interviewed individually or with their spouse. Four participants chose to be interviewed individually, including Bonnie, whose husband had died prior to the study, and two interviews were conducted with

couples. Three of the participants who chose to be interviewed individually were interviewed by telephone. Telephone limitations may have caused some of these participants to choose to be interviewed individually.

The couple interviews appeared to give accurate and balanced information about the couple's relocation experiences. Frequently each member of the couple collaborated the spouse's story by indicating agreement, by finishing the spouse's sentence, or by further elaborating on the spouse's statements. In one instance, a spouse indicated disagreement and the couple gained recognition that their views about the move to Sun City differed. In both couple interviews, the members of each couple appeared to work as a team while telling their stories. This team story telling might have reflected a deeply instilled pattern of mutuality in the couple's approach to life and to decision making. The couples' language supported this pattern of mutuality. The couples used "we" statements almost as often or more often than they used "I" statements while telling their stories.

The interviews with individuals appeared to provide honest and open personal views of each individual's relocation experiences. One of the individuals talked about weaknesses in his communication with his wife during the relocation decision making process. This weakness might not have been discussed as openly if the interview was conducted with the couple, rather than with just the husband. Some of the participants who chose to be interviewed as individuals might have been the dominant decision makers in their household. Three of these participants used "I" statements nearly twice as often (or more often) than they used "we" statements. The fourth participant interviewed individually used "I" statements exactly as often as she used "we" statements.

The difference in language between the interviews with couples versus the interviews with individuals might indicate that different data would have been gathered if all interviews had been conducted with couples or with individuals exclusively. These language differences, however, might instead represent different approaches to decision making processes and couple dynamics. The language pattern of the participant who was interviewed individually but who used “I” and “we” statements equally, similar to the language pattern of the participants who were interviewed as couples, supports the conclusion that individual versus couple interviews was not the sole factor in the language choices of the participants. Similarly, the data provided by the participants might not have been altered significantly by the individual versus couple interview formats.

## CHAPTER III

### RESULTS

Most movement occurs when there is a series of pushes and pulls. With a bicycle, locomotion occurs when one foot pushes down on a pedal and the other foot pulls up on a different pedal. With walking, the muscles push one leg forward and that leg pulls the rest of the body along. With relocation, one or more factors caused by change or by incompatibility with the current location pushes the older adult while other factors such as familiarity, facilitative features, or growth opportunities pull the older adult to the new location. Sometimes status quo reinforcers enter the situation and delay or work against relocation, much like a strong head wind impedes the progress of the bicyclist or walker. These status quo reinforcers combine with inertia and work to keep the older adult from relocating. When the pushes and pulls are strong enough to overcome inertia and the power of the status quo reinforcers, relocation occurs.

Although the pushes, pulls, and status quo reinforcers determine whether relocation will occur, the actual process, or techniques, used in forming a relocation decision can impact the older adult's satisfaction with the relocation. Just as a strong desire to get somewhere too quickly can cause a bicyclist to skid on a patch of oil or a walker to trip on uneven ground, a desire for a quick relocation can cause a person to form incorrect assumptions about a location. These incorrect assumptions may later provide the fuel that pushes the older adult to move from the new location.

The following sections explore the relocation decision making processes of six couples who chose to retire to Sun City and who later determined that Sun City was not appropriate as their final retirement location. Analysis of the data from the study resulted in the major relocation themes of pushes, pulls, status quo reinforcers, decision making processes, and attitudes toward the relocation decisions. Information about relocations both to and from Sun City is provided in each section. As the analysis of the data unfolded, the same themes and subthemes appeared to apply to the relocations, regardless of whether the moves were to or from Sun City. Many of the pushes away from previous locations later pushed the participants away from Sun City. Likewise, many of the pulls to Sun City later pulled the participants to another location.

#### Pushes Away From a Location

Change and incompatibility are the main forces that seem to have pushed the participants into relocating both to and from Sun City. Change either provided an opportunity to relocate (as in the case of retirement) or served as a wake up call (as in the case of health changes) that prompted the participants to make changes now rather than waiting until later. Incompatibility often spurred the participants to seek out a new environment that was more compatible to their needs or that provided more similarity, more familiarity.

#### Change

Change can upset the balance of life and nudge people to reevaluate their circumstances. Most of the changes the participants linked to their relocation decisions were major life changes. The participants discussed the influences of retirement, deaths,

health problems, and aging on their decisions to relocate. Some of the participants also discussed how environmental changes became factors in their relocation decisions.

### Work Changes

Two participants described moving to Sun City shortly after retiring or shortly after ending a post-retirement job. Another participant talked about having moved to another location after retirement and then later moving to Sun City. Catherine and Carl moved to Sun City shortly after Catherine ended her post-retirement employment with the local school district, and Edward talked about his move to Sun City after his retirement. Edward said that he had worked for a company that was sold several times. The last time the company was sold, he was offered a choice between relocation with the company or an opportunity for early retirement. He chose early retirement, and he explained the relationship between his decision to retire and his decision to move as, “I just figured, well, if I'm going to retire, I'll retire early and I'll retire to Sun City.”

Although Edward retired from his job, he did not retire from work. During his stay in Sun City, he saw the vending business that he started grow to the point where he indicated that he no longer felt he was retired. At that time, his vending business began to push him away from Sun City. Edward described the growth of his business and his feelings of being pushed from Sun City:

A good part of the reason I left Sun City was my business had grown so much. I was operating a big business out of my garage at Sun City, which was embarrassing to me, but no one ever questioned me about it. But I was running a lot of soft drinks and things in and out. . . . I was doing it all by myself. I have no employees and I was running them all over Austin and most of it were up 183 and east, down toward



the airport. I made a lot of trips back and forth, unnecessarily. . . . And the more my business grew, the more I was getting tired of making those constant runs back and forth. It was not convenient at all.

After Frank's retirement, Frieda and Frank moved back to Frank's hometown.

Although the timing of this move coincided with retirement, the actual destination of the move was related to a pull toward a familiar environment. Frieda's and Frank's move back to Frank's hometown is discussed more in "Familiarity" on page 39.

### Deaths

Three couples discussed deaths that prompted them to consider relocation. Alice talked about the deaths of her friends prior to the relocation to Sun City:

We belonged to the same bridge club for 45 years here. And all the sudden, we're the only couple who's still walking around out of 12 people. Half of them are dead and the other half — one of the spouses is homebound. So, uh, we feel like we haven't had bridge club in two years. That's all happened in two years. This is sort of a nudge that we need to be where our son and daughter are fairly close.

Bonnie described the impact of her sister's death on her decision to move to Sun City by saying, "And when we made the decision to move, I had just lost my sister. And she was very close to me, and that's when I made — helped make the decision to come." Bonnie later reemphasized the impact of her sister's death, "We were just wanting to go in a hurry. I just don't know what that feeling was, unless it was when my sister died. It was just too sad to be there."

Frank and Frieda also were impacted by death. Frank described the loss of numerous friends:

And then a strange thing in your life happens. And that strange thing happened to us about three or four years ago. Our friends started dying. And so we had this large group of friends that we socialized with for thirty/forty years, went on trips together, ten, fifteen, twenty couples. Now it's down to — well, three or four maybe. . . . And this is a big, big, big change in your life. It's even — I think it's even a bigger change than making moves.

Frank and Frieda continued their story by mentioning that two more friends from back home had died while they were living at Sun City. They described how the increased awareness of mortality impacted their decisions to move to and from Sun City by saying, Frank: “And one of these days we're going to die and” Frieda: “We wanted to spend more time with our family.”

### Health Problems

Two couples experienced health changes prior to their moves to Sun City, and one couple experienced health changes while they were living in Sun City. Health changes prompted Alice and Allen to seek relocation to Sun City based on the belief that medical services were more accessible close to Sun City than they were in their small town. Alice described the impact of good medical care on their decision to move to Sun City as, “Medical was number one priority.” After moving to Sun City, Alice and Allen discovered that the clinic adjoining Sun City provided routine medical services only and that they were required to travel some distance to receive the specialized care they required. Thus, the main need that pushed them to relocate remained unfulfilled in Sun City.

Frank and Frieda had visited Sun City several times and had talked about moving there for three years before Frank encountered his first major health problem. Three months after the surgery to correct Frank's health problem, Frank and Frieda again visited Sun City and purchased a home. The couple described the impact of Frank's surgery on their relocation decision by saying, Frank: "You have to think about what is in your best interest. And I think the surgery made both of us realize that we're not" Frieda: "Getting any younger."

Bill experienced a major health change while living in Sun City. Bonnie talked about Bill being diagnosed with cancer approximately one year after their move to Sun City. Although Bonnie never directly linked Bill's illness with their move away from Sun City, the decision to move from Sun City in order to be closer to shopping areas might have been related to reducing some of the stress Bonnie encountered as a result of Bill's illness. Bill died approximately one month after moving away from Sun City.

### Aging

Aging is an ongoing form of change that sometimes pressures older adults into making a relocation decision. Sprinkled throughout four of the interviews, the participants mentioned aging as a motivator to relocate. Alice talked about the pressure of aging by explaining, "Well, we felt like we had to move because [Sun City] was not what we wanted. And you know with that short of time left you think, well, gee, we need to be more satisfied."

In Bonnie's description of their decision to move to Sun City, she said, "It was getting time because we were getting up in years." She later included in her description of

their decision to move away from Sun City, “I didn't want to waste any more time,” and “At our age, I knew that we didn't have too much longer anyway.”

Dave focused his concerns about aging around the ease of making a move, “I knew the sooner I got out of [Sun City], the easier it would be to do so.” Dave further elaborated by saying that he likes to do his own packing and unpacking and that he did not want to wait to leave and find himself saying, “The heck with it. I'm just — it's too much hassle to move and I'm just going to stay.”

Edward framed his concerns about aging around a desire to protect Elaine. Edward explained these concerns:

I always worry about something happening to me, by the way. As healthy as I am, I still worry. If I were to get run over by a truck tomorrow, I want my wife to be in a place that would be comfortable for her.

Frieda also touched upon aging when describing their decision to move to Sun City. She said, “We're not getting any younger. That's one of the reasons too. Well, I just feel like, ah, you know, if something would happen to one of us two, and we both want to be closer to our daughter.” Although Frieda's and Frank's move to Sun City was to be closer to their daughter, their next move will bring them even closer to their daughter than they have been at Sun City.

### Environmental Changes

Four participating households cited changes in their property, their neighborhoods, or the community as motivators for them to relocate to or from Sun City. Bonnie described her disappointment with the growth of Sun City and Georgetown by saying,

“[Georgetown has] grown. I wanted to be in a small town, but it's turned out that it's not

like a small town.” Although Bonnie’s and Bill’s move away from Sun City took them to a home in Georgetown, the new location in Georgetown provided them with more convenient access to shopping and services within the town.

Catherine mentioned feeling pushed away from Houston because the city had grown too large and because, “The demographic of our neighborhood was changing significantly, and our property values were dropping. It just — you know, we just needed to leave, and we would have left, I think, under any circumstance. It was time to go.” When Catherine and Carl left Houston, they relocated in Sun City.

Dave described the major reasons for leaving his previous residence south of Austin was that the area “was getting very crowded very rapidly” and that the traffic between his home and where his sons lived was getting too heavy. Dave and Diane relocated to Sun City at the very beginning of the Sun City development. Dave described Sun City at the time he purchased their lot:

I just heard about Sun City, and I drove up there, and there was nothing out there but trees then and a metal building where they were trying to sell [Sun City property]. I drove out across there and found a big old oak tree and decided, “Hmm, this looks like it's kind of out in the country.” You know, about eight miles from Georgetown and decided to buy the lot.

As Sun City developed, the community did not stay the same as Dave originally found it. Dave described the changes when he said, “I guess before we knew it, it was getting very crowded too. Probably the biggest reason we left there — one of the major reasons — was the very heavy traffic between Georgetown and where my son and his wife live.” The

same community changes, crowding and traffic, that pushed Dave and Diane to move from their previous home to Sun City, later pushed them away from Sun City.

Edward described concerns about increased home maintenance due to an aging septic system and concerns about reduced property values and safety. These concerns pushed Edward and Elaine to relocate to Sun City. Edward described this push:

I figured the older I got, I did not want to stay in the home I was in. I saw things happening in the community — uh, above and around it — that said now and ten years from now this place will be downhill pretty fast. In all honesty, I was afraid of the neighborhood going into a crime element situation. Just saw that coming. I missed completely, by the way. It's like guessing the stock market. I was wrong.

### Incompatibility

In general, the participants did not identify incompatibilities and dissimilarities as reasons for moving away from their pre-Sun City retirement homes. Most of the participants, however, described incompatibilities and dissimilarities with their environment as factors that pushed them to relocate away from Sun City. Such incompatibilities as lifestyles and dissimilarities as age caused participants to feel out of place in Sun City. Additionally, the incompatible location of Sun City kept some of the participants from feeling satisfied with living in Sun City.

### Age

Although Sun City has minimum age requirements for residents, these minimum age requirements allow for a wide spread of ages amongst the residents. For older adults who are drawn to a community partly because they are looking to live near similar people, a wide age range can contribute to some of the older adults feeling as if they are too young

or too old to fit into the community. Three of the participants described feeling they were not the appropriate age for Sun City. Alice described her sense of feeling different from her neighbors at Sun City:

Most of the people that we knew, that we became acquainted with in the neighborhood were younger. They were, I would say, in their early sixties. And you know when you are nearly eighty, that's a difference, you know, in what you're doing.

Bonnie described her neighbors in Sun City by interjecting, "Out there as it turned out there are a lot of YOUNG people. Some in their early fifties." Bonnie indicated that the age difference added to her feeling as though she had less in common with her neighbors.

Edward described feeling that he did not fit in at Sun City because he felt he was younger than most of the other residents:

I was basically too young. And when I went out there I was, what, 58. I thought I was kind of young when you looked at all the neighbors and they are all fully retired, with pensions and what have you.

### Lifestyle

Although dissimilar ages and incompatible location applied some pressure on the participants to relocate, dissimilar lifestyles seemed to be the greatest incompatibility push factor. Lifestyle differences take many forms, including socioeconomic status, values, and more broadly, a way of life. Alice summed up the lifestyle incompatibility she felt with, "It was just that we had nothing in common with the group of people that were there." She

later elaborated on how her and Allen's way of life did not fit in with the Sun City lifestyle:

[Sun City] is a golf cart community. We knew that, but in the cul-de-sac where we lived, we were the only house without the golf cart, and every morning they all left to play golf — every day. They were VERY friendly. We were invited to many, many parties the very first month. Since it was coming up Christmas, there were lots of parties. We don't drink, and that has some of the bad effects, but that's in nearly every community. You couldn't go by that. We don't smoke, and we don't drink, and we don't party. So, it didn't fit us too well. We're a church oriented family and have always been.

Bonnie described the Sun City atmosphere more succinctly as, "That was not our lifestyle."

Catherine and Carl did not talk about an incompatible lifestyle with the other residents at Sun City. Instead, they talked about incompatible values with the administration of Sun City. Catherine described this by saying, "We didn't feel like the administration of Sun City represented the population as well as it should have." Carl elaborated on this by commenting on the use of funds to support golfing. "I thought the property — some of our dues, or a large proportion, was going into golfing. Where I didn't think that was a particularly good idea." Catherine and Carl identified this incompatibility in how the administration used the resident's dues as a major push for them to consider relocating away from Sun City.

Dave talked about the high costs associated with living in Sun City and with using the Sun City golf courses:



It kinda bothered me, I guess, seeing everyone going by to play golf, and I didn't feel justified to be able to afford to go out and play. I probably could've, but I guess from my era it just seemed an awfully lot. So consequently, I guess it kind of made me a little unhappy, and I thought the houses were very, very overpriced for the type of construction, you know. Like, uh, just a little bit of limestone rock, you know, on some of them or you could have it all that way, but every little thing they done ran extra, like adding a porch, you know, was a lot extra. And it just seemed like everything was very, very overpriced, I thought.

Dave also talked about how other residents seemed to be able to afford a different lifestyle than he could afford:

I knew quite a few [Sun City residents] that came down, stayed their six months and then went back to their hometowns where they lived on a lake or something up North. That way, if they established residency here after six months each year, they didn't have to pay taxes in Iowa. So a lot of them came down here for that reason — to establish residence and then go home in the summer. Which is fine, I guess. I was — I just wish I could have done it.

The cost was not the only reason Dave said he did not play as much golf as he would have liked. Dave mentioned a different style of playing, of having fun:

I was used to playing with people who, you know, if you wanted to visit, you could, and some of these persons seemed offended if while they were teeing off somebody was talking quietly on the side. . . . We're just out here to have a good time. When are we supposed to visit? . . . I guess I wasn't used to people that, well, spent 20 minutes on a 10-foot putt, you know. And you weren't playing for anything anyhow.

I think they watch too much television. And I guess I like to get out there and play and get done and go home and have a brewski.

Besides finding the prices higher than what he felt comfortable paying, finding other residents willing to pay the high prices, and not finding like minded golfing partners, Dave did not like the number and types of rules residents were expected to follow in Sun City. Dave described this lifestyle incompatibility as, “Too regimental for me.”

Edward talked about the discomfort of being at a different socioeconomic level than his neighbors at Sun City:

There is also a comfort level when you're dealing with people that are in your own social status. . . . We'd have been in a different social status [if we had been on a different street]. But we ended up on a place we wanted to live because of the way it looked and all, before there was even roads were cut in. . . . And all the neighbors around us were retired. Every single one of them. There wasn't any of them working within — on that street and the people that we associated with. Their economic status was way over us. It was just way up there, and these are people who were tourists and world travelers and most of them are ex-, um, presidents and federal government administrators and so on and so on. Our economic status in life — we've done very well and been real happy with things, but I never went beyond just managerial levels, and so even my economic status has never taken me up into the levels theirs was in. And so they were always taking off and running off to Mexico or running off to Canada. You name it, my neighbors were gone a lot. . . . You know, they turned out to be super wonderful. We had yard parties and just constant — and then they seemed like such nice, comfortable place to live, but yet you couldn't

engage in the same activities because economically, we couldn't have done that. We did not have the kind of money to take off and just take trips to Canada. Plus we socially never did it — never comfortable about it.

Frieda and Frank talked about lifestyle incompatibility in respect to their pre-Sun City community, Frank's hometown. Frieda explained that many of the people in the community centered their activities around their children and grandchildren, while Frieda's and Frank's children and grandchildren lived far away:

A lot of them [friends and relatives in the pre-Sun City community] had their families, see? So many of them had their families living there and they were involved with them, where we didn't. See, we didn't have our children close by that — you know, I used to kind of envy them, thinking, “Here they are. They can take their grandkids and do all these things.”

### Location

For some of the participants, the location of Sun City turned out to be incompatible with their desires to be convenient to shopping and specialized services. Alice cited convenience to high quality medical care, specifically to a Scott and White Clinic, as their main reason for moving to Sun City. After moving to be near medical services, Alice and Allen discovered that Sun City was not as conveniently located as they had assumed. Alice described this location incompatibility:

It was the environment — was not what we thought and the distance to the hospital, which we thought the clinic would provide things there (the Scott and White Clinic) but that didn't prove to be true. The family doctor was there and could recommend you, but I was recommended to go to Temple. And it was 47 miles to the Temple

hospital where we had to go for five weeks at least once each week right away, and it was on I-35 . . . very busy highway.

Besides the inconvenience to medical care, Alice said that she had been accustomed to much closer access to their church and to grocery stores and that the farther distance from these locations added to her push away from Sun City:

The other problem on travel was we were seven miles from the city limits of Georgetown, so we went to church and it was 11 or 12 miles to the church in Georgetown. It was about eight or nine miles to the grocery store. See all they have [at Sun City] is a little, like a little service station thing where you can get milk and bread and donuts and things like that. They have no grocery store per say. So, that meant where I'm living in a town where I get in the car and in three to four minutes I'm in a grocery store. We live in a town of less than 25,000 people [the pre- and post-Sun City town]. This is where we have been the whole time, for the 50-some-odd years. So it is very difficult for me to learn to buy groceries.

Bonnie indicated that she felt the distance from Sun City to Georgetown contributed to her loss of confidence in driving:

I guess that I sort of lost my confidence in driving while I was out there. Um, because for a whole year I didn't drive. Because it was so far out and my husband always did the driving and if I'd start out, um, he'd say — I think he'd kind of worry about me until I got home and I had to [go places, like to] the beauty shop. . . . Uh, I was a little nervous even doing that. So, and a lot of times he took me and I just sort of lost my confidence in myself.

Now that Bonnie is living close to the center of Georgetown and her husband has died and she no longer has him to worry about her, Bonnie drives shorter distances more frequently and feels she is regaining her confidence in driving. When asked how she felt the relocation away from Sun City has affected her, Bonnie replied, “I think I'm getting braver.”

Other participants identified incompatibilities associated with the location of Sun City that arose out of changes. The changes in Edward’s vending business made Sun City an inconvenient location for Edward and Elaine. The changes in traffic made Sun City an inconvenient location for Dave and Diane. For Frieda and Frank, Sun City appeared to be a convenient location to their daughter until a more convenient similar community developed. At that point, Sun City became less convenient and the location became less compatible. These and other changes are more fully explored in “Change” on page 24.

Only one participating household talked about being pushed away from the pre-Sun City location because of an incompatibility of location that did not arise from change. Catherine described a desire of, “Getting away from the Gulf, getting a little higher, a little more elevation and away from HURRICANE country.” She further explained, “We'd lived in hurricane country for a long, long time.”

#### Pulls Toward Relocation

Although factors pushed the participants to relocate, other factors pulled the participants to Sun City and later to other locations. These pulling factors gave the participants destinations for relocation. In many cases, the participants were pulled to a location by a familiar quality or feature, such as the accessibility of family members, a previously enjoyed location, or similarities with neighbors. In some cases, the participants

were pulled to a location because the new location facilitated the participant's needs or lifestyle. In other cases a pull to a location represented an opportunity for growth.

### Familiarity

Familiarity was cited most often as the strongest pull to move to a specific location. Some participants were drawn to Sun City or to a post-Sun City location by the nearness or accessibility of family members or friends. For some participants, the choice to relocate to Sun City or to a post-Sun City location was heavily influenced by a desire to move to or near a familiar location, such as a former residence, neighborhood, or vacation spot. A final aspect of familiarity that pulled the participants to relocate to a specific location was the desire to live amidst neighbors who the participants felt shared similar qualities.

### Family Members

The most often stated reason for relocation was for the participants to move closer to family members, specifically children, grandchildren, and great-grandchildren. Only one participating household did not cite a desire to move closer to children as a major reason for relocation to or from Sun City.

Alice's and Allen's move to Sun City took them farther away from their children, and Alice indicated that this distance was not acceptable. After living six months in Sun City and finding out that the medical services available near Sun City were not what they had expected, Alice and Allen moved back home and began making plans to relocate to a retirement community closer to their children.

Bonnie's and Bill's move to Sun City pulled them closer to their children and grandchildren. Bonnie described part of their pull to move to Sun City by saying, "With our sons being in this area, we decided that it was time since we were getting in our late

seventies that we should move close to them, but we didn't want to be in the same town.”

Bonnie’s and Bill’s move away from Sun City and into another retirement neighborhood closer into Georgetown kept Bonnie and Bill close to their sons but in a separate town.

After retirement, Dave and Diane moved from another state to a town south of Austin in order to be near their children and grandchildren living in the Austin area. Dave described the heavy traffic he encountered when he visited his children. He said that he believed moving north of Austin to Sun City would reduce his traffic problems. Although Sun City was not closer to his children, Dave believed that Sun City was more accessible to his children. After the traffic increased to the point where the children were no longer as accessible from Sun City, Dave and Diane moved to a town west of Austin that he thought was more accessible. Dave describe his closeness to his children and grandchildren:

My grandchildren and both my sons live in this area, and that's why we came down to begin with. And we see each other quite often, you know, probably two or three times a month. And then, of course, we get the chance occasionally to stay with the grandchildren. . . . You know when they have to go out of town on business or whatever, or one of them gets sick, you know, it's kinda nice to be close enough to go down and say, “Howdy.”

Edward’s and Elaine’s move from Austin to Sun City put them a little farther from their children, grandchildren, and great-grandchild. Amidst Edward’s reasons for moving back from Sun City to his old neighborhood in Austin was the pull to be closer to his family. He described the effect of his move back into Austin:

We're closer. We're much closer to [the children, grandchildren, and great-grandchild] than we were [at Sun City]. In distance also, I meant both distance

and the fact that we could see them more. By the way, they didn't like going out [to Sun City]. They didn't like [Sun City].

Frieda described her and Frank's primary reason for moving from Missouri to Sun City as, "We wanted to spend more time with our family." They stated that they are moving away from Sun City to be even closer to their daughter and her family. Frank talked about having looked for a Sun City-like retirement community closer to their daughter when they moved to Sun City. Although such a community was planned, there was no definite development date. Once the new retirement community started being developed, they purchased property and made plans to move from Sun City. Frank described their current environment at Sun City and the expectations they have concerning their upcoming move:

We'll wake every morning and sometimes [I] feel I've died and gone to heaven. You know, that's how good it is here. And it's going to be even better than that up there because it's going to be the same lifestyle, the same surroundings, the same activities, but our kids are going to be thirty minutes from us.

#### Location

Four participating households described pulls to a familiar location as factors in their relocation decisions. When Alice and Allen moved away from Sun City, they moved back to the familiarity of their pre-Sun City home in Oklahoma, which had been for sale but had not sold. Although they were aware of the shortcomings of their old location, Alice and Allen had planned to stay back home until they could find a location that met their needs better than Sun City. Alice described the pull to return home:



[Home in Oklahoma] is where, when I go to the grocery store I always run into people from the church or people I've taught with or people we've known throughout the years, or you know, when the telephone rings, it's a friend.

Catherine and Carl talked about their moves to and from Sun City as moves toward familiar locations. Catherine and Carl talked about their original retirement plans of building a house on property that they had owned and visited for many years in Colorado. Carl described how these plans fell through and they ended up moving to Sun City:

We had come up [to the property in Colorado] in the spring of '96 and we were hunting for a contractor and really a place to stay and a place to store our furniture, and we really struck out on all accounts. And on the way back to Houston, I suggested to Catherine that we — “Let's go by Sun City.” And we ended up the next day putting a down payment on a home. That's how we got to Sun City.

The decision to explore the option of relocating to Sun City was inspired by past experiences with the Texas Hill Country. Carl explained this pull to Sun City:

Well, we had always liked the Hill Country too — Fredricksburg, Marble Falls . . . and Austin, so it was kind of a natural for us to take a look at it — take a look at Sun City on the way back home.

Catherine's and Carl's move away from Sun City fulfilled their earlier dream of living on their property in Colorado. Catherine described the relationship of the moves to and from Sun City:

The way I looked about the move to Sun City was that it was a move in the right direction. But in my heart, I was — the whole time I was on my way to [Colorado]. And it was just a stop-over for me.

When Edward's vending business grew to the point that he and Elaine felt they needed to move from Sun City, they looked for houses closer in to Austin and particularly in their old neighborhood. Edward explained that houses in their old neighborhood were "valued lower and they didn't go off of the market as quick." Eventually, Elaine and Edward found a house that met their needs in their old neighborhood. Edward described the location they moved to after Sun City by saying, "I am living, by the way, not three blocks away from where I used to live. I am back in the same neighborhood that I told you about with the septic tanks and everything."

Frank and Frieda moved back to Frank's hometown after retirement. Frank's and Frieda's hometowns were close together. Frank described his experience of going back home after retirement:

You go back to your hometown and there are a few people there that I went to school with. Okay, and that's nice. But the relationship I had with them in school is gone. Completely gone. You go there and they're almost like strangers. You know. And you don't rekindle that relationship like you think you might. You think you might be, you know, friends again, but it doesn't necessarily work out.

Frieda encountered a similar experience being close to her relatives in the neighboring town. She described her experience by noting, "that was the nice part, to kind of be with family, you know, but they've changed and I've changed and so, you know, it wasn't — it was just a little different . . . from what we thought it would be."

#### Similarities with Neighbors

Most of the participants indicated that part of the pull to a new locations was the desire to live amongst neighbors who are similar to themselves in various ways, such as

age, education level, interests, and life experiences. Alice talked about some of similarities she expects to find in the neighbors at the retirement community where she and Allen are planning to move:

I have a friend that we both — we graduated in a small town in western Oklahoma. And one of my best friends at that time lost her husband about ten years ago, and she's been living at this other retirement community in Dallas for a couple of years, and you know, she'll be there. And the people there are very friendly and they're our age. You know, they're much closer. Of course, the age limit there is older. I don't know what it is, but it seems like it is 70. . . . It's a community of, I hate to even say it, but they are educated people. They've got all kinds of groups that meet to discuss things like — Allen loves the stock market information, and he's — they've got what they call the “Men's Coffee Klatches.” Lots of men here and they're all active.

Bonnie was pulled to relocate to a retirement neighborhood in Georgetown by a former neighbor from Sun City. The similar experiences that she and her neighbor shared drew her close to her neighbor. Bonnie explained this closeness:

And my neighbor . . . her husband was terminal. . . . And she's in [the same neighborhood as me] too now. That's why I'm here. . . . Out [at Sun City] I don't think anybody cared except my neighbor that was telling me about [this neighborhood]. We're real close because her husband was terminal. . . . We get up over the fence late in the afternoon at the back, and we'd tell what kind of a day we had, and she would bring me food. I never did get her any food, [laugh] but she'd bring me things, and she was the only one that was — but it was because we were compatible because we were both going through the same thing.

Carl described the safety associated with living amongst other older adults at Sun City by commenting, "In one way [the move to Sun City] was comfortable because . . . you knew you weren't going to be run over by a motorcycle."

In Dave and Diane's case, moving away from Sun City brought them to a community that was more similar to what they had experienced earlier in their lives. Instead of being pulled toward people of a similar age, Dave and Diane were pulled toward neighbors who were of similar ages to what they had known in the past. Dave explained this pull:

I was used to being around young people all of my life, and all of a sudden I'm with people my age, which is fine, and older, which is fine, but I missed being around the guys, you know, in their 40s and 50s that still liked to do a lot of things. And that just wasn't there, I didn't think.

Edward was pulled toward Sun City by the similar ages of the residents. He explained this pull:

A lot of [the decision to move to Sun City] had to do with the environment of people all sharing the same general concepts of retired people. They all had the same thing in common, being around other retired people.

Part of the pull to Sun City that Frank and Frieda experienced was the desire to share a similar lifestyle and similar values with other retired people:

The difference, the biggest difference, in my opinion — and we've lived several places, in several different types of neighborhoods. The biggest difference in living in a place like this — first of all, everyone here is coming here basically for the same reason, to enjoy this type of lifestyle. . . . They're all here for the same reason, to

enjoy the good life of the remaining years, and many of them are here because they got family that live around here.

### Facilitative Features and Growth Opportunities

Four of the participating households described having been pulled to Sun City or to a location away from Sun City because the new location had characteristics that facilitated their needs and gave them opportunities for growth. For Bonnie the growth opportunity in moving to her post-Sun City house in Georgetown centered around the location of the house. Being closer to shopping, services, and more supportive neighbors, the location has enabled Bonnie to regain some confidence in her driving and to realize her desire to “be independent as long as I can.”

Catherine’s and Carl’s pull toward growth brought them to realizing their dream of living in Colorado. When they prepared to leave Sun City, they had a house built that Carl designed and moved to where they could enjoy the beauty of nature. Catherine described their new location:

We're a little over four miles from the highway and as we said before, the road is not paved and the people that come by are coming to their house; they aren't going any place else. We're essentially at the end of the road. Ah, when — you know — when you look out you — trees and mountains. That's really beautiful.

Edward talked about having had a desire to learn to be more social and to learn to have a good time. He said that he felt living in Sun City would increase Elaine’s and his social life. Edward compared his expectations of Sun City to the cruises he and Elaine took on their vacations:

We are a couple that . . . neither one of us knows what the heck the other one wants to do. . . . And we'd go on a vacation and we were just constantly struggling as to what should we do, now that we are here. So when we go on cruises, cruises are so confining that you don't have to worry about what to do. It's there for you. It's all compacted and you just — you can sit in your room or you could just walk across the hall and go do whatever you want to do without having to think about it, because it's all right there. And in our social activity, in our social life here before we moved to Sun City, we really didn't engage in anything. It was just like taking a vacation. We just never did anything. We weren't going anywhere. And I thought, well . . . it is a confined community, which in effect, you're either going to do something or your going to sit on your front porch, but you didn't have to think about it — where or how to go. You just had to get up out of your chair and go do it, because there was so much of it available to you. . . . I thought it would force me to engage in social activities in Sun City, but I really feel like, when we got there, that part of that community, it wasn't us. It just wasn't us. We didn't know how to involve ourselves in the middle of it and when we did, we just weren't comfortable doing a lot of it.

Not having grown more social while at Sun City, Edward and Elaine developed different pulls that drew them back to their old neighborhood. Besides the search for familiarity, Edward and Elaine were drawn to their new house specifically because its design facilitated the needs of the business:

[The post-Sun City house] has a huge room off of the back of the garage. . . . We unload into that room. That was a key element. In all, these homes around here in

the neighborhood are like that. But not the one I was in. The home I was in prior to [Sun City] was a smaller home than this.

Frieda's and Frank's growth opportunities also centered around social activities. With the loss of so many of their friends, getting to know new people and partaking in social activities with other couples has been important to them. Frieda described their enjoyment of their social growth:

I feel like moving here was just great because right away we got — we both love music, and they have the dances with the big bands, and we have not missed hardly any of those dances, and we haven't danced in years. I mean, we just haven't. We just haven't gone to dances. And so that has been fun again. It was kind of like — and then meeting all of these new people.

#### Status Quo Reinforcers

Some factors work to hold older adults in place. These factors neutralize some of the power of the push toward relocation and the pull toward a new location and result in the inability or hesitancy of the older adult to relocate. Because the literature lacks a descriptive term for these factors, the term “status quo reinforcers” is used in this document to describe factors that exert resistance to movement. In the two interviews where a status quo reinforcer was mentioned, the status quo reinforcer was a person, in particular, a parent. Although some of the participants mentioned missing friends from previous locations and characteristics of their previous homes (for example, yards), only the presence of a parent seemed to make the participants hesitant to relocate.

Carl mentioned that his mother had died the year preceding his and Catherine's move to Sun City. Carl's mother had been living in a town near them. Although Carl's

mother did not live long enough to be a status quo reinforcer, Catherine indicated that Carl's mother would have had an impact on their ability to relocate to Sun City if she had lived. Catherine described this by saying, "You could say that [the death of Carl's mother] expedited the move. Because we would have had to move her to Georgetown also. . . . We wouldn't have left her in Houston."

Frank talked about his mother who is living near his hometown. He indicated that the desire to stay near his mother offset some of his and Frieda's pull toward Sun City:

And we thought we would really like this lifestyle [at Sun City]. We'd read about it. We knew people who had lived in communities like this and so we thought, "Well this is the thing to do." Move here and we are three hours from our daughter and family instead of 12 hours from St. Louis and [we have] a tremendous lifestyle. One of the stumbling blocks was the fact that I have a mother who will be 99 in March. Next month, she'll be 99. Mentally, she's sharp as a tack. So how do you leave a 98-year-old mother? Those are tough decisions that people have to make.

Frieda and Frank talked about not being able to commit to relocate to Sun City until after the push of Frank's health problems and resultant surgery added to the pull toward Sun City. This push and pull combination was finally enough to displace the anchor to Frank's mother.

### Process of Making the Relocation Decision

Although the decision making processes used to move to and from Sun City did not always differ significantly, the decision making processes often became more refined as the participants gained relocation experience. The following sections discuss the speed



with which the participants made their relocation decisions and the methods of exploration that the participants used before committing to relocation or to a relocation destination.

### Speed of Relocation Decision

Some of the participants described making hasty relocation decisions. Alice described her and Allen's speed in deciding to relocate to Sun City by saying, "We just did it in too big a hurry. I would say that's what we did. We probably picked out our house in too big a hurry." Alice indicated that she and Allen are taking more time to make their next relocation decision. Although they think they know where they are moving, they are staying in their pre-Sun City home while they take their time to check out the next house and the next community.

Bonnie talked about being in a hurry to move to Sun City, possibly because of her sister's death:

We thought it was — to move to Sun City — um, we thought it would be, um, we were just ready to go, and I don't know, I don't know why we didn't — it must have been some kind of omen that he was going to get sick. But we just thought it would be the perfect spot. You know, in between [the children]. . . . But I guess if that had been — we were just wanting to go in a hurry.

Bonnie's and Bill's decision to move to their post-Sun City house also was quick, possibly because of Bill's illness. Bonnie said that they looked at a house in her friend's new neighborhood and, "We made up our minds in one day."

Catherine explained that she and Carl were in a rush "to really make definite plans" when they bought their home in Sun City. Catherine's and Carl's rush was a result of having sold their house and of needing a new place where they could live.

Although Dave did not describe his and Diane's move to Sun City as hasty or rushed, he provided the following advice for other older adults who are planning to relocate:

I think sometimes it's a matter that your house is sold, and you've got your furniture stored, and it always seemed like it was 100 degrees when you're always looking for a house, and sometimes, you know, you made a quick decision just to kind of get tired, because you're tired every day — 100 degree weather, riding around looking for a place to move to, and a lot of times, you know, you think, "This town is it." And a lot of times you — and you hear the name of another town and you say, "Oh, that doesn't sound like a good place." Sometimes you go there and you are really surprised at what is there. So, I think it's really important to do a lot of shopping around to be sure.

#### Exploration Prior to Relocation

The process of exploration prior to relocation varied. Exploration sometimes involved visits to possible relocation destinations, visits to similar communities, the search for a compatible house, and discussions. Alice described her and Allen's exploration prior to relocation to Sun City by saying, "We stayed in [Sun City's] homes that they provide for you to look things over, and we did look them over, but anyway, uh, we thought it had what we wanted." She later described their dissatisfaction with that relocation decision with this summation, "We didn't check on enough. So I would spend more days there and look it over better." When they were exploring Sun City, Alice and Allen had considered moving to a "church facility" located closer to their children. That facility is where Alice and Allen are currently considering relocating. Alice explained that

only a duplex was available in the church facility at the time they moved to Sun City. She described their reason for not taking the duplex as, “The duplex we looked at was not conducive to what we needed. We needed a larger yard with our dog.”

Although Catherine’s and Carl’s relocation exploration prior to moving to Sun City was shortened by their need to vacate their pre-Sun City home, they spent a considerable amount of time and effort planning their move from Sun City. Catherine and Carl indicated that they looked for a home in Georgetown before deciding to build on their property in Colorado. Catherine provided some insight into their relocation experiences by suggesting that other older adults who are considering relocation check into the “change in tax structure.” Catherine further explained, “You should be aware of — particularly if you are moving to another state — you need to be aware that there may be a change in taxation.” Carl added, “Not only income tax, but land tax or property tax,” and Catherine further added “school taxes.” Carl also pointed out the need to check into “energy costs” by explaining, “It becomes a big part of your budget.”

Edward talked about his and Elaine’s pre-Sun City relocation investigation. He said that he watched the local real estate market “not without any great effort” and he discussed with Elaine nearby places where they could relocate. Edward described being drawn to Sun City when he heard that Sun City was being developed in nearby Georgetown:

[Sun City] was just an eye awakener because you get to our age, and you hear about these types of communities, and as soon as we heard that Sun City was moving to Austin, it made us pursue that idea — what it was all about, in other words.

After living in Sun City and after determining that Sun City was not an optimal environment for them, Edward and Elaine began a new relocation exploration, one that

was more concerted than their pre-Sun City relocation exploration. Edward described looking at existing homes closer to Austin and considering building a new home. The idea of building a new home proved to be too costly, so Edward and Elaine focused on looking for an existing home. In describing their search, Edward said:

We hunted around and we just kept hunting for the very location that we wanted to and we just kept targeting [the pre-Sun City neighborhood], because it is very central to everything I do. This is as central as you can get for my business, and we just kept looking and we found this one here. There were four or five of them in this neighborhood up for sale and they were also easy to get, by the way. No one else wanted septic tanks and the time we were looking the market was so high. . . . Anywhere else, you would have to jump and be ready to move quickly. In this neighborhood you did not have to do that. Number one, the prices were valued lower and they didn't go off of the market as quick. People were afraid of septic tanks and the fact that it wasn't in the city.

At the end of the participant interview, Edward suggested that older adults who are considering relocation talk with a neutral person before making a relocation decision:

Talk to somebody outside yourself . . . [someone other than] your husband and your wife. . . . You know, sometimes when you've lived together and grown together for so many years, you really aren't looking . . . at the big picture right. You need to see something beyond what we were looking at.

Frieda and Frank made several trips to Sun City before deciding to buy a resale home. Frieda described their relocation exploration:

We did talk about it and then we'd been down here like three different times and looked, and we were going to build a house, and then we decided instead of building we would just come in and try to buy a resale if we could. And then this surgery — because we knew — even called Scott and White to see if he could have surgery down here. . . . We were thinking we would move down here, but anyway, then we decided, no, we would stay there and then — so then we came down — you had the surgery in August, and we came down in November, and we bought this house in November, and then we moved in January. So we had planned — we had been talking about this for three years, I guess really.

Frieda and Frank did not just look at Sun City in Georgetown. Having friends and family members living in or near other Del Webb properties, they looked at Sun Cities in Arizona and at Hilton Head. Because their daughter lived closest to the Sun City in Georgetown, they focused their search for homes in that location. Frank described the house hunting:

In February we spent four days here. We came down in March of '99 and spent three days here. That's seven days, and then in August I had this surgery, and then we came back in November and spent three days, and that's when we bought our home.

In contrast to taking three years to decide to move to Sun City, Frieda and Frank made a “pretty fast” decision to move away from Sun City. Before moving to Sun City, Frieda and Frank had heard that a similar development was planned for the Dallas area, a location closer to their daughter. When Frieda and Frank checked into this other location, they were told that “they weren't going to build for a long time.” Frieda explained, “So we didn't want to wait. And we thought, ‘Well this will be good. We'll be close enough.’ We thought three hours is nothing compared with what we were doing.” After moving to Sun

City and living there for several months, Frieda and Frank discovered that the retirement community near Dallas had moved out of the planning stage and into development. At Thanksgiving they visited the development site, and the day after Christmas they bought a lot in the new development. Frieda described the post-Sun City relocation decision process:

So, that was fast, but only fast from the standpoint we heard about it, we went there, we knew what it was going to be like, and we lived here and so, we wanted to be closer to our daughter, so boom, we bought the lot.

#### Attitudes Toward Relocation Decisions

Thoughts about relocation prompted the participants to express a mixture of feelings and attitudes. Although some participants framed the relocation to Sun City as a “mistake” (Dave) or as a “wrong move” (Edward), the most common attitude that was expressed by the participants concerning their relocation decisions was that of having no regrets. Alice said, “And we never regretted it,” when she talked about moving away from Sun City. She indicated that she and Allen experienced some embarrassment concerning their moves when she explained, “It was kinda bad to tell the kids, you know — there we are [in Sun City] and we're not happy.” Alice also described feeling self-blame for Sun City not working out for her and Allen:

I think we went [into Sun City] with the attitude that it was temporary, and that was probably working against that. But we really thought we were trying. . . . I can't really say that it was bad. It was our fault on trying to be at a place where we would get involved, but it didn't have what we needed.

Alice summed up her and Allen's feelings about returning to their pre-Sun City home by saying, "We were perfectly elated about being home."

Bonnie mentioned that she "never regretted moving" to Sun City and that she "didn't regret moving" away from Sun City. She explained her feelings about the move away from Sun City:

I guess I was just so relieved [to move to the post-Sun City home] and I loved this house. I just felt like home and uh, but I guess so. And I didn't go back [to Sun City] to look for a long time at the house. When I pass now and look at [the Sun City house], I don't have any kind of feeling of regret or sadness. I just feel so glad to be in [the new house].

Bonnie talked about her disappointments with Georgetown and shared her resolve to stay living in the area near her children, "I'll just have to live with [the shortcomings of the location]. They don't even have a decent store [in Georgetown]."

Catherine said that although she liked Sun City "a lot better" than their pre-Sun City location, she never thought of Sun City as a permanent location. Carl, however, described a different attitude concerning their stay in Sun City:

I guess the best word I can say is ambivalent. I liked the Georgetown area real well, and I liked Sun City too. I — you know, on a percentage basis I'd say I liked it about 70%. . . . I had always liked Texas and I still do. You know, it was kind of a case where the whole family was happy [with the idea of moving away from Sun City and to Colorado and] that was where I was ready to go.

Dave described his move to Sun City as a familiar, possibly impulsive, mistake, but he indicated that the mistake was a valued experience:

I saw that tree [in Sun City] and I said, “This is going to be our house, right here.”

And that's kind of the mistake I made, but I've made some before. But, I mean, I don't regret [the move to Sun City]. It was a good experience.

Edward described his changing feelings about Sun City by expressing how he felt when he and Elaine moved there:

Oh, I figured [Sun City] was the place that we would go and we would stay. When we talked to the neighbors around after we were in here, “That's the last move we were ever going to make,” and that sort of thing. Everybody talked about doing things like that. And I agree right with them too. We both did. When we first got there this is exactly what we were doing, is talking and acting like those folks, that thinking that Sun City was wonderful and, “This is it,” and, “We'll never move out of here,” and, uh, it didn't hold true.

Edward's attitude toward Sun City as his final move changed to the recognition of Sun City as a “wrong move.”

Frieda and Frank indicated that moving to Sun City was a positive experience. Frank described the positive aspects of the move:

I think [the move to Sun City] helped. I think I feel better. . . . I think I feel better living in Sun City and doing the things we're doing and living closer to [the daughter and her family] than when we lived in [the pre-Sun City location]. We were sort of in a rut in a way.



## CHAPTER IV

### DISCUSSION

This chapter provides a summary of the results, conclusions based on the study, and recommendations for future research in the area of older adult relocation. The summary of results presents general patterns that emerged after consideration of the larger body of results, the conclusions section provides a high level interpretation of the results, and the recommendations section is intended to serve as a base for ideas concerning future research.

#### Summary of Results

Although many of the participants identified a main reason for relocating to and from Sun City, all of the participants described multiple pushes away from their former residences and multiple pulls to Sun City and their post-Sun City residences. In addition to the pushes and pulls, some of the participants identified status quo reinforcers, which worked to hold the participants in place and discourage their relocation. When the pushes and pulls were strong enough to overcome the power of the status quo reinforcers, the participants decided to relocate.

#### Major Pushes and Pulls

The pushes and pulls that the participants cited answered the “why” concerning relocation. The major pushes explaining why the participants decided to move were identified as change and incompatibility. Changes such as retirement, deaths of friends and

family members, health problems, aging, and environment were forces that pushed the participants to consider relocation. Other forces contributing to the push toward relocation were incompatibility with the age and lifestyle of neighbors and incompatibility with the location of the residence.

The major pulls explaining where the participants decided to relocate were identified as the desire to move toward familiarity, facilitation features, and growth opportunities. Familiarity took the forms of family members, locations, and similarities with neighbors. The facilitative features and growth opportunities included an atmosphere conducive to conducting business, convenience to shopping and services, and an array of social activities.

#### Pushes Dependent on Pulls

In many situations, pushes appear insufficient to motivate relocation. For some participants, a pull to a specific location may be necessary. Bonnie's story illustrates the situation of an older adult having a push to relocate but lacking a pull to a specific location. Bonnie described feeling isolated in Sun City, far away from shopping and services, and emotionally distant from neighbors. She indicated that she wanted to relocate, but she said that she was unable to relocate until her friend, a former neighbor, introduced her to another neighborhood within Georgetown. That introduction provided Bonnie with the pull she had been lacking. Once the pull was there, the decision to relocate was immediate.

For Catherine and Carl, the pushes were the decisive factors in deciding to relocate. Because they no longer desired to live in Houston, they sold their home before making definite relocation plans. When their tentative plans to move to Colorado proved

unworkable in their limited time frame, Catherine and Carl found themselves quickly needing to find a suitable place to live. After a brief visit to Sun City and the recognition that they would be able to move into a home in Sun City within their relocation time frame, they decided to move to Sun City. Even though the pushes to move were strong, Catherine and Carl still were able to identify some pulls toward Sun City. The availability of homes, the familiarity of and appreciation for the Texas Hill Country where Sun City is located, and the comfort associated with living amongst other older adults were a few of these pulls. Thus, even with such a definitive push to relocate as having sold their home, Catherine and Carl still needed some pulls, some attractions to Sun City in order to identify Sun City as their relocation destination.

#### The Power of Status Quo Reinforcers

Strong pushes and pulls are not always enough to motivate older adults to relocate. For Frieda and Frank, an early combination of pushes away from Frank's hometown and pulls to Sun City could not overcome the status quo reinforcer of a desire to continue living near Frank's mother. The pushes were great: deaths of numerous friends and incompatibility with the lifestyles of other residents. The pulls were significant: closeness to their daughter and her family and the availability of gaining new friends and a desired lifestyle. Regardless of the strength of these pushes and pulls, Frieda and Frank were not able to commit to relocation to Sun City until after Frank encountered a life threatening health problem. That health problem provided the final push, the extra momentum that they needed to overcome the status quo reinforcer.

### Compromises in Relocation

Compromise played an important role in relocating to Sun City for some couples. Later, these couples chose to move again, this time to their originally desired location. Catherine explained that she always felt Sun City was a “stop-over” on the way to Colorado. Catherine never gave up on her ultimate relocation destination, the destination that she and Carl had explored and looked forward to before settling for Sun City.

Frieda and Frank also explained that they had compromised in their move to Sun City. For them, their ideal relocation destination did not exist at the time they moved to Sun City. When that destination, a retirement community similar to Sun City but closer to family members in Dallas, began construction, Frieda and Frank decided to pull up roots in Sun City and build a home in the new community. Their satisfaction with the Sun City lifestyle prompted them to decide to relocate to a community that provided a similar lifestyle along with more convenient access to their daughter and her family.

Bonnie and Bob also may have compromised when deciding to relocate to Sun City. At the time they chose Sun City, acceptable accommodations were not available at the church sponsored retirement community where they had considered moving. Bonnie’s and Bob’s current consideration of relocating to the church-sponsored community suggests that their desire to quickly move to a location closer to medical facilities may have pushed them to compromise on their relocation destination when they moved to Sun City.

### Relocation as a Contributor to Later Relocation

An initial move may create momentum that makes it easier for some older adults to move subsequent times. Dave and Diane and Frieda and Frank moved to their pre-Sun City locations after retirement. For them, their post-Sun City move represented their third

move during later adulthood. Although Sun City was Alice's and Allen's first move after retirement, their current consideration of moving to a church-sponsored retirement community may lead to their third move during later adulthood.

### Conclusions

The decision to relocate to and from a retirement community frequently is governed by a set of internal and external factors that push the older adult away from the current residence and pull the older adult to a new residence. These pushes and pulls must exhibit enough force to overcome inertia and other status quo reinforcers holding the older adult in place at the current residence. Change and incompatibility act as pushes away from the current residence, while familiarity, facilitative features, and growth opportunities reach out and pull the older adult to a new location.

Besides the actual pushes and pulls that initiate movement, the exploration and decision making process the older adult uses to determine whether to relocate and where to relocate appears to impact the level of satisfaction the older adult experiences with the new location. A hasty relocation decision with insufficient exploration prior to the decision can lead to incorrect assumptions about the new location. These incorrect assumptions may later provide the fuel for the push away from this location.

Relocation in later adulthood optimally should be undertaken only after careful consideration of the pushes, pulls, and status quo reinforcers in the older adult's life and after substantial exploration of the relocation destination. For some older adults, the consideration of relocation motives and exploration of the relocation destination is cut short or bypassed, sometimes contributing to dissatisfaction with the relocation decision and often resulting in an additional relocation or series of relocations.

### Recommendations

The participants in this study provided insight into the relocation decision making process associated with moving to and from a retirement community. The following sections describe recommendations for further exploration concerning older adult relocation and for counselors and other helping professionals who work with older adults.

#### Further Exploration

Further exploration is needed to better understand relocation decision making processes of older adults. Exploration into relocation decision making processes of older adults who have experienced satisfying moves might provide information about the resources and supports the older adults utilized that led to successful relocation. By understanding successful relocation decisions, counselors may gain additional insight into how to more effectively work with clients who are struggling with making a relocation decision.

Additional exploration also should be undertaken to better identify and understand the status quo reinforcers, which discourage change and help keep older adults from exploring alternatives to less than ideal living situations. Some participants in this study indicated that status quo reinforcers caused them to hesitate to relocate to or from Sun City. How many older adults are unable to find pushes and pulls strong enough to overcome the status quo reinforcers that hold them in place amidst dissatisfaction with their residences? What are the strongest of these status quo reinforcers, and how can counselors work with older adults to accurately assess the power of the status quo reinforcers, and if appropriate, to empower the older adults to overcome the effects of the status quo reinforcers.

### Counseling Implications

Edward's statement that older adults should talk with a neutral person before making a relocation decision highlights the need for counseling opportunities to be made available and visible to older adults. By better understanding the availability of relocation decision making counseling services, the resources and interventions used in relocation counseling, and the ways counseling services are successfully publicized to older adults, counselors who work with older adults may become better equipped to provide assistance in exploring relocation motives and options. Client satisfaction levels with the various forms of relocation counseling services should be evaluated, along with the resultant satisfaction levels of the older adult clients who subsequently have chosen to relocate.

The location where an older adult resides can positively or negatively influence the level of the individual's well-being. By exploring relocation decision making processes and by attempting to better understand the factors that push older away from their homes, that pull them to new locations, and that pressure them to age in place, counselors and other helping professionals can learn to more effectively guide older adults along a relocation path that might lead to a higher level of well-being.

## APPENDIX A

### RESEARCH QUESTIONS

- What are the characteristics of the participants? (age, sex, race, ethnic background, religion, relationship status, health status, educational background, work history, relocation history, and family structure and location — parents, siblings, children, grandchildren, and great-grandchildren)
- How did the participants decide to move to Sun City?
- How did the participants decide to move away from Sun City, and how did that decision making process differ from the process that was used when they originally decided to move to Sun City?
- Where is or was the post-Sun City relocation destination? What does that destination have to offer, and how does that destination compare with Sun City and with the residence immediately prior to Sun City?
- What changes in the lives of the participants preceded their moves to Sun City and away from Sun City?
- What do the participants report as their subjective level of well-being? How has each move impacted their level of well-being? How have they anticipated impact on their level of well-being as a result of each relocation?
- What would the participants like to share that they feel would be of use to other older adults who are considering relocation?



## APPENDIX B

### (PARTICIPANT) CONSENT FORM

#### **Moving Away from Sun City: Why Some Older Adults Relocate Away from a Retirement Community**

You are invited to participate in a study of relocation decision-making in older adulthood. I am a graduate student at Southwest Texas State University at San Marcos, Department of Educational Administration and Psychological Services. This study will provide the basis for my thesis. I hope to learn more about your decisions to move to and from Sun City. You were selected as a possible participant in this study because you have relocated from Sun City in Georgetown, TX or you plan to relocate from Sun City in the near future. You are a member of one of seven households chosen to participate in this study.

If you decide to participate, I will conduct a semi-structured interview with you to learn more about your decisions to move to and away from Sun City in Georgetown. The interview will last approximately 30 to 45 minutes and will be audio taped in order to accurately capture and analyze the information that you provide to me. This interview might cause you to experience unpleasant emotions related to your relocation experiences. Through this interview, you might gain increased understanding of your own decision-making processes, and this new understanding might lead you to develop improved decision-making skills.

Any information that is obtained in connection with this study and that can be identified with you will remain confidential and will be disclosed only with your permission. Because this study is being performed under supervision of my thesis committee, the members of my thesis committee may request access to the original audiotapes. The three members of my thesis committee are all part of the Southwest Texas State University Department of Educational Administration and Psychological Services faculty. Their names will be made available to you at your request. An editorial assistant might be used for purposes of transcribing the audiotapes. The name of the editorial assistant will be made available to you at your request.

Your decision whether or not to participate will not prejudice your future relations with Southwest Texas State University. If you decide to participate, you are free to discontinue participation at any time without prejudice.

If you have any questions, please ask me. If you have any additional questions later, my thesis committee chair, Stella Kerl, Ph.D. will be happy to answer them. She can be reached at Southwest Texas State University; 601 University Drive; 4041 College of Education; San Marcos, TX 78666-4605 or at 512-245-3758.

You will be offered a copy of this form to keep.

You are making a decision whether or not to participate. Your signature indicates that you have read the preceding information, you have decided to participate, and you agree to the audiotaping of the interview. You may withdraw at any time without prejudice after signing this form, should you choose to discontinue participation in this study.

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Signature of Participant

Date

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Signature of Participant

Date

## APPENDIX C

### THEMES AND SUBTHEMES

- Pushes away from a location
  - Change
    - + Work changes
    - + Deaths
    - + Health problems
    - + Aging
    - + Environmental changes
  - Incompatibility
    - + Age
    - + Lifestyle
    - + Location
- Pulls toward a location
  - Familiarity
    - + Family members
    - + Location
    - + Similarities with neighbors
  - Facilitative features and growth opportunities
- Status quo reinforcers

- Process of making the relocation decision
  - Speed of relocation decision
  - Exploration prior to relocation
- Attitudes toward relocation decisions
- Participant Characteristics
  - History
    - + Relocation history
    - + Work history
    - + Education history
  - Personal data
    - + Relationship status and length
    - + Age
    - + Race and ethnic background
    - + Religion
    - + Family configuration

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## VITA

Melanie Claire Harper was born in Lafayette, Louisiana, on September 22, 1958, the daughter of Rhea Claire Suiter Harper and Daniel Eroy Harper. After completing her work at New Iberia Senior High School, New Iberia, Louisiana, in 1976, she entered University of Southwestern Louisiana in Lafayette, Louisiana. She received the degree of Bachelor of Arts from University of Southwestern Louisiana in December 1980. During the following year she was employed as a teacher at Washington Vocational Education Center in Washington, Louisiana. She continued taking courses at University of Southwestern Louisiana through August 1982. During the following 15 years, she was employed as a technical writer with International Business Machines in Austin, Texas. In January 1997, she entered the Graduate School of Southwest Texas State University in San Marcos, Texas, and from April 2000 until April 2001 she was employed as a technical writer with ClearCommerce Corporation in Austin, Texas. Melanie is expected to graduate with a Master of Arts degree from Southwest Texas State University in May 2001. After graduation Melanie plans to continue her education by pursuing a doctoral degree from the University of North Carolina at Greensboro.

Permanent Address: 105 Valley View Drive East  
Leander, Texas 78641

This thesis was typed by Melanie Claire Harper.