

Chapter 14

Geographic Mobility and Aging in Place

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Introduction

Because the popular press has had a long-term interest in the phenomenon of retirement migration, the small proportion of older persons who make long-distance moves has gotten a great deal of public attention. This state of affairs is unfortunate because mobility is richer and much more varied than the popular notion of it suggests and the explanations of mobility that have motivated research on this topic are complex and interesting.

In this chapter, the entire range of mobility in later life will be explored, including aging in place. We first describe rates of spatial mobility across the age span. Evidence from the United States and other countries is presented in a theoretical context that portrays industrial development as a key source of cross-national variation in the volume and character of later-life migration. Next, we show that later life migration is qualitatively different from labor force migration. Then the advantages of aging in place are examined; this is the overwhelming mobility choice of older Americans. From this point we review a variety of theoretical perspectives on later life mobility and aging in place (i.e., the migration decision model, the life course model, and the place identity model). In the section that follows we examine the impacts of later-life migration for receiving communities. This includes a discussion of migrant selectivity, the characteristics of migrants within flows and streams, and by implication, the economic, political, and social impact

of retirement migration on receiving communities. At this point the geographical patterns of later-life migration will be described, on both the state and county or county group level in the United States. As part of this description of patterns, brief attention is given to seasonal migration. Next we review evidence from longitudinal panel studies pertaining to the causes of residential mobility among elders. The final section of the chapter discusses the impact of migration on the health and well-being of older adults.

Rates of Later-Life Mobility

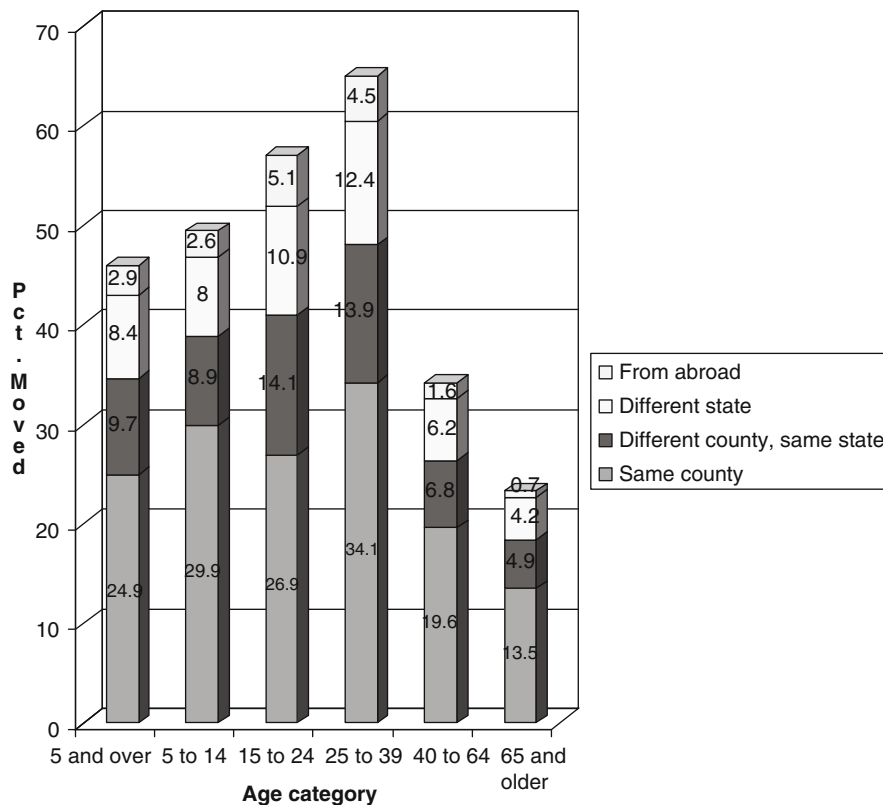
The United States

There is substantial variation in mobility patterns across age-groups. Estimates in Fig. 14.1 are based on data from the 2000 U.S. Census (adapted from Franklin 2003) and show that older adults have lower rates of geographic mobility than those for any other age category. This does not mean, however, that mobility is rare among elders. Of those 65 and older, an estimated 23 per cent had made some type of move within the five years preceding the 2000 census. Even so, young adults aged 25–39 were more than 2.5 times as likely to have moved during the same period, compared to those aged 65 and older. Declining mobility rates with age are

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* The second author died on Christmas Day, 2008. Chuck was an eminent scholar. He was also my constant friend and trusted mentor. I am deeply and forever indebted to Chuck and join a host of colleagues, former students, friends, and family in mourning his passing. Chuck was always genuinely happy to see me. I will miss his cheerful smile and unflinching optimism.
Don E. Bradley.

Fig. 14.1 Residential mobility and migration in the US across age categories, 1995–2000



Source: adapted from Franklin, 2003.

observed with respect to both local and long-distance moves. As compared to persons aged 25–39, persons 65 and older are about one-third as likely, and those aged 40–64 are about half as likely, to report an interstate move in the previous five years. It is worth pointing out that nearly 60 per cent of moves reported by those 65

and older were within the same county. Interstate migration is relatively uncommon. An estimated 4.2 per cent of those 65 and older in 2000 report having moved across state lines between 1995 and 2000.

A closer look at the impact of age on interstate migration is afforded in Fig. 14.2. Interstate migration

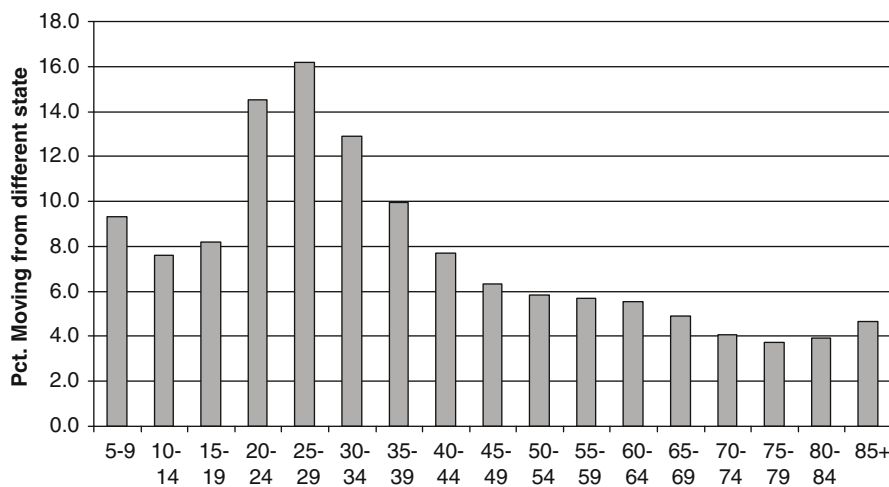


Fig. 14.2 Interstate migration in the US by five-year age category, 1995–2000

Source: 2000 US census, Five-Per cent Public Use Microdata Sample.

is the highest among those aged 25–29 at 16.2 per cent, but it declines across older age categories, reaches a low point among those aged 75–79, and then rebounds slightly in the oldest age category. Those 85 and older are more likely to report an interstate move than those aged 70–74, 75–79, or 80–84.

Industrial Development and Later-Life Migration

Because migration in later-life is obviously shaped by social context, we would expect substantial cross-national differences. In particular, industrialization may by various mechanisms impact not only the overall rate but also the character of later-life migration. A widely applied three-stage model (Law and Warnes 1982; Warnes and Law 1984) argues that rural-to-urban migration in the early phases of industrialization yields a cohort of first-generation urban dwellers with strong ties to their region of origin, setting up substantial urban-to-rural return migration flows upon retirement. In the second stage, elders living in urban zones have only weak ties to rural areas such that lifestyle preferences become increasingly influential and a limited number of amenity-rich retirement destinations emerge. These initial retirement destinations become overcrowded in the third phase, leading to an expansion in the number of favored retirement destinations.

The emergence of Law and Warnes (1982) second stage depends on the extent to which elders have the resources to complete lifestyle oriented moves toward areas offering scenic environs and recreational opportunities. King et al. (2000), delineate a number of changes associated with industrial development in the United Kingdom that have contributed to an increase over time in the number of seniors prepared to make a long-distance move. Though primarily concerned with international retirement migration, several of the arguments developed by King et al. (2000) apply equally well to long-distance internal migration, especially moves motivated by lifestyle considerations. In particular, declining labor force participation among older men combined with prolonged life expectancy means that individuals and couples in their fifties can reasonably anticipate a long retirement period in which to enjoy the benefits of a long-distance move. Improved education levels, moreover, mean that in the contem-

porary period those approaching retirement are likely to have expanded aspirations for their retirement years. These aspirations may generate a greater willingness to make a long-distance move in pursuit of an improved lifestyle. In addition, expansion of private and public pension programs has contributed to increases in income in later-life providing the means to finance a long-distance move.

At the same time, the rate of later-life migration within a given society should depend not only on the supply of potential movers but also the range of available destination opportunities. Industrial development is here again implicated. The extension of telecommunication, electrical, water, and sewage services to rural and outlying areas increase their attractiveness. Moreover, expanding transportation linkages to urban centers facilitate weekend and vacation visits to amenity rich areas, thus establishing connections that may pave the way for a move upon retirement (see King et al. 2000).

Historical and Cross-National Studies

Historical analyzes linking industrialization and later life migration within a given country are scarce. Allon-Smith (1982) traces shifts in the distribution of elders across counties in England and Wales between 1921 and 1971; amenity-rich retirement destinations (e.g., coastal areas) began to emerge during the 1930s and 1940s. However, Allon-Smith's (1982) analysis does not directly measure later-life migration or migration rates.

Evidence from U.S. Census data suggests that the rate of interstate migration among those 60 and older has been fairly stable since 1960, ranging from 3.9 per cent during the period 1965–1970 to 4.6 per cent for the periods 1975–1980 and 1995–2000 (Longino 2006). Yet, many of the most important industrialization-driven changes had been largely accomplished by 1955 (e.g., extended life expectancy). An examination of later-life migration rates beginning with the earliest phases of U.S. industrial development would of course be useful. However, Census data are not well-suited to this purpose; a residential mobility item was not included in the U.S. Census until 1940 (Longino 2006).

Cross-national variation in later-life internal migration has received only limited empirical attention.

Rogers (1988) analyzes previously reported age-specific migration rates for a number of more developed countries and finds notable regularities. Of special interest, Rogers (1988) finds that long-distance migration rates generally slope upward and peak at or near retirement age, while local moves become increasingly common in the oldest cohorts, likely reflecting the onset of widowhood and disability.

This “retirement peak” likely reflects retirement-triggered moves in pursuit of improved housing and a more agreeable climate (Serow 1988). But it is important to note that Rogers’ (1988) analysis failed to uncover clear evidence of a retirement peak in the age-specific migration rates for Japan. Rogers et al. (1990) specifically explore variability across industrialized nations comparing elder migration patterns in the United States, the United Kingdom, Italy, and Japan. They note especially low levels of long-distance migration among seniors in Italy and Japan. In both of these cases, the authors reason that limited financial resources and strong family ties operate to suppress later-life mobility relative to the United States and the United Kingdom where pension programs and social services for senior adults are more firmly established. Additionally, limited resources may account for the absence of a clearly defined “retirement peak” in the Japanese data.

Existing cross-national studies of later-life migration in industrialized nations are somewhat dated and additional analyses might profitably examine contemporary patterns. This is an important direction for further research given that the rate and character of later-life migration are expected to change along with industrial development. But an equally pressing issue is the absence of comparative studies that include lesser developed countries.

In Table 14.1 we offer migration estimates across specified age categories for Brazil, Chile, Costa Rica, Greece, Mexico, the Philippines, and Vietnam. Estimates presented in Table 14.1 are based on data from the Integrated Public Use Microdata Series – International (IPUMS-I) project. The IPUMS-I is a collaborative effort involving the Minnesota Population Center at the University of Minnesota together with statistical agencies and data archives around the world. Funded in part, by the National Science Foundation and the National Institute of Child Health and Human Development, IPUMS-I is a collection of individual-level data sets gathered from national samples as part of population censuses across multiple countries dating back to 1960. Each data set in the IPUMS-I collection has been cleaned, coded, and documented so as to facilitate comparative analysis across international samples. In order to generate reasonably comparable results we chose nations where (1) migration is measured in terms of change of residence in the previous five years, (2) moves across minor and major administrative boundaries are distinguished, and (3) the latest data were collected between 1999 and 2001.

Results presented in Table 14.1 indicate that across selected countries, those aged 60 and older are substantially less likely to make an interstate (or its equivalent) move as compared to their younger counterparts aged 25–59. Also, except for the Philippines, moves between major administrative units appear to be at least slightly more common in the oldest age categories. Of particular importance, only Greece and Chile, both relatively prosperous countries, exhibit reasonably well-defined retirement peaks such as those found in industrialized nations. Finally, it may not be a coincidence that the nations with the lowest GDP per capita levels, Vietnam

Table 14.1 Migration across major administrative boundaries within previous five years among persons over age 60

	Year 2000, GDP per capita in current US dollars ^a	Percentage reporting a migration within specified age categories, weighted estimates							
		25–59	60+	60–64	65–69	70–74	75–79	80–84	85+
Brazil 2000	\$4,135	3.87	1.67	1.84	1.6	1.56	1.54	1.61	1.68
Chile 2002	\$5,110	10.02	5.15	5.43	5.13	4.87	4.73	5.2	5.55
Costa Rica 2000	\$2,877 ^b	5.57	3.14	3.12	3.27	2.98	3.09	2.86	3.65
Greece 2001	\$12,278	6.44	3.04	4.05	3.06	2.54	2.31	2.58	2.72
Mexico 2000	\$5,492	4.55	2.06	2.04	1.86	1.81	2.08	2.03	2.93
Philippines 2000	\$1,073	3.58	1.39	1.53	1.42	1.34	1.19	1.09	1.18
Vietnam 1999	\$383	2.76	1.06	1.2	1.04	0.95	0.99	1.01	1.15

Source: Integrated Public Use Microdata Series – International, selected samples

^a World Economic Outlook Database, International Monetary Fund

^b 1999 GDP per capita.

and the Philippines, also report the lowest levels of later-life migration. This finding is broadly consistent with the notion that industrial development promotes later-life migration.

Results presented in Table 14.1 should be viewed as merely suggestive. Migration across major administrative boundaries may differ in character between national samples – for example, Brazilian states are substantially larger than Costa Rican provinces. Moreover, as discussed below, older adults move for a variety of reasons. Two countries may have comparable rates of later-life migration even where the predominant reasons for moving differ widely.

Later-Life Migration and Labor Force Migration

It is important to point out that it is not simply the rate of migration that varies by age. Later-life migration generally is different in kind as compared to mobility among those of working age. Working age migrants are typically powerfully influenced by differential labor force opportunities at origin and destination, other factors being equal (e.g., Borjas 1990). By contrast, the residential choices of retired people tend not to be constrained by labor force opportunity, at least not directly. Older parents may move in order to join adult children who previously migrated in response to labor force opportunities; so that an important component of later-life migration flows may “echo” labor-force migration (e.g., Van Der Geest et al. 2004). Nevertheless, it should be clear that with respect to migration decision-making, employment prospects are unlikely to be a primary consideration for elders who are no longer in the labor force.

This is not to say economic considerations are unimportant in the migration decision-making of older people. Fournier et al. (1988), present evidence to suggest that cost-of-living differences are an important predictor of the volume and direction of state-to-state later-life migration flows. According to Conway and Houtenville (2003), high living costs primarily operates to push the oldest individuals (i.e., aged 75 or older) out of expensive states. Lower taxes, moreover, generally appear to encourage in-migration for persons in their 60s, according to Duncombe et al. (2003), who analyzed intercounty migration patterns. Similarly, across states, net later-life migration flows appear to be sensitive to inheritance and income tax policies at both the origin and destination,

though the link is complex and may vary across cohorts (Conway and Houtenville 2003).

In conclusion, economic considerations enter the migration calculus differently for retirement-age migrants compared to the working-age. Graves and Waldman (1991), for example, demonstrate that older migrants appear to be attracted to counties where the supply of amenities is reflected in depressed wages rather than increased living costs, a finding that does not hold in younger cohorts.

The Advantages of Aging in Place

Dr. Robert Butler, founding director of the National Institute on Aging, has been quoted as saying, “The best place to retire is the neighborhood where you spent your life” (Boyer and Savageau 1987). It is popularly assumed that for most people who are retiring, their current place of residence holds many advantages. Often they live in a comfortable home and feel safe and secure in the known environment (Longino 1994). Friends visit them and children return, sometimes with grandchildren, for holidays or even live nearby. Ties to the local community, the neighborhood, favorite restaurants, civic and social clubs, and if they are so inclined, places of worship further connect them to a satisfying lifestyle. In addition to this, they may be close to recreational interests and places where they volunteer. The climate, too, may be acceptable and not pose a health threat. Given these potentially positive factors, why would such retirees want to move away (Longino 1994)? In any recent five year period, people over 60 are only about half as likely to make interstate moves as is the U.S. population as a whole (Longino 2006). So as implied in the title of this chapter, a useful discussion of mobility in late life must recognize that people tend to stay put when they retire.

Theoretical Perspectives on Mobility and Aging in Place

The Migration Decision Model

The oldest cluster of theories in the study of later-life migrants has come to be known as “the behavioral decision model.” It addresses the question “Why

do older people move?" and is associated with the work of Robert Wiseman (1980). Notably, Wiseman (1980) builds on Brown and Moore's (1970) model of residential mobility in the general population and adopts their division of the migration decision into two phases: the decision to move and the search for a new residence.

Decision to Move. This model assumes that individuals are continuously evaluating the suitability of their current residential situation. Most are apparently satisfied with their current place of residence when they retired and may have no motivation to move. Some, however, are not satisfied. Wiseman (1980) argues that among elders the first phase of the migration decision process is triggered by a change in circumstances or perceptions leading to decreased satisfaction with the current housing, neighborhood, or community as compared to perceived alternatives. The "triggering mechanisms" leading individuals or households to consider moving often involve important life course transitions that alter perceived residential needs. Retirement, for example, removes the location constraints imposed by labor force participation such as finding work and regularly commuting to work. Additionally, when children leave home many parents may begin to consider residential downsizing. The "triggering mechanisms" are comprised of both "push factors", such as the death of a spouse, and "pull factors", such as friends and family members residing in other places. Either can cause an individual to reevaluate his or her satisfaction with the existing residential situation (Wiseman 1980).

Among those considering a move, the decision process is shaped by factors that influence the perceived feasibility of moving. Wiseman (1980) distinguishes between relevant endogenous factors such as individual or household level characteristics, and exogenous factors such as local or regional conditions. As an example of endogenous factors, past mobility experience may reduce uncertainty associated with moving and encourage individuals to anticipate moving as a positive experience. With respect to exogenous factors, the feasibility of moving may depend a great deal on the housing market at the place of origin. Where demand is high, elders may more easily finance a move by selling their home.

Search for a New Residence. Brown and Moore (1970) argue that the search for a new residence depends on the acquisition and processing of infor-

mation regarding alternative destinations. Thus, "The household will search only those areas contained within its awareness space that satisfy the environmental and locational criteria of its aspirations, i.e., its 'search space.'" (Brown and Moore 1970: 9) For any household, the search space is a subset of its awareness space, which is comprised of destinations known through either *direct contact* through previous residence or visits such as vacations, or *indirect contact* through the recommendations of friends and family, media advertisements, and promotion by tourist bureaus and land developers.

Along these same lines, Wiseman (1980) points out that information flows are central to destination selection for many senior would-be migrants. Residential or vacation experience in a particular region, the presence of friends family, as well as promotional campaigns by local tourism bureaus, developers and the like are identified as mechanisms that bring alternative destinations into a household's search space. At the same time, Wiseman (1980: 148) argues that seniors contemplating a move toward a younger child may only have one destination in mind so that that "the selection of a destination is determined by the decision to move."

Of course, the search process may or may not be successful. Failure to secure a suitable destination may lead to adjustments to correct the sources of residential dissatisfaction, adjustments such as repairing or renovating one's home. In addition, Wiseman (1980) suggests that a substantial number of elders may be "involuntary stayers," – they may continue to experience low residential satisfaction but be unable to move because of limited resources.

Subsequent scholarship has suggested important refinements to Wiseman's (1980) migration-decision model. Cuba (1991) argues that many migrants to *amenity areas* give serious consideration to only one destination, so that distinguishing the decision to move from the selection of a destination is not always appropriate. Of 163 randomly selected older migrants in three Cape Cod communities, Cuba (1991) found that 81 per cent reported substantial "place experience" from previously having been a regular visitor or seasonal resident, and a majority had not considered any other destination. These results lead Cuba (1991) to suggest that vacation experience in a specific destination may prompt individuals and households to consider moving, in which case destination selection may actually precede the decision to move.

Haas and Serow (1993) propose a revised migration-decision model which makes no assumption as to the sequence of the decision to move and the selection of a destination. Indeed, they argue that the primacy of one as compared to the other may represent distinct styles of amenity-oriented migration. Results from a telephone survey of 814 older migrants residing in Western North Carolina found that approximately 43 per cent had not considered any alternative destinations, consistent with Cuba's (1991) result. More importantly, these migrants who were fixed on a destination before they decided to move were different from those who decided to move before they shopped for a destination. The former were pulled by personal attachments to friends while the latter were more attracted by the places, especially the amenities found in these places.

The Life Course Model

One of the oldest observations in the study of migration selectivity is that young people are more mobile than older people (Ravenstein 1885). Migration, therefore, is informed by demands and issues that arise in the life course. An early observation was that people move for many reasons concerning the youthful establishment of education, work and family statuses (Rossi 1955). It was only a matter of time until this rubric was extended to mobility at other stages of the life course. Warnes (1992), for example, developed a long list of life course events that occur, on average, at different ages. He sequenced them and discussed the housing needs and mobility patterns associated with them. In later life, the list of transitions that could motivate a move includes such things as retirement, bereavement and frailty.

Litwak and Longino (1987) were the first to present a developmental context for the patterns of elderly interstate migration, a framework that is now commonly reported in demographic studies. They argue that the nature of modern transportation and communication technology makes it easier for people to relocate and still stay in touch either through in-person visits or via the telephone or internet. These conveniences may alter the role of the kinship structure of families, including older people, as a factor stimulating midlife

and retirement related moves. It is important; however, to recognize that not all moves in later life are motivated by the same factors.

Litwak and Longino (1987) argue that three basic types of moves are associated with later life. The first tends to occur in early retirement and is driven by lifestyle considerations. These moves are often characterized as "amenity moves," and evoke an image of retirees on the golf course or in social gatherings. Pressure for the second type of move occurs when older people develop chronic disabilities that make it difficult to carry out everyday household tasks, a situation often compounded by widowhood. The theory argues that older migrants who move away from their adult children when they are healthy and married may later tend to move back toward them when, as assistance-seeking, or type-two migrants, they are disabled or widowed. A third type of move, institutional, may be triggered when family members are no longer able to provide adequate care of aged loved ones without outside help.

DeJong et al. (1995) argue effectively that poor health, reduced social affiliation, economic insecurity, having functional limitations, and getting on with life after a family crisis are all adequate reasons for moving. The life course model merely arranges some of these motivations around a type of move. The three types of moves are not prerequisites of one another and can occur at any stage of life. For example, assistance moves can occur early in the life course when young adult children "visit" their parents for extended periods between jobs or spouses, and may occur at nearly any age. Amenity moves; however, are more frequent in the early phase of later life, and assistance and institutional moves are more frequent toward the end of life.

Walters (2002) elaborated on these types of moves by showing that there are personal attributes (age, disability, marital status and income) that predict the type of move. He argues that low income is a more powerful motivator than disability for the second type of move. In addition, the place characteristics of geographical destinations are only distinctive among amenity-motivated movers. Place characteristics are not distinct among people making the second type of move, assistance and kinship moves, and therefore these movers are likely to be more dispersed geographically and, as a consequence, not very noticeable in the local older population.

The Place Identity Model

A final conceptual framework emerged during the 1990s that may be called the place identity model. Lee Cuba (1992) argues that selves as well as bodies can be mobile. Moving oneself physically to another community does not necessarily mean that one also moves emotionally or vice versa (Cutchin 2001). There are some migrants who never put down roots but remain emotionally tied to their former communities. Some of them have problems changing from being a vacationer to being a permanent resident after they arrive in their destination communities. And some assume a midlife-stretching, an “ageless self,” identity when joining the ranks of active retirees who resist stereotypes of later life (McHugh 2003).

Cuba and Hummon (1993) argue that identification with one’s dwelling, one’s community, and one’s region are arrived at differently. Personal possessions and the dwelling itself foster identification with the dwelling as “home.” This is especially so for older women. Social participation and the size of one’s friendship network are essential for strong identification with the community. And, finally, younger migrants more often base their identity on affiliations of friendship, family and emotional self-attribution, whereas older migrants do so in terms of dwelling and prior experiences with place. Weak community identity could hinder adjustment and thereby contribute to or trigger a second migration decision cycle (Stoller and Longino 2001). Finally, we confront shifts in place identity throughout our lives, and the experiences that accrue serve to inform future decisions (Watkins 1999). Place identity, therefore, must be seen as part of a long-term process of adjustment.

The Impacts of Later-Life Migration

Migrant Selectivity

There is considerable variation in the characteristics of older migrants, and variation in migrant selection leads to differential impacts at the destination. African Americans, for example, who migrate in their later years, have a strong tendency to return to their

state of birth and to the southern region (Longino and Smith 1991). Older Hispanic Americans, likewise, tend to move toward historical Hispanic enclaves in Texas, California and Florida (Biafora and Longino 1990).

Migrants tend to be better off economically than non-migrants in the destination community (Hazelrigg and Hardy 1995). In addition, some communities are especially attractive to more affluent retirees. Past vacationing patterns are related to the decision to move, and no doubt to destination choice as well (Longino et al. 2008). Not surprisingly, destinations where the cost of living is high may receive, on average, wealthier migrants. Amenity motivated migration tends to be more focused at the destination and more diffuse at the origin (Longino 2006); therefore, the impact of this type of migration is greater at the destination than areas of origin. In contrast, assistance motivated migration is more diffuse at its destination, seeking out children and other family members as care-takers wherever they live. Assistance motivated migration, therefore, has less pronounced destination impact than amenity motivated migration.

Research connecting migration selectivity with the life course model concludes that streams beget counter-streams, and counter-streams are often negatively selective (Litwak and Longino 1987). That is, the major streams of older migrants to Florida beget counter-streams back from Florida. Counter-streams are by definition smaller than streams. California, the major origin state for older migrants in the West, receives counter streams from all of its neighbors, Arizona, Nevada, Washington and Oregon. When the streams to and counter-streams from Florida were examined with data from the 1980 census, Litwak and Longino found that the characteristics of migrants differed between the two types of streams. Migrants in the streams fit the profile for the amenity-seeking migrant – they were younger, more often married and living independently. Those in the counter-streams tended to fit the assistance-seeking migrant profile. They were considerably older, on average, more often female and living dependently and returning to their state of birth.

Longino (2006) revisited the stream/counter-stream issue using data from the 2000 census, finding that there are 49 pairs of streams and counter-streams containing more than a thousand migrants in each. Four-

teen of the 49 exchanges involved streams to Florida and smaller counter-streams out of Florida. A second pattern was that all of the streams from neighboring states into California were smaller than the paired streams in the other direction. The streams to California were counter-streams. Unlike Florida, California has a negative net migration of older people.

When the characteristics of migrants to and from Florida were compared in the 2000 census microdata, the migrants to Florida still fit the amenity migrant profile in that they were, in aggregate, consistently younger, more often married, and living independently (Longino 2006). Migrant characteristics out of Florida in the paired exchanges were, as earlier research indicated, more often widowed, disabled and returning to their state of birth. This pattern even holds with exchanges between Florida and other Sunbelt states such as North Carolina, South Carolina and Tennessee. These findings suggest that the life course model was still operating in the same direction up to 2000.

Economic and Fiscal Impact

If later-life migration is selective in these ways, how are receiving communities impacted? A substantial amount of scholarship has explored the economic and fiscal implications of later-life in migration (for reviews see Reeder 1998; Serow 2003). Later-life in-migrants typically command income streams originating outside the region (e.g., Social Security, pension income) so that local expenditures inject cash into regional economies. In turn, the direct impact of local expenditures is multiplied as retiree in-migrant dollars recirculate among local businesses and consumers (e.g., Sastry 1992).

Evidence from decennial census data suggests that a sizeable amount of annual income is transferred between states as a result of elder migration. This money tends to concentrate, of course, in the major destination states (Longino and Crown 1990; Crown and Longino 1991; Sastry 1992). Between 1995 and 2000, interstate migrants aged 60 or older produced net income transfers to Florida worth approximately 8.8 billion dollars and from New York amounting to roughly 4.5 billion dollars (Longino 2006). Unfortu-

nately, a comprehensive measure of consumer spending is not included in the census microdata files. Income in these studies therefore is used as a proxy for consumer spending.

Analyses at the county-level also shed light on the economic impacts of later-life migration. Day and Bartlett (2000), for example, compare counties in the Texas Hill Country and report a positive link between later-life in-migration and income growth as well as employment and number of establishments within a variety of sectors (e.g., retail, service, financial services). Furthermore, across nonmetropolitan "retirement counties" (i.e., where estimated net-migration in the previous ten years has produced a 15 per cent increase in the 60 and older population) appear to support relatively high levels of employment growth (Glasgow and Brown 2006; Glasgow and Reeder 1990; Reeder and Glasgow 1990; Glasgow 1991). Yet, as Deller (1995) observes, counties that attract later-life in-migrants may be amenity-rich areas where the economy is buoyed by a vibrant tourist sector. Additional research may help to clarify the contribution of later-life in-migration to the relative prosperity of destination counties.

Economic simulation studies exploit data on the structure of state and regional economies in order to estimate both the direct and indirect economic impacts of later-life in-migration (Deller 1995; Sastry 1992; Stallman et al. 1999). Results suggest that the introduction of additional senior consumers may provide substantial stimulus and generate new jobs, of varied quality, across a range of sectors including retail, construction, eating and drinking establishments, real estate, health care, personal services, and financial services. At the same time, economic impacts may vary substantially depending on the characteristics of elders arriving in a given community (Stallman and Siegel 1995). Furthermore, simulation studies of this sort are limited because they do not actually measure the spending patterns of later-life migrants.

Serow and Haas (1992) collected information on expenditures from a convenience sample of 630 elder in-migrant households in Western North Carolina. They estimated a total annual impact of approximately \$71,600 per household, nearly a third of which arises from buying a home. In addition, Serow and Haas's (1992) results suggest that every two in-migrants generated roughly one new job. Bennett (1993) conducted a parallel analysis in seven non-

metropolitan counties on the South Atlantic Coast. Results were broadly similar to those reported by Serow and Haas (1992), in particular Bennett (1993) found that 90 per cent of elder in-migrants had bought or built a home within a year of arrival. An important point raised by expenditure studies is that economic impacts depend heavily on the structure of the local economy. Bennett (1993) points out that the coastal counties captured a relatively small portion of certain types of spending due to a lack of appropriate retail outlets (see also Hodge 1991).

Despite the resilience of a “gray-peril mentality” there is little evidence to suggest that later-life in-migrants typically drain public coffers in receiving communities (Longino 1988). Elder in-migrants contribution to the area tax base appears to at least balance out demand for public services (Serow and Haas 1992; Reeder et al. 1993). Insofar as health-care, relatively young and affluent amenity migrants are likely to be covered by private insurance and Medicare, so that medical services provided to amenity migrants import additional funds into the local economy (Bennett 1993; Reeder et al. 1993; Sastry 1992; Serow and Haas 1992). In fact, retired in-migrant healthcare consumers may subsidize medical services for the local indigent population (Bennett 1996).

Moreover, later life in-migrant households pay taxes to fund public education but are unlikely to place demands on local school systems (Reeder 1998). At the same time, within a given community later life in-migration may have negative implications for public school financing. Using the results of school district bond elections in Florida, Button (1992) and MacManus (1997) found lower support for school funding in districts with higher percentages of older residents and voters. This finding may reflect a tendency for voters of any age to be less supportive of public services they do not intend to use (Simonsen and Robbins 1996).

Alternatively, Berkman and Plutzer (2004) examine data from 9,129 school districts in 40 states and find that per student spending is higher where there are a relatively large number of nonmigrant elders but lower where there are a relatively large number of in-migrant elders. According to the authors, loyalty to community institutions may encourage long-term resident elders to support public schools even if they are not directly benefiting from this public service.

Social Impact

Longino (1990: 403) argued that retirees arriving in rural communities “may tend to float endlessly in a relatively rootless community, building their important social ties with other migrants... in doing so, perpetuating their separateness.” Based on a case study of one Cape Cod community, Cuba (1992) illustrates that lack of social integration and distinguishing characteristics of older migrants can make it easy for other community members (both nonmigrants and younger migrants alike) to view them as outsiders and to blame them for negative changes in the community. There are certainly reasons to believe that later-life in migration can generate social fissures and social conflict in certain situations.

Social conflict may be aggravated where older migrants are spatially concentrated. McHugh et al. (2002), for example, describe conflict surrounding efforts by residents of age-segregated communities in northwest Phoenix to gain exemption from paying school taxes. Residents of Sun City Arizona, the original age-restricted active adult community, adamantly defend their separateness and maintain a sort of fortress mentality partly in response to ageism in the broader society (McHugh and Larson-Keagy 2005).

The economic and social implications of later life in-migration may, of course, change over time; social conflict emerging relatively late. Rowles and Watkins (1993) examine three Appalachian retirement destinations illustrating overlapping stages of development. *Emergence* as a host community leads to *recognition* of the area’s potential as a retirement destination by community leaders. *Community restructuring* follows as local institutions adapt to an increasingly older population. Continued elder in-migration may lead to the point of *saturation* and generate a range of *new concerns* including crowding, traffic congestion, environmental degradation, social fragmentation, and the emergence of an economy that primarily serves the needs of newly arrived seniors.

Migration Flows

One of the defining characteristics of interstate retirement migration is that the migrants, who come from all states, are concentrated in only a few destinations,

a result of highly focused flows into certain states. In 2000, over half of older inter-state migrants in the preceding five years arrived in just ten states. Florida dominates the scene, having attracted from one-fifth to a quarter of all interstate migrants over 60 in all five census decades from 1960 to 2000. There was, however, a new phenomenon starting in the 1985–1990 migration period. There was a small, gradual, decrease in the proportion of migrants received by the major destination states, with a gentle spreading out of the flows (as compared with earlier migration periods). This increasing dispersion of destinations continued through the 1995–2000 period.

Key Sending and Receiving States

As Table 14.2 shows, the proportion of total migration going to the leading two destination states, Florida and California, has declined each decade since 1980, with California actually losing its second place ranking in 2000 to a much less populous state, Arizona. Although the declines for Florida and California were relatively small, the trend is clear and persistent. Underscoring the reality of this change, these declines are particularly noticeable because the numbers of interstate migrants leveled off between 1900 and 2000, causing the numbers, as well as the proportions, of migrants into Florida and California to drop between 1990 and 2000. There is no reason; however, to predict the demise of Florida as the leading destination for retired migrants on the basis of these recent trends. In recent years Florida has continued to attract more later-life migrants than Arizona, California and Texas combined.

In general, there is significant stability in the patterns over time. The proportion of older persons who make long-distance moves, the proportion who move to Sunbelt states, and indeed the share received or sent by the leading destination and origin states are not volatile, raising and falling decade by decade. Minor, but persistent, changes occur within a framework of considerable stability, and this predictability provides the basis for strategic planning.

Table 14.3 ranks the states by their estimated net number of older migrants. The states with the most positive net numbers tend to be Sunbelt states, although some New England and Inter-mountain Western states

appear among those with small positive net migration (Longino 2006). The states with strongly negative net migration numbers tend to be in the Middle Atlantic and upper Midwest states. Only Louisiana and California, among the Sunbelt states, have negative net migration of older people.

Sub-State Origins and Destinations

Using the 2000 census microdata files, the top 100 counties or county groups were ranked in terms of net interstate migration of older people (Longino 2006). In this ranking, Florida contains 31 of the 100 leading sub-state destinations for interstate migrants, in keeping with its longstanding status as the leading destination for older migrants. Nationally, the leading substate destinations are located in coastal, mountain and desert counties across the United States, from seaside Maine and Cape Cod in Massachusetts to coastal Oregon and the Puget Sound in Washington. Maricopa County, Arizona (Phoenix), and Clark County, Nevada (Las Vegas), rank first and third nationally, respectively, and are the leading substate destinations in the West. The second highest ranked county was Palm Beach County in Florida. Riverside County, California (Palm Springs), ranks 28th and is California's only entry on the list.

Although the Sunbelt is generally the dominant regional destination, there are attractive destinations outside of this region. Ocean County, New Jersey, for example, has consistently received enough retirees from New York and Pennsylvania to keep it among the top 100 interstate destinations for several decades.

Regional destinations attract migrants primarily from adjacent states (Cuba and Longino 1991). Examples are Cape Cod, Massachusetts, the New Jersey shore, the Pocono Mountains of northeastern Pennsylvania, all located outside the Sunbelt. The Ozark region of Missouri and Arkansas, and Western North Carolina are in the non-coastal Sunbelt. Southern and western Nevada and areas in the Pacific Northwest are also retirement areas of strong regional attraction, and they are frequently cited in retirement guides as good places to retire (Longino 2006).

The 100 counties or county groups in 2000 sending the largest numbers of interstate migrants to other states

Table 14.2 Ten states receiving most in-migrants age 60+ in five-year periods ending in 1960, 1970, 1980, 1990 and 2000

Rank	1960			1970			1980			1990			2000		
	State	#	Per cent	State	#	Per cent	State	#	Per cent	State	#	Per cent	State	#	Per cent
1	FL	208,072	22.3	FL	263,200	24.4	FL	437,040	26.3	FL	451,709	23.8	FL	401,052	19.1
2	CA	126,883	13.6	CA	107,000	9.9	CA	131,514	6.9	CA	134,183	6.4	AZ	134,183	6.4
3	NJ	36,019	3.9	AZ	47,600	4.4	AZ	94,600	5.7	AZ	98,756	5.2	CA	127,693	6.1
4	NY	33,794	3.6	NJ	46,000	4.3	TX	78,480	4.7	TX	78,117	4.1	TX	101,446	4.8
5	IL	30,355	3.3	TX	39,800	3.7	NJ	49,400	3.0	NC	64,530	3.4	NC	77,720	3.7
6	AZ	29,571	3.2	NY	32,800	3.0	PA	39,520	2.4	PA	57,538	3.0	GA	63,120	3.0
7	OH	27,759	3.0	OH	32,300	3.0	NC	39,400	2.4	NJ	49,176	2.6	NV	62,155	3.0
8	TX	26,770	2.9	IL	28,800	2.7	WA	35,760	2.2	WA	47,484	2.5	PA	60,082	2.9
9	PA	25,738	2.8	PA	28,600	2.7	IL	35,720	2.1	VA	46,554	2.4	NJ	54,425	2.6
10	MI	20,308	2.2	MO	25,300	2.3	NY	34,920	2.1	GA	44,475	2.3	VA	53,776	2.6
Total		931,012			1,079,200			1,622,120			1,901,105			2,096,841	
Interstate Migrants															
Per cent of Total in Top 10 States			60.7			60.4			59.5			56.3			54.3

Table 14.3 States ranked by the net number of migrants age 60+, 1995–2000

Rank	State	# of In-migrants	# of Out-migrants	Net # of Migrants
1	Florida	401,052	171,300	229,752
2	Arizona	134,183	52,403	81,780
3	North Carolina	77,720	42,731	34,989
4	Nevada	62,155	27,243	34,912
5	South Carolina	47,698	25,229	22,469
6	Texas	101,446	79,938	21,508
7	Georgia	63,120	41,985	21,135
8	Tennessee	50,036	31,853	18,183
9	Alabama	31,155	23,307	7,848
10	Arkansas	29,876	23,138	6,738
11	New Mexico	24,893	18,503	6,390
12	Oregon	40,778	35,905	4,873
13	Mississippi	19,433	14,951	4,482
14	Delaware	12,140	7,786	4,354
15	Missouri	40,363	36,651	3,712
16	Oklahoma	26,923	23,512	3,411
17	Montana	10,896	8,048	2,848
18	Idaho	15,313	12,553	2,760
19	Virginia	53,776	51,456	2,320
20	Utah	15,300	13,213	2,087
21	Maine	13,112	11,337	1,775
22	Colorado	40,320	38,546	1,774
23	Washington	47,192	46,024	1,168
24	New Hampshire	15,417	14,675	742
25	Vermont	6,591	6,345	246

were the comparatively populous metropolitan or suburban counties, led by Los Angeles County, California, and Cook County, Illinois. Not surprisingly the majority (58) of these counties or county groups were from outside the Sunbelt. The surprise is that the remaining 42 are located in the states that attract a large number of interstate migrants. Thirteen of these counties are located in Florida. These Florida counties receive far more interstate migrants than they lose to counties outside of Florida. However, migrants of retirement age do leave Florida and other Sunbelt states, a point often missed by media accounts of retirement migration. Indeed, Florida ranks third, below only New York and California in number of older out-migrants (Longino 2006). Counter-stream and returning to one's state of birth, as well as the large population base in these states, help to explain the substantial out-migration from the major receiving states.

When the 100 leading origin counties (or county groups) are examined, it is seen that nearly all are

large metropolitan or suburban counties. This fact helps to explain why interstate migrants like to move to counties that have a lower cost of living, are less congested, and are more scenic than the counties they leave. Nonetheless, the major receiving counties tend to be either metropolitan counties themselves or are not far from metropolitan counties (e.g., Dade and Hillsborough counties in Florida and Maricopa County in Arizona) and thus able to support important aspects of the migrants' former metropolitan lifestyles.

Seasonal Migration

The Census Bureau does not attempt to directly measure seasonal migration. However, there have been several useful local surveys that provide information on this topic. Survey results (McHugh and Mings 1991) have identified Arizona seasonal migrants as overwhelmingly Caucasian, retired, healthy and married couples who most often are in their sixties. These are characteristics that other studies have associated with amenity migration. McHugh and Mings were the first to document the common assumption that the colder the climate the more likely migrants are to migrate seasonally. United States retirees in states along the Canadian boarder have a greater propensity to migrate seasonally than those who live further south. And many seasonal migrants to Sunbelt destinations come from Canada.

When is seasonal migration only a precursor to a permanent move? The answer seems to depend on the balance between the seasonal migrants' ties to places and persons at origin and destination, and the shift in these ties over time, in keeping with Lee's (1966) push-pull model. The vast majority of seasonal migrants, perhaps 80 per cent, apparently do not relocate permanently (McHugh 1990). They often extend or shorten their visits over time, and then finally end their extended series of visits when their health forces them to do so. Arizona seasonal migrants tend to adjust to health decrements over time, reducing the number of side trips and giving up their recreational vehicles in favor of rental lodging during their seasonal trips (McHugh and Mings 1994).

McHugh et al. (1995) found that seasonal migration often occurs in stages, beginning with vacationing in midlife and leading to longer stays in the retirement years. When those who moved to Arizona only for the

winter were combined with those who left during the summer, and those who moved within Arizona seasonally, Hogan and Steinnes (1998) estimated that one-fourth of older persons in the state fall into one of these categories.

Predicting Mobility: Insights Gained from Panel Studies

There is a limit to what can be learned from cross-sectional and trend data such as the decennial Census, or one-time surveys of seasonal migrants. Relevant theory posits a complex decision-making process that cross-sectional data are unable to fully capture. The census mobility item asks about residence five years ago, allowing movers over this time interval to be identified. Yet data are collected after reported moves and are thus largely inappropriate for testing causal models of later-life migration.

A number of studies investigate migration decision-making using community or regional samples. Several rely on respondents who are older migrants in amenity-rich destinations to describe and characterize the process that lead to their move (Haas and Serow 1993, 1997; Cuba 1989, 1991; Cuba and Longino 1991; Carlson et al. 1998). By contrast, Longino et al. (2002) employ a sample of later-life migrants in Florida and another aging in place in Minnesota in order to collect information from both movers and nonmovers. They argue that migrants can shed light on only a portion of the decision-making process.

The importance of collecting information from both movers and nonmovers is evident in the fact that half of the Minnesota sample, in Longino et al.'s (2002) study had given "serious consideration" to a move. Among other findings, the researchers note that climate was a key motivating factor in both samples. Many of those aging in place extolled Minnesota's mild summers and the change of seasons. In addition, both groups reported high levels of residential satisfaction. Yet, as Longino et al. (2002: 48) point out, "Perhaps the great advantages of living in some place... are constructions drawn around oneself to justify the residence, rather than motivating a move." Retrospective studies are unable to account for this possibility.

A prospective approach to predicting migration is to examine the factors associated with migration inten-

tions. Pampel et al. (1984), for example asked randomly selected Iowa residents aged 55–64 to assess their interest in moving across 27 hypothetical retirement destinations. Descriptions of these hypothetical destinations were designed to isolate the main effects of several location factors (e.g., climate, type of terrain, proximity to ocean or lakes, proximity to good health care, proximity to close family). Results suggested relatively low overall interest in moving, though, interest in moving was higher for hypothetical destinations with a warmer climate and lower living costs.

Oldakowski and Roseman (1986) sampled Chicago residents aged 18 or older, divided into different age groups, in order to examine factors shaping their expectation of moving out of the Chicago area within the next five years. As compared to both younger and older age groups, ties to potential destinations appear to be an especially important factor associated with plans to move among those approaching retirement (i.e., aged 50–64).

In order to examine the decision-making of potential counterstream return migrants Stoller and Longino (2001) analyzed data from a sample of older in-migrants residing in Florida. Their findings suggest that person ties in the community of origin (e.g., children and siblings "living back home") are an important predictor of anticipating a homeward move. Based on a sample of Chicagoans aged 65 and older, Oh (2003) finds evidence to suggest that social bonds within one's neighborhood indirectly depress the intention to make some sort of move by positively influencing residential satisfaction. But, of course, prospective studies are limited in that *intended* moves are not *actual* moves.

Evidence from panel studies that use theoretically relevant measures to predict subsequent mobility is particularly compelling. Though a range of later-life migration studies employ a panel design (e.g., Colsher and Wallace 1990; Meyer and Speare 1985; Robison and Moen 2000; Teaford 1992), we focus attention here on those using nationally representative samples.

The Longitudinal Study on Aging (LSOA) is one such panel study, based on a nationally representative sample of persons aged 70 or older at baseline in 1984. Worobey and Angel (1990) focused on unmarried elders from the LSOA, and examined the predictors of dependent living arrangements at follow-up interviews in 1986. Among other findings, functional capacity in 1984 and deteriorating functional capac-

ity were both linked to increasingly dependent living arrangements by 1986 (i.e., living with others or living in an institution). Worobey and Angel (1990) were not interested in moving *per se* so that shifting living arrangements do not necessarily mean that an elder moved.

Speare et al. (1991) employed the LSOA to test the idea that increased disability among seniors creates pressure to make residential adjustments. Disability, poor subjective health, and age at baseline were all positively associated with having moved into an institution by follow-up in 1986. Those living with a spouse at baseline were at lower risk of mobility and institutionalization. With respect to the likelihood of a residential move, findings suggest that, rather than baseline disability, it is deteriorating functional capacity that predicts a move in the oldest age cohorts.

In order to focus attention on the precursors to an assistance move Longino et al. (1991) distinguish between moderate and severe functional disability and limit analysis to LSOA respondents living in the community at follow-up in 1986. Their results suggest that though baseline levels of moderate disability are not significant, increased difficulty with Instrumental Activities of Daily Living (IADLs) (e.g., shopping, preparing meals, managing money) between 1984 and 1986, is linked to an increase in the likelihood of making a residential move during the same period.

Further analyses based on community-dwelling LSOA panel member in 1984 and 1986 suggest that the impact of deteriorating functional health on residential mobility is moderated by available social resources. According to Bradsher et al. (1992) interwave increases in IADLs have a significantly stronger impact on the likelihood of having moved by 1986, among those recently widowed as compared to others. Similarly, Zimmerman et al. (1993) suggest that the stress of deteriorating functional health is buffered by the perceived availability of someone in the home to provide care if necessary for three or more weeks.

Miller et al. (1999) employ four waves of LSOA data collected semiannually between 1984 and 1990. They measure functional health with greater precision than earlier studies, and find that the implications of deteriorating functional health appear to depend on the type of difficulties experienced. Whereas, interwave increases in Basic Activities of Daily Living (BADLs) (e.g., bathing, dressing), had no statistically discernible effect, increased difficulty with Advanced Activities of

Daily Living (AADL) (i.e., managing money, using the telephone, eating) and Lower Body Limitations (LBL) (e.g., difficulty “walking a quarter of a mile”) are associated with a greater likelihood of having made a non-institutional move in the same two-year period. These findings are intuitive in that AADL’s and LBL’s are likely to generate the kind of “environmental press” that might be resolved via a residential move.

Thus, available evidence from the LSOA supports Litwak and Longino’s (1987) contention that declining functional health, in the absence of support from a spouse or adult child, generates pressure for older adults to move. Yet even in the oldest age cohorts represented in the LSOA, there is no expectation that residential moves would be exclusively health-motivated. Bradsher, et al. (1992: S267) argue that amenity-oriented moves may occur at any age, given that age is an imperfect proxy for lifecourse, and that, “motivations for residential change... are complex and multifaceted.”

DeJong et al. (1995) directly address the complex motivations for later-life moves using data from the 1984–1990 LSOA. Respondents that moved during the study period were asked to provide reasons for relocating, which the researchers used to construct theoretically and empirically informed “reason-for-move categories” (e.g., health, functional independence). Results indicate a wide variety of motivations; declining health was offered as the primary reason for moving in 19 per cent of cases. Moreover, the precursors of a move appear to vary substantially across “reason-for-move” categories. Of particular importance, measured increases in instrumental disability are positively linked to health-motivated moves but negatively associated with both comfort-motivated moves (e.g., seeking a better neighborhood or more agreeable climate) and economic security-motivated moves (i.e., affordable housing).

Yet, all of these authors who use LSOA data point out that limitations imposed by the data generate an irresolvable temporal ambiguity. Functional capacity changes and residential adjustments between baseline and follow-up are measured but not dated so that it is impossible to empirically establish the correct temporal order of events. This is an important issue because the relationship between health and migration is complex and it is likely that some portion of between-wave changes in health may be the result of moving rather than the cause (see Findley 1988).

Furthermore, within the LSOA residential mobility between panel waves was captured, but not the distance

of the move. Thus, LSOA-based studies are unable to distinguish between local and long-distance moves, even though the two are almost certainly different-in-kind (e.g., Wiseman 1980). This is a nontrivial limitation. For an elder experiencing environmental stress resulting from functional decline, residential mobility is only one possible adaptation strategy. Long-distance moves are generally more costly and disruptive than local moves and should figure differently into the migration calculus.

Additionally, though LSOA-based studies shed light on mobility among those aged 70 or older, these findings cannot be generalized to the young-old population. Litwak and Longino's (1987) lifecourse model anticipates a larger proportion of moves to be amenity oriented among those approaching retirement or recently retired as compared to those in older age groups. The Health and Retirement Study (HRS) represents an important opportunity to examine the causes of migration among the young-old. An ongoing panel study, initiated in 1992, the HRS is based on a representative sample of US households containing at least one person aged 51–61 at baseline (see Juster and Suzman 1995).

Bradley et al. (2008) examine the actuation of mobility intentions using five waves of HRS data, collected semi-annually between 1994 and 2002. Not surprisingly, they find a strong connection between migration intentions and migration outcomes. Of those households at baseline that were "certain" of a move in the coming two years, the estimated probability of having moved during that period was .48 for non-couple households and .55 for couple households.

Additional results suggest that the actuation of mobility intentions may operate differently for non-couple as compared to couple households. In order to explore household level factors that may condition whether or not intended moves are actuated Bradley, et al. (2008) construct a series of event-history models among those households reporting some expectation of moving at baseline. Findings indicate that among couple households, wealth is positively associated with the likelihood of completing an independent long-distance move (i.e., neither parents nor children at destination). In non-couple households, by contrast, wealth is negatively linked to independent long-distance moves. For many "young old" singles, expected moves are not necessarily desired moves and wealthier individuals may be better equipped to avoid moving.

Exploiting five waves of HRS data, Longino et al. (2008) use event-history models to examine the causal link between theoretically-relevant predictors, measured in 1994, and long-distance migration across a study period ending in 2002. Findings underscore the importance of person-ties at origin. Net of appropriate controls, those having parents or children living nearby were significantly less likely to move as compared to others. Similarly, ties to neighbors appear to discourage long-distance migration, according to the authors' results. But other kinds of community ties may also be important. Natives to a given area were less likely than others to move away, as were homeowners. Ties to potential destination areas are almost certainly of equal importance. Along these lines, Longino et al. (2008) find that having a regular vacation destination at baseline increases the likelihood of a future long-distance move by about 46 per cent net of controls. A positive effect of comparable magnitude is evident with respect to second home ownership, according to these same results.

Microlevel Impacts – Implications for Health and Well-Being

How do residential mobility and migration impact older individuals and their families? With the exception of forced relocations, migration is typically the product of rational decision-making. The intention to move depends on the expectation that migration will lead to the realization of some valued goal or set of goals (DeJong 1999; DeJong and Fawcett 1981). If voluntary migration is motivated by instrumental considerations, it is not unreasonable to suppose that elders may often enjoy improved life circumstances as a result of moving.

Along these lines, Ferraro (1981) examines the residential satisfaction of older movers. Analyses are based on a sub-sample of noninstitutionalized low and middle income elders, from the 1973 and 1974 waves from the Survey of the Low-Income Aged and Disabled. Relocates who at baseline were "desiring to move" reported enhanced housing and neighborhood satisfaction in their new as compared to their former homes.

Further, Oswald et al. (2002), interviewed 217 older Germans who had moved within the past three years in order to see if the goals motivating relocation were realized. The researchers concluded that subjects had

proactively enhanced their residential environments by moving. In addition, in several cases motivations for migration were linked to specific kinds of improvements. For example, movers motivated by a desire to improve their physical environment (e.g., a safer, nicer place to live) reported improved accessibility to key resources (i.e., physician, grocery store, and public transportation). Though as the authors are well aware, retrospective assessments of improvement may be biased by the subjects' desire to justify the expense and trouble of the move itself, Oswald et al.'s (2002) results support the notion that elders may improve their lives through migration.

At the same time, moving is a particularly stressful life-event that may have negative implications for the health and well-being of senior adults. One body of relevant research examines the impact of institutional moves, whether moving from the community into an institution or moving between institutions (see Baglioni 1989 and Danermark and Ekstrom 1990 for reviews). We focus on the implications of non-institutional or community to community moves, which have received substantially less attention. Most early studies employed small nonrepresentative samples, yielding mixed results (see Baglioni 1989 for review). Analyses that employ nationally representative longitudinal data are of particular importance.

Among the earliest such studies, Ferraro (1982) exploits data from the 1973 and 1974 waves from the Survey of the Low-Income Aged and Disabled, using a sub-sample representative of low and middle income elders living in the community. Residualized change models indicate negative relocation effects across a range of health indicators (i.e., days spent ill in bed, days hospitalized or institutionalized, difficulty with daily activities, self-care capacity).

Choi (1996) generates similar findings using the LSOA, 1984–1990, a nationally representative panel of persons 70 or older at baseline as described above. Initial health status did not predict subsequent residential mobility, though movers experienced steeper interwave health declines. However, Choi (1996) notes that among relocatees, those who experienced the greatest health declines were health-motivated movers who were predisposed to health problems prior to the move.

Careful readers will note that both Ferraro (1982) and Choi (1996) present findings that mirror previously described studies portraying residential mobility

as a response to deteriorating functional health (e.g., Miller et al. 1999; Speare et al. 1991; Zimmerman et al. 1993). Though interpreted differently, between-wave declines in health are consistently found to be associated with the likelihood of having moved during the same period. But is it declining health that causes migration or migration that causes a decline in health? Perhaps, the relationship is bidirectional.

The temporal ordering of health and migration among older adults has not yet been empirically resolved. Toward that end, Chen and Wilmoth (2004) return to the LSOA data but construct analyses that distinguish between short-term functional health implications (i.e., changes that occur during the same interval as the move) and long term functional health implications (i.e., changes that occur during the interval after the move). As in previous studies, initial results suggest greater functional disability (i.e., difficulty with ADL's and IADL's) among movers in the short-term. However, short-term functional decline was only evident among health-motivated movers who prior to the move may have been on a declining health trajectory.

Also important, Chen and Wilmoth (2004) were unable to generate evidence of long-term impacts. In terms of functional disability, respondents who had moved between 1984 and 1988, were no different from never-movers by the end of the subsequent two-year interval in 1990. Even health-motivated movers over the long-term were statistically indistinguishable from never-movers with respect to functional disability. Chen and Wilmoth (2004) argue that these results may indicate that moving allows persons to achieve a better match between their own needs and the opportunities and challenges presented by their residential environments.

Even so, as Chen and Wilmoth (2004) note, the LSOA data do not permit the relationship between health and migration to be completely disentangled. We join them in calling for analyses using longitudinal data collected at regular intervals that include timing of health changes and migration events. Even with such data, the health-migration connection is sufficiently complex so as to provide researchers with a number of challenging issues (see Findley 1988). For example, post-move health declines are not necessarily caused by moving, because elders who move may be self-selected such that those who anticipate deteriorating health will be more likely to move. Moreover, it may

be that negative health effects associated with migration are short-lived, as others have suggested (Findley 1988; Chen and Wilmoth 2004). In this case, a simple comparison of the health of movers vs. non-movers at follow-up might dilute the effect of relocation by treating those who had moved within the last month the same as those who moved just after the previous interview possibly two years prior.

Discussion and Conclusions

In the course of discussion we have alluded to areas where additional research is needed and have highlighted findings that might be clarified through further analysis. A broader observation is that there are relatively few later-life migration studies that focus on racial/ethnic minorities (e.g., Biafora and Longino 1990; Longino and Smith 1991; Watkins 1989). Existing research examines differential rates of migration and group-specific patterns with respect to interstate flows, but a range of important questions remain to be answered. For example, Longino et al. (2008) demonstrate that African American elders are less than half as likely to make a non-local move as compared to their White counterparts net of a range of relevant factors (e.g., marital status, education, economic resources, self-assessed health, travel experience indicators, home ownership, and ties to the community of origin). Why are African American seniors than others less likely to move? Careful attention to this question is warranted for any number of reasons, not least because, as noted above, migration is typically motivated by instrumental considerations, a strategy by which seniors seek to improve their lives.

How will later-life migration within the industrialized nations of Europe and North America be impacted by large cohorts born in the decades following World War II? This is an impossible question to answer with any confidence. A closer look at the United States illustrates the range of factors that may bear on later-life mobility over the near future in Europe and North America. In the United States, seventy-five million "baby boomers" born in the US between 1946 and 1964 will drive a dramatic increase in the 65 and older population between 2010 and 2030. Almost certainly we should anticipate an increase in the absolute number of later-life movers over the same period.

But will boomers' post-retirement mobility behavior be different from that of the preceding generation? There is reason to suspect stability in the overall rate of interstate migration. As previously noted, the proportion of 60 and older reporting an interstate move has changed little since 1960 (see Longino 2006).

Alternatively, boomers may in some ways be better equipped to make an amenity move in their later years than were previous generations. Compared at mid-life, baby boomers relative to the cohort born between 1926 and 1935 were more than twice as likely to have earned a college degree (Frey and DeVol 2000). Consistent with material presented above, higher levels of education should be linked with relatively high rates of long-distance mobility. Moreover, boomers as a group appear to be economically advantaged compared to their parents' status at roughly the same age (see Radner 1998). Perhaps enhanced financial resources will support higher rates of long-distance mobility among boomer seniors as compared to previous generations.

At the same time, the baby boom cohort is characterized by substantial internal diversity which should not be overlooked (Longino 1998). Despite the prosperity enjoyed by privileged boomers, compared to the cohort born between 1926 and 1935, baby boomers were about 50 per cent more likely to live in poverty at mid-life (Frey and DeVol 2000). A relatively large portion of boomers will have only limited resources upon retirement.

Even for relatively affluent boomer retirees the capacity to finance a long-distance amenity move cannot be taken for granted. In recent decades, rising home values have allowed seniors to realize substantial economic gains that could be used to purchase a new home in an amenity-rich destination (see Steinnes and Hogan 1992). However, boomers may find it difficult to realize these kinds of gains. Owing to the relatively small size of younger cohorts, upon retirement, boomers may find limited market demand for their homes (Stallman and Siegel 1995).

Moreover, relative to older cohorts, members of the baby boom are more likely to be covered by defined contribution rather than defined benefit pension plans. Boomers may find that they will have to work longer under defined contribution plans in order to generate pension wealth comparable to that enjoyed by previous retirees covered by defined benefit plans. Delayed retirement

among boomers may reduce the likelihood of completing an amenity-oriented move (Haas and Serow 2002).

Perhaps more important is the fact that many boomers will be living in amenity-rich areas upon retirement. Frey and Devol (2000) show that most of the metro areas with relatively large baby boomer populations are in southern or western states (e.g., Santa Fe, NM, Denver, CO, Atlanta, GA) reflecting labor force migration flows over the past several decades. Disproportionate shares of boomers are also found in a number of high-amenity metro areas across New England (e.g., Portland, ME, Burlington, VT).

The current concentration of boomers in amenity-rich metro areas may suggest that a smaller portion will have an incentive to move upon retirement. Alternatively it may simply turn out that among boomers a relatively large portion of later-life moves will be intraregional rather than interregional. Boomers residing in southern or western metro areas may make amenity moves toward less crowded areas in the same region that offer scenic beauty as well as cultural and recreational amenities. Atlanta, for example, is within easy reach of tourist areas in the mountains of north Georgia and North Carolina.

As a final consideration, we cannot assume that baby boomers will have the same housing preferences as previous generations of retirees. McHugh and Larson-Keagy (2005) argue that the emergence of age-segregated “active adult” communities following the Sun City model was driven partly by stereotypical depictions of aging as a period of inevitable decline and decay. Sun City and its offspring traditionally marketed themselves as enclaves supporting active retirement and disproving ageist stereotypes. But McHugh and Larson-Keagy (2005) suggest that these ageist stereotypes are eroding and so is demand for Sun City type havens from ageism. New multigenerational “lifestyle” communities offer a full range of amenities likely to attract recent retirees (e.g., golf course, pools, etc.) but avoid names and marketing strategies that connote retirement havens. Instead, a conspicuous trend has been the promotion and marketing of “ageless people pursuing lives of active leisure in idyllic environments.” (McHugh and Larson-Keagy 2005: 253).

We have covered a great deal of ground in this chapter. Amenity migration to Florida and other select destinations garners substantial media attention, partly obscuring (1) low rates of long-distance migration

among seniors and (2) the fact that later-life movers comprise an internally heterogeneous category. Our review certainly illustrates that migration among older adults is multifaceted so as to defy simple generalizations as to its causes and consequences.

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