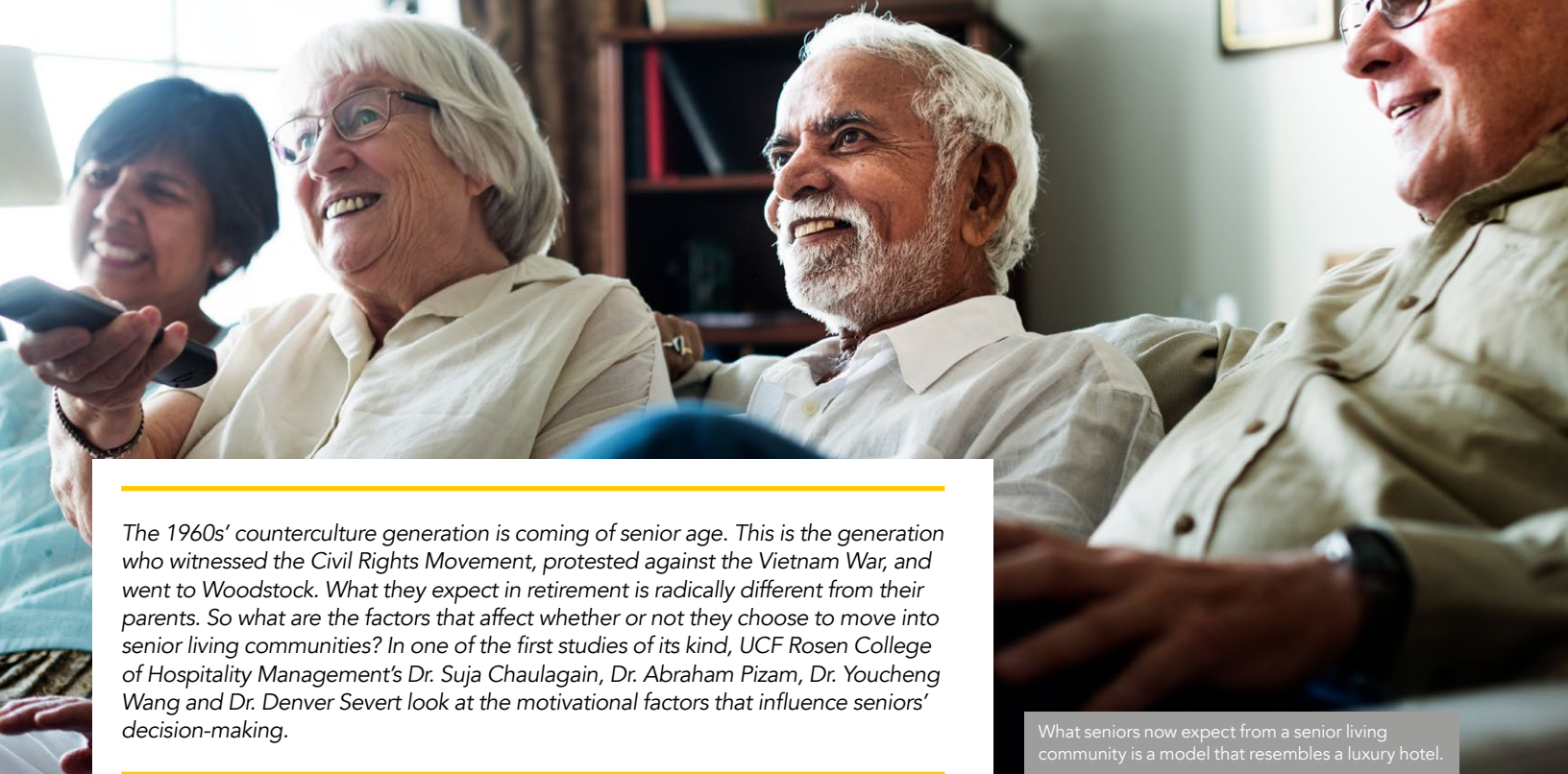


# FACTORS AFFECTING SENIORS' RELOCATION TO SENIOR LIVING COMMUNITIES



The 1960s' counterculture generation is coming of senior age. This is the generation who witnessed the Civil Rights Movement, protested against the Vietnam War, and went to Woodstock. What they expect in retirement is radically different from their parents. So what are the factors that affect whether or not they choose to move into senior living communities? In one of the first studies of its kind, UCF Rosen College of Hospitality Management's Dr. Suja Chaulagain, Dr. Abraham Pizam, Dr. Youcheng Wang and Dr. Denver Severt look at the motivational factors that influence seniors' decision-making.

What seniors now expect from a senior living community is a model that resembles a luxury hotel.

**W**e live in an aging world. Due to increasing life expectancy and the number of baby boomers reaching retirement age, the US Census Bureau estimates that by 2030, more than 20% of US residents will be aged 65 or older. By 2050 the figure is expected to be 22%—an estimated 89 million Americans. According to the US Department of Health and Human Services, by the same time around a third of those aged 65 or older will need to relocate to a senior living community.

The senior living community sector—already worth an estimated half a trillion dollars annually—is set to grow. However, social norms are changing and the 1960s' counterculture generation that is coming to retirement

age is radically different from their parents' generation. Today's seniors are healthier, more active and better educated. They also enjoy a higher standard of living, greater purchasing power, marry late and have fewer children, and have longer life expectancy. What seniors now expect from a senior living community is a model that resembles a luxury hotel with additional leisure facilities and activities programmes, and optional support and healthcare packages.

In one of the first studies of its kind, UCF Rosen College of Hospitality Management's Dr. Suja Chaulagain, Dr. Abraham Pizam, Dr.

Youcheng Wang, Dr. Denver Severt and a collaborator have researched the motivational factors that affect seniors' intentions to move to senior living communities. Published in the prestigious *International Journal of Hospitality Management*, their study particularly looked at the influence of 'push' and 'pull' factors and the mediating role of perceived barriers in influencing seniors' decision-making.

The research is based on the Theory of Migration proposed by Ernst Ravenstein in the late 19th century and developed by Everett Lee in the 1960s. Ravenstein argued that migration is affected by both the destination's

**BY 2030 MORE THAN 20% OF US RESIDENTS WILL BE AGED 65 OR OLDER.**



For some couples, only one of them requires additional support.

attracting, or 'pull' features, and the place of origin's repelling, or 'push' features. Lee added to Ravenstein's theory and proposed that relocation is also affected by intervening obstacles and personal factors.

## SHOULD I STAY, OR SHOULD I GO?

Following a review of the academic literature, Chaulagain, Pizam, Wang and Severt identified five push factors that might prompt seniors to relocate: health fears; social and family-related matters; housing and property-related worries; psychological concerns; and economic issues.

Health fears include a decline in physical and mental health and cognitive status, as well as worries about disability and hospitalization. Social and family matters include the need for extra help to care for a spouse, or full-time help if a spouse who was acting as their carer dies, as well as social isolation if children move away. Housing and property worries vary from a home being too big or having too many stairs, to maintenance being too difficult or expensive. Psychological concerns include feelings of loneliness and insecurity, as well as fear of crime and worries about declining health. Economic issues might include a decline in economic status and the rising costs of living, mortgage/rent and housing maintenance.

The researchers also identified pull factors that might prompt relocation. These include tangible and intangible service features and facilities which the Rosen research team grouped into three areas: facility-related factors; socio-psychological factors; and environmental factors.

Facility-related factors include the size, design, layout and quality of the accommodation and community, as well as transport and amenities, for example on-site healthcare, and policies such as allowing people to bring home furniture and belongings. Socio-psychological factors include feeling safe, for example not at risk of crime or worrying what would happen if they had a fall, as well as the desire to be around other people and enjoy social opportunities. Environmental factors include geographical location and attractiveness, as well as proximity to facilities for shopping and healthcare, and being close to family and friends.

## GIVING SENIORS A REASON TO STAY PUT

The researchers found little empirical research that studied the perceived barriers for those who are thinking about relocating to a senior living community. However, the limited number of studies on general long-term care planning

suggested five themes: family-related barriers; economic barriers; psychological barriers; socio-cultural barriers; and structural barriers.

Family-related barriers include being a carer for a spouse or adult disabled child, or having responsibilities to other members of the family. Economic barriers include the cost of relocation, including down-payments and monthly fees, which may not seem like a sound investment. Psychological barriers include the stress of relocation, fear of the unknown and concern about losing familiar support systems, as well as worries about loss of autonomy and moving to an environment where people are even older and more frail than they are. Socio-cultural barriers include the fact that people from some cultural backgrounds may regard it as unacceptable for seniors not to be looked after by their families, while others may perceive relocation as rejection by the family. Structural barriers include geographical distance from family, and lack of knowledge about what today's senior living communities are like.

Today's senior living communities offer ample recreation and socialization opportunities.



## FINDING OUT WHAT SENIORS WANT

Chaulagain, Pizam, Wang, Severt and their collaborator developed hypotheses in line with the push and pull factors and barriers identified in the literature review. They expected to find that, while push and pull factors affect relocation decisions, barriers would also have a mediating role, with some carrying more weight than others. A rigorous methodology was developed for their subsequent two-phase sequential exploratory mixed-method study.

Six focus group interviews were held and recorded, each involving eight to 12 seniors aged 65 or older who were either living in their own homes or had recently moved to a senior living community. Open-ended questions were used to facilitate discussion on the factors that motivate relocation decisions. The qualitative information gathered from the groups was then analyzed, coded and categorized, and the emerging themes checked against findings from the literature review.

This information was used to design an online survey which, after piloting, gathered quantitative data from 363 seniors aged 65 or older who were living in their own homes. Participants were asked to agree or disagree with statements according to a seven-point Likert scale. Structural equation modelling analysis was then used to study the resulting data.

The results of the survey confirmed that seniors' intentions to move to a senior living community are positively influenced by health, social and family, and housing and property-related push factors, and also by facility-related pull factors. Environment- and location-related pull factors were not found to have a positive influence. Factors that negatively influenced decision-making were found to be family-related, economic, socio-psychological, and knowledge and information barriers.



The hotel environment and worry-free service culture should be a focus for providers' promotional activities.

seniors' decision-making regarding senior living communities. By delivering a deeper understanding of seniors' relocation decision-making, it significantly adds to the literature on the topic.

The authors explain: "The study results indicated that the perceived barriers in the context of relocation is a multi-dimensional construct, which is comprised of socio-psychological, family-related, knowledge, information, and economic factors. The study results further confirmed that all of the perceived barriers had a significant negative impact on seniors' intention to relocate."

The study's findings have wider implications for senior living community operators, healthcare facilitators and government agencies. In particular, they suggest that senior living community operators should focus their promotional activity on the healthcare that they offer, the hotel environment and worry-free service culture they provide, as well as recreation and socialization opportunities.

Recommendations also include that families, friends and prospective residents should all be included within target marketing, and educational sessions should be held to educate everyone about the facility so that all stakeholders can be included in decision-making. Senior living community operators should also consider pricing structures that attract senior couples, where only one has an immediate support requirement, and offer flexible ownership and payment plans.

Regarding mediation effects, the study found that the positive relationship between health-related push factors and intention to relocate was only affected by family-related and socio-psychological barriers. The positive relationship between facility-related pull factors and the intention to relocate was only mediated by socio-psychological and economic barriers.

### PUTTING SENIORS FRONT AND CENTER

The Rosen researchers' study is one of the first to look at the motivational factors, perceived barriers, and inter-relationships that influence

**BY DELIVERING A DEEPER UNDERSTANDING OF SENIORS' RELOCATION DECISION-MAKING, [THIS STUDY] SIGNIFICANTLY ADDS TO THE LITERATURE ON THE TOPIC.**

# RESEARCHERS IN FOCUS

## PERSONAL RESPONSE

**Most of the hypotheses you developed from the literature review were supported by the results of the research investigation. However, environment- and location-related pull factors were not found to have a positive influence on seniors' relocation decisions. Did this surprise you and if so how/why?**

Yes, we didn't expect to find this result since environment- and location-related factors were found to be important factors in relocation decisions in prior literature. So, it was surprising. However, a logical explanation could be that seniors may not feel the need to be near their children, family, or other amenities and services as seniors are able to maintain connections over long distances through communication devices and social media, and are comfortable travelling with convenient transportation systems. Furthermore, amenities and social opportunities provided by the senior living communities may be more important for seniors than the location and environment features of these communities.

## RESEARCH OBJECTIVES

Chaulagain, Pizam, Wang and Severt provide insight into the factors that affect the senior population's decisions when it comes to choosing senior living communities.

## REFERENCES

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