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## **TOURISM AND RETIREMENT MIGRATION**

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# **Seasonal Migration of Retirees: A Review of the Literature**

**by**

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## **TOURISM AND RETIREMENT MIGRATION**

**Judith I. Stallmann\* and Maria Cristina Espinoza**

**Over the past twenty years, one set of non-metropolitan counties has consistently experienced above-average population growth (Cook and Hady, 1993). These are retirement counties--counties with a least a fifteen percent net in-migration of people aged sixty and older in either of the last two decades (Bender et al., 1985). As the migration of retirees to rural areas was noted, interest in why retirees migrate to rural areas and how they choose their particular location arose. One connection of interest is the connection between tourism earlier in life and the migration decision later in life. Because tourism is ubiquitous in our society, yet the majority of the elderly do not migrate, clearly tourism by itself is not a sufficient causal factor. In fact, tourism is not even a necessary factor as people may choose a place they have never visited as a tourist, such as a newly built retirement community (Wiseman and Roseman, 1979).**

**The objective of this paper is to sort out if tourism affects the migration decision and if so, at what point does it affect the decision? The next section briefly discusses a decision-making framework for retiree migration and examines the points at which previous tourism experiences may enter into the decision process. The following sections review specific studies and what they reveal about the impact of tourism on the migration decision. A final section summarizes the research findings and their implications for research and policy.**

## **Conceptual Framework of the Migration Decision**

**To answer the above questions we must begin with a theory or conceptual framework of retirement migration. For our purposes Wiseman (1980) provides a useful framework. Wiseman suggests that the decision to migrate can be viewed as a series of “steps” with different factors influencing each of the steps (Chart 1). When viewed in this manner, it becomes easier to identify the points in the decision process where a tourism experience might have an impact on the decision to migrate. For a more complete discussion of the decision process, the reader is referred to the original article.**

**The decision process begins with an evaluation of satisfaction with current living arrangements. This evaluation includes three factors: triggering mechanisms,**

evaluation factors, and the type of move. Triggering mechanisms include both personal changes and external factors that can be positive (pull) or negative (push). Tourism may serve as a pull factor in this “step”, providing information about the existence of amenities elsewhere. Several of the triggering mechanisms are similar to factors discussed in an earlier paper by Wiseman and Roseman (1979). In that paper they developed a conceptual framework that integrated gerontological and migration theories. The gerontological factors identified included retirement, loss of spouse, and health decline.

While certain factors trigger the evaluation of the current living arrangements, the decision maker then considers his/her personal situation and external factors that might or might not make a move feasible. A previous migration experience might have an impact at this stage. For the retiree that previous experience may have been as a seasonal migrant (Espinoza and Stallmann, 1996).

After evaluating the personal and external factors, the decision-maker decides to move or to remain. Either of these decisions may involve several related decisions concerning adjustments to budgets and living arrangements. The person who decides to move may choose relocation in the same area, seasonal migration, or permanent migration.

Once the decision to move is made, the destination for the move is selected. At this point tourism experiences may play a role, providing information on potential sites. The search for destination places is influenced by vacation experiences. Many persons considering retirement consider only those locations where they have vacationed for many years and to which they have developed strong attachments (Wiseman and Roseman, 1979).

In addition to vacation or tourism attachments, attachments to land or property investments as well as an established social network may influence destination choices (Wiseman and Roseman, 1979). An established social network, such as a childhood home or a previous employment location, may motivate some retirees

to migrate “back home” (Stallmann and Jones, 1995). Return migration may be the appealing to a person in an urban area who wants to escape perceived problems of city life and who longs for the less hectic and more familiar behavior patterns of an earlier age (Wiseman and Roseman, 1979).

Some amenity seeking retirees move without prior vacation experience by relocating to retirement communities. These retirees are not as influenced by vacation experience as they are by advertisements about retirement communities and experiences from friends or relatives who have migrated to these communities (Wiseman and Roseman, 1979; Reeder, Hopper and Thompson, 1995).

After the person has migrated, triggering mechanisms may again come into play to cause him/her to consider another move. Particularly as retirees age, their health declines, they are widowed, or their financial situation becomes less secure, some make a second move, motivated by the need for assistance. These retirees may migrate to an urban area to be nearer family and/or medical facilities. These moves are not influenced by tourism (Wiseman and Roseman, 1979).

A tourism experience can have a major impact at the fourth step in the process. Tourism, in some cases, may have an impact at the first step in the process, serving as a pull factor. As will be shown below, the literature does not reveal a consistent connection between tourism and retirement migration. The lack of a consistent connection in the literature may be due to the fact that survey questions concerning reasons for moving often are not based on the decision steps suggested by the conceptual framework.

### **Tourism and permanent migration**

The next sections of the paper review selected studies of retiree migration and what they reveal about the factors that influence migration.

## Evaluation of Residential Satisfaction

To explain elderly interstate migration between 1985 and 1990, Newbold uses a sample of non-native, return and onward elderly migrants drawn from the five percent Public Use Micro Sample (PUMS) data file, that is 1990 US census data (Newbold, 1995). The paper relies on a three-level nested logit model that estimates the decision to move or stay, then the decision of return or onward migration, and finally the choice of destination. The sample consists of persons aged 65 and over and a separate model was run for age groups 65-69, 70-74, and 75 and over.

The author defined non-natives as persons whose state of residence was different from their state of birth; onward migrants, as persons who move to destinations other than their state of birth; return migrants, as persons who return to their state of birth.

The destination choice of the elderly was affected by amenity and ecological effects in the hypothesized direction. Warmer destinations, destinations with a larger proportional share of elderly population, and destinations with a similar cultural makeup attracted onward migrants. As age increases, maximum temperature and racial similarity become less important in the decision-making process. However, elderly population share becomes more important for the old, which could reflect the greater availability of health care or support services available due to a larger elderly population. Return migrants are less sensitive to the physical amenities of coldness and temperature relative to onward migrants.

Because the study used secondary data collected for another purpose, it could not determine the role of tourism in the decision process of retirees. The variables available are similar to what Wiseman (1980) labeled "Triggering Mechanisms." They provide information on the factors that make one location preferable to another.

Between June 1992 and February 1993, 249 retired in-migrants participated in research panels held in nine communities in Arkansas, Oklahoma, and East Texas. The nine communities in the study are: Benton, Clark, and Garland Counties, Arkansas; Cherokee, Delaware, and Payne Counties, Oklahoma; Cedar, Mt. Pleasant, and Tyler, Texas (Miller et al., 1994). These communities were selected because they do, or would like to, recruit retirees to settle in their communities. Thus, the objective of the studies was not to understand the entire migration decision process. Rather, the objective was to focus on the features that attracted retirees to the community, or detracted from it. Communities that would like to attract retirees could use this information to make themselves more attractive.

Two questionnaires were designed. The first, administered as a take home, elicited information about household expenditures. The second questionnaire was completed in a group session. It collected information about why people moved to their current residence to retire, where they came from, if they liked living in the area, the extent of their participation in community activities, and personal information. In addition, focus groups were used to gain an in-depth understanding of the factors important to retirees (Miller et al., 1994).

The in-migrating retirees came from all over the United States, with most coming from the contiguous states and the Midwest. Respondents were asked what attracted them to the community. They were given a list of 14 features and asked to rate each feature for its importance in their decision to relocate (Table 2). Although there is variation by community, over all the communities, scenic beauty is rated as the most attractive feature, followed in descending order by recreational opportunities, mild climate, low medical costs, low cost of living, and modes tax rates (Miller et al., 1994).

In three areas closeness to family was ranked as an attractive feature of the community. In Payne County, Oklahoma this factor ranked first. In Clarke County, Arkansas, it ranked third, and in East Texas it ranked as the fourth most important factor. The importance of social ties suggests that these communities may be attracting return migrants. Planned retirement communities were an important factor attracting retirees in Cherokee County, Oklahoma (ranked fourth), and Benton County, Arkansas (ranked sixth) (Miller et al., 1994).

Respondents were also asked to rank the features that detracted from their community. The number of respondents identifying any feature as very important was low. Twenty-three of 249 respondents ranked poor medical care as a detracting feature, and these responses were concentrated in East Texas. In



descending order, other concerns included: cost of living, traffic control, far from family and friends, and climate (Miller et al., 1994).

It should be noted that the above studies did not ask how respondents learned about their particular community, so that a potential tourism connection would be not elicited. Rather, the studies concentrated on evaluation of the community after the migration decision.

**Table 2: Features that Attract Retirees to Communities**

| Attracting Features                | Benton | Garland | Clark | East Texas | Delaware | Cherokee | Payne | Overall |
|------------------------------------|--------|---------|-------|------------|----------|----------|-------|---------|
| Business Employment, Opportunities | 2.89*  | 2.93    | 2.43  | 2.69       | 2.7      | 2.84     | 2.66  | 2.75    |
| Mild Climate                       | 1.56   | 1.24    | 1.86  | 2.09       | 2        | 1.85     | 2.05  | 1.78    |
| Low Cost of Living                 | 1.72   | 1.7     | 2.05  | 2.06       | 2.18     | 1.96     | 1.83  | 1.9     |
| Cultural Opportunities             | 2.23   | 2.41    | 1.43  | 2.53       | 2.6      | 2        | 1.74  | 2.14    |
| Close to Family                    | 2.33   | 2.38    | 1.58  | 2.03       | 2.5      | 2.46     | 1.5   | 2.08    |
| Close to Friends                   | 2.48   | 2.7     | 2.09  | 2.48       | 2.72     | 2.79     | 1.8   | 2.41    |
| Low Housing Costs                  | 1.96   | 1.87    | 2.24  | 2.21       | 2.47     | 2.38     | 1.95  | 2.18    |
| Adult Educational Opportunities    | 2.73   | 2.9     | 2.14  | 2.61       | 2.84     | 2.48     | 2.5   | 2.61    |
| Low Medical Costs                  | 1.96   | 1.74    | 1.71  | 2.02       | 2.15     | 1.83     | 1.51  | 1.84    |
| Retirement Communities             | 1.82   | 2.37    | 2.86  | 2.39       | 2.37     | 1.88     | 2.36  | 2.25    |
| Recreational Opportunities         | 1.53   | 1.77    | 1.65  | 1.73       | 1.75     | 2.04     | 1.82  | 1.74    |
| Return to Native Area              | 2.47   | 2.58    | 2.14  | 2.73       | 2.63     | 2.88     | 1.93  | 2.45    |
| Scenic Beauty                      | 1.33   | 1.42    | 1.55  | 1.8        | 1.41     | 1.48     | 2.22  | 1.62    |
| Modest Tax Rates                   | 1.68   | 1.48    | 2.14  | 2.22       | 2.05     | 2.12     | 2.12  | 1.95    |

\* Average of respondents: 1=very important, 2=somewhat important, 3=not at all important in the decision to relocate

Source: Miller et al.1994

**A study of a retirement destination county in Ohio had objectives similar to those of the studies summarized by Miller et al. (1994) above. The objectives of the study were to understand the factors that influence retiree migration so that communities can improve their attractiveness to retirees. A questionnaire was distributed to retirees in Pike County, Ohio. Of the 288 questionnaires mailed out, data were collected from 162 retirement households in the city of Waverly, a response rate of 56%. Approximately 52% of the respondents were from Ohio and the remaining 48% migrated from 23 states, including Florida, Arizona, Texas, and North Carolina (Lindner, 1995).**

**Lindner (1995) defined seven factors influencing retiree migration. The financial concerns factor includes personal income taxes, costs of goods and services, etc. The housing opportunities factor includes the availability and cost of housing, property taxes, utilities, etc. Typical weather conditions include mean temperature, annual precipitation, lows in winter, highs in summer, humidity, etc. Personal security includes number and type of crimes committed locally. Service availability includes opportunities for continuing education, availability and quality of medical facilities, public transportation, and other programs designed to assist senior citizens. Job opportunities include the availability of jobs, including voluntary and for pay work. The social environment is concerned with local amenities and ambiance such as theaters, golf courses, local recreational opportunities, parks, restaurants, etc. The rank order of the importance of the factors in influencing retiree migration is: financial concerns, services available, security, weather, housing opportunities, social environment, and job opportunities.**

**Given the objectives of the study, the factors investigated were at the level of "Evaluation of Residential Satisfaction" (Wiseman, 1980) and did not ask how the retirees knew about the specific community. Thus, it is unlikely that a tourism factor would emerge.**

**All of the studies reviewed above asked questions that remained at the level of "Evaluation of Residential Satisfaction (Wiseman, 1980). In addition, the respondents were evaluating their satisfaction with the community to which they had migrated. Their evaluation of their previous residence is only implicit, in that it can be assumed that their previous residence fell short on some of these same factors.**

### **Destination Selection**

Cape Cod is a popular vacation destination in the Eastern United States. During 1986-1987, Cuba (1989) randomly surveyed 90 Bayside (a pseudonym for a community located on Cape Cod), Massachusetts, residents aged 60 and over, and had in-depth, tape-recorded interviews with 85 additional residents aged 60 and over. Bayside is a predominantly white, upper middle-class community. Over 30 percent of the residents are 65 or older, the highest percentage of elderly in the state. About half of the migrants are native to Massachusetts, and a large majority of migrants come from New England.

**The objective of the study was to explore the role of tourism in the retirement migration decision. Cuba (1989) found that tourism affects the choice of potential migration destination. Over 90 percent of all retirement-age migrants to Cape Cod had some previous vacation experience with their new home. Many had vacationed there since childhood (Cuba, 1989). Forty-five percent of the respondents had visited the Cape on a regular basis, and 23 percent had been seasonal residents of the Cape before they moved permanently.**

**Tourism also can be important in the decision process to help eliminate potential retirement sites. Cape Cod respondents who had visited traditional retirement destination places such as Florida and Arizona viewed them as "artificial", "plastic", or "sterile" age-segregated communities (Cuba, 1989).**

**Over years of visiting the Cape, friendships developed. Consequently, over 85% of those surveyed knew someone living on the Cape at the time they moved. Friends helped new arrivals feel more at home (Cuba, 1989). Cuba finds that the Cape is a favorite retirement**

destination because it is familiar and because it is close to the migrant's previous residence (Cuba, 1989). For these retirees being close to friends and family is another important factor in the migration decision.

Of the studies of permanent migrants, the Cuba study most clearly shows the linkage between tourism and the retirement migration decision, both in choosing and eliminating potential retirement sites. In addition, the study shows that social ties are an important factor in selecting a migration destination.

Most of the migrants to several Ozark communities during the mid 1970s had visited the area at least twice before moving. Some had vacationed there regularly for years. Some of these visits to the area were to visit family and friends who had migrated to the area. Over half of the migrants knew someone in the community before they moved. Migrants, on average, knew five people, mainly friends rather than family, before moving to the community. In addition, one fifth of the migrants had first learned of the community through a developer or realtor (Longino, 1981). This study once again points to the importance of determining how the migrant knew of the destination community. It points out that both tourism and social ties are important factors in the destination selection. In addition, promotion of a location can influence location decisions.

### **Seasonal migration and permanent migration**

Many tourism studies do not distinguish between tourism and seasonal migration. Cuba (1989) suggests that tourism is a continuum ranging from a day-trip by a one-time visitor to the several month stay of an annual seasonal resident. If seasonal migration is considered a form of tourism, then it is reasonable to ask if seasonal migration by retirees leads to permanent migration. Longino, et al.

(1991) further suggest that migration is a continuum that includes annual seasonal migration, migration that lasts several years and permanent migration. The following sections discuss the links between second home ownership and later retirement location and seasonal migration by retirees and later permanent migration.

### Second homes and retirement migration

Some tourists so enjoy an area that they buy a second home in the area and make repeated visits to the area, sometimes staying for several weeks at a time. Does owning a second home increase the likelihood that the owner will retire permanently to that location?

Clout (1977, cited in Girard and Gartner, 1993) found that some second homes were purchased as possible retirement locations. A 1991 survey of second-home owners in Barron County, Wisconsin, found that 32 percent of respondents plan to use their second home as a primary residence when they retire (Girard and Gartner, 1993). The study did not report how the homeowners first were introduced to Barron County.

A recent study in Forest County, Wisconsin, found that in some cases tourism led to buying a second home and later to seasonal residence and then permanent residence after retirement (Marcoulier, et al., 1996). Second-home owners were asked to rate (on a scale of one to ten) the importance of eight possible ways in which they learned about Forest County (Table 3). The item given the highest importance was vacationing in the region. Relatives and friends were also important in introducing second-home owners to the region.

Second-home owners were asked to state their plans for their second home when they retire (Table 4). One quarter of the second-home owners reported that they were already retired. Unfortunately, the survey did not ask if they had become permanent or part-time residents of the community since retiring, or if they remained

tourists. Thirty-six percent of second-home owners plan to continue their existing pattern of tourism (called seasonal by the authors) in the community. Nearly nineteen percent plan to become seasonal residents of the community (called part-time by the authors) after they retire. Thus, over half of second-home owners plan to live some part of the year in Forest County after retirement. Over 17 percent plan to make Forest County their permanent residence. Two and one-half percent plan to sell their second home when they retire. This suggests that areas with a large number of second homes can expect those homes to play a large role in the retirement plans of the owners.

**Table 3: Importance of Methods by Which Second-Home Owners First Learned About Forest County**

| Method                    | Percentage |
|---------------------------|------------|
| Vacationing in the region | 5.5*       |
| Daytrips                  | 2.7        |
| Relatives                 | 4.05       |
| Friends                   | 3.9        |
| Realtors                  | 1.1        |
| Brochures                 | .86        |
| TV/radio                  | .34        |
| Other                     | 3.03       |

\* on a scale of one to ten (most important)

Source: Marcouiller et al., 1996

**Table 4: Retirement Plans of Second-Home Owners**

| <b>Retirement Plans</b>                             | <b>Percentage</b> |
|---|-------------------|
| <b>Already retired</b>                              | <b>25.7</b>       |
| <b>Will continue to be a seasonal resident</b>      | <b>35.6</b>       |
| <b>Will live in Forest County part of the year*</b> | <b>18.7</b>       |
| <b>Will live full-time in Forest County**</b>       | <b>17.5</b>       |
| <b>Will sell the second home</b>                    | <b>2.5</b>        |

\* Labeled tourism in the rest of this paper

\*\* Labeled seasonal migration in the rest of this paper

Source: Marcouiller et al., 1996

### Retiree seasonal migration

A review of the literature on seasonal migration by retirees suggests that only a small percentage of seasonal migrants are considering permanent migration (Espinoza and Stallmann, 1996). The studies of seasonal migration tend to have similar objectives to the studies of permanent migration; their main objective often is not to investigate the migration decision.

The data in a study of Chautauqua County, New York, were collected from a 25 percent sample (N=1279) of all the individuals aged 60 and over interviewed between June 1978 and March 1979 as part of non-metropolitan Chautauqua County's Area Agency on Aging needs assessment (Krout, 1983). A total of 176 people, that is 13.8% of the sample, were classified as seasonal migrants. The authors believe some seasonal migrants may have been out of town at the time the interviews were conducted, resulting in an undercount of seasonal migrants. Seasonal migration was defined as living at another

address, not necessarily outside of the county, for at least 2 months of the year.

Of the seasonal migrants in this study, 86.3 percent migrated south: 76.8 percent to the Southeast and 7.5 percent to the Southwest. Respondents were asked to list up to three reasons for seasonally migrating, starting with the most important reason (Table 5). The most popular first choice for migrating was "better climate" (74.2%), followed by a distant "be near family" (7.4%), then health reasons (6.45%), "recreational opportunities" (2.5%), "better housing" (1.8%), and finally, "lower taxes" and "lower cost of living" (each 0.6%). Once again, the question asked was at the level of "Evaluation of Residential Satisfaction" for the selected seasonal destination (Wiseman, 1980). The respondents were not asked how they learned about their destination site. Because this study interviewed retirees in their permanent home, it can be thought of as a comparison of their residential satisfaction between their permanent and seasonal homes.

A study of seasonal migrants was conducted in the East Mesa/Apache Junction area of Arizona in November, 1980. Questionnaires were distributed to all occupied spaces in one of the newer, larger travel trailer parks using its centralized message boxes (Sullivan and Stevens, 1982). It was requested that only women fill out the questionnaire in order to control for gender differences in personal questions such as educational levels. Most of the information requested, however, referred to the household. Questionnaires were also given to both sexes in a smaller, older mobile home park. Due to the lack of a centralized message system in the mobile home park, the authors asked participants to fill out the questionnaire at a mid-March potluck supper. Questionnaires also were made available (the method was not specified) to residents who did not attend the supper. Only the responses of the women were

Table 5: Reasons for seasonal migration



| Reason            | 1st Choice (%)<br>(n=168) | 2nd Choice(%)<br>(n=79) | 3rd Choice (%)<br>(n=21) |
|-------------------|---------------------------|-------------------------|--------------------------|
| Better climate    | 74.2                      | 21.5                    | 4.8                      |
| Be near family    | 7.4                       | 26.6                    | 14.3                     |
| Lower taxes       | 0.6                       | 5.1                     | 9.5                      |
| Better retirement |                           | 1.3                     | 4.8                      |
| Better post-      |                           |                         | 4.8                      |
| Recreation        | 2.5                       | 24.1                    | 23.8                     |
| Lower cost of     | 0.6                       | 5.1                     | 33.3                     |
| Better housing    | 1.8                       |                         | 4.8                      |
| Other (half is    | 12.9                      | 16.5                    |                          |

Source: Krout, 1983

included in the final report to ensure compatibility with the travel trailer park data. The final sample includes 158 travel trailer responses and 65 mobile home responses.

Various reasons for migrating to East Mesa, Arizona were provided by the respondents (Table 6). Not unexpectedly, the reasons given fall mainly into Wiseman's (1991) triggering mechanisms. Life transitions include the health responses. Pull factors include climate, friends, and information gained by "traveling through the area." This latter category suggests that tourism is a positive (pull) triggering mechanism for seasonal migration.

Table 6: Reasons for Seasonal Migration

| Reason        | Travel Trailer (%) | Mobile Home (%) |
|---------------|--------------------|-----------------|
| Climate       | 89.9               | 86.2            |
| Visit friends | 28.3               | 36.9            |
| Own health    | 22.0               | 35.4            |

|                   |      |      |
|-------------------|------|------|
| Husband's health  | 26.2 | 27.4 |
| Traveling through | 8.2  | 4.6  |

Source: Sullivan and Stevens, 1982

When asked about plans for permanent migration, 25 percent of the travel trailer and 12 percent of the mobile home residents were considering a permanent move to their seasonal location. At the same time, 18 percent and 26 percent of the respondents intend to stay in East Mesa for more than six months of the year. Yet, these self-identified seasonal migrants do not consider Arizona their permanent residence (Sullivan and Stevens, 1982).

In a survey of seasonal migrants to Apache Junction, Arizona, 10 percent of travel trailer and 46 percent of mobile home residents stay 6-10 months of the year. A census of the park owners/managers reported that 30 percent of travel trailer and 38 percent of mobile home residents stay six months or more. Three percent of the travel trailer residents and 7 percent of the mobile home residents plan to make Apache Junction their permanent residence. (Happel, Hogan and Pflantz, 1988). The seasonal residents in this study are self-identified as such. By most definitions, those that stay more than six months are de facto permanent residents.

Canadian seasonal migrants to Florida showed a pattern of vacationing and increasingly longer stays in Florida prior to seasonal migration. Many bought a residence in their seasonal location. Seasonal residence in Florida was five months or less because Canadians lose their eligibility for medical care if they are out of Canada more than six months of the year (Longino et al., 1991). With such a constraint, seasonal migration will not lead to permanent migration, but the study does show a link between tourism and seasonal migration.

McHugh (1990), in reviewing the study of East Mesa reported above and studies of seasonal migrants in the Upper and Lower Rio

Grande Valley, concludes that seasonal migration is a life-style rather than a precursor to permanent migration.

The percentage of seasonal migrants who are considering a permanent move is lower than the *a priori* expectations of many researchers (Hogan and Steinnes, 1993). Using 1980 census data on seasonal and permanent migration to Arizona, Hogan and Steinnes (1993) find that seasonal and permanent migration are due to differential responses to factors that affect migration. Thus seasonal and permanent migrants are two separate migration streams--i.e. the alternatives are attractive to two different groups of retirees. While some seasonal migrants may make the switch to permanent migration, it is unlikely that most will.

Seasonal migrants are less likely than permanent migrants to move to an adjacent state because seasonal migrants are more likely to be seeking a climate change. Both streams respond positively to a higher winter temperature, but seasonal migrants respond more positively than permanent migrants. Seasonal migrants are more likely to come from rural areas than are permanent migrants. The rate of seasonal migration increases as income increases, perhaps because the cost of seasonal migration eliminates this option for some households. Similar coefficients on age reinforce the finding that the two groups are distinct migrant streams rather than seasonal migration being a precursor to permanent migration as seasonal migrants age (Hogan and Steinnes, 1993).

In an interesting twist, Longino et al (1991) move from the question of whether prior seasonal migration leads to permanent migration to suggest that prior permanent migrants attract seasonal migrants. In a study of retired seasonal migrants from Canada to Florida, 8-18 percent of the seasonal migrants had permanent resident family members within 50 miles. And 70 percent had permanent migrant friends within 50 miles. (The study did not ask if the friends were Canadian.) Longino et al (1991) suggest that the permanent resident family and friends provide a destination for seasonal migrants.

## Summary

The literature on permanent migration of retirees does not show a consistent connection between tourism and retirement migration. There may be several reasons for the lack of connection.

First, tourism is ubiquitous in American life. Almost all Americans have engaged in tourism at some point. Yet, the majority of retirees do not migrate. Thus, simple correlations would show no connection between tourism and retirement. This would be similar to showing a correlation between drinking milk as a child and drug use later in life.

Second, the question most often asked of migrants is of the general form, "Why did you move?" This elicits an implicit comparison of the current location with the previous location. The question only occasionally elicits a tourism response such as in the Sullivan and Stevens study in Arizona. Sometimes the question (or a follow-up question) is worded in the general form of, "Why did you move to this specific place?" That question also tends to elicit a comparative response with a previous place. The Miller et al. studies show this type of response. Questions of this nature stay at the level of "Evaluation of Residential Satisfaction" (Wiseman, 1980) and are unlikely to elicit any potential connection with tourism. In addition, because the questions are asked of migrants, they are asking about their residential satisfaction with the current community and not about the community they left because of some dissatisfaction.

Only when the question is asked in the form, "How did you find out about this specific place?" is the tourism connection elicited. Wiseman's (1980) conceptual framework would suggest that the previous two questions ask about triggering mechanisms and only the last question is tied to the destination selection. Cuba (1989), in the study of Cape Cod asks the question in this manner and finds that tourism is an important factor both for selecting a migration destination and for rejecting a destination.

A third reason for lack of a consistent connection between tourism and migration in the literature is that, for a given research project, other objectives (such as determining the economic or fiscal impacts of retirees) were more important and the researcher concentrated on those. Understanding the migration decision was a secondary objective and the questions were not as carefully asked. Research needs to be directed specifically at the decision process before the connection between tourism and migration emerges. The Cape Cod study by Cuba (1989) carefully investigated the decision process as its main objective.

It is also clear that factors other than tourism affect the retirement destination decision. The Cape Cod study, which showed the clearest link with tourism, also found that living near family and friends was an important consideration. For migrants to several of the communities in Arkansas, Oklahoma, and Texas, being near family was cited as an important attractive feature of the destination (Miller et al., 1994). Several studies found that social networks are important in destination selection (Wiseman and Roseman, 1979; Longino et al., 1991; Longino, 1981). The social network may become more important as retirees age and move in order to receive assistance (Stallmann and Jones, 1995).

Wiseman and Roseman (1979) point out that people may retire to a place they have never visited, such as a planned retirement community, based on the experience of family and friends. Migrants to Cherokee County, Oklahoma, and to Benton County, Arkansas listed the existence of planned retirement communities among their top 4 and 6 reasons, respectively, for choosing their destination. Recruiting by developers and realtors influenced retirees to migrate to the Ozarks (Longino, 1981).

Research also suggests that elderly seasonal and permanent migrants are two separate migration streams. Thus, seasonal migration in most cases will not lead to permanent migration. At the same time it should be pointed out that in most studies the seasonal migrant is self-identified as such. Many of these self-identified

seasonal migrants are de-facto permanent migrants because they live in the community for more than six months of the year.

This review of the research points to the need to use a conceptual framework of migration decision-making to determine the impact of tourism on migration. At the same time, the research points to other factors, such as social networks and the promotion of retirement communities, as an influence on the destination selection. Which of these factors is most important will vary among retirees. Research to identify types of retirees who respond to each factor would be useful to help communities target their attraction strategies.

Several states have launched programs to attract retirees (Reader, Hopper and Thompson, 1995). The research suggests that destination choice is community, not state, specific. The research suggests that communities that are tourism destinations also have the potential to be retirement destinations. Such communities may want to consider advertising their retirement potential to tourists. Communities that wish to attract retirees will need to evaluate not only features that attract migrants, but also the features that retirees feel detract from their communities. In addition, communities with mobile populations, college towns or communities with out-migration, may be able to target former residents and attract some "back home."

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