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FACULTY PAPER SERIES

FP 97-2 **October 1996**

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Seasonal Migration of Retirees: A Review of the Literature

by

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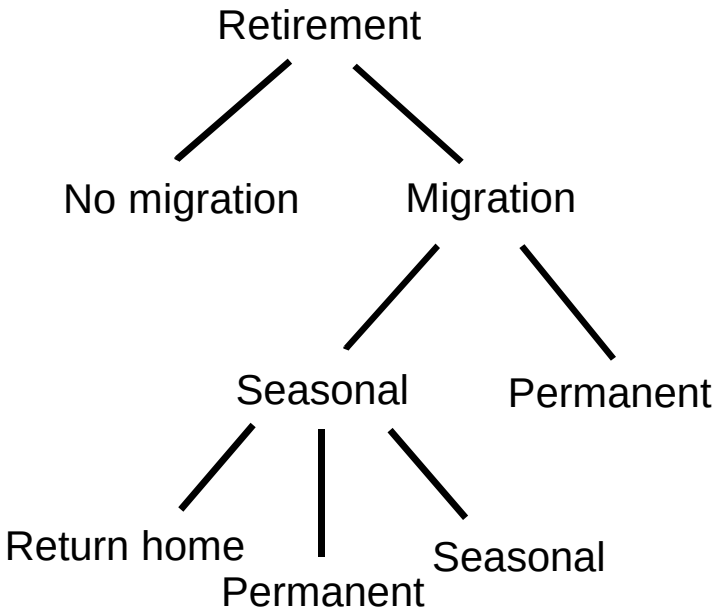
Introduction

More than forty years ago, a well-respected demographer stated that old people are not migratory but stay put more than any other age group (Thompson, 1951). Shortly after that demographers showed that while migration rates fall after about age 35, but, while still low, do increase at retirement age. That is people over 60 are more likely to migrate than people in their 50s (Sastry, 1992). This has led to a great deal of research on the impacts of elderly migration on the receiving communities. Much of this research has concerned rural communities, which have a net inmigration of the elderly. In fact much of the urban to rural population turnaround in the 1970s was the result of elderly migration (Beale, 1988).

Of those who do migrate, there are permanent migrants and seasonal migrants (Chart 1). Permanent migrants tend to sell their home and buy another home in their new community. Seasonal migrants maintain their home and buy or rent another dwelling in their seasonal community. Some seasonal migrants do not have a seasonal community, but live in a travel trailer and visit several communities. Seasonal migrants may continue their migration pattern for the rest of their lives, or may make a permanent move either to the seasonal community or back to the original community. At which point they become permanent migrants or non-migrants.

The research on retiree migration has tended to focus on permanent migration, perhaps because the demographic data are available. Particularly, the studies of the economic and fiscal impacts of migrating retirees have concentrated on permanent migrants (Siegel and Leuthold, 1992; Wood and Allen, 1993; Miller et al, 1994). But among the elderly there is also a considerable amount of seasonal migration--changes of residence for part of the year with a return to the permanent residence --which also has economic and fiscal impacts.

Chart 1: Retirement Migration Choices



Another reason
that there has been little research on seasonal migration is because seasonal migration is often considered part of tourism rather than migration. Tourism studies generally do not include a separate category for seasonal migrants (Happel, Hogan, Sullivan, 1983).

The objective of this paper is summarize the existing literature on seasonal migration by the elderly--the characteristics of seasonal migrants, the reasons for seasonal migration, and the economic and fiscal impacts of seasonal migrants on the receiving communities. In addition, seasonal migration's links to tourism and to permanent migration are examined.

SEASONAL MIGRATION

While the vast majority of elderly do not migrate, either seasonally or permanently, after retirement, migration rates do increase at retirement from pre-retirement rates (Wiseman and Roseman, 1979). Most migration takes place between and within urban areas, but there is a net outmigration from urban to rural areas. A pattern appears to be movement of both permanent and seasonal migrants from the snowbelt to the rural communities in the Sunbelt, to places such as Arizona, Texas, and Florida.

Seasonal migrants are often called snowbirds because the majority of them engage in seasonal migration each winter in order to escape the harsh winter of the snowbelt. While factors such as lower housing costs, recreational opportunities, and lower crime rates are some reasons why retirees migrate, less is known about why a particular community is chosen. In fact "...elderly migrants cannot be viewed as a homogeneous group. It appears that many patterns of elderly migration exist and that different subgroups of older people move for different reasons" (Wiseman and Roseman, 1979, p. 325).

Some retirees may consider communities or areas visited as tourists as potential retirement sites (Wiseman and Roseman). The resource amenity, the planned retirement, and the seasonal communities may fit this pattern. Some retirement moves, such as the old home town, the regional retirement center and the continuing care community would not fit this pattern (Stallmann and Jones, 1995). Even moves to some of the planned retirement communities are influenced by marketing rather than previous knowledge of the area (Wiseman and Roseman, 1979). While all retirees have probably engaged in tourism at some time in the past, the majority of retirees do not migrate. Thus, for only a small percentage of retirees does tourism lead to migration.

Sample Design

This paper reviews six studies of seasonal migrants in Arizona, Texas, and New York. The study from New York is particularly interesting because, unlike other studies, it interviews migrants at their permanent residence rather than at their seasonal residence and includes non-migrants in the sample for comparison. Only the New York study adopted a definition of a seasonal migrant, in all the other studies a seasonal migrant was self-defined. Although Florida is a mecca for retirees, no studies were found which provided information about their social characteristics nor about the economic impacts on the communities to which they migrate. The sampling frame used in each study is different and reporting conventions also differ among the studies making comparisons among the studies and generalizations from them difficult. To clarify these differences, we begin with a description of each study.

Data from the Upper Rio Grande, Texas, are the product of a February 1985 survey consisting of a questionnaire and an interview (Martin, Hoppe, Larson, and Leon, 1987). No geographical reference was provided regarding the specific location of the study area. The questionnaire was distributed to all 194 occupied units of a trailer park. The response rate after two weeks was 77%, that is 149 questionnaires. The study provided no further information about the method of distribution. Interviews were requested in 20% of the units

of six other randomly selected parks; this sample included 168 persons. The response rate was 66%, that is 110 interviews. The total sample consists of 259 responses obtained by questionnaire and interview methods.

The data for the Lower Rio Grande, Texas, study were collected through an annual survey, given in January 1979 (Rush, 1980). Business students placed copies of the self-administered two-page questionnaire in virtually all recreational vehicle parks in Cameron and Hidalgo counties and in tourist clubs in McAllen, Edinburg, Pharr, Harlingen, Brownsville, and Mission. Further information about the collection method was not provided in the study. The responses from recreational vehicle parks refer to visitors who stay in travel trailers. However, the study does not report which types of housing are represented in the responses obtained from tourist clubs. The percentage of responses that came from recreational vehicle parks and from tourist clubs was not reported. A total of 2,682 questionnaires, representing 5,036 persons, were returned and analyzed.

The surveys used to gather data for the Apache Junction, Arizona, study were distributed in two mobile home/trailer parks in early March 1986 (Happel, Hogan, and Pflantz, 1988). The questionnaires were distributed at a preannounced morning coffee meeting and collected the following week at another coffee meeting. These parks cater to the "lower end" of the market; hence, this sample is known to be income biased. The final data set contains 133 mobile home households and 93 travel trailer households. Some of the results reported were separated between mobile home and travel trailers while other results were aggregated. Estimates of the total number of seasonal migrants in the Phoenix area were obtained from a park census for the 1986-1987 season. These estimates were combined with expenditure information from the Apache Junction surveys to compute the economic impacts on the Phoenix area.

Another study was conducted in Arizona in November 1980 and it encompassed the East Mesa/Apache Junction area. This study will be referred to as the East Mesa study to avoid confusion with the study above. Questionnaires were distributed to all occupied spaces in one of the newer, larger travel trailer parks using 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 mobile home park. Due to the lack of a centralized message system in mobile home parks, the authors asked participants to fill out the questionnaire at a mid-March potluck supper. Questionnaires were made available, the method was not specified, to residents who did not attend supper. However, only the responses of the women were included in the final report to ensure compatability with the travel trailer park data. The final sample consists of 158 travel trailer responses and 65 mobile home responses.

A third study in the Phoenix, Arizona area uses data from a wide variety of sources to draw conclusions about the types of visitors that come to Phoenix area and their impact on the economy and services in the community. Data from *Arizona Tourism and Travel* (1981), a 1980 study conducted by the ASU Bureau of Business and Economic Research, provided information about the number of tourists visiting Arizona each year. Some expenditure information was obtained from the 1981 Phoenix Retired Couple's Budget. Information about the seasonal migrants's households and expenditures was also obtained from *Foresight Eighty*, a 1981 study of seasonal households conducted by Western Savings and Loan Association. Travel trailers were not included in that study. Seasonal winter residents in the Phoenix area are found in Scottsdale and Mesa/East Mesa/Apache Junction. This area of Mesa/East Mesa/Apache Junction will be referred to as Mesa in this study to avoid confusion with the two studies above. The authors also used the demographic and economic characteristics supplied by the Sullivan and Stevens study (referred to above as East Mesa). Social and economic indicator information is drawn from various sources: *1980 Census of Population, Supplementary Reports*; *Monthly Traffics Counts Station (1979)*; *Seasonal Patterns of Hospital Activity (1979)*; *Hospital Bed Plan of the Central Arizona Health Systems Agency (1977-1983)*; Arizona Emergency Medical Systems, Inc.; City of Scottsdale Planning Office (1982); and City of Mesa's *Planning and Community Development (1982)*. The census information on Maricopa County, Arizona included seasonal migrants who lived in all housing types, except resorts, motels, and hotels and those who stayed in the home of a permanent resident. The sample size was not provided.

In Tucson, Arizona, the sample was composed of housesholds whose head was at least 65 years old (Monahan and Greene, 1982). Census information indicated that mobile home parks, trailer courts, and apartment complexes attract large numbers of seasonal migrants. From this, a random sample of sites was generated by systematically including every fifth housing unit from a random starting point. Using this sampling method, interviews were obtained, whether by phone or in person was not specified, from 424 households. This yielded 281 winter visitors and 143 permanent residents. The authors note that "virtually all" of the permanent residents in the sample were earlier migrants themselves. The study does not state whether they were previously seasonal migrants. This study is biased by the age minimum of 65, which eliminates younger retirees.

The data in the New York study of Chautauqua County were collected from a 25% sample (N=1279) of all individuals aged 60 and over interviewed between June 1978 and March 1979 as part of nonmetropolitan 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. Respondants were not asked what time of the year they traveled, hence it cannot be assumed that these seasonal migrants are snowbirds, although analysis of the data suggests that most migrated during the winter months. This study is special in that it studies migrants in their state of origin and not in the destination state, like the other studies do, and thus we can compare them with non-migrants. This study is biased by the age minimum of 60.

Housing options for seasonal migrants include a second home, apartments, hotels, motels, trailer and mobile home parks, and staying with friends or relatives. The most common housing option among all studies was travel trailers and mobile homes. This suggests that seasonal migration is no longer confined to the affluent who can afford to maintain two separate, permanently fixed housing units (Sullivan and Stevens, 1982).
Literature on seasonal migrants focuses on those who choose to live in travel trailers and mobile homes. The two exceptions to this are the Tucson study which includes migrants living in mobile homes, travel trailer parks and apartment complexes and the Chautauqua County study which includes people living in many types of housing. None of the surveys included migrants living in motels and hotels or staying with friends and relatives.

General characteristics of seasonal migrants

Marital Status

Seasonal migration is a lifestyle practiced mostly by couples. All of the studies show that marriage rates among seasonal migrants are much higher than the national rate for people 60 and over (Table 1). In the Lower Rio Grande Valley, 92% of the sample were couples (only a few of which were of the same gender) (Rush, 1980). In Apache Junction, the authors reported that the sample was made up of almost entirely couples (Happel, Hogan, Pflantz, 1988). At the lower end, 72% of the seasonal migrants in the Chautauqua study were married (Krout, 1983). This is still higher than the national percentage for persons over 60. Only the non-migrants in the Chautauqua study were similar to the national average.

In the Upper Rio Grande sample more men (95%) than women (87%) were married (Martin, Hoppe, Larson, and Leon, 1987). This pattern reflects the 1980 US marriage patterns for persons 60 and over, when 79.1% of men and 44.9% of women were married. The relatively high marriage rate, compared to the US, for permanent residents in Tucson may be attributed to the fact that they were earlier migrants (Monahan and Greene, 1982). Previous studies show that retirees who migrate are married when they migrate and are more likely to be married than others in their age group (Longino and Biggar, 1981; Wiseman, 1980)

Married people are more likely to choose mobile lifestyles than the non-married. In Chautauqua County, a greater percentage of the seasonal migrants than of the nonmigrants are married (Krout, 1983). In the East Mesa study a greater percentage of the women in the travel trailer sample are married than of the women in the mobile home sample (Sullivan and Stevens, 1982). In Tucson more seasonal migrants than permanent residents, living in the same parks, are married (Monahan and Greene, 1982). The age difference might be explained if the fact that the permanent residents, previously were seasonal migrants, but are older and hence more are widowed. The study, however, says only that they are previous migrants. In addition, living in a travel trailer implies driving long distances in a large vehicle, while a mobile home implies driving a car (smaller vehicle) or flying to the seasonal home. A partner shares driving duties and provides the companionship that a mobile life style limits. Thus, it is not surprising that the travel trailer population is younger and more likely to be married.

In general seasonal migration is practiced mainly by couples because this mobile lifestyle limits interactions with other people. The more mobile the lifestyle, i.e., seasonal migration versus non-migration and travel trailers versus mobile homes, the higher the percentage of seasonal migrants who are married.

Table 1: Marital Status of Seasonal Migrants

Married (Percentage)	
Study	Overall
Upper Rio Grande	91%
Lower Rio Grande	92%
Apache Junction	almost all couples
East Mesa (travel trailer)	91.2%*
East Mesa (mobile home)	78.5%*
Tucson (seasonal migrants)	86.8%**
Tucson (permanent residents)	70.6%**
Chautauqua County (seasonal migrants)	72%***
Chautauqua County (nonmigrants)	57%***
US (1980) Persons 60 and older	59.2%

* Only women were interviewed
** Study participants had to be at least 65 years old
*** Study participants had to be at least 60 years old

Age

Even for simple data, such as age, different reporting conventions and sampling frames make comparisons among the studies difficult (Table 2). The Tucson and Chautauqua studies restricted age to persons over 65 and 60 respectively, leaving out younger retirees. Even among the unrestricted age studies, only in East Mesa were some respondents less than 60 years old (Sullivan and Stevens, 1982) suggesting that the age bias in the above two studies may not be large. In fact, the East Mesa study had the greatest age range among all studies reviewed: 45 to 83 years. Even though the Chautauqua County required a minimum age of 60 for participation it showed the highest average age of seasonal migrants (Krout, 1983). The average age of seasonal migrants ranged from 67 to 71 years.

Two of the studies did not provide average ages nor sufficient information to calculate them. Hence, for the Lower Rio Grande and Apache Junction only the medians are reported. The Lower Rio Grande study provides median age by sex and the Apache Junction study provides a range for the median age (Rush, 1980 and Happel, Hogan, and Pflantz, 1988). The median ages are within the range of the average ages reported in the other studies.

East Mesa mobile home dwellers tend to be older (68.6 years) than travel trailer dwellers (61.2 years) in the same study. On the other hand, Chautauqua County's seasonal migrants are older than nonmigrants, which is surprising because one would expect less moving, due to health reasons, as age increases. On average, Tucson's permanent residents are older than seasonal migrants since they were earlier migrants themselves (Sullivan and Stevens, 1982).

Table 2: Average Age of Seasonal Migrants

Study	Overall	Male	Female
Upper Rio Grande	67.5***	68.8	66.2
East Mesa (travel trailer)			61.2***
East Mesa (mobile home)			68.6***
Tucson (seasonal migrants)	67.3*		

Tucson (permanent residents)	68.9*		
Chautauqua County (seasonal migrants)	71**		
Chautauqua County (nonmigrants)	70**		
Lower Rio Grande (median)		67	64
Apache Junction (median)	68-70		

* Participants had to be at least 65 years old
** Participants had to be at least 60 years old
*** Average age calculated from midpoints of frequency distribution given in the study

Education

In all samples the vast majority of seasonal migrants had obtained at least a high school degree (See table 3). In the Upper Rio Grande Valley, women had slightly over a year more education than men, on average (Martin, Hoppe, Larson, and Leon, 1987). The average years of schooling in the Tucson study was lower for permanent residents than for seasonal migrants (Monahan and Greene, 1982). In Chautauqua County, seasonal migrants, on average, had two more years of education than nonmigrants (Krout, 1983). These results suggest that seasonal migrants have higher levels of education compared to various nonmigrating groups.

Average years of education were not reported in the East Mesa study, however, a breakdown of the ranges of education level was provided: 77.9% of the travel trailer sample and 78.4% of the mobile home sample completed high school or attended college (Sullivan and Stevens, 1982). No education information was available for the Lower Rio Grande.

Table 3: Average Years of Education

Study	Years of education
Upper Rio Grande	11.3
Lower Rio Grande	NA
East Mesa (travel trailer)	NA*
East Mesa (mobile home)	NA**
Tucson (seasonal migrants)	12.5

Tucson (permanent residents)	11.6
Chautauqua County (seasonal migrants)	11.9
Chautauqua County (nonmigrants)	10
Apache Junction (median)	12*
US Persons 60 or older (median)	10.6***

* 77.9% completed at least high school
** 78.4% completed at least high school.
*** Computed from March 1981 and 1980 Current Population Reports.

Race

Almost all seasonal migrants surveyed were white. In general, 99% or more of all the samples were white. The lowest percentage found was 91% among mobile home households in the East Mesa area (Sullivan and Stevens, 1982).

Retirement status

The majority of the people surveyed in all the studies were retired. Some were partially retired, as was the case of 8.4% of the Lower Rio Grande sample (Rush, 1980). In that same sample, 86.3% were fully retired. In the Upper Rio Grande Valley, 98% of males and 96% of females were retired (Martin, Hoppe, Larson, and Leon, 1987). In the East Mesa study, 99% of travel trailer and 91% of mobile home dwellers were retired (Sullivan and Stevens, 1982). In Tucson, 88.6% of seasonal migrants and 88.8% of permanent residents were retired (Monahan and Greene, 1982). In Chautauqua County, 90% of seasonal migrants and 79% of nonmigrants were retired (Krout, 1983).

Income

Because income information is difficult to obtain, each study reported income differently, making comparisons difficult. In general, the seasonal migrants surveyed fall in the range of lower-middle to middle income classes. All studies, except for Apache Junction, incorporated both groups. The Apache Junction study focused specifically on the lower end of the market (Happel, Hogan, and Pflantz, 1988). No income information was available for the Upper or Lower Rio Grande regions.

The Phoenix area study reported that the hypothetical typical retired couple required $11,488 in 1981 in order to maintain a moderate standard of living. They also reported that only 10% of Mesa seasonal residents had annual incomes above $25,000, while the

percentages above that level for Sun City and Scottsdale were 39% and 49%, respectively (Happel, Hogan, and Sullivan, 1983). In East Mesa, only 23.7% of the travel trailer sample and 39.6% of the mobile home sample had incomes of $15,000 or more in 1982 (Sullivan and Stevens, 1982).

Some studies support the conjecture that seasonal migrants tend to have higher incomes than other comparison groups. In Tucson 53.7% of seasonal migrants compared to 24.5% of permanent residents had household incomes of $15,000 or more (Monahan and Greene, 1982). In Chautauqua County 18.7% of seasonal migrants and 11% of nonmigrants had household incomes of $10,000 or more in 1978-1979 period (Krout, 1983).

Seasonal and Permanent Dwellings

Seasonal migrants enjoy a wide variety of housing possibilities. Some choose to live in single-family homes (often a second home) or apartments, others in hotels or motels, yet others prefer travel trailer and mobile home parks, and still others opt to live with friends or relatives. This suggests that seasonal migration is no longer confined to the affluent who can afford to maintain two separate, permanently fixed housing units (Sullivan and Stevens, 1982). In the Apache Junction area, seasonal migrants stay in a variety of dwellings: 47% in mobile homes or travel trailers; 23% in apartments, 15% in single family homes or condominiums, 8% in hotels/motels, and 7% with friends or relatives. The survey of Apache Junction referred to here only included seasonal residents in mobile homes and travel trailers. The vast majority of seasonal residents in the Lower Rio Grande Valley bring their own housing, such as campers, motor homes and travel trailers.

Many seasonal residents own a home. In the Upper Rio Grande Valley, 84% of the sample own a home; of these more than 75% own a home in their state of permanent residence (Martin, Hoppe, Larson, and Leon, 1987). This means that 63% of the seasonal migrants own their permanaent residence and 21% own a home in the Upper Rio Grande Valley. In the Lower Rio Grande study, 17.6% of the sample own property in the valley (mobile homes on small lots constitute most of these properties) and another 10.2% are considering such a purchase (Rush, 1980). In Chautauqua County, seasonal migrants are more likely to own a home (location unspecified); 81.2%, compared with 74.5% of nonmigrants (Krout, 1983).

Factors that determine seasonal migration

When asked why they migrate, seasonal migrants most frequently responded: to escape the cold winter in the snowbelt states. Not surprisingly, snowbirds planned their length of stay in the states they visited based upon the length and severity of the winter in the north. In Chautauqua, climate was the principal reason given by 74% of the seasonal migrants (Krout,

1983) and in East Mesa by 90% of the travel trailer and 86% of the mobile home dwellers (Sullivan and Stevens, 1982).

But climate was not the only reason that prompted retirees to migrate. In the East Mesa study respondents could give more than one reason for their seasonal migration. In addition to climate, (in order of most often cited response) respondent's own health or husband's health, visiting friends, and traveling through the area (tourism) were other circumstances which led to seasonal migration to Arizona . A smaller percentage of mobile home residents than travel trailer residents cited climate as the main reason (Sullivan and Stevens, 1982). In Chautauqua, seasonal migrants also could supply more than one reason for seasonal migration. These included: proximity to family, health, and recreational opportunities (Krout, 1983). Thus, tourism did not seem to play a major role in why seasonal migrants chose to migrate. No studies, however, asked how the specific community was chosen. Community choice may be influenced by tourism (Wiseman, 1980).

The length of stay by seasonal migrants varies, often based on the duration of winter in the snowbelt. In the Upper Rio Grande Valley (Martin, Hoppe, Larson, and Leon, 1987), visitors stay an average of 18.6 weeks. In the Lower Rio Grande Valley (Rush, 1980) the median length of stay is 16 weeks. In Apache Junction, 10% and 46% of travel trailer and mobile home visitors, respectively, stay 6-10 months. A census of park managers/owners reported that 30% of seasonal households living in travel trailers and 38% of those living in mobile homes stay 6 or more months (Happel, Hogan, and Pflantz, 1988). In East Mesa 75% and 63% of travel trailer and mobile home visitors, respectively, intend to stay 3-6 months, and 18% and 26% intend to stay more than 6 months (Sullivan and Stevens, 1982). Even more surprising is that these self-identified seasonal migrants do not consider Arizona their state of usual residence.

Link between seasonal and permanent migration

Only small percentages of seasonal migrants surveyed were considering permanent residence in the state to which they migrate seasonally: in the Upper Rio Grande Valley, 23% (Martin, Hoppe, Larson, and Leon, 1987); in the Apache Junction area, 3% of the travel trailer and 7% of the mobile home samples (Happel, Hogan, and Pflantz, 1988); and in the East Mesa, 25% of the travel trailer and 12.3% in the mobile home samples (Sullivan and Stevens, 1982). As noted above, a much higher percentage of seasonal migrants stay more than 6 months, making the seasonal residence a de facto permanent resident. It is also important to note that practically all the permanent residents surveyed in the Tucson study had migrated to the area but the study does not state whether they had first been seasonal migrants.

But why engage in seasonal migration and not permanent? Even in some extreme cases, such as in Apache Junction, when some visitors stay up to 10 months a year in a sunbelt state, they still do not consider the "visiting" state their state of permanent residence (Happel, Hogan, and Pflantz, 1988). This desire to still claim residence in their home state suggests that seasonal migrants are not yet ready to leave the familiar world they enjoyed before retirement. Those ties may still be too strong to be broken by a complete move to set up permanent residence elsewhere. In this sense, seasonal migration could serve as the means by which to gradually become used to the idea of a future permanent move or as the means to have the best of both worlds by not completely losing contact with old friends.

The percentage of seasonal migrants considering permanent migration was lower than the authors of this paper expected. Other researchers have also expressed this opinion (Hogan and Steinnes, 1993). Using 1980 Census data on seasonal and permanent migrants to Arizona (also the study area for many of the studies reviewed above), Hogan and Steinnes (1993)suggest that seasonal and permanent migrants respond differentially to factors that affect migration. Thus, seasonal and permanent migrants are two separate migration streams. While some seasonal migrants may make the switch to permanent residence, 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 than do permanent migrants. Seasonal migrants are more likely to come from rural areas than are permanent migrants. The rate of seasonal migration increases as incomes increase, perhaps because the cost of seasonal movement eliminates this option for some households. Reinforcing the finding that seasonal and permanent migrants are two separate migration streams is the finding that both groups have similar coefficients on age. This suggests that permanent migrants are not merely seasonal migrants who have aged.

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

Economic Impacts on the Receiving Community

Migrant retirees bring wealth into the communities they move to. The studies emphasize the economic impact that seasonal migrants have on the communities they visit. In all the papers reviewed, only the direct impact of the seasonal migrants' consumer expenditures were calculated. Because any multiplier effects generated have been ignored, the resulting figures constitute under-estimates of the actual economic impacts that seasonal migrants have on the communities they visit.

Although injection of wealth into the seasonal communities seems to be the case in the short-run while retirees are relatively young, active, and seasonally present in the community residents, this may not necessarily remain the case as the retirees become older and stop seasonal migration to become permanent residents of a community (Stallmann and Siegel, 1995). The papers reviewed did not consider the potential long-term impacts of the elderly on the communities they migrated to. For example, the economic impact of the permanent residents in Tucson, who had previously been seasonal migrants, was not discussed.

Table 4: Weekly Expenditures by Seasonal Migrants

Weekly Expenditures by Seasonal Migrants	
Lower Rio Grande	$ 105
Apache Junction (travel trailer)	$ 181*
Apache Junction (mobile home)	$ 206*

Phoenix	$ 239**

* Calculated from the monthly expenditures given in the study
** Calculated from the seasonal expenditures given in the study

Visitors to the Lower Rio Grande Valley had estimated weekly expenditures of $105 in 1979 (Rush, 1980). The expenditures included "food, housing, utilities, gasoline, clothing, etc" (Rush, 1980, p. 174). The question asked for an average of weekly expenditures and the checklist provided amounts with $25 increments from "less than $50" to "more than $150" (Rush, 1980, p. 174). The 2,682 families surveyed stayed an average of 16 weeks, and the authors assumed that they represented a conservative 10% of total seasonal visitors to the area. This implies that seasonal migrants to the Lower Rio Grande spent $45 million in the local community (Rush, 1980). If the direct impacts are accurately estimated, the actual total impact is likely to be larger.

Seasonal migrants interviewed in the Apache Junction area represent the lower end of the market. Expenditures in the Apache Junction survey included rent/lease, electricity, natural gas, telephone, groceries, auto and gasoline, entertainment, services, retail purchases, and other. Average weekly household expenditures were $206 by mobile home residents, and $181 by travel trailer residents. Of the 47,000 snowbird households (or approximately 94,000 persons) estimated from the park census, 25,400 households were estimated to live in mobile homes and 21,600 in travel trailers. Total expenditures on utilities (electricity, natural gas, and telephone) by park households are estimated to be over $18.5 million per season. Seasonal estimates for groceries and retail purchases, auto and gasoline, and entertainment and services are over $54, $13, and $26 million, respectively. Expenditures on rent or lease payments are estimated at $57 million for both travel trailer and mobile home visitors. Thus, seasonal residents directly inject an estimated $200.22 to $226.43 million per season into the local economy (Happel, Hogan, and Pflantz, 1988). The multiplier effect of the direct impact, which creates an additional contribution to the local community, was not calculated.

The seasonal migrants to Apache Junction (Happel, Hogan, and Pflantz, 1988) spend almost twice as much as seasonal migrants to the Lower Rio Grande (Rush, 1980). Unfortunately, the Lower Rio Grande study does not provide income estimates, so it cannot be determined if spending patterns are lower because incomes are lower. There are also two major differences between the migrants to the Lower Rio Grande and Apache Junction that could account for the large spending differences. First, in the Lower Rio Grande "the vast majority come equipped with their own transportation , housing, and recreational facilities" (Rush, 1980, p. 171). In contrast, "many mobile home (and travel trailer households) buy their accommodation units in the Phoenix area" (Happel, Hogan, and Pflantz, 1988, p. 126). The monthly payments for these units may be included in the "other" category (Happel, Hogan, and Pflantz, 1988). Secondly, mobile home dwellers in Apache Junction usually sign year-long leases (Happel, Hogan, and Pflantz, 1989), whereas the Lower Rio Grande study

suggests leases last only the length of stay of the snowbirds (Rush, 1980). Hence, the yearly lease expense spread over the actual length of stay could account for some of the difference in weekly expenditures.

Note also that weekly expenditures for mobile home households in Apache Junction are a bit higher than those of travel trailer households (Happel, Hogan, and Pflantz, 1988). "Mobile home households spend significantly more on groceries and electricity and significantly less on entertainment than do the travel trailer households, perhaps because of the larger living space (less confined area) in the accommodation unit" (Happel, Hogan, and Pflantz, 1988, p. 124) Overall, mobile home households spend more on most things (except rent/lease, entertainment, auto and gasoline) than do travel trailer households (Happel, Hogan, and Pflantz, 1988).

The Phoenix area study was the only other study that provided expenditure information. The authors reported that a hypothetical retired couple[2] in Phoenix, Arizona required $11,488 per year in order to maintain a moderate standard of living in the Phoenix area. The study also found that the typical seasonal couple stayed approximately 4 months. This implies an expenditure of $3,829 per seasonal household in 1981, which implies weekly expenditures of $239. Based on a population of 35,600 seasonal households (22,800 in fixed-base housing units and an additional 12,800 in travel trailers), seasonal residents are estimated to have spent $136 million in 1981. In all likelihood, these expenditures generated additional multiplier effects (Happel, Hogan, and Sullivan, 1983).

Fiscal Impacts

Retirees also generate revenues and costs for local governments. In the Apache Junction area, mobile home and travel trailer households were estimated to have contributed $10 million in sales tax, rental occupancy tax, motor fuel tax, and utility tax revenues in 1986-87. That is, $45 per seasonal household per month. This is an estimate of only the four major taxes paid by seasonal residents. Other taxes they would incur include property taxes on mobile homes and land (owned or incorporated in rent/lease payments); vehicle license taxes paid on cars, trucks, RV's, and travel trailers, kept in Arizona; sales taxes on vehicles and travel trailers; and taxes on tobacco and alcohol products purchased in the state.

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[2] "Foresight Eighty reports the results of a survey conducted by M. R. West, Inc. for Western Savings and Loan Association between November, 1979 and January 1980. Five thousand one hundred (5,100) permanently fixed housing units, including mobile homes, were selected using a stratified probability sampling design with quotas. Although no distinction is made as to when these part-timers resided in the state, the survey date leads us to expect that the vast majority are winter visitors, especially since many part-timers come from Canada, Michigan, Minnesota, Washington, and Illinois (p. 228)," (Happel, Hogan, Sullivan, p. 9, 1983).

In the Phoenix area, it is estimated that the seasonal households paid $23 million in sales tax in 1981. This translates into $48 per seasonal household per month (Happel, Hogan, and Pflantz, 1988). No other revenue sources were estimated in the Phoenix study.

Table 5: Selected Monthly Fiscal Revenue Generated by Seasonal Migrants

Selected Monthly Fiscal Revenue Generated by Seasonal Migrants	
Apache Junction	$45*
Phoenix	$48**

* Only included sales, rental occupancy, motor fuel, and utility taxes
** Only includes sales tax.

A seasonal index for sales tax revenues in Mesa for the period 1977-1981 are highest from November through May the indexes are higher. For fiscal years 1977-78, 1978-79, 1979-80, and 1980-81 the lowest indices are 0.8, 0.81, 0.85, and 0.78, corresponding to the months of June, June, July, and October, respectively. The highest indices were 1.28, 1.30, 1.31, and 1.25 in the months of December for the first three years and November for the last year. The November-December increase could be attributed to the holidays, but not the increases from January through May. June's index has been increasing also, suggesting that seasonal migrants are staying longer (Happel, Hogan, and Sullivan, 1983). This indicates that seasonal migrants have a marked impact on the economy of the communities they move to. Not only do the indexes show an increase in sales tax revenues during the first months of the year, which are usually low sale periods in the retail business, but the trend seems to indicate that the increase in revenue is lasting longer into the year, as migrants extend their stays in the communities they visit. Average seasonal indexes for restaurant sales taxes and rental sales taxes in Scottsdale for the period 1977-1980 also show a pattern of increases from December through May. In the index for rental sales tax, however, the month of September is unexpectedly high (Happel, Hogan, and Sullivan, 1983).

Only one of the studies provided information about public expenditures caused by retirees. The Phoenix area study provides data that illustrate significant increases in service demands during the peak months of seasonal migration, January through April. Monthly traffic counts in Mesa and Scottsdale for 1979, show that the average for peak volume hour ranges from the lows of 1645 and 1836 in July and June, respectively to highs of 4044 and 2658 in March and January, respectively. The months with the highest seasonal indices are January through March for Mesa and January through April for Scottsdale (Happel, Hogan, and Sullivan, 1983).

Occupancy rates of hospitals during 1976 ranged from 73.9% in July to 96.5% in March for Mesa community hospitals and from 68.9% in July to 91.6% in March for Scottsdale community hospitals. Monthly emergency room admissions in Mesa Lutheran Hospital in 1982 were 1901 in February and steadily dropped to 1339 in June (Happel, Hogan, and Sullivan, 1983).

Monthly sewage flows in Scottsdale for the 1976-1980 period ranged from a low of 7.14 millions of gallons per day in July to 9.03 million in February. A seasonal index shows the peak months are January thru April. These increases in need for roads, hospital, and other public services represent a cost to the host community, but no study quantified these costs (Happel, Hogan, and Sullivan, 1983).

The Apache Junction area experiences some environmental problems due to landscaping. During the off season, the parks become barren fields. In addition, the local residents complain about the reduction in their quality of life due to the number of winter residents. The increase in population causes congestion, which increases commuting, shopping, and driving time for permanent residents. In addition, permanent residents attribute the deterioration of the roads to overuse caused by seasonal migrants (Happel, Hogan, and Pflantz, 1988).

Policy issues

At the time of most of these studies, revenue-sharing was an existing federal program which allocated revenues to the states based on the number of permanent residents. Many of the studies were concerned with the fact that, although many seasonal migrants stayed a large portion of the year, they did not consider themselves permanent residents. For example, some Apache Junction snowbirds stayed up to 10 months, but did not consider themselves permanent residents of Arizona (Happel, Hogan, and Pflantz, 1988). The concern was that the seasonal communities were not obtaining their "fair share", given the large number of seasonal migrants they had. Although such a program is no longer in place, the concern still exists for other federal assistance programs which take permanent population into consideration.

Conclusion

The most often cited reason for engaging in seasonal migrantion was climate-- escaping the harsh northern winters. Other reasons were health, visiting friends, traveling through the area (tourism), to be near family, and recreational opportunities. While seasonal migration has the potential to lead to permanent migration, the studies reviewed indicate that few of the people surveyed were considering such a move. On the other hand, many of the seasonal migrants resided in the area more than half of the year. Because seasonal and

permanent migrants are two separate streams of migrants, the majority of seasonal migrants will continue that lifestyle Hoppel and Steinnes19).

In general, seasonal migration is practiced by couples. Few elderly travel alone. Although reporting conventions and sampling frames differed, their average age is in the late sixties, although in Chautauqua the average age was in the low seventies (Krout, 1983) and for travel trailer dwellers in the East Mesa average age was in the low sixties (Sullivan and Stevens, 1982). Most seasonal migrants have achieved at least a high school education. When comparison groups were available, the data suggest that seasonal migrants have higher levels of education than nonmigrants and are more likely to be married. Seasonal migrantion is not reserved only for the affluent. Many seasonal migrants are lower-middle income.

The studies reviewed indicate that seasonal migrants are not solely attracted to rural areas, but also to urban areas, as shown by the studies in Apache Junction, East Mesa, Tucson, and the Phoenix area, Arizona, (Happel, Hogan, and Pflantz, 1988; Sullivan and Stevens, 1982; Monahan and Greene, 1982; Happel, Hogan, and Sullivan, 1983).

Expenditures by seasonal migrnts directly inject money into the economy and create jobs. The multiplier effects of those injections were not estimated. The studies of seasonal migrants were not sufficiently rigorous to determine the net economic impacts on the seasonal communities

In addition, some studies addressed the fiscal impacts of retirees on the seasonal communities. Several studies found retirees cause increases in demand for services (Monahan and Greene, 1982; Happel, Hogan, Pflanz, 1988; Hogan, Happel, Sullivan, 1983). However, none of the studies related the costs of these increases in demand to the public revenues generated by retirees. The studies which included revenues generated by retirees did not include all sources of public revenues in their estimate. The area of economic and fiscal impacts of seasonal retirees is clearly an area where more research is needed. We cannot conclude whether the retirees generated a net fiscal cost or benefit for the communities.

In addition we were not able to identify any study which identified the economic and/or fiscal impacts of seasonal migration on the communities that are the permanent residence of the seasonal migrants. The loss of expenditures for several months is likely to have a negative economic impact on that community. The probable net fiscal impact on these communities is unclear.

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