

## CHAPTER 8

### SOCIAL INTEGRATION AMONG OLDER IN-MIGRANTS IN NONMETROPOLITAN RETIREMENT DESTINATION COUNTIES:

*Establishing New Ties*<sup>1</sup>

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#### INTRODUCTION

Migration is closely associated with various life course transitions, and, as Longino (1990) and others have shown, retirement and migration are frequently linked. While the 2000 CPS showed that older persons tend to have a relatively low propensity to migrate (only 2.0 percent crossed county lines from 1995 to 2000 compared with 8.6 percent of persons aged 30–34), when they do move, they are more likely to move to nonmetropolitan (nonmetro) destinations.<sup>2</sup> As a consequence, older persons have made a positive contribution to nonmetro population change in each decade since the 1960s. Regardless of the overall direction of metro to nonmetro migration—positive in the 1970s and 1990s and negative in the 1980s—more older persons have moved to nonmetro areas than in the opposite direction in each decade since the 1970s (Fulton et al., 1997).<sup>3</sup> Counties with higher than average net in-movement of older persons are among the most rapidly and consistently growing types of nonmetro area. During the 1990s, for example, nonmetro counties with 15 percent or higher net in-migration of persons aged 60 or older grew by 28 percent compared with 8 percent for other nonmetro counties. Retirement destination counties, by definition, attract older migrants, but they also attract working-age persons who obtain jobs in economic activities induced by the in-flow of retirees (Johnson & Fuguitt, 2000). Hence, retirement migration has been an engine of nonmetro economic and demographic growth, and many states and localities have developed explicit strategies to attract retirees (Reeder, 1998; Stallman & Siegel, 1995).

While a substantial amount of research has examined the geographic mobility of older Americans (De Jong et al., 1995; Litwak & Longino, 1987) and the social and economic effects of retiree migration on destination communities

(Glasgow & Reeder, 1990; Siegel et al., 1995), few studies have focused on the social adjustment of older in-migrants in nonmetro retirement destinations. Our research seeks to fill this gap by examining migrants' formal and informal social relationships and comparing their degree of social integration with that of longer-term older residents of retirement destination counties. This chapter contributes to a larger study of social integration and well-being of older in-migrants to nonmetro retirement counties. The overall hypothesis motivating the work is that older in-migrants to nonmetro counties who establish extensive and meaningful social relationships are expected to age more successfully than their counterparts who fail to establish effective social relationships and involvements.

Our goals in this chapter are: (a) to examine the selectivity of migration to nonmetro retirement destination counties by describing the social, economic, and health characteristics of a sample of older in-migrants and comparing them with longer-term older residents of the same counties; (b) to examine migrants' degree of formal and informal social integration, and compare their social involvement with that of longer-term older residents; and (c) to examine the determinants of social participation among elders in nonmetro retirement destinations. This analysis sheds light on the process by which older migrants build social ties and establish social relationships and participation in their new communities. We will not examine the link between social integration and social well-being *in this paper* because this depends on the availability of data from a re-contact survey that was just conducted in 2005. Rather, our purposes in this paper are to establish a baseline of information of migrants' and non-migrants' health, socioeconomic status, and social participation, and to examine the process by which older in-migrants become socially integrated subsequent to moving to nonmetro retirement counties.

Newcomers' integration is important from both the community's and individual migrants' perspectives. More effective integration into the community contributes to migrant health, longevity, and overall quality of life. From the destination community's point of view, better-integrated migrants provide time, experience and know-how that can contribute to accomplishing important communal goals.

## CONCEPTUAL FRAMEWORK: MIGRATION AND SOCIAL INTEGRATION

### Migration and Social Networks

Migration is a permanent or semi-permanent change of residence that disrupts everyday social relationships (Long, 1988). Hence, even when migration is voluntary, which is usually the case with retirement migration, it is initially disruptive of long term social involvements. Older in-migrants to nonmetro retirement destinations face the challenge of establishing new social relationships, and some persons are more successful in doing this than are others. As indicated earlier, few studies have focused on the adaptation of older migrants to nonmetro retirement

areas, even though migrant adjustment has been a major focus of research on international migration. Such studies demonstrate that social networks are a critical element in the migrant incorporation process (Alba & Nee, 1999; Zhou & Logan, 1991). They show that having access to co-ethnic social capital in the destination facilitates migrant adjustment and that maintaining social relationships with one's community of origin can also affect the adaptation experience. Accordingly, in addition to examining the usual socioeconomic correlates of social integration, our study examines the extent to which older in-migrants to nonmetro retirement counties had pre-existing social relationships in destination communities and whether they maintain contacts in their origin community subsequent to moving to a nonmetro retirement destination. The presence of pre-existing relationships might facilitate older migrants' success in becoming socially integrated in nonmetro retirement destinations, and, conversely, maintaining contact with one's origin might diminish one's inclination to become socially involved in a new area of residence.

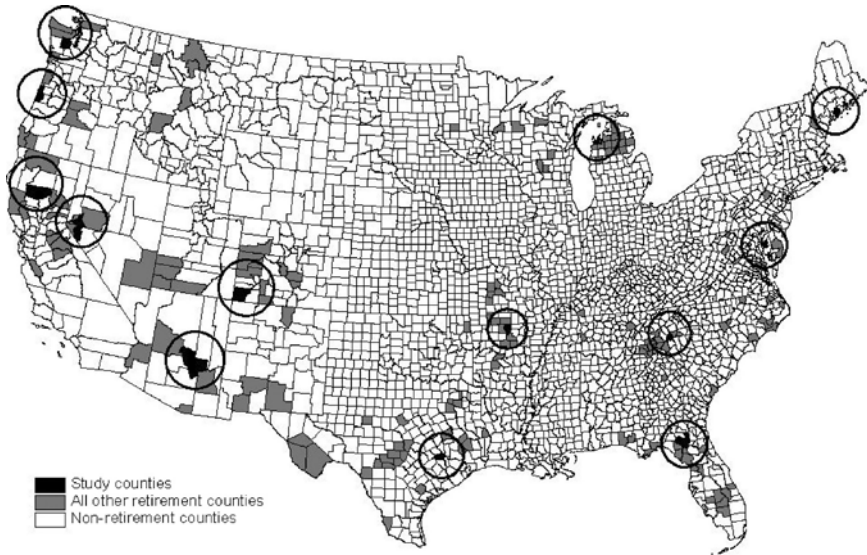
### Social Integration

We follow Pillemer, Moen, Wethington, and Glasgow in conceptualizing social integration as "the entire set of an individual's connections to others in his or her environment" (2000, p. 8). This broad definition of social integration refers to both participation in meaningful roles and the network of social contacts. Hence, to say that an individual is highly integrated in this sense means being embedded in a network of social ties, the most proximate of which are family, friendships, and affiliations with community organizations (Booth et al., 1991; Glasgow & Sofranko, 1980). This usage differs from narrower conceptualizations simply involving the personal support that people gain through family and friendship networks. In contrast, our concept also includes participation in clubs, volunteer agencies, and other organizations. While family and friendship relationships tend to yield emotional support, information, and various resources and services (such as caregiving and transportation), formal organizations serve as educational arenas where participants become better problem solvers, and they provide bridging ties linking persons to a constellation of community organizations that provide information and supportive services. Both formal and informal social integration have been shown to enhance older people's well-being (Glasgow, 2004; House et al., 1988; Moen et al., 1989; Young & Glasgow, 1998).

### THE RETIREMENT MIGRATION SURVEY

This research examines survey data obtained from recent older migrants to nonmetro retirement destination counties and a matched sample of longer-term older residents of these same counties. Nonmetro retirement destination counties

*Figure 8.1. Nonmetropolitan Retirement Destination Counties as Defined in 1990*



*Source:* ERS-USDA, based on the results of the 1990 Census of Population.

*Note:* A nonmetro retirement destination county is defined as having 15% or greater increase in population aged 60+ from in-movement between 1980 and 1990.

are defined as having a 15 percent or greater increase in population age 60+ from in-movement between 1980–1990 (Cook & Mizer, 1994).<sup>4</sup> From the list of 190 nonmetro retirement destination counties, we selected 14 counties that reflect the diversity of contexts represented in this analytical category. Even though nonmetro retirement destinations are concentrated in the South and Southwest, we purposely selected study sites in other regions where retirement migration is also well established (see Figure 8.1). Hence, while our survey data are not statistically representative of the older population living in the 190 nonmetro retirement destination counties, they do reflect the broad diversity of local conditions contained in areas that attract older persons to nonmetro America.

Data were collected by Cornell University's Survey Research Institute in the fall of 2002 using computer-assisted telephone survey techniques. Age-targeted samples for the 14 study counties were obtained from a commercial vendor, and respondents were screened with respect to residence in a study county,<sup>5</sup> age 60 to 85, and length of residence. Migrants were defined as persons who had lived in the county for five or fewer years. The sample was stratified to obtain approximately equal numbers of migrants (368) and longer-term residents (420). The resulting

sample represents the population age 60–85 in these 14 counties. When a contacted household contained more than one person age 60–85, one older household member was chosen randomly to be the respondent. Each telephone interview lasted approximately 30 minutes.

## NONMETRO RETIREMENT DESTINATION COUNTIES

### Definition and Location

While only 190 counties meet the nonmetro retirement destination criteria, past research indicates that retiree in-migration at somewhat lower rates is a widespread phenomena throughout much of nonmetropolitan America. In other words, achieving the status of a retirement destination may be somewhat rare, but older migrants are moving to rural counties throughout the nation at somewhat lower rates. Hence, our examination of retiree adjustment has relevance far beyond the small set of counties where the rate of older in-migration is highest.

Nonmetro retirement destination counties are disproportionately located in the Southeast, Southwest, Mountain, and Pacific Coast sub-regions (see Figure 8.1). They are most likely to be located in amenity-rich retirement areas with warm climates, especially those with lakes, coastal areas, and other scenic resources. However, some nonmetro retirement destinations are located in Michigan and Wisconsin, the Missouri Ozarks, and in New England. Many retirement areas have recreation- and resort-based economies which may have been well established prior to the initiation of retirement in-migration.

### Comparative Profile of Retirement Destination Counties

The data in Table 8.1 show that retirement destinations are areas of growth and socioeconomic advantage. Retirement destination counties grew by 28.4 percent between 1990 and 2000 compared with only 8.3 percent for other nonmetro counties (Table 8.1). Moreover, almost one out of every four residents of retirement counties lived elsewhere five years prior to the 1990 and 2000 censuses compared to only about 18 percent in other nonmetro areas.

Compared with other nonmetro counties, retirement destinations had a slightly lower percentage of their population aged less than 20, and a slightly higher share above age 65. This is unsurprising given the fact that this category of counties had relatively high in-migration at age 60 and above during the previous decade. The percent 65 and above remained constant during the 1990s in both retirement and non-retirement counties because new entrants to these age groups were relatively few since they are members of small depression-era birth cohorts. However, the percentage 65 and above will increase rapidly in the near future when the large baby boom cohorts begin entering this age group.

*Table 8.1. Comparative Profile of Retirement Destination and Other Nonmetro Counties, 1990–2000*

	Retirement Counties (N = 190)		Other Nonmetro Counties (N = 2115)	
	1990	2000	1990	2000
Percent of Population				
Under age 20	28.4	25.9	30.2	28.5
Ages 20–64	54.8	56.3	54.1	56.1
Ages 65+	18.8	18.8	15.7	15.5
Median Per Capita Income in 1999 (USD)	\$11,305	\$17,807	\$10,194	\$16,046
Median Household Income in 1999 (USD)	\$22,732	\$34,490	\$21,637	\$32,258
Percent Below Poverty Level	15.0	13.3	18.0	14.9
Percent of Population Employed (Age 16+)	52.0	52.5	55.2	56.1
Percent of Population Unemployed (Age 16+)	3.9	3.4	4.0	3.5
Percent of Population Age 5+ Years				
Lived In A Different County In 1995	25.3	24.3	18.0	18.8
Percent of Population Change, 1990–2000		28.4		8.3

*Source:* 1990 and 2000 US Census of Population.

Retirement destination counties are substantially better off financially than other nonmetro counties. Retirement counties have higher income and lower poverty rates than their counterparts with lower rates of retiree in-migration. The relative income of retirement destinations and other nonmetro counties was essentially unchanged between 1990 and 2000, although retirement destinations increased their advantage slightly with respect to median household income (the ratio increased from 1.05 to 1.07). Relative income examined through the lens of personal income and poverty, however, was the same in both 1990 and 2000. Employment-related measures are very similar in both county types. Residents of non-retirement counties are only slightly more likely to be employed than persons living in retirement destinations, and this difference has remained essentially constant since 1990. Similarly, unemployment rates do not vary between retirement and non-retirement counties.

These data are consistent with previous research (Longino & Crown, 1990; Glasgow & Reeder, 1990) demonstrating that retirement in-migration has a positive impact on nonmetro economies. Hence, it is understandable that state and local areas have devoted significant resources to attracting retirees as an economic development strategy (Reeder, 1998). Given the expectation of rapid aging during the next several decades, this further underlines the importance of understanding the retiree migration process as an aspect of rural social and economic change during the 21<sup>st</sup> century.

WHO MOVES TO NONMETRO RETIREMENT DESTINATIONS,  
AND WHERE DO THEY COME FROM?

Metro-Nonmetro Origin

Previous research had shown that older in-migrants to nonmetro retirement destinations came overwhelmingly from metropolitan places. In fact, Glasgow’s (1995) study of service utilization among older in-migrants to nonmetro retirement destinations in the Middle Atlantic region showed that nine of ten originated in metropolitan areas. In contrast, our data show that a much lower share of older in-migrants originate in metropolitan counties. As shown in Table 8.2, over one quarter of in-migrants come from other nonmetro counties.<sup>6</sup> Moreover, nonmetro-origin in-migrants are more likely to cross state boundaries while metro-origin in-migrants are evenly split between the same and a different state. Glasgow’s data were collected in 1993 when the “rural rebound” was in full swing, while our survey was conducted in 2002 when the volume of migration of older people to nonmetro areas had diminished (Johnson & Fuguitt, 2000).<sup>7</sup> Hence, the geographic pattern of older migration to nonmetro areas may have changed during this time as well. In addition, Glasgow’s earlier survey was restricted to the Middle Atlantic region with its plethora of large metro areas, and this may account

*Table 8.2. Metro-Nonmetro Origin of In-Migrants to Nonmetro Retirement Destinations, 2002*

	Residence Category		Total
	Metro	Nonmetro	
Same State	35%	11%	54%
Different State	37%	16%	46%
TOTAL	73%	27%	100%

*Source:* Cornell Retirement Migration Survey.

for the somewhat different origins of older migrants in the present study which was conducted in 14 different nonmetro locations throughout the United States.

#### Characteristics of In-Migrants to Nonmetro Retirement Counties

The data in Table 8.3 show a comparative profile of migrants and longer-term older residents. These data reconfirm the results of previous research indicating that older migrants to nonmetro retirement destinations are positively selected (Glasgow, 1995; Longino, 1990). In-migrants are younger, more likely to be male (because they are younger and more likely to be married and living with their spouse), and more highly educated. The education data for longer-term residents are higher than expected. While longer-term residents have less education than in-migrants, over one third of longer-term residents have completed college, and only 8 percent have less than a high school education. The unexpectedly high percentage of college graduates among longer-term residents may reflect the fact that nonmetro retirement destinations have been attracting older migrants for some time, and hence many longer-term residents may themselves have been migrants at a previous time. This would diminish the socioeconomic differences between older in-migrants and longer-term older residents.

Nine out of ten in-migrants have retired at least once in their life compared with 83 percent of longer-term older residents. However, between 35 and 40 percent of both migrants and longer-term older residents currently work for pay. Some of these persons are labor force re-entrants, while others have worked continuously without ever retiring. The importance of current earnings, however, should not be over-emphasized. Less than two out of ten respondents reported that earnings from work were an important component of their current total household income. By comparison, 60 percent of longer-term residents and in-migrants indicate that Social Security is important, and over half of in-migrants and 40 percent of longer-term residents state that savings are a very important component of their total income (data not shown here). In summary, while these data show the familiar selectivity of in-migrants, differences between migrants and longer-term older residents of nonmetro retirement destinations are less than expected.

Similar to the socioeconomic data shown above, the data in the lower part of Table 8.3 indicate that in-migrants are in somewhat better health than longer-term residents, but the differences are modest.<sup>8</sup> The most important conclusion that can be drawn from these data is that older residents of the 14 nonmetro retirement destination counties are in remarkably good health, regardless of their migration status. This lack of difference is surprising since longer-term residents are significantly older, on average, than their in-migrant counterparts. Still, over 80 percent of both groups rate their health good or excellent, less than one third have been diagnosed with a new medical condition during the past two years, and fewer than one in four have stayed overnight in a hospital during this time. Predictably, respondents report a very low level of activity limitation, with longer-term residents



Table 8.3. Comparative Profile of In-Migrants vs. Longer-Term Older Residents in Nonmetro Retirement Destinations, 2002

	Migrants	Non-Migrants
<i>Demographic and Socioeconomic Characteristics:</i>		
<i>(Percent unless otherwise noted)</i>		
Median Age (years)	68.1	71.0
≥70 yrs	36.8	56.6
Female	48.6	66.2
<High School	3.5	8.1
High School Graduate	23.9	28.5
College or Post-Graduate	43.5	34.7
Ever retired	91.0	82.7
Currently working for pay	36.9	34.8
Median years in county	2.9	22.1
<i>Health Status:</i>		
Rating health good or excellent compared to others	85.8	81.9
Having illness or injury during past two years	28.3	31.4
<i>Utilization of Medical Care:</i>		
Visited doctor ≥10 times in past yr.	15.1	18.5
Stayed overnight in hospital in last 2 yrs.*	21.6	23.8
More than 1 overnight stay	29.5	38.0
<i>Activity Limitation:</i>		
Limited with respect to:		
Walking 6 blocks	22.0	29.0
Climbing stairs	19.0	21.1
Doing household tasks	12.8	16.0
Going shopping	8.1	10.2
Volunteering	9.1	16.4
Driving a car	8.1	9.1
Participating in recreation	18.8	25.5
Bending, kneeling, or stooping	26.9	26.3
	(N = 368)	(N = 420)

\* Respondents with at least one stay.

Source: Cornell Retirement Migration Survey.

experiencing slightly more limitations but for the most part still being able to participate in the activities of daily living.

#### LEVEL OF SOCIAL PARTICIPATION AMONG MIGRANTS AND LONGER-TERM OLDER RESIDENTS OF RETIREMENT DESTINATIONS

Our general expectation was that in-migrants would be substantially *less* well integrated in the retirement destination communities than longer-term residents. Simply comparing persons who have lived in a place for five or fewer years (migrants) and persons who have lived there for more than five years (non-migrants), however, could be problematic if a substantial number of non-migrants moved in a couple of years before the somewhat arbitrary five-year cut off. Fortunately, this is not a problem in the present research because while some longer-term residents did move to the retirement destination during the past decade, most have lived there far longer. In fact, longer-term residents have lived in their current county for an average of 22.1 years (Table 8.3); 46 percent have lived in their current county for 20 years or longer, and less than 25 percent have lived there for 10 or fewer years (data not shown).

#### Informal Social Relationships

As expected, the data in Table 8.4 show that longer-term residents are more likely to have primary group relationships in the retirement destination counties than is true of in-migrants. However, in-migrants also have a considerable number of family and friend connections in their new communities. Half of longer-term older residents have at least one child within a half hour drive, and a quarter have two or more children close by. Grandchildren and other relatives are also quite

*Table 8.4. Informal Social Relationships of In-Migrants and Longer-Term Residents of Nonmetro Retirement Destination Counties, 2002*

	Migrants	Non-Migrants
Percent with at least 1 child within 1/2 hour	34.9	49.7
Percent with 2 or more children within 1/2 hour	8.4	24.2
Percent with at least 1 grandchild within 1/2 hour	28.6	39.7
Percent who see their children 5 or more times per year	41.7	51.8
Percent with other relatives within 1 hour*	31.8	42.0
Frequency of visits with friends	1–2 times/wk	1–2 times/wk.

\* Other than children and/or grandchildren.

*Source:* Cornell Retirement Migration Survey.

accessible to longer-term residents. Similarly, a fairly large number of recent migrants to nonmetro retirement destinations have family members living nearby. While their level of access to family is less than that of longer-term residents, over one third of migrants have a child within a half hour drive, 29 percent have grandchildren nearby, and 32 percent have other relatives in their immediate vicinity. These findings are in contrast to Litwak and Longino's (1987) developmental theory of elderly migration which hypothesizes that retirees move to amenity-based locations at the time of retirement and subsequently make a second move to be close to their children later in life, especially if they experience declining health or an adverse life course event such as the loss of their spouse. In contrast, our data seem to indicate that many older persons consolidate their family ties much earlier in life during their first move after retiring.

These data provide insights into the destination selection process among older persons who move to nonmetro retirement destinations. It seems obvious that, in addition to amenities, the location of family and friends is an important consideration in their destination choice. Our survey (data not shown here) show that four of ten migrants visited friends in their new communities prior to moving there, and 48 percent of migrants with relatives in the destination county visited them prior to moving in. Thus, for many migrants, destination choice is steered by the location of friends and relatives. Physical access to friends and family is reflected in visitation patterns. Both migrants and longer-term residents report average visiting of once or twice per week. From the standpoint of informal social integration, older residents of nonmetro retirement counties, both recent migrants and longer-term residents, appear to have ample opportunities to interact with and obtain support from friends and family.

#### Formal Social Participation

Participation in formal organizations and community activities is shown in Table 8.5. Over two-thirds of longer-term older residents participate in at least one type of formal organization compared with 58 percent of in-migrants. Longer-term residents are somewhat more likely to participate in service, political, and volunteer organizations, but migrants and non-migrants are equally likely to participate in social clubs (although longer-term residents belong to more clubs). Similarly, participation in community activities does not vary much between migrants and longer-term older residents. Longer-term older residents attend religious services more regularly, but in-migrants are more likely to participate in team or individual sports, to attend cultural events, and to use a gym or health club or take an exercise class. Hence, while the data in Tables 8.4 and 8.5 show that longer-term older residents are somewhat more integrated in both informal social relationships and formal organizations, migrant vs. non-migrant differences in participation are modest. Clearly, *migration status is not the principal factor explaining why some older residents of nonmetro retirement counties are more socially integrated than others.*

*Table 8.5. Formal Social Participation of In-Migrants and Longer-Term Residents of Nonmetro Retirement Destination Counties, 2002*

	Migrants	Non-Migrants
<i>Participation in Formal Organizations:</i>		
Percent participate in at least 1 type of formal organization	58.5	63.4
Percent participate in service organizations	22.8	31.0
Median number of organizations	(1)	(2)
Percent participate in political organizations*	8.9	13.1
Percent participate in social clubs	32.3	32.6
Median number of clubs	(1)	(2)
Percent participate in organized volunteer activity*	38.1	42.6
<i>Participation in Community Activities:</i>		
Average frequency of attendance at religious services	Monthly	2–3 times/month
Percent never attend:	36.3	32.1
Percent attend sometimes or often:		
Senior Center	12.3	12.6
Adult Education	16.6	18.4
Team or Individual Sports (participate)	21.7	16.2
Cultural Events	49.2	34.0
Gym/Health Club/Exercise Class	22.0	19.0

\* Median number of political organizations is less than 1 for both groups.

*Source:* Cornell Retirement Migration Survey.

### Why Are Some Older Residents of Retirement Destinations More Likely to Participate in Formal Organizations?

In this section we examine factors associated with variability in participation in formal social organizations among migrants and longer-term older residents in nonmetro retirement destinations. Even though our data indicate that migrants and longer-term residents have similar levels of participation in formal social organizations, they also show a substantial amount of variation in participation within both the migrant and non-migrant groups. We focus on three types of factors that have been shown in previous research to be associated with social participation: (a) socio-demographic status, (b) health and activity limitation, and (c) involvement in close primary social relationships (Young & Glasgow, 1998). Logistic regression provides a multivariate technique for examining factors that are associated with the likelihood of participation in formal organizations, with the outcome variable coded 1 = participates, and 0 = does not participate. Three logistic regression

Table 8.6. Factors Associated with Organizational Participation among Older Persons in Nonmetro Retirement Destinations, 2002

	Participation Index (0, 1)		
	Non-Migrants	Migrants	Migrants
Currently Married	0.1894	0.2832	0.5632
Age (Yrs.)	-0.0077	-0.0185	-0.0271
Male	-0.1087	0.1024	0.0482
Adult Kids Close	-0.2670*	-0.1487	-0.1051
Relatives Close	-0.0046	-0.0519	-0.0693
Years in County	0.0189*	0.0224	0.1205
Education (Yrs.)	0.2790***	0.1633***	0.1886***
Currently Working	-0.4697	-0.6961*	-0.6456
Good Health	0.4302*	0.0244	0.001
Problem Walking 6 Blocks	-0.4088	-0.6598*	-0.5204
Problem Driving	0.2248	-0.3789	-0.7673
Metro Origin			-0.1948
Owned Land			-0.0002
Vacationed Here			0.314
Not Visited Friends			-0.559
No Friends Here			-0.1693
Not Visited Relatives			-0.2914
No Relatives Here			-0.0322
Returned to Origin			-0.3341
Constant	-4.138	-0.8929	-0.3718
-2 Log Likelihood	451.979	435.530	344.059
Pseudo R <sup>2</sup>	.224	.121	.154

p < .05, \*\*\* p < .001.

models were run, and their results are shown in Table 8.6. The first model examines factors associated with participation in formal organizations among non-migrants in the 14 retirement destination counties. The second model examines the same set of variables but only among migrants. The third migrant model includes additional independent variables that were only asked of migrants and reflect their contact and associations in the retirement destination prior to their move there, as well as contact with their origin community subsequent to their move.

Prior research on social participation among older persons has shown that participation is higher among the young-old, healthier persons, those with few activity limitations, and persons with more education (Young & Glasgow, 1998). Conversely, participation has been shown to be lower among persons with dense

networks of close ties that result in frequent interaction with friends and family and among persons who work for pay outside of the home (Moen et al., 2000). The rationale for expecting greater social activity among younger and healthier persons is straightforward. Simply put, these older people are more physically able to participate than the old-old and persons with physical limitations on their activities. Better-educated older people are more likely to participate in community activities because education promotes the value of community service and participation. In addition, more highly educated older people have more financial resources and can afford to pay dues and participation fees, and they can better afford transportation and other costs associated with involvement in service, political, social, and/or volunteer organizations. In contrast, participation in formal organizations has been shown to be lower among older people with frequent primary group involvements because interaction with family and friends is thought to substitute for social involvements in the wider community. Finally, employed persons are less likely to participate because of time constraints associated with their work schedules, although on-the-job social connections may bridge people to other social involvements (Moen et al., 2000).

The non-migrant analysis reconfirms some of these earlier findings, but the results seldom reach the level of statistical significance. Education has the most consistent positive association with organizational participation.<sup>9</sup> Better health is also positively associated with participation. Having children close by has the expected negative association with organizational participation. In contrast, while older age, having relatives nearby, currently working, and being physically limited are in the expected negative direction in association with organizational participation among older residents of nonmetro retirement destinations, these effects fail to reach statistical significance.

We included length of residence in the logistic regression even though our previous cross tabular analysis did not demonstrate substantial differences in organizational participation between migrants and older residents who have lived in the retirement destination five or more years. While the five-year migration cut off is somewhat arbitrary, previous research has shown that residential stability is positively associated with community involvement (Sampson, 1988). Hence, regardless of the absence of a migrant/non-migrant difference in the cross tabular analysis, we wanted to examine whether duration of residence makes a difference once other variables are controlled. The data in Table 8.6 show the expected positive relationship between length of residence and participation in formal organizations among longer-term residents of retirement destination counties.

#### Why Are Some Recent Migrants to Retirement Destinations More Likely to Participate in Social Organizations?

While the five-year migration cut off may be somewhat arbitrary, it identifies a subgroup of older residents of retirement destinations who have lived there

relatively briefly. Why are some of these newer residents more socially involved than others? In addition to the factors shown for non-migrants in Table 8.6, research indicates that contact with the retirement destination prior to moving there should increase a migrant's knowledge of the destination community and enhance the chances that in-migrants will become socially involved in a relatively brief amount of time (Glasgow & Sofranko, 1980). As indicated earlier, recent migrants to the 14 nonmetro retirement destinations had a variable amount of prior contact with destination counties before they moved there. Over one-quarter owned property in the destination prior to moving, about half had vacationed there, and about one-third had visited friends or relatives who lived in the destination county prior to their move.<sup>10</sup> These types of prior contacts have been shown to be important factors in steering migrants to particular nonmetro destinations (Williams & McMillen, 1980; Williams & Sofranko, 1979). Everything else being equal, one would expect that in-migrants with prior experience in their new residences should have more information about the community, more knowledge of opportunities to become involved, and perhaps a stronger commitment to the place than recent in-migrants who had little or no prior connection to the place previous to moving and/or who had never been there before.

In contrast, maintaining contact with one's previous community might be expected to reduce social participation in the destination during the first several years of residence. Old ties that are maintained might substitute for new involvements and reduce one's inclination to join new organizations. This would be especially true if migrants belonged to "cosmopolitan" organizations in their origin communities. Such organizations have primarily non-local membership that would facilitate continued participation after migration (Richmond, 2003) and a reduced inclination to join new organizations in the destination. Seven out of ten in-migrants in our study have visited their origin community at least one time during the year prior to the survey, and nine of ten who made such visits did so to visit friends (the next most likely reasons for visiting were to obtain medical or dental care, 41 percent, and to shop, 39 percent). Accordingly, it seems that older in-migrants to nonmetro retirement destinations maintain fairly strong connections with their previous places of residence, and there is reason to believe that those who visit their previous home might be less likely to become socially involved in their new communities.

#### Migrants Compared with Non-Migrants

The logistic regression analysis displayed in the migrants' column in Table 8.6 examines factors related to variability in organizational participation among older persons who have lived in a retirement destination county for five years or less. Considering the variables examined for both longer-term older residents and migrants (Model A), these data show that among recent migrants, education has a strong positive effect on organizational involvement, while the

likelihood of involvement is depressed by currently working and by activity limitations.

Other variables show expected relationships with participation, but none of these relationships reaches the level of statistical significance. For example, older migrants are less likely to participate in organizations; having children and other relatives close by reduces one's propensity of becoming involved in formal organizations; good or excellent health enhances participation in organizations; length of residence in the retirement destination is positively related to involvement in community organizations; and migrants who have problems driving are less likely to participate.

#### *Prior Contact with the Destination*

The analysis in Model B examines whether prior contact with the destination enhances the chances that a migrant will be socially involved in formal organizations after moving to the new community. While most of the relationships shown in this model are consistent with our expectations, none of these relationships reaches the level of statistical significance. Moreover, this model examines whether returning to one's origin community depresses the likelihood of participation among migrants. Again, the relationship is not statistically significant, and in fact it is in the opposite direction from our expectations. Hence, we find no statistically persuasive evidence that prior contact with the destination or continuing contact with the origin affects migrants' likelihood of becoming involved in formal organizations in retirement destination counties. As was true in the two previous models, education is the only variable to increase consistently and strongly the likelihood of participation in formal organizations among older residents of nonmetro retirement destinations.

#### SUMMARY AND CONCLUSIONS

This analysis presents a picture of who is moving to nonmetropolitan retirement destination counties, where they come from, their primary group ties, and their post-move levels of organizational participation. Our analysis reconfirms some findings of previous research on retirement migration, but some of our results are at variance with previous research. Consistent with previous studies, in-migrants to the 14 retirement destination counties are positively selected with respect to younger age, higher education, greater health, and absence of activity limitation. As with previous research, we found that longer-term residents are somewhat more likely to be embedded in informal social relationships with family and friends, although in-migrants are not lacking in these types of social connections. The fact that in-migrants have substantial kin and friendship ties in nonmetro retirement destinations prior to moving there makes us re-examine theories of migration among older populations in the United States. Prior research indicated that



retirement migration is primarily motivated by the presence of amenities in destination communities (Litwak & Longino, 1987). Our research suggests that family reunification may also be a motive shaping retirees' destination choice. Moreover, previous research indicated that amenity-seeking older migrants are likely to make a subsequent move later in life to be closer to their children. Our research suggests that family reunification often occurs earlier in the life course, not later in life as a result of declining health, loss of a spouse, or other adverse circumstances. In contrast to previous research, older in-migrants in our survey are less likely to originate in metropolitan areas, and their level of participation in organizations is greater than we had expected.

Our analysis of factors associated with organizational participation among older residents in nonmetro retirement destination counties showed that educational attainment is the only consistent predictor of organizational participation. In addition, we found modest evidence that having children close by depresses participation (especially among non-migrants), duration of residence increases the likelihood of participation, currently working depresses participation (especially among migrants), and health and lack of activity limitations are positively associated with involvement in formal organizations. Contrary to our expectations, having prior experience in one's new community does not enhance the ease of becoming involved in community organizations, and maintaining contacts in one's origin community does not have a depressive effect on participation in one's new residence.

Therefore, while this study has helped us think systematically about the process by which older in-migrants to nonmetro retirement communities become socially integrated, it has raised as many questions as it has resolved. Reconfirming the education effect is reassuring, but why does education have such a strong and pervasive impact on participation? Perhaps better-educated persons are more likely to participate in organizations because they develop "bridging social capital" in school (e.g., the longer one attends school, the wider is one's network of affiliations). Or perhaps students are socialized to appreciate the value of social participation, and the longer one studies, the stronger the lesson. Understanding education's effect on participation is a theoretical challenge that we have not fully surmounted at this time. We also need to examine the reasons why age does not have a depressive effect on participation. The association between informal social relationships with family and friends and participation in the formal organizational sphere is not fully understood. Recent migrants to nonmetro retirement destinations have a substantial amount of prior experience in their new communities prior to moving there. However, contrary to our expectations, we found that prior contact does not enhance the chances that one will become organizationally involved soon after arrival. These questions await further analysis. This paper has provided some insights into the process through which new residents become socially involved in retirement destinations, but further research is needed to elaborate this process. Only after we understand how in-migrants become socially integrated, and how

longer-term older residents maintain their social connections, will we be able to understand whether and how social integration makes a positive contribution to the health and well-being of older residents in nonmetro retirement destination communities.

#### ENDNOTES

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2. This is true of the "young old" population. In contrast, when the oldest old move they are more likely to move toward metropolitan areas to be close to their children or better medical care (Glasgow & Beale 1985; Litwak & Longino, 1987).
3. Older in-migrants made a relatively small contribution to the 1990s nonmetro population rebound because the number of new entrants to the older age groups was diminished as a result of the aging of relatively small depression era birth cohorts (Johnson & Fuguitt, 2000).
4. In-migration rates among retirement destinations ranged from 15 percent to 121 percent. Age-specific net migration data for counties during 1990–2000 were unavailable when this analysis was conducted. Hence, we relied on 1980–90 data to identify nonmetro retirement destination counties. The number and location of such counties has changed marginally since 1990.
5. Age-targeted samples are based on telephone area codes that sometimes span more than one county. Hence, it is possible that some persons in the age-targeted sample could actually live in a contiguous county and not in the study county. Individuals who did not live in one of our study counties did not meet our residence criterion and were screened out.
6. Origin patterns differ among the 14 retirement counties. Less than two thirds of in-migrants come from metropolitan counties in Baxter, Arkansas; Lincoln, Maine; and Lincoln, Oregon, but more than 80 percent have metropolitan origins in Gila, Arizona; Talbot, Maryland; and Tehema, California.
7. As shown in chapter 2 of this book, net migration rates among persons 60+ increased during the 1990–2000 decade even though the volume of migration at these ages declined because potential migrants were drawn from small depression-era cohorts.
8. Some people question the reliability of self reported health, but a substantial body of literature has substantiated the accuracy of such measures (Idler & Kasl, 1991; Wolinsky & Johnson, 1992).
9. Income also had a positive association with participation in previous bivariate analyses, but we deleted it from the multivariate analysis because more than one third of respondents failed to answer the income question. Accordingly, retaining income in the multivariate analysis would have substantially diminished the number of cases with information for all respondents.
10. In contrast, only 8.7 percent had ever lived in the destination previously.

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