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Extended Abstract

**Introduction**

Florida represents a rich and interesting state for demographers—simply, the population has changed so much and in so many ways. In fact, Florida is the only state to have been ruled by Native Americans (pre-Columbian), the Spanish (1500s), the French (1600s), the British (1700s), Spanish again (1800s), and then Americans (Gannon). Even if one is not a historian, such a dynamic reveals itself in the architecture, culture, food, and language. South Florida, in particular, maintains a cosmopolitan flair due to tourism, trade with Latin America, and proximity to the Caribbean Islands.

In terms of demography specifically, Florida no longer maintains a greater male-to-female ration. During the early 1900s, males outnumbered females 109 to 100. As of 2000, females outnumber males 105 to 100. If age is taken into account, then females outnumber males 131 to 100 at age 65 or older (Smith, pg.9).

*Demographic Changes*

The racial landscape has also transformed: Whites accounted for 56% of the population, Blacks represented 44%, and the remaining 1% signified Other races at the beginning of the 20th century. During the late 1980s and early 1990s, Whites represented an enormous 85%, Blacks 14%, and nearly 2% for Other races.[1] As of 2000, Whites signified 78%, Blacks 15%, and the remaining 7% as Other. Due to changes in the 2000 Census questionnaire and classification of Hispanic as Ethnicity (as opposed to race), nearly 7% of the total population self-reported as being Hispanic or Latino.

Another interesting demographic variable corresponds to median age. Stanley Smith, from the Bureau of Economic Research at Univ. of Florida, estimated the median age as 22.9 for the entire U.S. and 20.4 for Florida at the outset of the 20th century. By 1950, the median age increased for both the U.S. and Florida to 30.2 and 30.9, respectively. This increase in median age elicits smiles from demographers for it shows the Demographic Transition Theory at work. In other words, the changing age structure partly resulted from decreasing mortality followed by decreasing fertility. Advances in medicine, bacteriology, and health practices reduced mortality, as well as infant mortality. Along with this, availability of contraception further decreased fertility. Shortly after 1950, with the end of World War II, the U.S. underwent a surge in fertility and the National median age decreased slightly by 1970. As for Florida, the media age *continued to increase* due to the population momentum from older migrants outpacing increased fertility. As of 2005, the National median age approximates 36.4 while Florida approximates 39.5.

*Migration*

Aside from California, Florida is the only other state to consistently maintain high levels of domestic and international in-migration. According to Smith's estimates, "more than 1.1 million people moved to Florida from other states between 1955 and 1960, 1.2 million between 1965 and 1970, 1.8 million between 1975 and 1980, 2.1 million between 1985 and1990, and 1.9 million between 1995 and 2000." [2] As for immigrants, only 85,000 migrated from 1955 to 1960, but this number surged to 653,000 by 1995 to 2000.

Why is Florida so popular, particularly among older age groups? Much like California, which symbolizes the sun, sand, and surf, Florida symbolizes warmth and summer vacations, particularly due to Walt Disney World. Although this still holds, the dominant image, as of the 1970s, centers on tropical

[1] Largely due to the greater numbers of whites in-migrating, and continuing to do so since in 1950.
[2] Certainly, Florida also has a high level of *out-migration*, particularly among the younger age group (18-40); however, net migration is positive and substantial.

breezes and retirement. In short, the mantra of real estate moguls—location, location, location—explains such high levels of in-migration.

**Previous Research**

In understanding migration, outlining some models will serve a useful purpose for this analysis. One of the earliest models for later-life migration corresponds to the Lifecourse Model. Peter Rossi introduced this in 1955 on the idea that "residential mobility often arises in response to particular lifecourse events, such as marriage, occupational advancement, and the departure of children from the household" (Walters, pg. 39). Although introduced many decades ago, only a dozen or so studies have explicitly evaluated and refined this model. Anthony Warnes, at the Center for Ageing and Rehabilitation Studies at Univ. of Sheffield, is among the first to "place the lifecourse model in social and historical context" and suggests "historical changes have mediated the impact of lifecourse events on geographic mobility [and] migration upon retirement is prominent only in late-industrial societies, and that large-scale mobility in response to declining health seems to have emerged even more recently" (Walters, pg. 39). A case in point refers to migration due to apprenticeship or widowhood during the early 20th century. Today, retirement or health are primary reasons to migrate. Based on this, Warnes further defines later-life migration into three classes:

*(1) long-distance migration by healthy seniors due to retirement*
*(2) sort-distance migration to urban areas due to widowhood, moderate illness*
*(3) relocation to nursing homes or other institutions due to terminal illness*

William Walters offers another extension of the Lifecourse Model. By examining spatial patterns and characteristics of destination households, three types of migration may occur:

*(1) amenity—distinct spatial migration due to climate and leisure activities*
*(2) assistance—migration to family co-residence due to low income or economic dependence or spouse absence*
*(3) disability—migration to shared living arrangements due to severe illness*

Although Walters' typology parallels Warnes, one key difference relates to spatial migration as a salient factor for (1). In addition to Walters, others have extended the later-life migration model to include fiscal variables (taxes, local government spending), proximity of children to parents, and return migration.

Another early migration model stems from the work in Urban Studies. This econometric model (1973) explains in/out migration using unemployment rate, growth in employment, wages, climate, age distribution of population, level of education of population, and in/out migration rate (Alperovich, pg. 135). Although primarily used to understand inter-metropolitan migration, this model can be extended and applied to later-life migration since many of the variables still correlate with the outcome variable or dependent variable (migration). A simplified version of the model is:

$$IMR = \beta + \beta_1(UR) + \beta_2(GR) + \beta_3(W) + \beta_4(Temp.) + \nu(Pop.) + \varepsilon$$ [*]

William Serow (2001), at the Center for the Study of Population at Florida State University, tested a somewhat similar model examining retirement migration from 1950-60, 1960-70, 1970-80, and 1980-90 using Census data. His model includes *geographic, demographic, and economic/structural variables*. Geographic variables relate to coastal location, airports, and urbanization. Since Serow focuses

[*] UR=unemployment, GR=growth rate, W=wage, Temp=climate and v is vector of population characteristics, such as age, education level, labor participation.

only on the white population, demographic variables relate to total white population age 60 or over. Finally, economic/structural variables relate to crime, rent, and property taxes.

Results from his analysis suggest retiree migration is positively associated with geographic locations. In other words, the Atlantic and Gulf coasts are primary draws for retirees. Similarly, a positive association also occurs with total population age 60 or over.

Although these findings are somewhat obvious, the urbanization variable shows an interesting relation—it is positive during 1950, but negative thereafter. Also, rent and property taxes exhibit a positive relation, whereas a negative one is expected. Serow suggests this may be due to income-effects or other variables, such as proximity to family or climate, masking the true effect.

**Methods**

*Data*

This analysis uses the Integrated Public Use Microdata Series (IPUMS) and the 2005 American Community Survey (ACS) to examine retiree in-migration demographics and patterns/trends. IPUMS data series, which are projects at the Minnesota Population Center at University of Minnesota, "include information on a broad range of population characteristics, including fertility, nuptiality, life-course transitions, immigration, internal migration, labor-force participation, occupational structure, education, ethnicity, and household composition." The ACS, a project at the US Census Bureau, replaces the decennial long-form and captures demographic, economic, and social characteristics of households on an annual basis for all states, counties, MSAs, and population areas greater than or equal to 65,000 people.

*Analytic Sample*

I use five percent IPUMS samples from 1980, 1990, 2000 and the one percent sample from the 2005 ACS. Since I am interested in retiree migration into Florida, I flag observations that migrate into the following 19 MSAs:

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|---|---|
| Daytona Beach | Naples |
| Fort Lauderdale-Hollywood-Pompano Beach | Ocala |
| Fort Myers-Cape Coral | Orlando |
| Fort Pierce | Panama City |
| Fort Walton Beach | Pensacola |
| Gainesville | Punta Gorda |
| Jacksonville | Sarasota |
| Lakeland-Winterhaven | Tallahassee -Tampa-St. Petersburg-Clearwater |
| Melbourne-Titusville-Cocoa-Palm Bay | West Palm Beach-Boca Raton-Delray Beach |
| Miami-Hialeah | *Bradenton |

In addition to the typical demographic variables (age, gender, marital status, race), I examine housing/home ownership and continued labor force participation. Since my analysis focuses on retiree migration, I exclude observations that are less than 62 years of age. This forms the final data set, which ranges from a high of 16,670 observations for 1990 to a low of 942 observations for 2005.

**Analysis**

I provide descriptive analysis for key demographic variables (using STATA V9.2). Since the samples are weighted, I employ the population weight command to produce accurate statistics. The migration frequencies/tabulations provide the basis for all of the Florida maps (using ARCGIS). In addition to providing a visual or spatial aspect to migration, I also conduct geospatial analysis to test for high-low clustering using Getis-Ord and Local Morans, as well as hot-spot rendering.

## Conclusion

Certainly, various factors influence the decision to migrate—geography, housing market, amenities, etc. In the case of Florida, the coast appeals to many retirees and continues to do so today. However, this preference is constrained by an income budget that cannot feasibly attain housing in some areas of Southeast Florida—Fort Lauderdale and Miami in particular. Although migration will continue into Florida (despite some Midwest retirees migrating into Arizona or Nevada), I predict future migration will continue to increase into Fort Pierce, Jacksonville, Lakeland, Melbourne, and Orlando.

Besides changing migration patterns, my analysis also suggests some characteristics of retirees have changed across time. For instance, the 1980 sample contains nearly 95% White retirees while the 2005 sample contains just under 87%. Although migration still occurs mostly among whites, this appears to be a growing trend among other races. Another interesting observation relates to martial status. With the 1980 sample, nearly 71% are married, 20% widowed, and only 3% divorced. With the 2005 sample, nearly 63% are married, 19% widowed, and over 11% divorced. Although one cannot know when divorce occurred, the trend of higher divorce rates seems to carry into the migrating retiree population. The one characteristic that remains consistent refers to labor status. In all time periods, nearly 90% of retirees no longer participate in the labor force.

## Continued Work

Please note this research project is on-going and I will introduce another migration model. At present, I am developing a multinomial logit model to estimate the probability of migration into four distinct regions in Florida (Panhandle, Gulf Coast, South, and Central). The key independent variables correspond to housing costs and a dummy variable denoting retirement/non-retirement community status. I will also consider variations of this model based on the Life Course Theory of later life migration.

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