

# Demographic Efficiency of Elderly Migration to Florida

Christopher J. Schiavone and Russell L. Ivy

## Introduction

In the past few decades social scientists have become increasingly interested in issues related to the nation's elderly. One important reason for this growing enthusiasm is the dramatic increase in the number of aged. At the turn of the century the elderly accounted for about 4% of the U.S. population. It reached 10% during the 1970s (Graff and Wiseman 1978) and presently the share of the elderly in the nation's population is approximately 12.5%. As the growth rate of the population continues to decrease and people live longer, within a couple of decades into the 21st century the share of the nation's elderly in the total population is projected to reach 20% (Graff and Wiseman 1978; U.S. Census Bureau 1995).

Geographers are well equipped to address issues related to aging, particularly changing spatial distribution of the aged and the reasons for these changes (Golant 1987; 1990, Graff and Wiseman 1978; Long 1988; McCarthy 1983; Rogers and Woodward 1988; Rogerson 1996; Warnes 1981, Wiseman 1978). In the past, aging in place accounted for most of the change in the elderly concentration (Rogerson 1996), however, throughout the last half of this century, particularly in the United States, the more affluent elderly have been migrating to more physically desirable parts of the nation (Golant 1990; Wiseman 1978). Two of the most important reasons for focusing attention specifically on elderly migration are (1) their motivation to migrate is usually different from that of younger people since unlike younger people few elderly migrate in search of work and (2) the number of elderly in any given area has a direct bearing on that area's social and economic

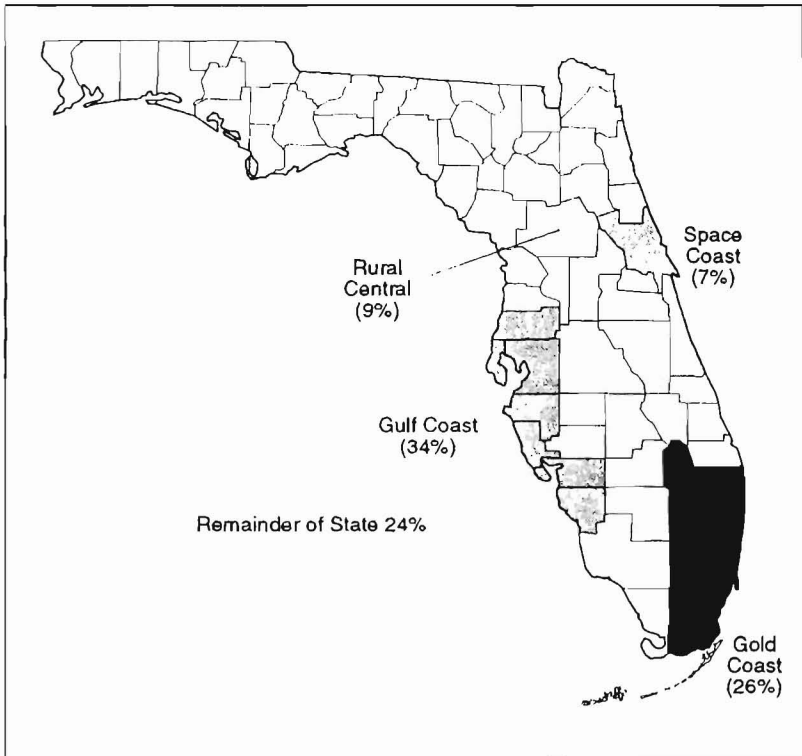
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infrastructure, particularly health services (Conway and Houtenville 1996, Graves and Knapp 1988; Todson 1980).

The state of Florida has long been an important destination of elderly migrants, both seasonal and permanent (Winsberg 1993). Utilizing a statistical measure known as demographic efficiency, this paper identifies migration patterns between other states and Florida at both the state and substate level. Additionally, it will be shown that migration patterns of the elderly to and from Florida are not uniform in terms of volume or source regions. This is especially true when the elderly are divided into "younger" aged and "older" aged groups. Four regions of the state have been defined that are especially attractive to the aged (Figure 1).

**Figure 1**  
**Elderly Migration Regions**  
**Percentage of All Elderly Migrants to Florida**  
**between 1986 and 1990**



## **Identifying the Elderly**

The definition of the aged is arbitrary (Barsby and Cox 1975), since there is no clear physical dichotomy between them and the non-elderly (Serow 1987). The U.S. Census Bureau defines elderly as those 65 or older, yet the Older Americans Act recognizes 60 as being elderly, and allocates funds to states based on absolute numbers of such (Rogers and Woodward 1988). Furthermore, the American Association of Retired Persons (AARP) uses age 55 as a lower boundary for admittance. Many researchers use either age 60 or 65 as a lower limit of inclusion (Barsby and Cox 1975; Golant 1987, 1990; Hazelrigg and Hardy 1995; Hogan 1987; Hogan and Steinnes 1994; Litwak and Longino 1987; Manson and Groop 1988; McHugh and Mings 1996; Watkins 1989; Yeatts et al 1987; Wiseman 1978). Several researchers have further categorized the elderly into the younger aged and the older aged (Hazelrigg and Hardy 1995; U.S. Census Bureau 1995; Watkins 1989; Yeatts et al 1987). This categorization is important because the elderly are not a homogeneous group. The younger cohort is usually more wealthy, healthier and more mobile, and more likely to migrate, both permanently or seasonally (Hazelrigg and Hardy 1995; Wiseman 1978). The most commonly used age cohort for the younger aged is 60 to 74, the period when many retire (Hazelrigg and Hardy 1995; Hogan 1987; Hogan and Steinnes 1994; Rogerson 1996; Sullivan 1985; Watkins 1989; Wiseman 1978; Yeatts et al 1987). Among social scientists the lower boundary for the "older" aged is commonly age 75 (Hazelrigg and Hardy 1995; Rogerson 1996; Watkins 1989; Wiseman 1978; Yeatts et al 1987), although the U.S. Census Bureau raises it to 85. The needs of these two age cohorts differ, as do their spatial patterns of concentration and mobility (Watkins 1989).

## **Demographic Efficiency**

One statistical measure utilized to discern migration flows and patterns is demographic efficiency (also known as demographic effectiveness) devised by Thomas in 1941 (Plane and Rogerson 1994). This statistical measure takes into consideration that between any two places there usually are flows in both directions (cross-flows), but it is the net flow and its direction that is most important (Manson and Groop 1996; Plane 1984; Plane and Rogerson 1994). Demographic efficiency is simply a ratio of net migration (the difference between in and out-migration) to total migration (the sum of in and

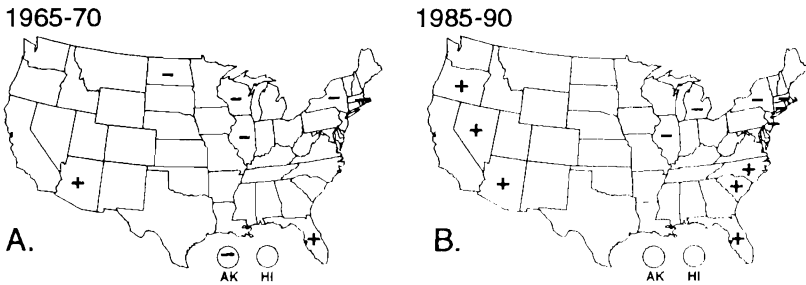
out-migration) multiplied by 100. For example, between 1985 and 1990 the Gulf Coast region of Florida received 15,060 younger aged (65-74) from New York, but during that same period 1,982 younger aged left Florida for New York, making a net migration to Florida of 13,078. When in-migration and out-migration between Florida and New York are added together (17,042) it becomes the denominator and net migration (13,078) the numerator. The resultant division is +.77, and is referred to as positive demographic efficiency. If the reverse had been true and 15,060 of this age group had left Florida for New York State and only 1,982 had come from New York, the demographic efficiency would have been expressed as -.77, and would be referred to (from Florida's perspective) as negative demographic efficiency. Demographic efficiency values range from +1.00 to -1.00. To attain values of those two extremes the flow must be in only one direction. Streams whose demographic efficiency is high either positively or negatively are said to be effective. Flows that are more balanced and do not redistribute population are considered ineffective (Manson and Groop 1996).

Although demographic efficiency measures are highly correlated with net migration rates, there are benefits from using demographic efficiency as opposed to net migration rates when looking at broad flows and patterns. For example, demographic efficiency is solely a function of current period movement, whereas net migration rates utilize the total population in the denominator as a means of standardization. One challenge to using migration rates is that the results are influenced by the historical population change of that particular region (Plane 1984; Plane and Rogerson 1994). For instance, if mass in-migration occurred in the past, it may skew the present population component. Furthermore, when using demographic efficiency measures, there is no need to standardize population sizes because the ratio of net to gross is the focus. There is, however, a major drawback when one uses either demographic efficiency or net migration rates: sparsely populated regions may exhibit large negative or positive rates of both but the cross-flows involve fewer people (Plane 1984).

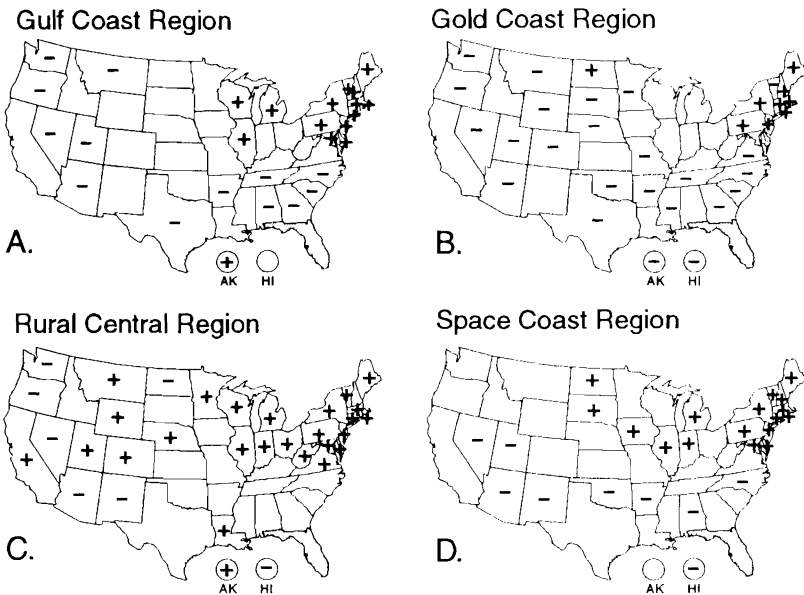
### **Florida as a Destination of Elderly Migrants**

To illustrate the long-standing importance of Florida in attracting elderly migrants, a demographic efficiency measure of elderly inter-state migrants was applied to every state in the nation as well as Washington DC for the period 1965 to 1970 and from 1985 to 1990.

**Figure 2**  
**Extremes in Demographic Efficiency of**  
**Elderly Interstate Migrants**



**Figure 3**  
**Extremes in Demographic Efficiency of Elderly**  
**Interstate Migrants between**  
**Different Regions of Florida and other States, 1985-90**



The data sets for both were obtained from the 1970 and 1990 U.S. Population Censuses (U.S. Bureau of the Census 1972; 1992). Figures 2A and 2B identify regions of high elderly demographic efficiency, either positive or negative. Notice, only two states exhibited noteworthy positive demographic efficiency for the 1965-70 time period: Florida (+. 68) and Arizona (+. 45). No other state in the nation had larger absolute net gains of the elderly (159,538 and 20,024 respectively). However, during the 1985-90 migration period, six states exhibited relatively high positive demographic efficiency: Florida (+. 50), Nevada (+. 42), Arizona (+. 40), North Carolina (+. 38), South Carolina (+. 33), and Oregon (+. 32). This is consistent with the findings of one recent publication. Colant (1990) stated that migration streams of the elderly are becoming more diverse. Not unexpected are the states that have had especially high negative demographic efficiency. That is, far more elderly leave these states than arrive. These include Illinois, New York, and Massachusetts, states that lost far more of their elderly than they gained in both the 1965-70 period and that of 1985-90. These three states rank among the nation's top five as place of origin of Florida's aged.

### Methodology

Initially, through use of 1990 census data, the important regions within Florida where the aged settle are defined (Figure 1). Their definition was obtained by first identifying those Florida counties that between 1985 and 1990 received the most elderly from outside Florida. These counties were then grouped into four discrete regions; the Gulf Coast, the Rural Central Region, the Gold Coast and the Space Coast. Next, demographic efficiency measures were calculated for these regions based on flows between each and other states. For example, demographic efficiency measures between the Gold Coast region (Dade, Broward, and Palm Beach counties) and 49 states as well as the District of Columbia were determined. Some may argue that comparing a part of a state with entire states is not valid, since mixing different levels of census aggregation may produce different results. Others support the use of different levels (Plane and Rogerson 1994). The authors believe that examining the flows between each sub-state region and other states will show characteristics that are masked when looking at the state as a whole. Lastly, a breakdown of migration behavior of the younger aged and the older aged will be examined, also utilizing the demographic efficiency measure.

## **Demographic Efficiency and Elderly Migration to Florida**

Retirees began to come to Florida in substantial numbers after World War I, and initially one of their most important destinations was St. Petersburg, located in the Gulf Coast region. Although today the city has a smaller share of the aged within its population than the state's average, it continues to be identified with elderly people. Following World War II the Gold Coast rose to become Florida's premier destination of retirees, and held that position until the 1980s. After Fidel Castro took power in Cuba hundreds of thousands from that country went into exile, the majority settling in the metropolitan Miami area. Their arrival, whether justified or not, severely tarnished Miami's reputation as a retirement destination. Those who continued to choose the Gold Coast usually went to counties north of Miami. Many, however, chose to go to the Gulf Coast, particularly counties to the south of St. Petersburg. As a result, the Gulf Coast has replaced the Gold Coast as the major retirement destination within the state. The Rural Central region of the state, as well as the Space Coast also were beneficiaries of the deflection of retirees from the Gold Coast.

The entire state of Florida's image as a retirement destination has suffered in recent years because of its notoriety throughout the nation as a haven for violent crime as well as its high cost of living. Condemnation of the entire state for these conditions is unjustified, because within it most places are relatively crime free and the cost of living is not excessive. Nonetheless, the problems of a few places have caused many retirees to reject the state as a place to live. Florida's loss has benefited a number of Sun Belt states, particularly North Carolina, South Carolina and Georgia. Another factor which must be taken into consideration when examining cross-flows of elderly migrants between the rest of the nation and the state of Florida as well as its four retirement regions is the need among a significant number of aged Florida residents to move outside the state because they no longer can care for themselves. This usually means going to where their children live.

The source of Florida's retirees has long been the northeastern quadrant of the nation, those states from New England through the lower Great Lakes to Wisconsin that fit within the nation's old Manufacturing Belt. It is within this part of the nation where there first arose a substantial number of people who could afford to retire elsewhere. Some acquired their wealth through their entrepreneurial efforts. Many more, through the efforts of their unions, were able to receive large enough pensions to leave upon retirement. Social

Security benefits became an important source of income for retirees after World War II, making it possible for others to entertain retirement elsewhere. As will be seen from an examination of demographic efficiency, streams developed from different parts of the northeast quadrant of the United States to different parts of Florida.

Many of these trends show up cartographically in Figures 3 A through 3D. These maps show the extremes in demographic efficiency for all aged migrants moving between Florida and other states between 1985 and 1990 for each of the four important retirement regions of Florida. Note that the high positive demographic efficiency states for all four regions are commonly located in the northeastern quadrant of the nation, the aforementioned old Manufacturing Belt. The Rural Central and the Space coast regions, however, are paired with several high positive demographic efficiency states that are far to the west of the Mississippi River. Just why so many more of the aged come from these states to Florida than Florida sends aged to them is not known. The traditional states that draw aged from them are California and Arizona, and more recently New Mexico. It should be further noted that both in and out migration of the aged between these states and Florida is very small.

Note the variation among Florida's retirement regions in both the number of high positive demographic efficiency states and those that have high negative demographic efficiency. By the period 1985 to 1990 the Gold Coast, especially that portion that includes Miami, had lost much of its attraction to the elderly. Except for one unexplained outlier (North Dakota) the few states that have high positive demographic efficiency with the Gold Coast are within the Mid Atlantic region and New England. These are the states that for decades have sent far more of their aged to Florida than they have received aged from the state. It also should be noted with regard to the Gold Coast that there were 22 states for which it had high negative demographic efficiency. Included among them were a number within the Southeast. Some of this movement, especially to the Southeast, was by residents of the Gold Coast who left for retirement communities springing up in Georgia, South Carolina and North Carolina.

The Rural Central portion of the state is paired with more states for which it has a high positive demographic efficiency (26) than the other three. Also, there are fewer states than any other Florida retirement region for which it has high negative demographic efficiency (7). Although it should not be implied that the Rural Central region is now drawing more retirees from outside the state than the other four regions, it does suggest that relatively few of the aged who come to it



want to leave for another state once they get there. Furthermore, there are few states elsewhere in the nation that are attracting more aged from the Rural Central region than they are sending to it.

The Space and Gulf Coast also have wider national appeal than the Gold Coast. This is particularly true of the Space Coast. Although it draws the fewest aged immigrants of any of the four regions, its appeal even extends into the Dakotas. One can be certain, however, that the movement between those two states and Florida is and has been very small. The Gulf Coast has more states with which it has high negative demographic efficiency than does the Space Coast. A number of the states for which the Gulf Coast has a high negative demographic efficiency are in the South, and it is likely that a large number of Gulf Coast retirees are leaving to live in retirement communities within these states. At least far more aged are going to these states than are coming from them to the Gulf Coast region.

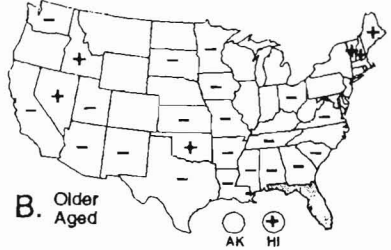
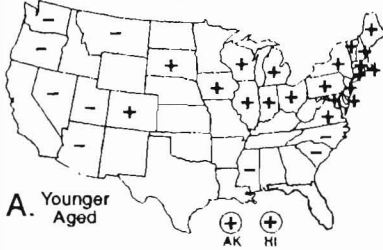
### **Younger Aged versus Older Aged**

Maps of extremes in demographic efficiency were created for the young aged (65-74) and the old aged (75 and above) for each of the four retirement regions to examine cross-flows during the period 1985 and 1990 between them and the rest of the nation (Figures 4A through 4H). This disaggregation corroborates some of the generalities made earlier in this paper. For example, it was mentioned that many retirees, as they age in Florida, reach a point where either their health or their finances or both do not permit them to remain in their present location. Some lose their spouses and do not want to live alone. Others feel that the cultural environment in which they live no longer is safe, and chose to relocate to a safer place. Some move to what they perceive are safer locations outside of Florida, others return to the cities where they spent their productive lives, while some go to where their children live, or where they have an alternative support system they can draw upon. Although not within the scope of this study, a large number of aged each year move across county boundaries within Florida.

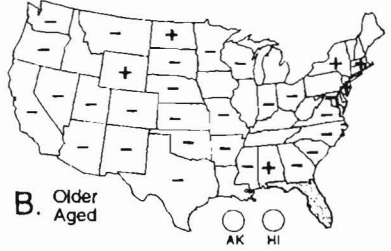
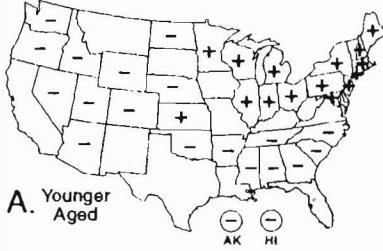
The Gold Coast is that retirement region in Florida that has the worst reputation for high cost of living and crime. It also has the fewest states for which it is paired with that have extremely high positive demographic efficiency. This holds for both aged cohort groups. It is evident that many more young aged come to the Gold Coast from the states of the old Manufacturing Belt than young aged Floridians leave to go to those states. Conversely the states that have

**Figure 4**  
**Extremes in Demographic Efficiency of the Aged between**  
**Four Florida Retirement Regions and other States, 1985-90**

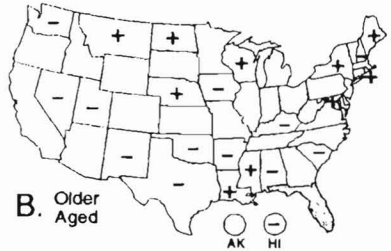
**Gulf Coast Region**



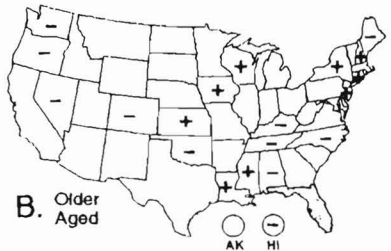
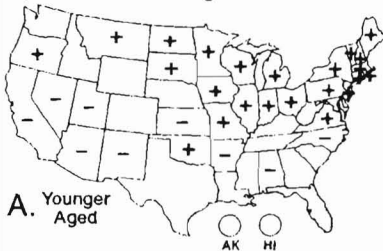
**Gold Coast Region**



**Rural Central Region**



**Space Coast Region**



high negative demographic efficiency with the Gold Coast are not only exceptionally numerous for both age groups, but they are widely spread throughout the nation. Only small numbers of migrants are involved in the cross-flow of many of these states, but it does suggest that many aged, especially the older ones, want to leave the Gold Coast to go elsewhere. Note that Minnesota, Wisconsin and Ohio send far more young aged to the Gold Coast than they receive, but they receive far more old aged than they send. The southeastern states receive far more of the aged in both cohorts than they send, probably in part due to Gold Coast retirees moving to recently developed retirement communities.

The other three regions each had more states with high positive demographic efficiency in the younger than the older age cohort. This is expected, since many more among the young aged are willing to leave those states in which they spent their productive lives and move to Florida than among the older aged. Less well understood is why, for all four regions, but to varying degrees, there were fewer states in the Mid Atlantic and New England region that suffered a loss in their high positive demographic efficiency status when the young aged and the older cohort are compared, than any other part of the nation. Further research needs to be done to ascertain just why the older aged continue to come from states like New York and Massachusetts in far greater numbers than older aged from Florida go to these states. Attention is drawn to the Rural Central region, where for the younger aged cohort there was an exceptionally low number of states for which it had high negative demographic efficiency (2). It would appear that those younger aged who come to this increasingly popular Florida region like it and do not leave to go to another state. However, in the older age cohort they do, since the number of extremely negative demographic efficiency states increased to 13. This is far lower than the number that are extremely negative for the Gold Coast older aged, but well above the number of negative demographic efficiency states involved in cross-flows with the Space Coast (11).

### **Summary**

Use of the demographic efficiency statistic does support a number of generalities that have been made about migration of the aged between Florida and other states, as well as between Florida's four largest retirement regions and these states. Clearly Florida is losing its appeal to retirees, although it still is great. Nonetheless, when aged migration between 1965 and 1970 is compared with that

between 1985 and 1990, several states (North Carolina, South Carolina and Georgia in particular) have arisen to offer stiff competition for these retirees. Also, when aged migration to and from Florida between 1985 and 1990 is examined, it appears that retirees from different parts of the nation favor certain parts of Florida. Demographic efficiency measures also confirm that Gold Coast retirees are more apt to abandon their homes for other parts of the country than those living in any other retirement region in Florida. The Gold Coast has high negative demographic efficiency with more states than do the other three regions.

The Gold Coast shows up unfavorably compared to the other three Florida regions when the aged are disaggregated into the young aged and the old aged. Not only does it have fewer high positive demographic efficiency states than the Gold Coast within both aged cohorts, but there are more states for which it has a high negative demographic efficiency than any of the other regions. In both aged categories the Rural Central region fairs the best among the four regions or ties for best with regard to the number of states with which it has high positive demographic efficiency. Also, in the younger aged category it has the least number of states for which it has high negative demographic efficiency, and in the older aged category only the Space Coast has fewer. Clearly the Rural Central region and the Space Coast are regions that have a bright future for the state's retirement industry.

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