

## Retirement Migration Definitions Matter

Submitted by: [Carolyn S. Wilken](#), Ph.D., M.P.H., Extension Gerontology

Haas, W. H., Bradley, D. E., Longino, C. F., Stoller, E. P., & Serow, W. J. (2006). In retirement migration, who counts? A methodological question with economic policy implications. *The Gerontologist*, 46(6), 815-820.

In this study Hass and colleagues examined how the implications of various definitions of retirement migration. Although one may think that Shakespeare's admonition that 'a rose by any other name smells as sweet' would apply to describing older adults who we commonly call 'snowbirds'; these researchers found that relying on a traditional age-based definition of retirement migration (people ages 60 and over who move across important political boundaries i.e. county, state, or nation) significantly miscounts the migrant population. Accurate population estimates have important policy and program planning implications, not to mention the structuring/restructuring of political districts.

### **The researchers identified 3 definitions of older adult migration:**

- 1) Traditional Age-based Definition: Retired migrants age 60 and over.
- 2) Retirement-Based Definition 1: Retired migrants aged 50 or older who report working no more than 26 weeks a year and report receiving at least \$1 in Social Security or disability income.
- 3) Retirement-based Definition 2: Retired migrants who are 50 or older who are not in the labor force and report receiving at least \$1 in Social Security or disability income.

Using data from the long-form of the 2000 U.S. Census the authors found that using the traditional definition of retirement migration excludes those who retire earlier, at ages 50-59. Using retirement rather than age as a qualifier, the actual number of retired migrants was 21% less.

Florida, Arizona, California, Texas and North Carolina are the five top retirement migration hosts, or receiving states. A comparison of the rates of migration between each definition (for Florida) revealed important differences between definitions suggesting that specifying actual working/retirement status reduces the real number of older (50 years and older) migrants coming into Florida.



### **“So what?” you may ask.**

Understanding the employment status of older migrants to a community leads to a better understanding of the economic impact of migration. Retirees bring with them transfer payments such as Social Security, private pensions, and equity income, as well as Medicare and generate what is known as a mailbox economy. Those who are fully retired bring those assets into a community and do not compete with the indigenous workforce for jobs. Those who are still working, even part-time have a different impact on the economy. Using all three definitions of migration, the researchers found that fewer partially retired people migrate to Florida than Texas and California, therefore having less impact on the workforce.

### **Implications for County FCS Faculty**

County faculty are frequently involved in county-level community development and are responsible for the development of their own programs. Recognizing the differences in how migration is calculated provides faculty with important information to contribute to those planning processes. This study which utilized data from the U.S. Census reminds us of the wealth of information available from the census data. To find data related to many aspects of your county or community (i.e. age distribution, education levels, income, housing costs, etc.) follow this link [http://factfinder.census.gov/home/saff/main.html? lang=en](http://factfinder.census.gov/home/saff/main.html?lang=en) to the *American Community Survey* and enter your city or county. In the past, the census data was unusable to most professionals, but now census data is presented in a very user-friendly format and is therefore not only accessible it is also usable! Data presented in the *American Community Survey* reflects the issues of concern to FCS agents and can be very helpful in developing needs assessments, preparing situation statements for Plans of Work, and for prioritizing programs.