

Aging in the American South¹⁾

Fumie Kumagai

I. Introduction

The issue of aging is an international phenomenon.²⁾ And, what is occurring in Japan is also true for the United States of America. We must, however, be aware of the existence of regional variation in aging even within one national boundary. Even in such a small island country as Japan, this is still true as Kumagai demonstrated in her recent study of aging in urban Tokyo and rural Niigata.³⁾ Thus we should expect much more variation in a diversified and continental country like the U.S.A. That is, in some regions of the United States, the phenomenon of aging has been progressing much more rapidly than in other parts. Since the impact of aging on any social context is symbolic for social changes, analyses of the issue are likely to assist us in identifying the future direction of American society.

Therefore, the major purpose of this paper is to identify some of the demographic characteristics of aging in the United States, especially that of the American South. The study, however, is meant to give a descriptive overview of the situation rather than an analytical presentation.

II. Maturing Society: Size and Growth of the Older Population in the U.S.A. in General

Of the ten forces reshaping American society today, first comes the "maturing society."⁴⁾ That is, American society is aging rapidly. There are two outstanding characteristics of the American maturing society; the one is the graying of America, and the other is the longevity revolution.

As is shown in Table 1 the older population in America has increased far more rapidly than the rest of the population for most of this century.⁵⁾ In the last two decades alone, the American elderly population grew by 54 percent. (See Table 1.) The under-65 population, on the contrary, increased by only 24 percent. Since 1960, an average of 149,000 persons a month have joined the ranks of the elderly. This type of demographic change

Table 1. Actual and Projected Growth of the Older Population 65+ 1900-2050:
U.S.A. & Japan (in percent).

Year	USA	JAPAN
1900	4.0	5.4
1910	4.3	5.2
1920	4.7	5.3
1930	5.4	4.8
1940	6.8	4.8
1950	8.1	4.9
1960	9.2	5.7
1970	9.8	7.1
1980	11.3	9.1
1990	12.7	11.9
2000	13.0	16.2
2010	13.8	19.9
2020	17.3	23.5
2030	21.2	23.1
2040	21.7	24.1
2050	21.8	23.5

Sources: U.S. Congress Committee Serial #99-B, CIS S-142-6, *America in Transition: An Aging Society 1984-85 ed.*, June 1985, p. 11, Table 1-2; Institute of Population Problems, *Latest Demographic Statistics: 1985*, March 1986, p. 57, Table 57 and p. 60, Table 61; Institute of Population Problems, "Projections for the Japanese Population," August 22, 1986.

is unprecedented and bears one dramatic conclusion, that is, America is growing older. Hence, the phrase "the graying of America" has emerged.

Not only in American society, but also in industrial nations people are living longer than ever before. (See Table 2.) During the 20th century alone, more than 25 years' increase in life expectancy has been attained, whereas, the previous 25-year gain was achieved in 5,000 years in the history of mankind. Hence, we live in the era of the "longevity revolution."

On top of these two general characteristics which define aging societies in modern industrial nations, there are a handful of distinctive features concerning the American situation in particular. They are as follows:

1. The population statistics of 1984 reflect this century's growth in the older population.

Table 2. Life Expectancy at Birth and Age 65 by Sex and Calendar Year, 1900–2050: U.S.A. & Japan.

Year	USA				JAPAN			
	Male		Female		Male		Female	
	All birth	At age 65	All birth	At age 65	All birth	At age 65	All birth	At age 65
1900.....	46.4	11.3	49.0	12.0	44.0		44.9	
1910.....	50.1	12.1	53.6	12.1	44.3		44.7	
1920.....	54.5	12.3	56.3	12.3	42.1		43.2	
1930.....	58.0	12.9	61.3	12.9	44.8		46.5	
1940.....	61.4	11.9	65.7	13.4	46.9		49.6	
1950.....	65.6	12.8	71.1	15.1	58.0	11.5	61.5	13.9
1960.....	66.7	12.9	73.2	15.9	65.3	11.6	70.2	14.1
1970.....	67.1	13.1	74.9	17.1	69.3	12.5	74.7	15.4
1980.....	69.9	14.0	77.5	18.4	73.4	14.6	78.8	17.7
1990.....	71.4	14.5	78.9	19.2	75.7		81.5	
2000.....	72.1	14.8	79.5	19.5	76.8		82.7	
2010.....	72.4	15.0	79.8	19.8	77.4		83.4	
2020.....	72.7	15.2	72.7	20.1	77.8		83.9	
2030.....	73.0	15.4	73.0	20.3				
2540.....	73.3	15.6	73.3	20.6				
2050.....	73.6	15.8	73.6	20.8				

Source: U.S. Congress Committee Serial #99-B, CIS S-142-6, *America in Transition: An Aging Society 1984–85 ed.*, June 1985, pp. 20–21, Table 1-6; Institute of Population Problems, *Latest Demographic Statistics: 1985*, March 1986, p. 41, Table 33 and p. 48, Table 42; Institute of Population Problems, "Projections for the Japanese Population," August 22, 1986.

2. The graying of America will continue well into the next century with the aging of the baby-boomers.
3. The 85-plus population is the fastest growing age group.
4. The elderly population itself is growing older.
5. The non-white population has a smaller proportion of elderly persons than the white population.
6. Older women outnumber older men.
7. The ratio of elderly to working age persons is increasing dramatically.
8. The upward trend in life expectancy is continuing.
9. Two-thirds of all elderly males will be veterans, who have served in the armed forces, by the end of this century.

III. Geographic Distribution and Mobility of the American Elderly

On the average, older Americans tend to move far less often than younger counterparts. This geographic stability of the older population is causing a graying of some areas of the United States, where older persons have stayed on and younger persons have moved out.

Other parts of the country, such as Florida, are also experiencing an aging of their population due to the migration of older persons during their early retirement years. These retirees tend to migrate to the "Sunbelt" and away from the "Frostbelt." And then, a small number of the Sunbelt migrants follow a general migration pattern that is occurring called "counter-migration" in which, once they have moved from one State to another at retirement, they subsequently return home or to a State in which family members live.

Let us now discuss each of these trends more in detail by breaking down geographical regions into states, suburbs, and counties.

A. States:

In 1983 the proportion of the elderly 65 and over in the United States was 11.7 percent of the total population. Of them, almost half were living in eight states, namely, California, New York, Florida, Pennsylvania, Texas, Illinois, Ohio, and Michigan. In addition, distributions of the elderly population by regions are approximately same as those of the total population of 233.981 millions in 1983 as shown below.

Region	Total 1983	Population 2000	65+ 1983
Northeast	21.2% ..	(17.4%) ..	25.9%
North Central (Midwest)	25.2% ..	(22.3%) ..	24.7%
South	34.0% ..	(37.0%) ..	34.3%
West	19.6% ..	(23.4%) ..	20.2%

These regions, however, are ones defined by the U.S. Census Bureau, and do not coincide with the popular notion of the Sunbelt. The Sunbelt usually includes such states as California, Arizona, and New Mexico, all of which are parts of the Western region of the U.S. Census Bureau definition. (See Figure 1-a.)

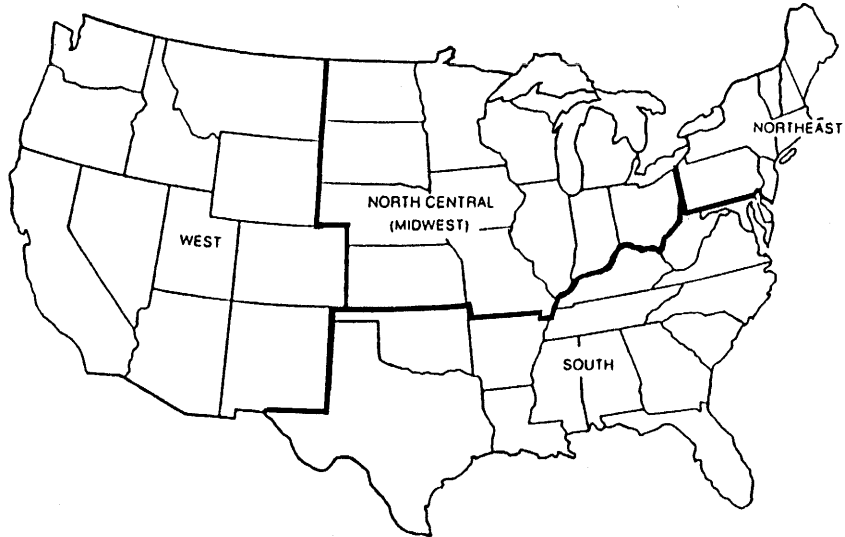


Figure 1-a. United States Regions as Defined by the Census Bureau.

Source: R. M. Bernard and B. R. Rice (eds.), *Sunbelt Cities: Politics and Growth Since World War II*, Austin: Texas, University of Texas Press, 1983, p. 3.

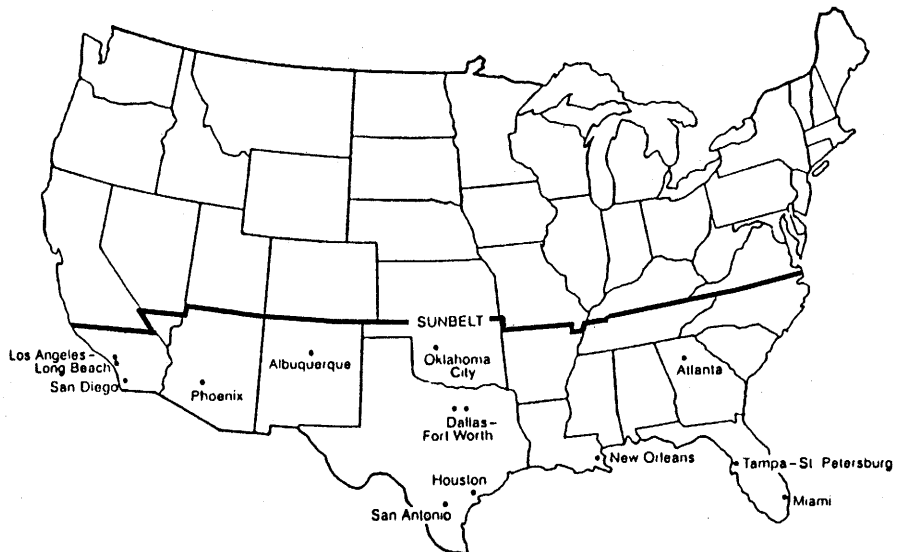


Figure 1-b. The American Sunbelt.

Source: R. M. Bernard and B. R. Rice (eds.), *Sunbelt Cities: Politics and Growth Since World War II*, Austin: Texas, University of Texas Press, 1983, p. 7.

Thus, it seems worthwhile to clarify which states really belong to the Sunbelt. The Sunbelt idea is a mixture of economics, conservative politics, and demographic change generally associated with the observation that the southeastern and southwestern sections of the country have been growing and prospering more than the Northeast and Midwest in recent years.⁷⁾ There are, however, inconsistencies concerning the regional distribution of states which fall under the Sunbelt. The most widely circulated early description was probably that of freelance journalist Kirkpatrick Sale, who assailed the rise of the Sunbelt as a threat to the nation's progressive political tradition. Sale actually used the term "southern rim" rather than Sunbelt, but he discussed the same phenomenon. It is widely accepted that with some minor adjustment, Sale's definition of the region's boundaries is still the best. Sale wrote in his 1975 polemic *Power Shift*, "It hardly seems an accident that there is indeed a cartographic line that sets off this area almost precisely: the boundary line which runs along the northern edges of North Carolina, Tennessee, Arkansas, Oklahoma, New Mexico, Arizona, or generally the 37th parallel.⁸⁾ That is, Sale extended the line to the Pacific to catch lower Nevada and Southern California. (See Figure 1-b.)

By looking at the projected population distributions by the year 2000 shown above, we note the Sunbelt migration will continue to the next century.

As stated earlier, one half of the American elderly are concentrated in eight states. Of these states, all but Michigan had over one million persons aged 65 and over, and there is a wide range of distributions of elderly persons among all the states.

Alaska, for instance, had the smallest number of elderly persons in 1983, less than 3 percent of its total population. At the same time, Alaska, along with Nevada, also experienced the largest increase in their elderly population between 1980 and 1983 (i.e., 23.6%).

In 1983, Florida was the state with the largest proportion of residents 65 and over (17.5%) which exceeded nearly by 6 percent the national average of the year (11.7%). Arkansas, Rhode Island, Iowa, Missouri, South Dakota, Nebraska, and Kansas followed with 13 to 14 percent.

Most states had at least a 50 percent increase in the number of persons 85 and over between 1970 and 1980. While Arizona, Florida, and Nevada experienced more than a doubling in the size of their 85 and over population.

During this decade, Nevada experienced the largest increase in persons 65 and over (113%), and New York the smallest (10.8%).

The traditional notion of Florida as the state with the greatest concentration of elderly persons is borne out by the statistics. In fact, the proportion of 65 and over persons in Florida (17.5%) is now about what it will equal for the rest of the states in the year 2020 (17.3%). The three large metropolitan areas in 1980 with the greatest proportion of elderly in the United States were all in Florida. That is, more than 20 percent of the population of the Fort Lauderdale-Hollywood and Tampa-St. Petersburg metropolitan areas were elderly. In the Miami area, one in six persons was elderly. These three Florida cities also had the largest proportions of persons age 75 and over (7 to 8%) and 85 and over (1.3 to 1.7%) although these proportions were not much above the national average.

On the contrary, Houston, Texas was the metropolitan area with the smallest percentage of elderly in 1980 with less than 7 percent. In absolute numbers, only the New York metropolitan area had over one million elderly residents.

B. Suburbs:

The growth of the suburban elderly population has touched every major region of the United States. According to the study based on a nation-wide sample of 2,300 suburbs, the average suburban elderly population in 1980 was 11.8 percent.¹⁰⁾ For the first time in 1980 a greater number of older persons lived in the suburbs (10.1 million) than in central cities (8.1 million). Older persons are found disproportionately in suburbs which were established before World War II. These older suburbs also have lower average resident income levels, more rental housing, lower home values, and higher population densities.

C. Counties:

Counties with a high percentage of elderly are distributed all across the country. Moreover, there are now over 500 rural and small town counties in which persons 65 and over make up at least 16 percent of the total population, and in 178 counties the elderly make up over 20 percent of the total population.

Over 50 percent of these counties, especially in the nation's heartland, are agricultural areas where the older population has stayed on while the younger generation has moved out. Heavy out-migration of the young and relatively low fertility has contributed to a high proportion of elderly in such states as Iowa, Kansas, Missouri, Nebraska, South Dakota, Arkansas, Maine, Massachusetts, Rhode Island, and Pennsylvania. Other areas with an exceptionally high proportion of older persons are those to which the older population has relocated in retirement, such as Florida, the Ozark plateau in Arkansas, and the Texas hill country.

IV. Geographic Mobility of the Elderly: Interstate Migration and Counter-migration

A. Interstate Migration:

Today's older generation in America tend to remain where they have spent most of their adult lives. For both adults and children, rates of moving decline with increasing age. The highest rate of moving is among adults in their early twenties. Between 1982 and 1983, only 4.9 percent of older persons moved, compared to 34.5 percent of 20 to 24 years olds and 16.6 percent of persons of all ages.

In recent years, the number of older persons who move has been increasing. Estimates from the Retirement Migration Project, using data from the U.S. Bureau of the Census, show a 50 percent increase in the number of older persons who reported migrating from state to state during the 1970's, as compared to a decade earlier.¹²⁾

Of the 1,662,520 Americans over the age of 60 who moved out-of-state during this period, nearly half (47.6%) went to five states: Florida (25.8%), California (8.7%), Arizona (5.6%), Texas (4.5%), and New Jersey (3.0%).

Of these five states, three had an especially large increase in the number of older immigrants between 1960 and 1980. They are Arizona (a 215 percent increase), Texas (a 191 increase), and Florida (a 110 percent increase). In addition, Florida attracted over a fourth of all the interstate migrants over age 60 during the last two decades.

Where, then, are the origins of these interstate elderly migrants? New York is the top contributor of elderly state-to-state movers while California is

second, Illinois third, and Florida and New Jersey fourth and fifth. Elderly migration is essentially a mirror of a national trend where state-to-state movers are leaving the Northeast and Midwest and moving into the Sunbelt states of the South and West.

Older persons who move from state to state are relatively affluent, well-educated and are frequently accompanied by a spouse. Many older persons who move to non-metropolitan areas are motivated by positive images of rural or small town life, or negative views of metropolitan life. Furthermore, most older persons who move have pre-existing ties to the new area, such as family, friends, or property.

B. Countermigration:

Some 60-plus persons who migrated to the Sunbelt in their early retirement years return to their home states or to states outside the Sunbelt to be near their children. This trend, called countermigration, is a new topic in recent years, and relatively small in absolute numbers, but is statistically significant.¹³⁾

The exchange of older migrants between states is not unique to New York and Florida. There are twenty pairs of states that exchanged over a thousand older migrants each way between 1975 and 1980.¹⁴⁾ Half of these exchanges are with Florida.

Florida has six major trading partners of elderly migrants; namely, New York, New Jersey, Pennsylvania, Ohio, Illinois, and Michigan.¹⁵⁾ Florida lost significant numbers of elderly migrants to these states. At the same time, all of these states send a substantial number of migrants to Florida. For instance, from 1975 to 1980, approximately 127,600 people aged 60 and over in New York migrated to Florida. Whereas, 9,000 elderly residents of Florida moved to New York, 56 percent of whom was the state of their birth. The average age of these countermigrants was 73 years.

Another Sunbelt state, California, also lost migrants to other areas, but not to states which generally have large numbers moving to California such as New York and Illinois. A substantial volume of elderly residents in California moved to the Western states such as Oregon, Arizona, Washington, and Nevada and to the southern state of Texas as well.¹⁶⁾

Reasons for countermigration seem to be obvious. Several years must

transpire before retirees, in the state of "young-old" when they first moved in to Florida, feel motivated to return to their place of origin. The major reasons would be their declining health, reduced income and purchasing power, and widowhood. Hence, those leaving the Sunbelt are most likely to have income below the poverty line, many are disabled, or are living in institutions or homes for the aged.

We must be cautious, however, not to derive an unfounded conclusion as to the alarming situation of counter migration on a national level. In fact, the vast majority of retirees do not make a U turn after 10, 15, or 20 years or more of living in their environments of destination. The elderly who do make that return journey are a very small minority, especially in the case of Florida (i.e., somewhere around 10 returnings per 100 in the stream).¹⁷⁾

V. Maturity Market in America

If Florida attracts the vast number of senior citizens, it may well be the demographic and marketing map of the American future. Florida, in a sense, is a pioneer of what the rest of the United States will be like by the turn of the century. In fact, with more than 17 percent of its population over 65 and a full 33 percent over 50, Florida's demographics do accurately reflect forecasts for the United States in the year 2000.

Moreover, marketing experts now realize that the 50-plus age group, not only has more financial resources to purchase but also is more inclined to spend it than younger consumers. This is the segment now growing three times faster than the rest of the country's population, once considered the most productive target for advertising and marketing.¹⁸⁾ The reasons for this reversal can be easily detected. As people become older their fixed expenses tend to decline. They have either paid for their homes or are making only modest mortgage payments. Their children have grown up, and they are no longer burdened with installment debt payment. While there are still far too many elderly people living below the poverty line, improvements in both private pension plans and social security have made life comfortable for millions of others. As a consequence, households headed by someone over 50 now hold more than half of all discretionary income in the United States, approximately \$150 billion.

In addition, the notion of retiring and saving for children has changed.

Instead, retirees of today prefer to enjoy their own lives. This is the very point which makes them exciting to marketers. It is true that the over 50 age group possesses much more time than working baby-boomers to watch television programs and to read magazines. To attest to this, nowadays older people appear more frequently in print advertisements and television commercials to attract the attention of the majority viewers.

We come to the question, however, of whether Florida really is an accurate reflection of the national market of the future. Some argue that it is atypical in terms of income and median-age distribution. Others contend that test marketers tend to concentrate too much on affluent subgroups. The truth would seem to be that marketers need to go further into detail about the analyses of the characteristics of older persons if they desire to approach older consumers more effectively. If this is the case, given its demographics, Florida would still seem to be the most illuminating state in the United States for the marketing target of the future.

VI. Conclusion

We discussed earlier that the population growth of the United States will progress much faster in the American south than elsewhere. The projected population gain of the United States between 1980 and 1990 will be in an average of 17 percent. Whereas such southern states as Florida (27.1%), Arizona (27.0%), Nevada (20.8%), New Mexico (17.4%), and western states as Colorado (20.8%), Alaska (19.2), Utah (18.9%), Idaho (18.8%) all exceed the average of the projected population gain of the United States, there are states which lag significantly behind the national average. These states are as follows: District of Columbia (5.0%), New York (0.5%), Ohio (2.3%), Pennsylvania (2.6%), Illinois (3.6%), Indiana (4.2%), Connecticut (4.7%), Iowa (4.8%), South Dakota (4.9%), and Kansas (5.4%).¹⁹⁾

Among the states which will gain in population significantly by the turn of the century, rates of increase in the Sunbelt region are outstanding. Four major influences seem to contribute to such significant population growth of the Sunbelt. They are defense spending, especially that generated by World War II, other federal outlays, a favorable business climate, and an attractive quality of life.²⁰⁾

The elderly, in large concentration in the Sunbelt, comprise a greater

proportion of the constituency today. Hence, its impact on political and economic spheres are not insignificant. They are the so-called "gray power" and are becoming a massive pressure group to the Reagan Administration, especially on the issue of Social Security.

Traditionally, older voters have been more conservative than the electorate as a whole. Their conservatism has been intensifying in recent years because of inflation and the patriotic and cultural issues of the 1960s. Now they face a threat to Social Security and the political problem of taxing the shrinking relative number of young workers to support the soaring number of retirees. This fact indicates a definite change in the politics of the elderly. If the economy of the 1980s is not strong enough to ease the pressures building up in the Social Security system, and if stagflation continues, the politics of being old in the United States may turn to be radical.

In the long run, the newer cities of the Sunbelt will age and will probably resemble their older northern counterparts in many aspects of growth and politics. Furthermore, the South and Southwest are likely to be the new industrial America where people can still reach the American dream, as Fredrick Hofheinz, former mayor of Houston, puts it.²¹⁾

Notes

- 1) This is an outgrowth of a paper presented at the Monthly meeting of the Japan Society for Southern American Culture on May 11, 1986 held at the International House of Japan in Tokyo. I express my sincere appreciation to Professor Hisako Yanaka who gave me an opportunity to give the presentation, and to participants of the seminar whose constructive comments and criticism assisted me to make the final version of this paper.
- 2) D. C. Cowgill and L. D. Holmes, eds., *Aging and Modernization*. New York, Appleton-Century-Crofts, Educational Div., Meredith, 1972; F. Kumagai, "Aging in the World and the Elderly in Japan." pp. 211-243 in *Aging Well Through Living Better*. Paris, France: International Center of Social Gerontology; F. Kumagai, "Satisfaction among Rural and Urban Japanese Elderly in Three-Generation Families" (July) 1986, submitted for publication.
- 3) F. Kumagai (July, 1983), *op. cit.*; F. Kumagai, "The Duality of the Japanese Family and Household: External Modernism and Internal Traditionalism" (August) 1986, submitted for publication.
- 4) "10 Forces Reshaping America," *U.S. News & World Report*, March 19, 1984, pp. 40-52.
- 5) Sources of U.S. statistics are as follows: U.S. Department of Commerce, Bureau of the Census, *Historical Statistics of the United States: Colonial Times to*

- 1970, *Part 1 & Part 2*, September 1975; U.S. Department of Commerce, Bureau of the Census, *Statistical Abstract of the United States 1985*, 105th ed., December 1984. The Japanese statistics, on the other hand, were compiled from the following sources: Institute of Population Problems, *Latest Demographic Statistics: 1985*, March 1986; Institute of Population Problems, *Projections for the Japanese Population*, August 22, 1986.
- 6) Congressional Committee Serial #99-B, CIS S-142-6, *America in Transition: An Aging Society 1984-85 ed.*, June 1985, especially pp. 7-24, Chapter 1, "Size and Growth of the Older Population."
 - 7) R. M. Bernard and B. R. Rice, eds., *Sunbelt Cities: Politics and Growth Since World War II*, Austin: Texas, University of Texas Press, 1983.
 - 8) K. Sale, *Power Shift: The Rise of the Southern Rim and Its Challenge to the Eastern Establishment*, New York: Random House, 1975, p. 11.
 - 9) R. M. Bernard and B. R. Rice, eds. (1983), *op. cit.*, p. 4.
 - 10) J. R. Logan, "The Graying of the Suburbs," *Aging*, June-July 1984, pp. 4-8.
 - 11) Congressional Committee (1985), *op. cit.*, pp. 25-30, Chapter 2, "Geographic Distribution and Mobility"; M. L. Duggar, "Remaining in the Sunbelt," *Proceedings of a Symposium*, March 1985, pp. 32-36; C. F. Longino, Jr., "Returning from the Sunbelt: Myths and Realities of Migratory Patterns Among the Elderly," *Proceedings of a Symposium*, March 1985, pp. 7-11.
 - 12) Congressional Committee (1985), *op. cit.*, pp. 25-30, Chapter 2; The Retirement Migration Project, Center for Social Research in Aging, University of Miami, September 1984.
 - 13) University of Miami (1984), *op. cit.*
 - 14) C. F. Longino, Jr. (1985), *op. cit.*
 - 15) C. F. Longino, Jr. (1985), *op. cit.*, p. 7.
 - 16) C. F. Longino, Jr. (1985), *op. cit.*, p. 11.
 - 17) H. L. Sheppard, "Summary Remarks," *Proceedings of a Symposium*, March 1985; C. F. Longino, Jr. (1985), *op. cit.*, p. 11, Table 1.
 - 18) "Targeting the Old Folks: Florida Leads the Way in Marketing to the Elderly," *Newsweek*, January 6, 1986, p. 54.
 - 19) K. P. Phillips, *Post-Conservative America: people, politics, and Ideology in a Time of Crisis*, New York: Random House, 1982, p. 95.
 - 20) R. M. Bernard and B. R. Rice, eds. (1983), *op. cit.*, pp. 11-19.
 - 21) F. Hofheinz, *New York Times*, February 9, 1976.