

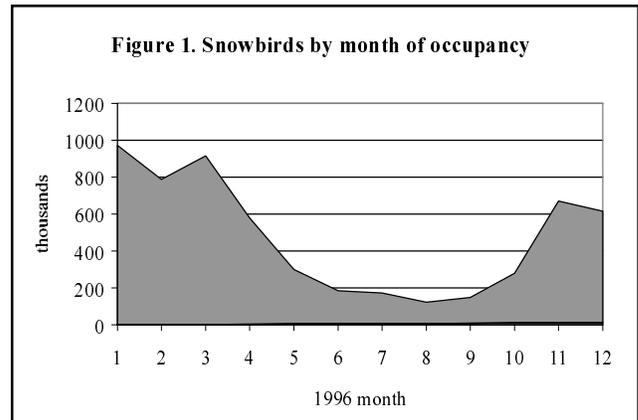
The Florida Elusive Snowbird

By Janet Galvez
Director of Information/Publication Services

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While market researchers hunt for new niches of robust consumers and communities vie for educated, affluent residents, Florida has them and may not know it. They are the temporary residents known as snowbirds. Because official ties are often with other states, they elude Florida data catchers. Socioeconomic data available from a survey by the University of Florida's Bureau of Economic and Business Research reveal their characteristics and habits. The results are both expected and unexpected.

Although the phenomenon is undisputed, it has long defied enumeration. Both the US Census and the official estimates of Florida tourists exclude their numbers. In 1990 The Census Bureau eliminated the question that identifies individuals who are temporarily away from a primary residence. Visit Florida stops counting visitors when their stay exceeds 180 days. Estimates produced at the University of Florida reveal that 472,200 temporary residents could be found on the average day in Florida in 1996. These numbers, however, don't tell the whole story. Because the migratory behavior is predominately weather related, nearly a million (971,200) seek the warm sun on the average January day while only 113,700 stay through the dog days of August. This seasonal pattern of occupancy, seen in Fig 1. at right, resembles a roller coaster, giving regional service providers and retailers a ride each year.



Implicit in this picture is the exit of 857,500 temporary residents from peak-to-trough. While small relative to the state, only, about 6 percent of the total resident population, this fluctuation is exacerbated by an unequal geographic distribution (see Table 2). The exit from the January high occupancy to the August low is equivalent to all of the combined 1996 permanent residents of Sarasota-Bradenton and Naples MSA's. This variation in the snowbird population from high to low points in fact surpasses the number of 1996 residents in 14 of Florida's 20 metropolitan areas.

Table 1. 1996 Estimated Snowbirds

	Percent Of Sample	1996 Estimated Snowbirds
January	7.20	971,200
February	5.90	784,800
March	6.80	913,300
April	4.40	576,100
May	2.30	294,700
June	1.40	177,700
July	1.30	164,900
August	0.90	113,700
September	1.10	139,200
October	2.10	268,500
November	5.00	658,800
December	4.60	603,600
1996 Average		472,200

Table 2. Regional Distribution of Snowbirds

Region	Percent Of Sample	Average Stay in months
Northeast	5.9	6.1
Northwest	4.9	6.3
Central	13.0	5.2
Southeast	35.0	6.1
Southwest	41.2	5.9

Region definitions :

Central	Brevard, Flagler, Lake, Orange, Osceola, Seminole, Sumter, Volusia
Northeast	Alachua, Baker, Bradford, Clay, Columbia, Dixie, Duval, Gilchrist, Hamilton, Lafayette, Levy, Marion, Nassau, Putnam, St. Johns, Suwannee, Union
Northwest	Bay, Calhoun, Escambia, Franklin, Gadsden, Gulf, Holmes, Jackson, Jefferson, Leon, Liberty, Madison, Okaloosa, Santa Rosa, Taylor, Wakulla, Walton, Washington
Southeast	Broward, Dade, Glades, Hendry, Indian River, Martin, Monroe, Okeechobee, Palm Beach, St. Lucie
Southwest	Charlotte, Citrus, Collier, De Soto, Hardee, Hernando, Highlands, Hillsborough, Lee, Manatee, Pasco, Pinellas, Polk, Sarasota

The demographic profile as revealed by the current telephone survey is, in many ways, predictable. Snowbirds are overwhelmingly white (92.8 percent), currently married (66.7 percent), living in a 2 person household (62.3 percent) and college or higher educated (63.7 percent), Largely non-participants in the labor force (61.0 percent), and aged 55 or older (66.4 percent). In fact, nearly a third of the seasonal sample are over the age of 70 (32.3 percent). This is roughly 2 and a half times higher than the proportion of Florida residents aged 70 or older. Also as expected, most snowbirds are retired (71 percent) but a surprising 29 percent work. The majority of working snowbirds are fulltime, professionals. However, working snowbirds are 2 times more likely than Florida residents to work part-time, and these are most often low paying, laborer and clerical positions. Some of these snowbirds who retrain each year to fill the seasonal jobs created by the influx of their peers. Another surprising characteristic is the extent to which this seasonal migration becomes a way of life. Fifty-four percent report that they have regularly visited Florida for 10 or more years.

Perhaps the most interesting new information relates to the self-reported household income of snowbirds. The differential between Florida residents and snowbirds was found to be a surprising 19 percent, or \$9,100 annually, over 1994-96. Even more dramatic differences emerge when age is considered. While both snowbird and permanent resident incomes decline after age 59 at about the same rate, snowbirds, maintain an average annual advantage of \$22,700 per household over these later years.

But how do they spend while in Florida? It is often assumed that spending patterns for older, retired Americans differs from that of the general population. A number studies have shown that the level of affluence is a

more significant determinant of consumer spending than is age or employment status. In fact some research indicates that migrant retirees, a group similar to the majority of Florida's seasonal population, spend more than permanent, working residents, but do so in different categories of goods. These studies show that migrant retirees buy new, more expensive homes early in retirement, and without regard to age spend more on major purchases such as home furnishings, auto and recreational equipment, while spending less on clothing and automobile operation. The University of Florida survey data show that buying patterns and intentions on a limited number of big ticket items is similar for seasonal migrants and permanent residents. Both groups are about equally likely to buy homes and cars in the next 6 months, although seasonal migrants are more likely to spend more on new cars. Similarly both groups are about equally likely to own the homes where they were living in at the time of the interview. Seasonal residents, however, more frequently live in attached homes (12.5 percent), apartments (17.9 percent) and mobile homes (21.3 percent).

Because of its perpetually mild winters, Florida should continue to garner a share of those seeking mild, sunny locations for the winter, but during the 1990's other southern states have more aggressively pursued and successfully capturing these educated, affluent households, leaving fewer for Florida's future. With the aging of the US population, the trend toward seasonal migration will undoubtedly increase, arguing for increased attention to this segment of the population. Many cost benefit questions arise for government and private sector planners and impact local economies for the better and for the worse. While these issues remain, years of interviewing has provided a critical start point, a socio-economic distribution of Florida's snowbirds.