

## A DEMOGRAPHIC COMPARISON of MEXICAN ELDERS in the U.S. and MEXICAN ELDER RETURN MIGRANTS

### *Background*

The number of Latino elders in the United States is projected to increase substantially over the next half century. Mexicans comprise a dominant proportion of these elders. A large proportion of Mexican-origin elders in the U.S. are foreign-born and, many times, have the option to retire in Mexico or in the United States. This decision can have significant economic consequences in the U.S. given their substantial use of certain public programs, such as Supplemental Security Income and Medicaid. This study attempts to understand the characteristics of Mexican immigrant elders who remain in the U.S. upon reaching old age and those who reverse migrate. Utilizing the Health and Retirement Study (HRS) and the Mexican Health and Aging Study (MHAS), this study compares the demographic characteristics and migration histories of these two populations in order to understand what factors are associated with reverse migration among Mexican immigrant elders in the U.S.

### *Methodology*

This study utilizes the 2002 wave of the Health and Retirement Study (HRS) and the 2001 Mexican Health and Aging Study (MHAS). The HRS is a longitudinal study of individuals aged 50 years and older living in the United States, many of whom have been interviewed every two years since 1992. Questions cover physical and mental health, insurance coverage, financial status, family support systems, labor market status, and retirement planning. The 2001 HRS sample includes 18,127 respondents, 383 of whom are foreign-born Mexican Americans aged 50 years and older.

The MHAS is a prospective panel study taken in Mexico of 13,497 Mexicans aged 50 and older, 1,297 of whom have lived and worked in the U.S. Of those who have lived and

worked in the U.S., 194 respondents are U.S. citizens or legal permanent residents aged 50 years and older. The MHAS measures most of the concepts in the HRS but within the institutional context of Mexico. The MHAS was based on the HRS, so the phrasing of questions in both of the surveys is similar.

The HRS sample in this analysis includes respondents aged 50 years and older who self-reported being Mexican-American and foreign-born. Although the HRS contains a variable indicating the country in which the respondent was born, it was not available for public release. For the purposes of this analysis, these elders will be referred to as U.S.-residing elders. The MHAS sample includes respondents aged 50 years and older who were interviewed in Mexico, have lived and worked in the United States, and are U.S. citizens or legal permanent residents. These individuals have the legal capacity to remain in the U.S. during old age but chose to return Mexico. They will be referred to as Mexico-residing elders.

I distinguish between MHAS respondents who are U.S. citizens or residents and MHAS respondents who have worked in the U.S. but do not have any legal basis to live in the U.S. The latter do not provide important information regarding their choices as to the location of their retirement since they do not have the choice to legally retire in the U.S. Both the HRS and MHAS contain respondents younger than 50 years of age due to the fact that spouses are also interviewed. All individuals younger than 50 are excluded from the analysis.

### *Results*

A demographic comparison demonstrated interesting differences between U.S.-residing elders, Mexico-residing elders, and Mexican migrant elders with no legal status in the U.S. Mexican immigrants who remain in the U.S. as elders are, on average, two years older than those who reverse migrate (65 versus 63, respectively). Many of these elders return to Mexico to work

rather than to retire. Though both samples have relatively low levels of education, Mexican immigrants who remain in the U.S. have three more years of schooling than their Mexico-residing counterparts (4 versus 1, respectively). Mexico-residing Mexican elders are also more likely to be male than their U.S.-residing counterparts and are equally as likely to be married.

An analysis of the migration histories of both populations also reveals interesting results. While both groups arrived in approximately 1965, the modal year of arrival for U.S.-residing elders is in the 1950s while it is in 1960s for Mexico-residing elders. Both groups first arrived to the U.S. at approximately the same age, namely 25. Mexico-residing elders were substantially more likely to have last returned from the U.S. at old age compared to Mexico-residing elders who are not U.S. citizens or legal permanent residents.

### *Limitations*

One of the most important limitations of this analysis is the small sample size. The small sample sizes limits the analysis to descriptive statistics rather than a more causal analysis. A more thorough analysis may draw on a larger dataset to make causal inferences. Another notable limitation is that it does not indicate whether or not respondents who were interviewed in Mexico had any intention of returning to the United States. These elders may travel back and forth between the U.S. and Mexico for extended periods of time. Therefore, we cannot assume that they are long-term reverse migrants. Yet another limitation is that I could not obtain adequate information on their relative income. The differences in the measures examined in this analysis may be attributed more to income than the actual measures.