

*Project*

***“Ageing as an opportunity for economic development”***

*Discussion paper*

## **Mobility of the ageing population: migration and tourism**

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### ***1. Mobility of the ageing population at the interface between migration and tourism – an introduction***

Leisure-oriented mobility of elderly citizens has become a phenomenon of increasing economic, social and political importance within advanced societies and especially in the Western hemisphere. It constitutes a process that is difficult to address properly in its scope, intensity and consequences, because it often blurs the differences between migration and tourism, thus avoiding the official registration processes of State authorities on different scales. It is intrinsically related to tourism, second-home development and includes at the same time temporary and permanent relocations. In this regard, academic debates usually conceive lifestyle migration and other leisure-oriented mobilities such as second-home or residential tourism as a temporary or permanent spatial movement of relatively affluent persons that travel and move between meaningful places with an individually imagined and collectively perceived potential to provide a better quality of life (Benson, O’Reilly, 2009). Such mobility strategies, which had for a long time been the privilege of aristocratic and upper classes, have now diffused to broader parts of the population, and there is both qualitative and quantitative evidence that they have experienced a significant increase worldwide (Janoschka, Haas, 2014). Lifestyle migrants comprise a broad spectrum of people that range from counter-cultural dropouts seeking a more coherent life beyond the constraints of global capitalism, over independent graphic designers moving to remote mountain villages, to the workers of oil companies who relocate with their families at seaside locations. However, its vast majority consists of a rather elderly population that at the end of their economically productive lifespan, often just before or after retirement, moves temporarily or permanently to a new place, which offers specific amenities. For this reason, some academics have coined the mobility of ageing population also as ‘retirement migration’ (King et al., 1998; Gustafson, 2008; Rodríguez, 2001; Truly, 2002).

### ***2. Destinations of a mobile ageing population***

During the last two decades, the global spread of destinations for the mobile ageing population has produced a differentiation of previously clear-cut spatial patterns, that was mainly of a sun-seeking population that heads towards the US sunbelt states (in the North American case) and the Mediterranean coastal areas (in Europe). Yet globalisation, the informational revolution that eases communication across continents, cheaper and easier air traffic, better infrastructure especially in countries of the Global South and further individualisation of Western societies have highlighted attractiveness for manifold new destinations. As the housing prices grew overwhelmingly since the early 2000s in the US Sunbelt states, many people from the US and Canada have now moved to Latin American

countries such as Mexico (with an estimated number of 500,000 North Americans), Costa Rica, Panama, and Ecuador (Janoschka, 2009; Hayes, 2015). British citizens have discovered destinations in South Africa and Malaysia. Australians have been moving to the Philippines, and Germans reside now in places such as the Dominican Republic and Thailand. Economic considerations are often at the forefront of these decisions, as living costs are much cheaper in countries of the Global South, and this is a sound reason for households ranging from middle classes down to the poverty line (Green 2014). Many elderly people can thus afford in these countries also personal services and medical treatments that they would be unable to in their home country. Beyond this, different trends can also be observed in traditional destinations. For instance, mountain areas such as the Rocky Mountains, the Patagonian Andes, the Southern Alps in New Zealand and the European Alps have become trendy among elderly people, connecting thus with long-lasting traditions of upper classes to move seasonally to mountain villages and resorts (Gosnell, Abrams, 2011; Perlik, 2011). There is also some fresh evidence that smaller towns in rural settings with mineral or thermal Spa installations increasingly attract retirees. Weidinger and Kordel (2015) analysed for instance that such Spa towns belong to the most dynamically growing municipalities in Germany, due to the inflow of older inhabitants. However, taking into consideration exclusively quantitative data, Southern European coastal areas are still the most important destination for international retirement migration and the multiple facets of the interrelation between tourism and migration. Hundreds of thousands Britons, Germans, French and other North and Western Europeans have been buying houses in the South of the continent for decades, especially in countries such as Malta, Greece, Croatia, Portugal, and of course in Spain – which is by far the most important European destination.

### ***3. Mobility of the ageing population between migration and tourism – Spain & Portugal***

Spain and Portugal have been identified by far as the two most prominent target regions for international retirement migration across the European Union. Although statistical data is rare and does not give a full representation of the migration process in its manifold dimensions, it should be the starting point for further explorations. In this regard, Rodriguez et al. (2010) demonstrate that the number of officially registered elderly migrants from EU-15-countries at the Spanish coastal areas ascends to more than 400,000. But in recent years official numbers demonstrated a sharp decline of more than 20 percent (INE, 2015) – something that should be taken into consideration with regard to future policies targeting elderly migrants. However, many experts indicate that official numbers only give a more or less accurate acknowledgement of about 80 percent of those who permanently relocated to Spain, and the recent decline does not necessarily mean a return migration. It can also be the consequence of legislative changes on the national level, especially with regard to inheritance and taxation.

Taking this into consideration, it is important to state the presence of another much bigger group of elderly people who move for longer periods to Sp. Yet they do not appear in official statistics, as they have not undertaken any registration at the local or national level, thus making use of the freedom of movement and the lack of border controls in the European Union. In other words, estimations of the phenomenon in Spain range from 500,000 to 750,000 elderly European who rather permanently live in the country, and another group of similar size that stays in Spain for periods between three and seven months per year (the latter is the length that usually motivates citizens to get officially registered).

In the Portuguese case, retirement migrants strongly concentrate in the Algarve, but recent sprawl has also acknowledged some areas such as the Southern Atlantic coast, some beach towns in relative proximity to Lisbon and several rather remote inland destinations (Sardinha, 2014). Taking into consideration the minor size and population of the country, retirement migration is a significantly smaller phenomenon than in Spain. Yet estimations calculate of several tens of thousands of households having relocated to Portugal. This is enough to make it an important aspect for regional and especially local development.

This leads us to the uneven geographic consequences of retirement migration. For instance, it is recognised that more than 90 percent of this migration concentrates, in the Spanish case, in eight provinces, which are Alicante, Murcia, Almeria, Malaga, Girona, Balearic Islands, Tenerife and Las Palmas. On the local level, this clustering is even stronger, thus challenging, amongst others, the provision of local services. For example, Rodriguez (2012) identifies that in more than 100 Spanish municipalities the European retirees are more than 50 percent of the local population. And Janoschka and Duran (2014) have shown how this group has become relevant for the reorientation of local politics that was taking place recently, thus transforming broader social demands towards the State into concrete political claims that derived into channels of political participation and representation. Taking into consideration the results from Rodriguez (2012), who derives from a representative household survey with 720 respondents carried out in Spain that 75 percent of the retired migrants have a monthly household income of more than 3,000.- €, it is demonstrated how an economically powerful population proves to have further impacts about the way social discourses and politics are shaped in place.

#### ***4. Existing research and scientific challenges about ageing population at the interface between migration and tourism***

Recent research on mobile elderly population has been focusing beyond only the economic and social impacts it has on its destinations. In this regard, it is important to remind that leisure and lifestyle-oriented migrations and movements do not only include people, but also involve capital, objects, information, knowledge and cultures associated to this voluntary relocation (Janoschka, 2009). Four major strands of research may characterise the key questions that scientist have been facing recently:

- *Identity constructions and belonging of ageing migrants:* Contemporary lifestyle-led mobility patterns contribute to and illustrate a breakdown in conventional binary divides of different concepts within Social Sciences, for instance between work and leisure. They also destabilise concepts of home and away, asking for alternative constructions of identity, belonging and place attachment that include multi-locality and sustained corporeal mobility (Cohen et al., 2015). Something similar occurs with the transnationalism and social networks take place in contemporary multi-local families in which the elderly have moved away. The mobility of the ageing population proves to produce important and relevant insights into the realities of individualisation in liquid modernity.
- *Integration and adaptation of elderly migrants after the move and ageing in place:* The relocation of an ageing population to Spain and Portugal implicates a series of difficulties and challenges, both on an individual and societal level. Given the fact that this mobile population only has very rudimentary knowledge of the locally spoken languages, they are vulnerable to abuses and often cannot fully interact with the host population. It is a substantial fact that –different to labour migrants– only a very minor proportion manages to properly speak Spanish or Portuguese even after decades. This situation produces major problems especially for the provision with public services, reducing substantially the possibility of a successful social integration (Janoschka, Duran, 2014). Additionally, multi-local dwelling makes it often difficult to maintain social networks that are necessary when living abroad and under conditions of increasing physical fragility as it occurs with ageing migrants across time (Haas, 2015).
- *Contested spatialities of ageing:* Research within this strand discusses mainly two interrelated aspects – on one hand the question of how mobilities, which are supposed to be an expression of individual desires, are at the same time a centrepiece of the transnational capitalist exploitation of assets. Many case studies have shown how retirement migration is an important factor for the further dispossession of ‘original’ inhabitants, occupants and users of the correspondent spaces and places. Such dispossession is especially strong but not restricted to destinations of the Global South, where it is usually widely assisted by liberal governments, and it produces

more or less virulent conflicts and processes of contention (Janoschka, Haas, 2014). On the other hand, discussions about the spatialities of ageing also refer to a proper theorisation that is necessary within human geography and sociology to better understand the body and (spatio)temporality in conjunction with ageing (Schwanen et al., 2012). In this regard, it is important to remind that acting on culturally specific notions of positive ageing, has consequences for individual migrants when their bodies contradict their image of themselves as active and independent (O'Reilly, Benson, 2015). This is also informed by the cultural differences about positive and active ageing between rural Spanish and Portuguese areas and urban societies in Britain, Germany and other countries, especially with regard to the role of and the personal and logistic support and assistance that is by the family (Oliver, 2008).

- *The effects of the economic and social crises and environmental deterioration:* One of the key assets of retirement migration destinations worldwide, apart from climatic virtues, consists usually in attractive landscapes that respond to idyllic rural imaginations. However, especially during the construction booms of the 1990s and 2000s, the most attractive European destinations have become urbanised on a rather massive scale, with the consequent deterioration of the environment due to overexploitation of resources. Large scale urbanisations have remained at least partially empty, and the image of the 'modern ruins' as a by-product of the real estate boom of the previous decade have transformed the ways in which many potential migrants approach Spain now. In the case of the region of Valencia, misapplications of local and regional land use policies provoked massive protests of groups of alarmed expatriates that challenged the regional planning legislation because it had permitted abuses and unjustified expropriations (Janoschka, 2010). Although European institutions, after many years of struggle, enforced a new planning legislation, the damage on the image of the region remains. Additionally, the social, economic and political crises that have repeatedly overcome the European Union since the financial crash of 2008 have caused also important effects. This was first the case among British migrants, who after the rapid devaluation of the British pound saw drastically diminished their purchase power (Huete et al., 2013). But also other decisions of the Spanish government on social services and taxation have attenuated attractiveness.

### **5. Mobility of the ageing population between migration and tourism – challenges & opportunities**

The mobility of the ageing population between migration and tourism has a series of practical challenges but also opportunities for local and regional development. The following table will sum up some of the key questions that could inspire a critical reflection between scientists and practitioners.

Challenges	Opportunities
<ul style="list-style-type: none"> <li>- The European baby boomers (those born between 1946 &amp; 1965) have started to reach retirement age, this means that the 'market' of the mobile ageing population is growing substantially.</li> <li>- Current pensioners 'on the move' are most prosperous generation that ever has existed.</li> <li>- Tourism, seasonal movements and long-term migration of pensioners are closely related, and previous touristic experiences strongly motivate to buy and move. As mass tourism has brought millions of Europeans to Spain &amp; Portugal, positive previous experiences exist.</li> <li>- Housing prices have significantly fallen since 2008, and this makes the Iberian market again internationally competitive.</li> </ul>	<ul style="list-style-type: none"> <li>- Many destinations areas, especially in the Mediterranean, have significantly lost their outstanding quality criteria due to over-construction and disperse urbanisation.</li> <li>- Clients are highly demanding and require specific services that have been significantly reduced in many municipalities due to the long-lasting economic crisis.</li> <li>- Infrastructure for elderly migrants requires age-specific and culturally sensitive adaptations, and local services should be offered in the main languages of dwellers, as local language competence is extremely low.</li> </ul>

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