



IUL School of Social Sciences

Department of Social and Organizational Psychology

**Acculturation Strategies and Outcomes of
International Retired Migrants in Portugal**

By

Deborah Dahab

Dissertation submitted as partial requirement for the conferral of
Master in Psychology of Intercultural Relations

Supervisor:

Dr. Christin-Melanie Vauclair, Invited Assistant Professor, ISCTE-IUL

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Resumo

Os IRM (International Retired Migrants – Migrantes Reformados Internacionais) são um grupo demográfico em crescimento em Portugal. A literatura em Psicologia Social até hoje tem negligenciado a forma como este grupo realiza sua aculturação. Este estudo investigou as estratégias de aculturação adotadas pelos IRM, os resultados de sua adaptação psicológica e sociocultural, além de sua percepção de preconceito devido à idade avançada e por ser estrangeiro. Nós esperávamos que alguns dos pressupostos da literatura de aculturação (Berry, 1997) não fossem comprovados dada a especificidade deste grupo no que tange a idade e mudanças no estilo de vida associadas à reforma. O estudo foi realizado com os IRM que atualmente vivem em Portugal (N=131). Os participantes foram recrutados através de grupos de expatriados no *Facebook* e preencheram um questionário *online* que continha as medidas de interesse. Confirmando nossa hipótese, a Integração foi a estratégia que mostrou os maiores níveis de adaptação psicológica e sociocultural. Contudo, contrariamente à nossa hipótese e ao consenso na literatura sobre aculturação, a Separação foi a estratégia que mostrou os menores níveis de adaptação psicológica e sociocultural. A estratégia de Marginalização não produziu os piores resultados como a literatura geralmente sugere. Especulamos que possivelmente haverá um novo tipo de IRM “marginalizado” que se sente confortável em ‘não se identificar’ nem com a cultura original nem com a cultura local. Verificamos também que o preconceito percebido por ser estrangeiro é mais saliente que o preconceito percebido pela idade. Finalmente, o estudo sugere estratégias para integrar os IRM na sociedade portuguesa com o objetivo de manter aqueles que já estão no país e atrair aqueles que ainda não decidiram seu destino para o período da reforma.

Palavras-chave: Estratégias de aculturação, Adaptação Psicológica, Adaptação Sociocultural, Migrantes Reformados Internacionais, Migração de Estilo de Vida

PsycINFO Codes:

3000 Social Psychology

3020 Group & Interpersonal Processes

Abstract

The IRM (International Retired Migrants) are a growing demographic group in Portugal. The literature in Social Psychology has so far overlooked how this specific group acculturates. This study investigated the acculturation strategies adopted by the IRM, their psychological and sociocultural adaptation outcomes, and their perception of prejudice due to their advanced age and being a foreigner. We expected that some of the assumptions from the acculturation literature (Berry, 1997) might not hold, given the specificities of this group regarding age and changes in lifestyle associated with retirement. The study was conducted with IRM who currently live in Portugal (N = 131). The participants were recruited through expatriate groups on Facebook and completed an online questionnaire containing the measures of interest. Confirming our hypothesis, Integration was the strategy that showed the highest levels of psychological and sociocultural adaptation. However, contrary to our hypothesis and to the consensus in the acculturation literature, Separation was the strategy that showed the lowest levels of psychological and sociocultural adaptation. The Marginalization strategy did not produce the worst adaptation outcomes as the literature widely suggests. We speculate that there may be a new type of “marginalized” IRM that feels comfortable with ‘not identifying’ with host or original cultures. We also found that perceived prejudice against being a foreigner was more salient than perceived age prejudice. Finally, the study suggests strategies to integrate the IRM into Portuguese society aiming to keep those who are already in Portugal and attracting those who are still deciding their retirement destination.

Keywords: Acculturation Strategy, International Retirement Migration, Psychological Adaptation, Sociocultural Adaptation

PsycINFO Codes:

3000 Social Psychology
3020 Group & Interpersonal Processes

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Glossary of Terms

INE	Instituto Nacional de Estatística – Statistics Portugal
IRM	International Retired Migrants
PALOP	Portuguese-speaking African countries
SCAS	Sociocultural Acculturation Scale
SEF	Serviço de Estrangeiros e Fronteiras – Immigration and Borders Service
UN	United Nations
SEF	Serviço de Estrangeiros e Fronteiras
VIA	Vancouver Index of Acculturation

Chapter I - Introduction

1.1 The General Context

According to the UN, in 2013 there were more than 230 million immigrants worldwide, representing 2.3% of the world's population. Portugal had almost one million immigrants, representing 8.4% of the country's population. Traditionally, however, Portugal is known more for its emigration. In fact, in 2013 Portugal had almost two million emigrants,¹ which is about twice the number of immigrants and around 20% of the country's population. According to Malheiros (2001), the Ministry of Foreign Affairs of Portugal estimates that there are currently 4.3 million Portuguese people and of Portuguese ancestry living abroad. According to INE, net migration in Portugal in 2014 was negative by over 30,000 people, which means that there were more people emigrating than immigrating. Nonetheless, the emigration and immigration flows of Portugal have been quite dynamic over time.

Portugal's tradition for emigration started from the overseas exploration in the 15th century and continued consistently into the late 1950's. In the mid-1970's, with the end of the dictatorship in Portugal, emigration rates dropped and immigration rates slowly began to increase. Also at this time, the decolonization of former colonies in Africa made Portugal a destination not only for the *retornados* (Portuguese people and their descendants who now returned to Portugal), but also for people from Africa, especially those from the former colonies such as Angola and Cape-Verde. After joining the European Union in 1986, Portugal became an attractive place for Eastern European immigrants, especially from the Ukraine, Moldavia, Romania and Russia.

During the 1990's, the mix of immigrants was different from other waves of immigration in that they were more diverse in terms of nationalities and occupations (Malheiros, 2001). Migrants from the PALOP (Portuguese-speaking African countries) were mostly low-skilled and took jobs in the construction sector, or in domestic and industrial cleaning. There were also well-educated professionals from Western Europe and Brazil which included a mix of highly-skilled migrants (dental surgeons, marketing managers and IT professionals) as well as semi- and lower-skilled migrants that ended up working in the hospitality, commerce and construction sectors. According to Padilha and Ortiz (2012), around the year 2005 the migration from Asia, especially from India, China and Pakistan started to increase. Initially the connexions with Portugal through the Portuguese

¹ <http://www.migrationpolicy.org/programs/data-hub/charts/immigrant-and-emigrant-populations-country?width=1000&height=850&iframe=true>

presence in Asia (Macau) and African connections with India were catalysts of this movement. Afterwards, migration flows and commercial connections with China reinforced these migration movements.

Portugal can be considered a country open to immigration and one that fosters the integration of its foreign population. According to the Migrant Integration Policy Index of 2015², Portugal is the second highest-ranking country in terms of migrant integration, and the Index identifies Portugal as a country with highly positive attitudes towards immigrants.

The 2014 Annual Report of SEF³ lists the nationalities with the most immigrants in Portugal as: Brazil (22%), Cape-Verde (10%), Ukraine (10%), Romania (8%), China (5%), Angola (5%), Guinee-Bissau (5%), United Kingdom (4%), São Tomé e Príncipe (3%) and Spain (2%). It is interesting to note that Ukraine and Romania, which are countries with no historical ties to Portugal, are in third and fourth place. It is also interesting to notice the relative importance of the immigration from the UK, which is almost the same percentage as Angola and Guinee-Bissau and even larger than São Tomé e Príncipe. These three African countries are former colonies of Portugal and have close historical ties with Portugal, including the language.

The Report of Foreign population in Portugal for 2011⁴ states some particular aspects of the immigrants from the UK. The immigrant from the UK is on average 50 years old, quite older than the average age of the general immigrant population which is 34.2 years old. Also, on average 6.09% of the immigrants in Portugal state that they were retired, whereas in the group of British immigrants this number increased to 43.14%, almost seven times larger. Still, according to the Report, immigrants from the UK reside mostly in Lagos, Loulé and Silves, all of which are in the Algarve and known for tourism activities. This is different from the average immigrant of Portugal who lives mainly in Lisbon, Sintra or Amadora. These statistics give us an indication that migrants from the UK are quite different from the average immigration in Portugal. They belong to an older age group and are at a phase in life. They no longer participate in the labour market and are focused on enjoying their retirement years. These particular aspects of older migrants are of special interest in this study.

² <http://www.mipex.eu/portugal>

³ http://sefstat.sef.pt/Docs/Rifa_2014.pdf

⁴

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_estudos&ESTUDOSest_boui=226328459&ESTUDOSmodo=2

1.2 A Special Case: Older Migrants

The Portuguese government's strategies have shown a special interest in the group of migrants that move to Portugal at retirement age. The Portuguese Strategic Plan for Tourism⁵ (2007) issued by the Ministry of Economy and Innovation states that residential tourism is expected to grow in the coming years at an annual rate of 4.6%. This will occur despite the fact that Portugal represents only 4% of the Iberian market. Moreover, Portugal has a high potential to further develop this area: in a survey of persons aged 50 years and above conducted in the United Kingdom, Portugal was the country with the highest capacity to retain former tourists as residents when they retired. Among the group of persons who visited Portugal in the last 10 years, over a third (37%) considered the possibility of retiring in Portugal.

Although these numbers do not refer to the actual number of older residential tourists in Portugal, any statistics are likely to be underestimations. According to Rodríguez, Fernández-Mayoralas and Perez (2004), the phenomenon of a person who has migrated, has retired and resides or is a tourist for longer periods of time in a host country is often referred to as a "residential tourist". For this group, the term immigrant or migrant is loosely used, since the migration is often not definite and possibly includes seasonal or discontinued residence. The authors mention the difficulty in quantifying the movements of these older migrants, especially because the numbers and data are measured on a nationwide scale and the criteria of country of origin and length of stay are debatable. The authors estimated that 50% of the foreign retirees in Spain do not register, for reasons ranging from avoiding tax authorities, preferring to keep personal data private, and avoiding paperwork in a language they do not understand. According to INE in 2011, 6.09% of the foreign population in Portugal stated that they were retired, and 7.12% stated a pension as their source of income.

One of the few studies that has been conducted on older residential tourists in Portugal found that the good weather, lower costs of living relative to their home country and a slower pace of life are the central factors that motivate them to migrate to Portugal for retirement (Warnes, King, Williams & Patterson, 1999). The authors argue that the migration of this group represents changes in the receiving society that must somehow accommodate these new-comers that seldom speak the local language yet fuel the local economy with expenditures and many times demand health and welfare services.

5

<http://www.turismodeportugal.pt/english/TurismodeportugalIP/AboutUs/Anexos/PENT%20VER%20INGLES.pdf>

1.3 Implications for Individuals and Societies

The immigration of retired and therefore older people is a growing phenomenon in a country like Portugal that may not be accustomed to this type of migration. Therefore, it is important to understand how these individuals are adapting to Portugal, as well as what may hinder a successful acculturation. Although it is known that the main motivation of these migrants is usually to increase their well-being and quality of life through the move to another country (Warnes *et al.*, 1999), little is known about their subjective well-being and the factors that may affect it in their host country. A better understanding of this and other acculturation factors can help to attract newcomers, as well as maintain the migrants that are already in Portugal.

At the societal level, these migrants offer numerous economic opportunities, including the delivery of better and more adequate services like in real estate, welfare and health (Casado-Díaz, 2006). In this context, Portugal has already begun this movement by making a website⁶ available in English for migrants in general and which highlights items of interest to the older residential migrants concerning taxation, health services and property information. Portugal has also created tax incentives for retirees that have decided to move to Portugal, as well as incentives for the purchase of real estate. The present study is a step further in obtaining a better understanding of the psychological processes of these migrants and their adaptation to Portugal. The resulting knowledge may help to develop intervention schemes in order to increase their well-being and acculturation processes to Portugal.

1.4 Research Aim

The overall aim of this thesis is to better understand the psychological and sociocultural processes associated with the acculturation of older residential migrants in Portugal. Issues related to perceived prejudice against both being a foreigner and being older will also be approached. It is expected that the move to a different country involves a dramatic geographical and cultural change which may be especially challenging to older people. Therefore, what is known so far from empirical research on acculturation (Berry, 1997, 2001, 2005) may not hold for this specific group of migrants.

⁶ <http://www.livinginportugal.com/en/>

1.5 Theoretical Background

1.5.1 Definitions

Lifestyle migration. So far, this thesis referred to residential migrants as the focus of interest. They can be included within the phenomenon of “lifestyle migration”, which is the migration of individuals that are considered financially privileged, who are of various ages and for whom migration means an improvement in quality of life (Benson & O’Reilly, 2009). This social phenomenon is very different from other more traditional types of migration, since the motivation is clearly not economic or political. Lifestyle migrants are people that not only have the possibility to make a conscious choice of where to live, but also can choose how to live (Torkington, 2012).

Lifestyle migrants are individuals that decide to migrate in search of a better lifestyle that is more similar to their beliefs. Economic factors frequently take a backseat in the decision process of the migration and the destination (Benson, 2011). According to Benson (2009), this type of migration is a choice in their life trajectory that extends from life before migration and into the future, i.e. life after migration. It entails that individuals take control of their lives and manifest their individuality by deciding to change their lifestyle, country of residence and culture in which they live. The choice of geographical relocation to increase their quality of life is possible because this group is usually relatively wealthy (Benson & O’Reilly, 2009).

Although all voluntary migrations are built upon the expectation of increasing quality of life, lifestyle migrants are different in the sense that financial issues are not as important as the improvement of their quality of life. Research has shown that the narrative of these individuals regarding the future host country centres on a combination of good climate with lower costs of living when compared to the home country. While many other types of migrants pursue better economic conditions, at times that can mean a decrease in their quality of life such as worse living conditions. In the case of lifestyle migrants, the increase in the quality of life is clearly a priority in the migration decision. In this migration process, the features of the new lifestyle that is being pursued include quality of life and freedom from prior constraints (Benson & O’Reilly, 2009). In general, better quality of life can be understood as the access to better education, employment and health. For this group it is also associated to mild climates and good amenities; the consumption of leisure experiences are among some of their fundamental values (Casado-Díaz, 2006; Haug, Dann & Mehmetoglu, 2007; Huete, Mantecón & Estévez, 2013).

In Sociology and Anthropology, lifestyle migration has been studied to understand these contemporary social movements and their influence on the receiving communities. In Social Psychology, immigrants are described as individuals who voluntarily relocate for long periods of time. The pull factors of the migration processes are associated with social, political, and economic issues, and migration is not simply an issue of choice for the migrant (Ward, Bochner & Furnham, 2001). On the contrary, the decisions of lifestyle migrants concern selecting the best place to live and constructing a coherent narrative of the self, fulfilling personal and emotional needs. Thus, lifestyle migration expresses the individuality and identity of the migrants (Torkington, 2012).

Benson (2009) points out that lifestyle migrants feel the need to differentiate themselves from tourists and that they want to be accepted as locals. In her qualitative research in the Algarve in the south of Portugal, Torkington (2012) describes the need of British migrants to feel like, and be perceived as, locals. According to this author, the identification as a non-tourist means distancing themselves from their original nationality, which translates into the need to feel a sense of belonging. This need is expressed as the desire to feel part of the community and that the host society perceives them as locals. Torkington (2012) argues that, in this process, lifestyle migrants tend to distance themselves from other migrants similar to themselves, those that have moved from their original country for similar reasons. It is noteworthy that, despite being away from their references of origin, these migrants feel a need to position themselves as a part of a community that is new and different from their original culture.

International Retirement Migration. Most of the characteristics which describe the individuals above also apply to so-called International Retired Migrants (IRM). IRM are in fact a sub-group of lifestyle migrants, since they aim to pursue a better quality of life by migrating after retirement. Hence, the main characteristic is that they choose to live their retirement years in a different country other than their home country where family and friends are still living. According to Benson and O'Reilly (2009) the migration process is presented as a way of overcoming the trauma of certain life events; retirement is viewed as a potentially traumatic event with changes in their role in life with the end of the professional realm. In this context, the migration process is presented as a way of taking control of their lives, or as freeing them from ties and allowing the migrants to live lives more “true” to themselves. In this phase in life, the IRM construct a reality in which their move will bring their reality closer to the life they wished to have and until now had not been possible to realize.

Moreover, the migration and its decision process are both an individual and a collective process. On one hand, the individual process is characterized by the decision to live in a place more aligned with their way of being, reinforcing the individualization issue. On the other hand, the decision to migrate has a collective aspect, since the factors that influence the migration process are not only limited to the migrants, but affect also both the community they left behind, as well as the community that receives them. Furthermore, the migrant's original community has collective images about the host country as a location of choice, where the representation of good climate is a common characteristic. Thus, the community of origin also has an influence in the decision making process, even if it not conscious or explicit.

It is noteworthy that Social Psychology has focused mainly on studying migrant groups other than IRM, such as international business workers, sojourners, international students, tourists, immigrants who are professionally active, and refugees (Ward *et al.*, 2001). Searches in Psych Info on December 29th, 2015 for “acculturation” AND “IRM” and “acculturation” AND “international retired migration, “acculturation strategies” AND “retirement migration”, “acculturation strategies and adaptation” AND “retirement migration”, “acculturation strategies” AND “IRM” and “acculturation strategies” AND “international retired migration” produced zero hits. This result gives us an indication that there is a gap in the research and literature on the acculturation processes of this specific group, with its specific characteristics, motivations and needs.

Notwithstanding, there is a growing trend of this type of migration, especially in Southern Europe (Casado-Díaz, 2006), and given their age bracket, IRM may be different from other migrant groups in their acculturation processes and outcomes.

1.5.2 Migration in Old Age

Research on International Retirement Migration. Most of the research on the IRM is from the disciplines of Sociology, Tourism, Anthropology and Geography (Benson, 2011; Gustafson, 2002; Janoschka, 2010; Williams *et al.*, 2000). It seems to be quite a “grey area,” where many disciplines study and analyse this phenomenon from different angles. To date, most of the research focuses on the migration of North Americans to Central America. Research from Europe usually focuses on the migration of Northern Europeans to Southern Europe where France and Spain are the main destination countries studied. There are some studies that include Portugal as a destination, but only take into account the Algarve region (Torkington, 2012; Warnes *et al.*, 1999).

International Retired Migration research was first a subject of studies conducted by tourism geographers, in the context of the role that tourism and holidays play in the decision-making process of place of retirement, and the impacts that this type of migration has on the tourism environment (Williams *et al.*, 2000). Research in the area of economic geography focuses on IRM's migration as a decision resulting from reaching a critical phase in life – with retirement being a major critical point – and the decision of moving and where to move are central in these studies (Wiseman & Roseman, 1979).

Tourism experiences can shape the choices of the IRM, in the sense that the migrants that had previous experiences with mass tourism are expected to choose retirement facilities that provide a similar experience (e.g., gated communities). Other IRM that had tourism experiences of a more individual type are expected to seek areas less touched by mass tourism (Williams *et al.*, 2000).

Since many IRM spend part of the year in the chosen country and another part in their home country, this migration flow can also be seen as seasonal and has impacts on both the migrating group as well as the host society. Some of the impacts include the emergence of communities specifically designed for the older age group, as well as the dissemination of associations and clubs that promote activities targeted to the foreign older residents. Furthermore, this new group of residents promotes the emergence of newspapers, radio and television broadcasts specifically transmitted for them (Gustafson, 2002; Wiseman & Roseman, 1979).

Anthropologists have explored individual adaptation experiences and mobility trajectories as well as the social implications of IRM for host and home communities (Benson & O'Reilly, 2009; Torkington, 2012). Sociologists have focused on issues of gender, social class, nation, community and transnational identity formation among retired migrants (Casado-Díaz, 2006; Rodríguez *et al.*, 2004). These fields have studied the migration phenomenon's effects on the IRM as much as their influence in the receiving society. The mostly qualitative research of these fields aims to comprehend the effects of IRM experiences on social identity.

It has been challenging for researchers to place the IRM into a migrant category since the distinction of tourist and migrant is permeated with different identities, multi-properties and various life-styles. Moreover, the IRM are a highly heterogeneous group: some create a new identity in the new location and others retain ties to their country of origin. Williams *et al.* (2000) developed a study with British IRM in four different locations: Costa del Sol,

Algarve, Tuscany and Malta. The authors found that 72% of the respondents had a previous connection to the location due to tourism experiences. Also, about one-third was a resident in the destination country but from the non-resident group, only about 10% stayed more than 6 months; this is usually the period until one has to register legally. Hence, this gives us some indication that this group searches to maintain a certain degree of flexibility and “anonymity” in order to avoid taxation and other bureaucratic issues.

The authors also examined the proximity to the home country by assessing how many times IRM take trips back to their home country. They found that 18% of the respondents return to the UK three or more times a year, and about one-third do not go back at all. Regarding previous professions, the range is also broad: from farmers, entrepreneurs and traders to UK former public servants. The participants in the study from all four locations were divided roughly equally between the ones that had had previous connections with their chosen area through previous holidays and trial periods of residence, and the ones who had lived and worked in the location before or who had close family links in the area. Once again, this shows how heterogeneous this group can be in terms of their behavior, socio-demographics and proximity to their home country.

Some of the reasons for the growth of this type of migration are related to the increase in longevity, extension of active old age and the reduction of the legal age for retirement. In addition, there has been an increase in the retirement earnings for a number of individuals who are able to consider a range of retirement strategies. The increased access to information, ease of communication and international travel have also allowed for more knowledge regarding foreign destinations (Williams *et al.*, 2000).

Given this group’s heterogeneity, we believe that understanding the psychological and sociocultural aspects related to the IRM’s adaptation to a new culture is paramount to begin to unveil the complex weave of psychological processes and acculturation choices that this group experiences in Portugal.

1.5.3 The Missing Link: A Psychological Perspective

Research in Social Psychology regarding the migration of older people has mostly focused on the psychological well-being of immigrants of lower status groups that immigrate with their families. We found one study that analysed the psychological distress of older migrants in Australia (Chou, 2007), where these older migrants had to adjust to new lifestyles. One of the most important barriers found was language and communication, since the migrants did not speak English. The study mentions some major types of stress that can affect

and have an important influence in psychological distress of this group: psychological changes, making them more vulnerable; role losses or transitions such as retirement; education and living arrangements; and lower levels of social support (Chou, 2007).

Much of other research related to older migrants focuses on the group as a minority and as part of the whole family who migrates, with implications on intergenerational relationships (Park & Kim, 2013). Many times, the younger descendants are responsible for the well-being and support of the older family members. In most cases, the language barrier is mentioned as an important hurdle in adapting to the new environment and culture.

Immigration is viewed as a major life event that has an impact in the lifestyles of older migrants. Also, within the Korean immigrants in New Zealand, it was found that gender had an influence in people's daily lives: older men seemed 'less adjustable' to the new culture (Park & Kim, 2013).

So far, mostly qualitative research has been conducted on this group by anthropologists and sociologists (Benson & O'Reilly, 2009; Benson, 2011, 2013; O'Reilly & Benson, 2009; Torkington, 2012). A few studies attempted to estimate the amount of IRM in Spain (Casado-Díaz, 2006; Rodríguez *et al.*, 2004) and analysed the motivations to migrate and overall well-being of this group in Tuscany, Malta, Costa del Sol and Algarve (Williams *et al.*, 2000). The psychological well-being and acculturation experiences, however, were not analysed. We did not find a psychological study that used acculturation theory and quantitative methods in order to better understand IRM's acculturation experiences.

1.5.4 The Social Psychological Framework of Acculturation

Individuals' acculturation strategies. How to acculturate in new cultures is one of the most important issues that individuals migrating to a new country must handle. It is a challenge faced both by the migrating group and also by the host society, since acculturation can be seen as the processes and outcomes of intercultural contact (Berry, 1997). When assessing acculturation, it is important to recognize and identify which are the dominant and non-dominant groups. In general, the dominant group is the host society, and the non-dominant group is comprised of the migrants who are new to the receiving culture. In this context, and according to Berry (1997), the acculturation strategies that are pursued by the migrants (as individuals and as a group) relate to daily interactions with the host society and can be characterized along two major dimensions: (1) Cultural maintenance: the degree to which the individuals desire to keep their cultural identity; and (2) Contact and participation: the degree to which the individuals desire to be involved in the host culture.

From the interaction of these two dimensions, four different acculturation strategies can be defined. When individuals pursue the interaction and identification with the host culture and do not wish to keep their cultural identity, then an Assimilation strategy results. On the opposite spectrum, when individuals wish to keep their cultural identity and do not wish to interact and identify with the host culture, then the Separation strategy is pursued. When the individuals wish to maintain both their cultural identity and interact/identify with the host culture, the Integration strategy is defined. Finally, when the individuals neither wish to keep their cultural identity nor to interact and identify with the host culture, the Marginalization strategy is defined (Berry, 1997).

It is important to highlight that the framework of acculturation strategies assumes that the migrating group is free to choose how to acculturate. From the information about Portugal's public policy regarding the promotion of integration of migrants seen earlier in this chapter, we believe that this is a fair assumption in the case of Portugal.

In fact, the acculturation strategies are part of a larger framework that takes into account group level issues, such as the characteristics of the host society and the original society as well as aspects that can influence the acculturation for the group as a whole, such as economic, ecological, social and cultural aspects. At the group level, the contact of the cultures will lead to changes in both cultures. At the individual level, there are important factors prior to the acculturation process - such as age, educational level, gender, status, migration expectations, cultural distance and personality - that influence the acculturation process and its outcomes. Individuals of both cultures will undergo shifts and stress, leading to long-term psychological and sociocultural adaptation (Berry, 2005).

During the acculturation process, issues such as the length of time, social support, prejudice and discrimination of the host society, as well as the acculturation strategies themselves, play an important part in the acculturation outcome (Berry, 1997).

In the short term, the outcomes of acculturation are behavioural shifts and acculturative stress. Behavioural shifts involve new culture-shedding and culture-learning, which are the losses of previously-acquired behavior, replacing them with new behaviours that allow for a better "fit" in the new society. When these short-term processes do not run smoothly, the individual faces acculturative stress; that is, when greater levels of conflict can happen, and experiences are seen as problematic (Berry, 1999). It is important to note that adaptation refers to the long-term outcome of the acculturation process, and it is not synonymous to assimilation (as in the Assimilation strategy described above). Adaptation can

be positive or negative; one can be well-adapted or poorly adapted, and the concept is associated with the relatively stable changes that take place to respond to external demands (Berry, 2005).

Psychological adaptation. Psychological adaptation involves the individual's psychological well-being; it is related to the individual's affect and emotions, and it is often operationalized in terms of depression or global mood disturbance. Psychological adaptation refers to a person's cognitive and affective responses to acculturation within a host cultural; outcomes of these responses include well-being, depression, and life satisfaction (Ward *et al.*, 2001). It is strongly influenced by personality, coping styles and social support. Lower psychological adaptation has been linked with loneliness, avoidance coping styles and is associated with acculturative stress (Ward & Kennedy, 1999); it tends to present the greatest difficulties for individuals in the initial phases of the migration process.

Berry (1999) argues that the individuals that adopt the Integration strategy present higher levels of psychological adjustment. The Assimilation and Separation strategies are associated to intermediate psychological adaptation outcomes, and the Marginalization strategy is associated with the worst outcome.

In contrast to the consensus that Marginalization is the acculturation strategy that shows the worst psychological adaptation outcome, recent investigations have found a new way to look at this strategy. A study by Debrosse, de la Sablonnière & Rossignac-Milon (2015) found that many immigrants that adopt the Marginalization strategy actually lead a happy life. They found that this group thrives with the sense of “uniqueness”, i.e. the need to feel and be seen by others as distinct. Bourhis, Moïè, Perreault & Sene (1997) also have proposed different approaches to understanding the Marginalization strategy. According to these authors, the Marginalization strategy can be a form of ‘anomic Marginalization’ or ‘individualism’. Therefore, the Marginalization strategy can be considered a detachment from both (host and original) cultures and a manifestation of the migrant's individuality. Hammer, Bennett & Wiseman (1996) describe a different approach to marginalization; they consider it as way in which individuals construct their cultural identities that are at the “margins of two or more cultures” and “center to none” (p.425). In this framework, the authors make a distinction of two types of Marginalization: (1) the form of alienation, with a clear separation from either cultures, and (2) the constructive form whereby the individual moves in and out of cultures and this becomes a positive aspect of one's identity.

Sociocultural adaptation. As opposed to psychological adaptation, sociocultural adaptation is related to the behavioural competence and social skills concerning people's daily tasks and interactions. This includes cultural learning and cultural shedding; the former is related to acquiring new social skills in order to better "fit" into the new culture, and the latter is related to letting-go of behaviours that were typical of the original culture but no longer fit adequately in the new culture. The factors that influence the sociocultural adaptation are the previous knowledge of the host culture, language fluency and the degree of interaction with locals.

In general, sociocultural adaptation shows a growing trend in the initial phases of the transition with the assimilation of new information. After a while, the growth reaches a plateau once the culture-specific skills are adopted (Ward & Kennedy, 1999). The processes involved in sociocultural adaptation rely on the individual's capacity to change many aspects of daily life as well as learn new basic skills such as new languages.

The different acculturation strategies entail different levels of effort to "fit in". Learning a new language and a new way of leading life may be a worthwhile effort for those interested in pursuing the Integration or Assimilation strategy. For others, however, the cultural shedding may be too difficult leading to higher levels of acculturative stress, in which case the migrants end up pursuing the Separation or Marginalization strategies. The sociocultural adaptation and acculturation strategies are linked in the sense that the strategy adopted is a result of a combination of the intention (interest in contact with the host culture) and the actual capacity to learn effectively new skills related to the new culture.

1.5.5 Old Age as a Special Case

When we think about the learning curve for IRM and the difficulties they face we should take into account that many of the steps required for transitioning into a new way of life entail a great deal of change and learning on the part of the new comer in the host culture (Nejati & Farshi, 2008). While the process of culture-shedding may not be so difficult especially when the migrant made a voluntary move, cultural learning might be more difficult. The Integration strategy assumes that there is an equal interest in having contact with the host culture as well as maintaining the own culture. This process requires keeping a balance between these two spectrums which can be difficult to achieve and maintain because they can at times be opposite to each other. For example, the older migrant might like the idea of living in a more laid back setting but cringe every time there are experiences of low efficiencies in services. In this sense, for the older migrants in Portugal this means that they

should start to adopt a new way of life, learn a new language, interact with locals, consume different food and lead a different pace of life. On the opposite spectrum, there are IRM that choose to live in a protected gated community where there is much less contact with the host culture and therefore the need to make efforts regarding cultural adaptation, which is always a bit stressful, is minimal. Therefore in these cases, the Separation acculturation strategy perhaps would lead to higher levels of psychological well-being.

According to Park & Kim (2013), learning a new language can be difficult for older migrants. The authors conducted a study where one participant who was an older migrant described the experience as feeling “blind, deaf and mute” (p.159). The experience of older migrants to Portugal might not be as strong as the description above, since the study was performed with Korean older immigrants in New Zealand, and therefore the cultural distance was larger than with two western countries such as Portugal and the UK (Hofstede, 2011). Also, the alphabets in Portuguese and English are the same and the Portuguese population’s exposure to English is quite extensive, since it is a mandatory discipline in all schools in the country. Nonetheless, this age group is confronted with specific hurdles and challenges. For older migrants, implicit learning is more difficult when the conditions are demanding and there is multi-tasking (Nejati & Farshi, 2008). We can assume that the total immersion of the IRM in a new culture is a multi-tasking learning environment filled with cognitive challenges that might transform into frustration.

1.5.6 Societal Attitudes and the Role of Prejudice

Prejudice towards foreigners. Prejudice and discrimination are related to the attitudes and behaviors resulting from relational outcomes influenced by the immigrant’s acculturation strategies and the host society’s acculturation orientations. The host society’s acculturation orientations are influenced by government policies and ideologies relative to immigrants. It is important to note that the same host society can have different attitudes of prejudice and discrimination towards different groups. The attitudes can be positive towards a group in particular and negative towards another group, since the realm of prejudice and discrimination is directly related to the intersection of the host society’s attitudes and stereotypes of a given group of immigrants and this group’s acculturation strategy (Bourhis *et al.* 1997).

Bourhis *et al.* (1997) developed an interactive model where, in addition to the acculturation strategies of the migrants, also takes into account the attitudes of the host society towards the immigrant group. This interactive model is matched to Berry’s acculturation strategies model (1997) but at a societal level. The authors describe the

interactive model with two dimensions relative to the host society: (1) the degree of acceptance that immigrants maintain their sense of cultural identity, and (2) the degree of acceptance that immigrants adopt the host society's cultural identity. When the level of acceptance of maintenance of the immigrants' cultural identity is high and the level of acceptance of the immigrants' adoption of the host society's culture is also high, the Integration strategy is defined. When the degree of acceptance of maintenance of the immigrant's heritage culture is low and the level of acceptance of their adoption of the host culture is high, the Assimilation strategy is defined. When the acceptance of the immigrant's level of maintenance of the cultural identity is high and the acceptance of the immigrants' adoption of the host culture is low, the Segregation strategy is defined. Finally, when both dimensions are low, the Exclusion or Individualism strategies are defined.

Berry (2005) presents a similar framework taking into account the role and strategies of the dominant group in how the acculturation would take place. In his framework, when the dominant group (host society) accepts the relationship among groups but has low acceptance of the immigrants' maintenance of their cultural identity, the Melting Pot is termed. When the dominant group is open to both relationships within the groups and accepts the immigrant's maintenance of their cultural identity, Multiculturalism is found. When the dominant group accepts the maintenance of the immigrant's cultural identity but has low acceptance of relationships among the groups the Segregation strategy is found. Finally, when the dominant group has low acceptance of both relationships among groups and the maintenance of the immigrants' cultural identity, the Exclusion strategy is found.

When considering the interaction of the immigrants' acculturation strategies and the host society's strategies, a set of relational outcomes can occur. Bourhis *et al.* (1997) argue that these relational outcomes can be conflictual, problematic or consensual. Hence, much of the success of an individual's acculturation strategy depends also on the attitude of the larger society. If the individual's acculturation strategy is one of Integration, the larger society must also be aligned with this objective or the migrant will likely find it harder to participate in the new society.

The interactive model takes into account the vitality of the host majority and of the immigrant groups. Bourhis *et al.* (1997) explain that group vitality is a "conceptual framework that compares the relative strength and weakness of immigrant and host society in multicultural settings" (p.382). This concept is related to the economic, social and sociohistorical status and prestige of the group, how likely they are to make a distinctive

entity within the host society, if they have acquired representation at decision-making levels, and how representative they are proportionally to the host society (Harwood, Giles & Bourhis, 1994).

In this context, the IRM in Portugal can be considered a high vitality group with high status. One of the main reasons is because this group is associated with the perceived and relative wealth. The cost of living in the country of origin of the IRM (e.g. UK, Netherlands, and Germany) is considerably higher than in Portugal. According to Eurostat, in July 2015 the minimum wage in Portugal was less than 750 € while the minimum wages in the UK, Netherlands and Germany were around 1500 €⁷. Receiving pensions from their country of origin allows this group to have more disposable income and purchase high priced real-estate and travels.

These characteristics can bring negative perceptions and envy from the host society and entail higher levels of perceived prejudice and discrimination by the immigrant group, and therefore they can make it harder for the immigrants to adopt the Integration acculturation strategy. One study developed in the Netherlands found that the perceived personal and group prejudice is stronger among highly educated immigrants. The authors proposed the concept of the Integration paradox where, by being more educated and having more contact with the host culture, the immigrants are more sensitive and exposed to personal and group prejudice (Doorn *et al.*, 2013).

Most of the research to date describes a relationship between the host society's perception of the preferred acculturation strategy and the actual acculturation strategy adopted by the minority group (Celeste, Brown, Tip & Matera, 2014; Pehrson, Brown & Zagefka, 2009; Zagefka *et al.*, 2014). However, this research deals mostly with minority groups that present a lower status and lower vitality when compared to the majority group. Zagefka *et al.* (2014) developed a longitudinal study that analysed the acculturation strategies of minorities in England, Belgium and Germany and the majorities' attitudes towards them (Zagefka *et al.*, 2014). The authors found a link between the acculturation strategies adopted and prejudice, reinforcing the importance that the attitude of the host society towards the immigrant is as important as the attitude of the immigrant towards the host society. The authors also found that prejudice increased the desire for cultural maintenance and decreased cultural adoption for minority members.

⁷ http://ec.europa.eu/eurostat/statistics-explained/images/4/43/Minimum_wages%2C_July_2015_%28%2B9%29_%28EUR_per_month%29_YB16.png

In this context, feeling subjected to prejudice either because of their foreign status or due to their advanced age, combined with the challenges of cultural shredding and cultural learning associated with the sociocultural adaptation process required in the adoption of the Integration strategy, might be too cumbersome for older migrants. They might feel more comfortable adopting acculturation strategies that entail less involvement with the host culture, such as Separation or Marginalization.

1.6 Research Questions and Hypotheses

The literature on acculturation seems to indicate that there is a consensus regarding the acculturation strategy that delivers the greatest levels of psychological adaptation. Nonetheless, other aspects such as sociocultural adaptation and prejudice also have an important role in the complex weave that results from the acculturation strategies of older migrants. The Integration strategy has been described as the best strategy in various settings and cultures, and Marginalization has been described as the acculturation strategy with the worst outcomes in terms of the individual's psychological adaptation (Berry, 1997).

Debrosse *et al.* (2015) developed a study that showed a new dimension to the Marginalization strategy; these individuals may be exercising their individuality by distancing themselves from both the host and the original culture. This idea had been presented by Bourhis *et al.* (1997) when the authors propose a revision of the Marginalization strategy separating the concept into two aspects. The first aspect is 'anomie', describing migrants that reject both cultures, and it is in line with the original concept of the Marginalization acculturation strategy. The second aspect is 'individualists'; i.e. when migrants prefer to identify with themselves as individuals and not with a specific group.

To date, there have not been any studies that analyse the psychological and sociocultural processes and acculturation strategies of the IRM. Given the age range and specific characteristics of this group, we considered that the consensus regarding the best outcomes being associated to the Integration strategy might not hold. The IRM are older, no longer have ties with the workforce and therefore the processes involved in Integration might be too cumbersome to pursue at their stage in life. Learning new skills and memory retention become more difficult at this stage in life (Nejati & Farshi, 2008; Yoon, Hasher, Feinberg, Rahhal & Winocur, 2000) and therefore perhaps other acculturation strategies also deliver the same or higher levels of psychological and sociocultural adaptation. In addition, the experienced prejudice for being a foreigner or being older also plays a part in the choice of the

acculturation strategy adopted by this group, considering the specificities of Portugal as a host culture.

In this context, the present study proposed to verify three hypotheses:

H1: IRM who adopt the Separation or Integration acculturation strategy show the highest levels of psychological adaptation.

H2: IRM who adopt the Assimilation or Integration strategy show the highest levels of sociocultural adaptation.

H3: IRM who adopt the Marginalization or Separation acculturation strategy show the highest levels of experienced prejudice from being a foreigner or from being older.

Chapter II - Method

2.1 Procedure

The participants of this study were recruited via Facebook groups targeted at the expatriate community in Portugal in general. To recruit participants we posted messages on the target groups searching for people who were retired, foreigners that currently lived in Portugal and there was no cut-off age. The criteria to participate were that the respondents must be retired from their main professional activity and be an expatriate living in Portugal. The participation took place from April to July 2015 and entailed answering an online questionnaire that took roughly 10 minutes to complete using Qualtrics software. When opening the link to the online survey, the participants were informed about the aims and goals of the study, and that they could withdraw from the study at any stage. They were also given contact information should they have any questions. In addition, they were informed that their responses were anonymous and treated with confidentiality. At the end of the survey they were invited to leave their email addresses and participate in a draw for five brunches at a trendy coffee shop in Lisbon and 33% of participants completed this information. They were informed that, in the case that they divulged their email addresses, these addresses would be kept anonymous.

2.2 Participants

In the following section, the most salient characteristics of this sample (N=131) will be summarized. Please see Table 2.1 for a more detailed breakdown of sample characteristics. The sample comprised participants where the majority of was female (73.3%). The participants' age ranged from 29 to 82 ($M = 60.95$, $SD = 8.53$), and although the age range is very large, only a few respondents (2.4%) fall into the young and middle age category (29 to 40). Just over half (58%) was over 61 years old and almost a third (28.2%) was between the age of 50 and 60 which can be considered as early retirees.

The most frequent nationality was British (79%); this may be the result of the fact that the questionnaire was in English which might have made other non-English speaking nationals uncomfortable to participate. In addition, the recruitment of participants was done via Facebook expatriate groups where the official language is English. Just over 63% stated that their level of education was first or second stage of tertiary. When asked about their level of income and subjective perception of income almost 20% of the participants left this information blank. While this behavior is not uncommon, since this question is considered to

be sensitive information, 45.7% of participants that did answer the question said that they were ‘coping’, ‘finding it difficult’ or ‘very difficult to live on present income’; whereas around half of the participants (54.5%) stated that they lived comfortably on present income. Regarding the objective income, 58% stated that their net monthly income ranged from 500 € to 2,500 €. The amount of time the participants had been living in Portugal ranged from less than a year to 45 years ($M = 7.5$, $SD = 7.9$).

2.3 Measures

The measures used in this study have also been used in other acculturation studies. When relevant, they were adapted to suit the needs of the local culture and target audience. Since the expatriate community that we approached was expected to be English speakers (as first or second language), there was no need to translate the scales or measures.

2.3.1 Acculturation. The Vancouver Index of Acculturation (VIA) (Ryder, Alden & Paulhus, 2000) was used to assess the participants’ level of acculturation. The respondents were asked to indicate their level of agreement to 20 statements using an eight point Likert Scale ranging from ‘Strongly Disagree’ to ‘Strongly Agree’.

The statements were separated in two subscales with ten items each: (a) statements regarding the original heritage culture; and (b) statements regarding the target (mainstream or host) culture. In this study the target (host) culture was the Portuguese culture. All of the 20 statements of the original scale were used, albeit with changes in wording in order to adapt them to the Portuguese context. For example, one of the statements referring to the original heritage culture was ‘I believe in the values of my heritage culture’ and a statement referring to the target culture was ‘I get along with Portuguese people’.

Previous studies found that the Vancouver Index of Acculturation (VIA) has a good internal consistency, with Cronbach alphas ranging from .85 to .92, depending on the sample studied (Ryder *et al.* 2000). The nine point Likert scale in the original scale was changed to an eight point Likert scale in this study. The choice to use an even number point scale was to avoid the use of a middle point, therefore defining the participant’s response in a more definite direction towards agreement or disagreement.

In this study the Cronbach’s alpha for the host culture subscale was .87 and for the heritage culture subscale .88, and therefore satisfactory. Thus, two composite scores were created for items assessing maintenance of the heritage culture and items assessing the adoption of the host culture.

2.3.2 Psychological Adaptation. Psychological adaptation refers to an array of internal psychological outcomes which include personal satisfaction and good mental health (Berry, 1997; Ward *et al.*, 2001). In this context, this study accessed three different indicators of the psychological aspects in the new cultural context: (a) Happiness (b) Satisfaction with Life, and (c) Intention of Staying.

Happiness. The respondents were asked to indicate their general level of happiness in Portugal, using a ten point scale, from 'Extremely Unhappy' to 'Extremely Happy'. This item has also often been used in studies with general populations such as in the European Social Survey (ESS Round 4: European Social Survey, 2004).

Satisfaction with Life. The Satisfaction with Life scale (Pavot & Diener, 2009) was used to access migrants' overall satisfaction. This scale is comprised of five statements, and participants were asked to indicate their level of agreement, using an eight point Likert scale ranging from 'Strongly Disagree' to 'Strongly Agree'. Pavot and Diener (2009) reported a good internal consistency of the scale with a Cronbach's alpha of .85. In the current study, the Cronbach's alpha was even higher with a value of .94. We also analysed the internal consistency when including the happiness item and found Cronbach's alpha to be .94, therefore not altering the reliability of the scale. We decided to compute a composite score based on these six items which assesses individuals' subjective well-being.

Intention of staying. Another measure used to access the level of contentment of being in Portugal was the Intention of Staying in the country. This variable has been used as a component of life satisfaction (Warnes *et al.*, 1999). For this study, this indicator was used as another way to measure the contentment and satisfaction of living in Portugal. Using a 100% scale, the participants were asked to indicate the likelihood of staying in Portugal. The response options ranged from 'Very likely to leave Portugal at some stage' (scored as 0%) to 'Very likely to stay in Portugal forever' (scored as 100%).

2.3.3 Sociocultural adaptation. Sociocultural adaptation refers to an array of external psychological outcomes that connect migrants to the new culture, which includes the ability to deal with daily issues (Berry, 1997). According to Ward and Kennedy (1999), sociocultural adaptation is composed of issues related to daily tasks and issues related to a more profound understanding of the sociocultural process.

Sociocultural Adaptation Scale (SCAS). To investigate migrants' sociocultural adaptation, the Sociocultural Adaptation Scale (SCAS) was used (Ward & Kennedy, 1999).

Prior to responding to this scale, participants were asked to indicate their heritage culture as an open-ended question, and about half said their heritage culture was British (55%).

There were 34 statements regarding the adaptation to the Portuguese culture, and the participants were asked to indicate their level of agreement from ‘Strongly Disagree’ to ‘Strongly Agree’, using an eight-point Likert scale. Similarly to the VIA scale, an eight-point scale was chosen to avoid the “middle ground” choice. The original scale has 41 statements, and for this study seven items were excluded since they were not pertinent for the target audience. The statements that were dropped were: ‘Understanding what is required of you at university’, ‘Living with your host family’, ‘Relating to members of the opposite sex’, ‘Relating to older people’, ‘Coping with academic work’, ‘Dealing with foreign staff at the university’ and ‘Expressing your ideas in class’ since they were related to the student and/or youth group.

In many instances, the original statements were adapted to fit the Portuguese context, the retirement age group and their life stage. The statements in the scale referred to both daily events such as ‘It is easy to communicate with the Portuguese on a daily basis’ and to more profound understandings of the sociocultural adaptation process such as ‘I am able to see two sides of an intercultural issue’.

Internal consistency measures of the scale have ranged from .75 to .91 supporting the scale’s validity (Ward & Kennedy, 1999). In the current study, the Cronbach alpha was .92. The authors describe a set of two subscales where the first subscale deals with cognitive and behavioural items combined with interpersonal skill items and the second subscale deals with impersonal tasks and activities. In this study the first subscale had a Cronbach alpha of .88 and the second subscale had a Cronbach alpha of .87. Since they were correlated highly ($r = .80, p < .001$), we decided to use one overall composite score representing sociocultural adaptation.

2.3.4 Experience of Prejudice. A series of six questions were asked regarding the participants’ experience with prejudice and discrimination due to being a foreigner or due to being older. Three questions assessed the experience of age discrimination and were taken from the European Social Survey (ESS Round 4: European Social Survey, 2004). The remaining three questions were similar but were rephrased for the purpose of this study, and they assessed the experience of discrimination derived from being a foreigner. For each question the participant was asked to indicate how often they have experienced situations of prejudice and discrimination. The response options assessed the frequency of experienced

discrimination and the options of response were ‘Never’, ‘Rarely’, ‘Sometimes’, and ‘Very Often’, using a four point Lickert scale . Internal consistency of the experienced-age-prejudice scale has been verified with Cronbach alphas ranging from .75 to .94 (Vauclair, Lima, Marques *et al.*, in preparation). In this study the Cronbach’s alpha was .88. The internal consistency of the prejudice-experienced-towards-foreigners scale (based on being a foreigner) was also reliable with a Cronbach’s alpha of .90. Hence, two composite scores were created that assess the two types of experienced prejudice.

2.4 Socio-demographics

Participants were asked about basic demographic information, i.e. gender, date of birth, nationality and length of time living in Portugal.

They were asked about their objective and subjective income; the objective income was assessed by asking about the household’s total income, after tax and compulsory deductions and from all sources. The possible answers were six options of ranges of values: ‘Less than 500€’, ‘Between 500-2,500 €’, ‘Between 2,500 – 6,000€’, ‘Between 6,000 – 10,000€’, ‘More than 10,000€’ and ‘Don't want to respond’.

The subjective income was measured with the question ‘Which of the descriptions below comes closest to how you feel about your household's income nowadays?’ and the response options were: ‘Living comfortably on present income’, ‘Coping on present income’, ‘Finding it difficult on present income’ and ‘Finding it very difficult on present income’.

The participants were asked to indicate their highest level of education achieved on the following categories: ‘Not completed primary education’, ‘Primary or first stage of basic’, ‘Lower secondary or second stage of basic’, ‘Upper secondary’, ‘Post-secondary, non-tertiary’, ‘First stage of tertiary’, and ‘Second stage of tertiary’.

To access their current level of Portuguese, the participants were asked to answer the question: ‘How well do you speak Portuguese right now?’ with the following options as possible answers: ‘Very poor’, ‘Poor’, ‘Fair’, ‘Good’ and ‘Very Good’.

Regarding their marital status, the question ‘What is your marital status?’ was asked with the following possible responses: ‘Married/ stable relationship’, ‘Separated / Divorced’, ‘Single’, ‘Widowed’.

To understand the composition of their family, the participants were asked to indicate if they had children and how many. They were asked with whom they lived with the following response options: ‘Alone’, ‘With partner’, ‘With partner and children’, ‘With

children' and 'Other'. When the 'Other' answer was chosen, the participants were asked to specify.

Their general state of health was assessed with the question "How is your health in general? Would you say it is:" and the options for response were: 'Very Bad', 'Bad', 'Poor', 'Neither Good nor Bad', 'Fair', 'Good' and 'Very Good'.

The housing situation of the participants was assessed with the question: 'What is your housing situation in Portugal?' and the options for response were: 'Rent short term (up to 12 months)', 'Rent long term (more than 12 months)', 'Purchased', 'Residence', 'Gated community', and 'Other'. When the 'Other' answer was chosen, the participants were asked to specify.

Regarding the resident status in Portugal, the question 'What is your status in Portugal?' was asked, with three possible responses: 'Permanent resident', 'Citizen' or 'Other', with instructions to specify if the last answer was chosen.

To assess the length of time the participants have been living in Portugal, the question 'How long have you been living in Portugal?' was asked, with indications to answer in years and/or months. To know the area of residence and location of the respondents, two questions were asked: The first question was. 'Which phrase below describes the area where you live?' with five possible responses: 'A big city', 'The suburbs or outskirts of a big city', 'A town or a small city', 'A country village', and 'A farm or home in the countryside'. The second question was: 'In what region do you currently live?' with four possible answers: 'Lisbon', 'Cascais/ Estoril', 'Algarve' and 'Other'. When answered 'Other', respondents were asked to specify the city.

To assess their retirement situation, the participants were asked to indicate the date of retirement and if they had a post-retirement occupation. If yes, they were asked if this occupation entailed contact with Portuguese people, with the following possible answers: 'Yes, mostly with Portuguese people', 'Yes, but only little contact with Portuguese people', and 'No'.

The participants were asked how many times per year they returned to their home country and the length of stay. They were also asked if they owned a phone number in Portugal and in their home country, as well as if they kept a house in their home country, if they took Portuguese lessons prior to their move, for how long and if they still took Portuguese lessons.

To understand the decision making process of the migration, the participants were asked ‘How long did it take from the time you had the idea to move until the move actually happened?’ with the following possible answers: ‘1 - 6 months’, ‘7- 12 months’, and ‘More than 12 months’. They were also asked if they had considered other countries besides Portugal and if yes, to specify up to three countries. A complete version of the questionnaire can be found in Appendix I.

Chapter III - Results

3.1 Sample Profile

A descriptive analysis of the sample (N=131) can give us an overview of the demographic characteristics of the IRM in Portugal. As seen in Table 1, the majority of the participants were married (78.6%) and about two-thirds had children (75.4%). Most lived with their partner (72.1%) and regarding their overall health, 67.3% considered it to be 'Good' or 'Very Good'.

Despite the fact that the vast majority (71.5%) stated to be a permanent resident in Portugal, only 15.4% of the participants considered their level of Portuguese to be 'Good' or 'Very Good' ($M=2.59$, $SD=1.08$).

Over two-thirds (72.8%) did not take Portuguese classes prior to moving and about one-third (31.1%) was still taking Portuguese lessons while living in Portugal.

Regarding the type of residence, 69.9% had purchased a home in Portugal. The majority (79.6%) lived in 'A town or a small city', 'A country village' or 'A farm or home in the countryside'.

When asked about the region of residence, only 26.5% indicated to live close to the capital of the country (i.e., Lisbon, Cascais or Estoril). About one third (30.4%) lived in the Algarve and the larger part of the participants (43.1%) lived in other regions.

The fact that 45.6% owned a phone number from their home country and almost one third (27.7%) kept a house in their home country gives us some indication that the ties to their original country are in some cases still maintained. In fact, 64% of the participants stated that they return to their home country from one time to three times per year.

Just over two-thirds (75.7%) had retired completely from their main professional activity, and 56% had a post-retirement occupation in Portugal. From this group, 50% had mostly contact with Portuguese people in their post-retirement occupation. Even though the question regarding the time of retirement was only answered by about 60% of the participants, the time of retirement ($M=6.98$, $SD=5.59$) was similar to the time living in Portugal ($M=7.55$, $SD=7.98$) possibly indicating that the respondents moved to Portugal for retirement.

Regarding the decision making process, over one third (37.3%) stated it took from 1 to 6 months from the initial idea to the actual move to Portugal, and 55.3% considered other countries besides Portugal. Spain, France and Italy were three of the most frequent options besides Portugal.

Table 2.1*Characteristics of the Sample (N=131)*

	<u>Socio-demographics</u>	<u>Count</u>	<u>(%)</u>
Gender			
Female		96	(73.3%)
Male		35	(26.7%)
Age			
29 to 40 years old		3	(2.3%)
41 to 50 years old		15	(11.5%)
51 to 60 years old		37	(28.2%)
61 to 70 years old		65	(49.6%)
71 years old or more		11	(8.4%)
Marital Status			
Married /Stable Relationship		103	(78.6%)
Separated / Divorced		15	(11.5%)
Single		5	(3.8%)
Widowed		8	(6.1%)
Have children			
Yes		98	(75.4%)
No		32	(24.6%)
Nationality			
British		103	(78.6%)
Dutch		5	(3.8%)
Other		23	(17.6%)
Status in Portugal			
Permanent Resident		93	(71.5%)
Citizen		4	(3.1%)
Other		33	(25.4%)
With whom they live in Portugal			
Alone		21	(16.3%)
With partner		93	(72.1%)
With partner and children		10	(7.8%)
With children		1	(0.8%)
Other		4	(3.1%)

Highest level of education		
Not completed primary education	1	(1.0%)
Lower secondary or 2nd stage of basic	4	(3.8%)
Upper secondary	18	(17.3%)
Post-secondary, non-tertiary	15	(14.4%)
First stage of tertiary	19	(18.3%)
Second stage of tertiary	47	(45.2%)
Current level of Portuguese		
Very poor	18	(17.3%)
Poor	30	(28.8%)
Fair	40	(38.5%)
Good	9	(8.7%)
Very Good	7	(6.7%)
Perception of current household income		
Living comfortably on present income	56	(54.4%)
Coping on present income	36	(35%)
Finding it difficult on present income	7	(6.8%)
Finding it very difficult on present income	4	(3.9%)
Monthly income (net of taxes and deductions)		
Between 500-2,500 €	61	(58.7%)
Between 2500 – 10,000€	19	(18.3%)
More than 10,000€	9	(8.7%)
Don't want to respond	15	(14.4%)
Level of health in general		
Bad	2	(1.9%)
Poor	6	(5.8%)
Neither good nor bad	5	(4.8%)
Fair	21	(20.2%)
Good	44	(42.3%)
Very good	26	(25%)
Complete retirement from professional activity		
Yes	78	(75.7%)
No	25	(24.3%)
Time living in Portugal		
0 to 5 years	34	(50%)
6 to 10 years	24	(35.3%)
11 to 15 years	3	(4.4%)
More than 16 years	7	(10.3%)

Housing situation in Portugal		
Rent short term (up to 12 months)	4	(3.9%)
Rent long term (more than 12 months)	20	(19.4%)
Purchased	72	(69.9%)
Residence	5	(4.9%)
Gated community	1	(1%)
Other	1	(1%)
Description of area of residence in Portugal		
A big city	7	(6.8%)
The suburbs or outskirts of a big city	14	(13.6%)
A town or a small city	23	(22.3%)
A country village	34	(33%)
A farm or home in the countryside	25	(24.3%)
Region of residence in Portugal		
Lisbon	10	(9.8%)
Cascais / Estoril	17	(16.7%)
Algarve	31	(30.4%)
Other	44	(43.1%)
Number of times per year return to country of origin		
Never	20	(19.4%)
Once	43	(41.7%)
2-3 times	23	(22.3%)
4-5 times	13	(12.6%)
6 or more	4	(3.9%)
Own a Portuguese phone number		
Yes	102	(99%)
No	1	(1%)
Own a phone number from country of origin		
Yes	47	(45.6%)
No	56	(54.4%)
Keep a house in country of origin		
Yes	28	(27.7%)
No	75	(72.8%)
Portuguese lessons prior to move		
Yes	28	(27.2%)
No	75	(72.8%)

Note: Numbers for breakdowns may not add up to total for sample because of missing data.

3.2 Descriptive Statistics of Psychological Variables

The large majority (74.8%) of the participants ($M = 8.3$, $SD = 1.75$) scored their level of Happiness in Portugal from 8 to 10, indicating that most of them felt quite happy. Regarding Intention of Staying, the participants' response was generally supportive of staying in the country for the long run ($M = 79.9$, $SD = 25.3$). Almost half of the participants (49.5%) scored 7 or above ($M = 6.38$, $SD = 1.58$) indicating that they had high levels of life satisfaction.

3.3 Correlations

We first examined Pearson correlations between psychological adaptation (Subjective well-being and Intention of staying), acculturation scales (VIA scale, SCAS scale), experienced prejudice against being a foreigner and experienced prejudice against age. Not surprisingly, Subjective well-being and Intention of staying presented a high and positive correlation ($r = .76$, $p < .01$) indicating that the more content with their life, the more they intended to stay in the country.

We also found a high and positive correlation between the Sociocultural adaptation scale (SCAS scale) and Subjective well-being ($r = .55$, $p < .01$), which leads us to believe that the more adapted the migrants are in terms of daily interactions with and activities in the host culture, the higher is their subjective well-being. Consistent with our expectations, we also found that acculturation to Portugal (VIA Scale) was positively associated with Subjective well-being ($r = .27$, $p < .01$). Not surprisingly, the experience of prejudice against being a foreigner ($r = -.45$, $p < .01$) was negatively related to Subjective well-being and acculturation indicators.

As can be seen in Table 3.1, Intention of staying in Portugal was significantly correlated with the SCAS scale ($r = .54$, $p < .05$), leading us to believe that the more socio-culturally adapted are the migrants, the higher is their likelihood of staying in Portugal. Still, regarding Intention of staying in Portugal, this variable was significant and negatively correlated to the experience of prejudice due to foreigner status ($r = -.45$, $p < .01$). From this relationship we can see that the more discrimination the participant feels about being a foreigner, the lower is the likelihood of staying in Portugal. The experience of prejudice due to age also was negatively correlated with Subjective well-being ($r = -.23$, $p < .01$), albeit presenting a weaker relationship than prejudice experienced for being a foreigner.

When analysing the correlation of the scales with key socio-demographic variables, we found that the educational level had a positive relationship with the VIA Acculturation

Scale ($r = .24, p < .05$) giving us the indication that the higher the level of education, the more acculturated the participants tend to be. The educational level also presented a negative correlation with the Prej_Age (Prejudice against age) ($r = -.22, p < .05$), leading us to believe that the higher the level of education, the less discriminated the participants feel about their age.

Table 3.1

Pearson-Product-Moment Correlations between Measures of Acculturation and Subjective Well-Being, Experienced Prejudice against being a Foreigner and Experienced Prejudice against age

Measures	SWB	SCAS	VIA	Prej_Age	Prej_Foreign	Int.Stay
SWB	1	.55**	.27**	-.23**	-.45**	.76**
SCAS		1	.43**	-.17	-.41**	.54**
VIA			1	-.07	-.14	.23
Prej_Age				1	.63**	-.22*
Prej_Foreign					1	-.45**
Int.Stay						1

N=103 SWB=Subjective Well-Being and Happiness; SCAS=Sociocultural Acculturation Scale; VIA=Vancouver Index of Acculturation; Prej_Age=Age Prejudice Scale; Prej_Foreign=Foreigner Prejudice Scale; Int.Stay=Intention of Staying in Portugal

** $p < .01$ * $p < .05$

3.4 Acculturation Strategies

According to Berry (1997), the four acculturation strategies are a result of the interaction between two dimensions: (1) the degree of maintenance with the Heritage Culture and (2) the degree of contact or identification towards the Host Culture. When both dimensions are high, the Integration acculturation strategy is defined. When the degree of contact towards the Host Culture is high and the maintenance of the Heritage Culture is low, the Assimilation acculturation strategy is defined. When the degree of contact towards the Host Culture is low and the maintenance of the Heritage Culture is high, the Separation acculturation strategy is defined. Finally, when both dimensions are low, the Marginalization acculturation strategy is defined. The Vancouver Index of Acculturation – VIA scale (Ryder *et al.*, 2000) was used to group the participants into one of the four different acculturation strategies: Assimilation, Integration, Separation or Marginalization (Berry, 1997). For this purpose, we used the subscales referring to identification with the ‘Heritage Culture’ and ‘Host Culture’ of the VIA Acculturation Scale to obtain the dimensions related to the level of maintenance with the heritage culture and the level of contact and identification with the host culture. Participants’ mean scores on each dimension were dichotomized by categorizing the

scores as either a high or a low score on the respective dimension, and the criterion for the division was the midpoint of the scale. Given that the VIA scale was assessed through an eight point Likert scale, this means that a mean score of less than four was categorized as low and more than four was high on the respective dimension. After categorizing each participant into one of the four acculturation strategy groups, there was an almost balanced amount of participants in each of the acculturation strategy groups as can be seen in Table 3.2.

Table 3.2

Acculturation Strategy Groups (n=103)

<u>Groups</u>	<u>Count</u>	<u>(%)</u>
Integration	38	(36.9%)
Assimilation	30	(29.1%)
Separation	19	(18.4%)
Marginalization	16	(15.5%)

Chi-square tests were performed in order to verify differences in the acculturation groups regarding relevant socio-demographic factors. In many instances the assumption of “minimum cell frequency” was violated, in which case the Likelihood ratio was the indicator used.

There were no significant differences found in regard to Gender [$\chi^2(3) = 2.11, p = .55$], Nationality [$\chi^2(6) = 3.03, p = .81$], Level of Education [$\chi^2(15) = 11.70, p = .70$], Level of Portuguese [$\chi^2(12) = 6.94, p = .86$], Age (categorized as ‘29 to 40 years old’, ‘41 to 50 years old’, ‘51 to 60 years old’, ‘61 to 70 years old’ and ‘71 years old or older’ [$\chi^2(12) = 11.58, p = .48$], Time in Portugal categorized as ‘Up to 5 years’, ‘From 5 to 10 years’, and ‘More than 10 years’ [$\chi^2(6) = 9.18, p = .16$], Objective Income [$\chi^2(15) = 19.86, p = .18$], Subjective Income [$\chi^2(9) = 10.17, p = .34$], Health [$\chi^2(15) = 24.42, p = .06$], Status in Portugal [$\chi^2(6) = 3.07, p = .80$], and Housing Situation [$\chi^2(15) = 18.19, p = .25$].

We found significant differences in two variables: Marital Status [$\chi^2(9) = 21.68, p = .01$] and Area where Lives [$\chi^2(12) = 24.84, p = .02$] suggesting that there is a relationship between these variables and the acculturation strategy adopted by the participant is not independent from marital status and the area where they live⁸. Most of the individuals were

⁸ To determine if these variables (Marital Status and Area where Lives) had an effect on the dependent variables, a MANCOVA analysis was performed using these variables as covariates. Levene’s test for homogeneity of variance was verified but Box’s test of Equality of Covariances Matrices was violated. There was a statistically significant difference in Intentions of staying $F(3,94) = 6.80, p = .00$; partial eta squared = .18; Sociocultural Acculturation $F(3,94) = 17.59, p = .00$; partial eta squared = .36; and Subjective well-being $F(3,94) = 6.02, p = .00$; partial eta squared = .16. The results show that when

married (78.6%) and over one-third (37.3%) adopted the Integration strategy. Just over half (57%) live in a farm, house in the countryside or village and from this group 56.7% adopted the Integration strategy.

A one-way between-groups multivariate analysis of variance (MANOVA) was performed to examine differences between the acculturation groups regarding the dependent variables. We used the MANOVA in order to perform the analysis of variance of several dependent variables at the same time, therefore adjusting for the risk of Type 1 errors. The categorical variable was acculturation strategy and the dependent variables were Subjective well-being, Intention of staying, Prejudice against age, Prejudice against being a foreigner, Sociocultural Acculturation Factor1 and Sociocultural Acculturation Factor2. Since these last two variables presented a high correlation ($r = .80$, $p < .05$), we considered them together. The two preliminary assumption testing was conducted; Box's test of Equality of Covariance Matrices was performed and with $p < .001$, the assumption was not violated. Levene's test of equality of Error Variances was performed, and it indicated that the only the variable that violated the assumption was Intention of staying with $p < .001$.

We found statistically significant differences between the acculturation strategies on the combined dependent variables: $F(18,261) = 3.58$, $p < .001$; Wilks' Lambda = .54, partial eta squared = .19. After the Bonferroni adjustment level of .008, there was a statistically significant difference in Intention of staying $F(3,97) = 6.53$, $p = .00$; partial eta squared = .17; Sociocultural Acculturation $F(3,97) = 17.29$, $p = .00$; partial eta squared = .35; and Subjective well-being $F(3,97) = 5.05$, $p = .00$; partial eta squared = .14.

Subsequently, to determine which acculturation group differed from which, one-way ANOVAs were conducted with each dependent variable. Preliminary analyses using ANOVA examined for differences in the acculturation strategies on ratings of Subjective well-being and Intention of staying. Levene's test for homogeneity of variance was not violated, and there was a statistically significant difference in Subjective well-being scores for the Separation, Integration and Assimilation acculturation strategies $F(3,99) = 5.19$, $p < .001$. Post hoc comparisons using the Tukey HSD test indicated that the mean score for Separation ($M = 5.63$, $SD = 1.58$) was significantly different from Assimilation ($M = 6.91$, $SD = 1.50$) and from Integration ($M = 7.17$, $SD = 1.35$). The size of the effect was .13, which can be considered large.

considering the covariates, the effect on the dependent variables does not change when compared to the MANOVA analysis performed in this study.

The same analysis was done with Intention of staying as the dependent variable, in order to identify differences between the acculturation strategies, and it yielded similar results. In this case the Levine test of homogeneity of variances was violated, but since the sample was $n > 30$, according to the central limit theorem, we felt confident to move forward. With this variable there was a statistically significant different score for the Separation, Integration and Assimilation group $F(3,98) = 6.77, p < .001$. Post hoc comparisons using the Tukey HSD test indicated that the mean score for Separation ($M=61.32, SD=30.51$) was significantly different from Assimilation ($M=90.24, SD= 12.95$) and from Integration ($M=84.18, SD=23.63$). The effect size calculated using eta squared was .17, which is considered a large effect.

With the Sociocultural Acculturation scale (SCAS), the assumption of test of homogeneity of variances through the Levene's test was not violated, and we found significant differences in all four groups $F(3,99) = 17.39, p < .001$. Post hoc comparisons using Tukey HSD indicated significant differences in all four groups, with Separation ($M=4.71, SD=.91$), Marginalization ($M=5.29, SD=.81$), Integration ($M=6.19, SD=.73$) and Assimilation ($M=6.12, SD=.88$). The effect size of this variable was .35, which is considered a large effect.

When analysing the Prejudice against foreigners, the assumption of homogeneity of variances using Levene's test was not violated and with $F(3,98) = 2.78, p = .05$ We identified that this variable presented differences among the acculturation strategies. Post doc Turkey HSD tests, however, did not show significant differences among the groups, possibly because the significance level ($p = .05$) was exactly the cut-off point of .05.

For the Prejudice against age, the test of homogeneity of variances was not violated, but we did not find differences $F(3,98) = .19, p = .91$ among the acculturation strategies regarding this variable.

Finally, we performed the ANOVA analysis with other socio-demographic variables: Level of Portuguese $F(3,99) = 1.15, p = .33$, Age $F(3,99) = .81, p = .49$, Objective Income $F(3,99) = 1.73, p = .17$, Subjective Income $F(3,98) = .63, p = .60$, Health $F(3,99) = .63, p = .60$, Time in Portugal $F(3,66) = .80, p = .50$ and Area where Lives $F(3,98) = .50, p = .68$ to identify any differences among the acculturation strategy groups. All the variables passed the Levene's test of homogeneity of variances, and the results indicated that none of these variables presented a significant difference among the acculturation strategy groups.

In summary, the analysis performed showed that individuals that adopted a Separation acculturation strategy presented the lowest levels on all three dependent variables when

compared to the other acculturation groups, as can be seen in the graphs below. On the other hand, individuals that adopted an Integration or Assimilation strategy were among the ones who presented the highest scores on the three outcome variables. An interesting finding is that the Marginalization strategy did not present the lowest levels of Subjective well-being, Sociocultural acculturation and Intention of staying; this group seemed to be better “adjusted” than the group that adopted Separation as an acculturation strategy.

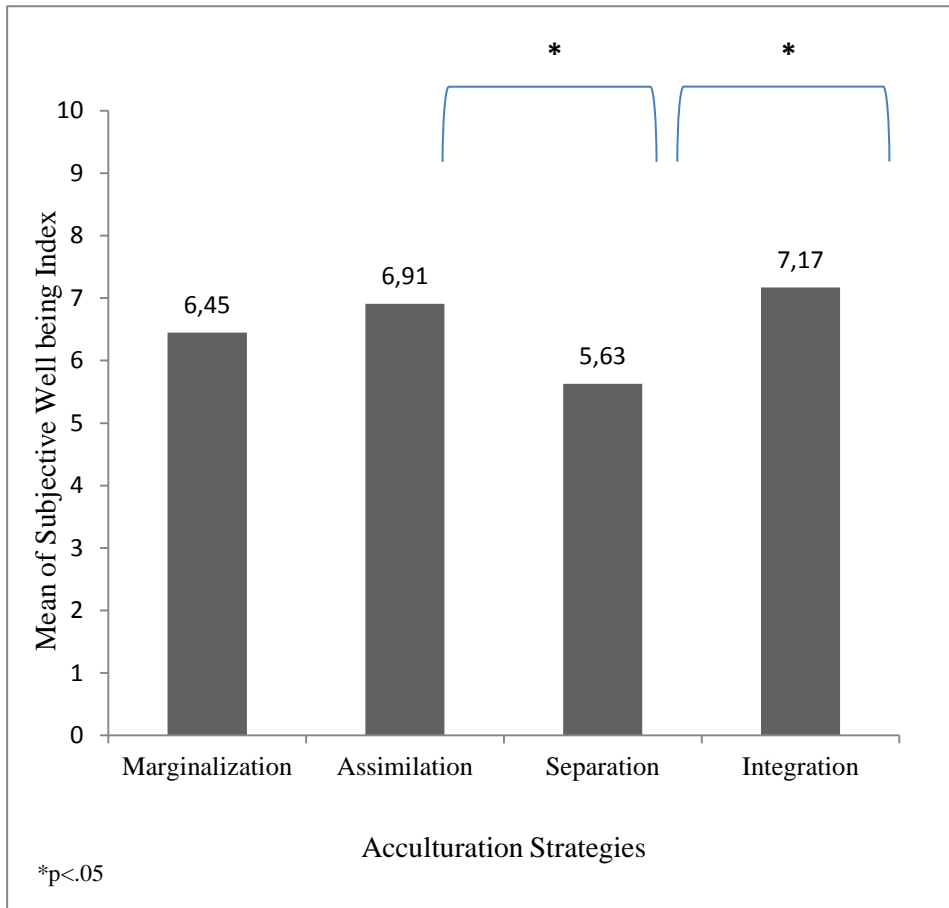


Figure 3.1 Subjective Well-Being by Acculturation Strategy

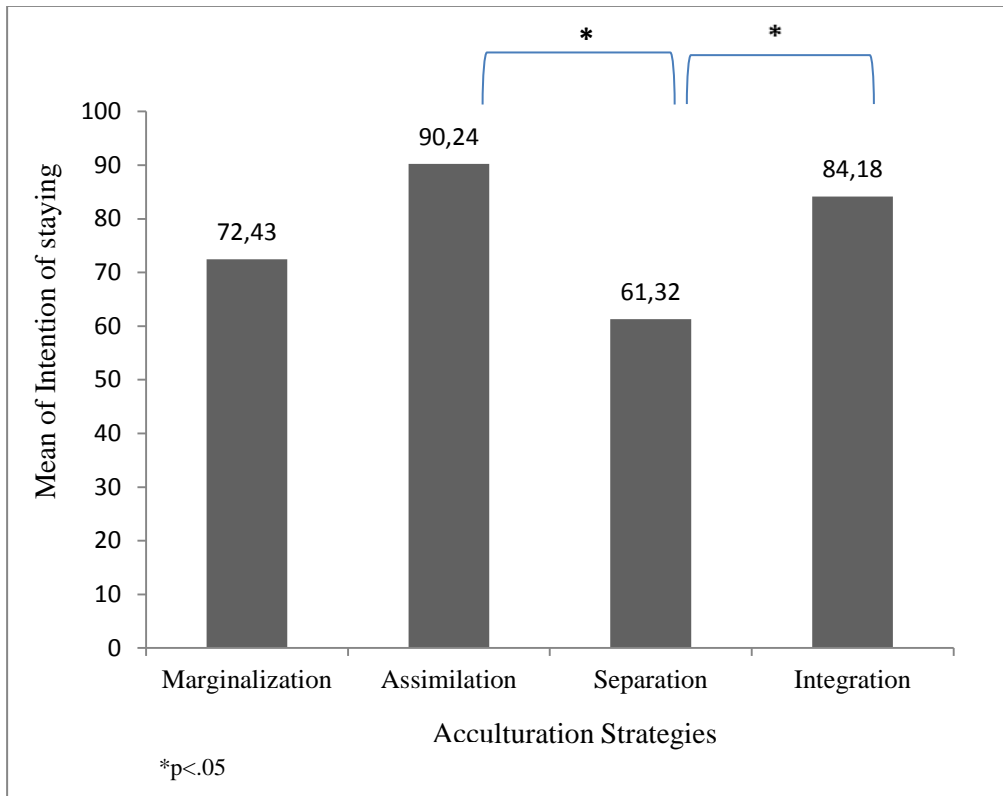


Figure 3.2 Intention of staying by Acculturation Strategy

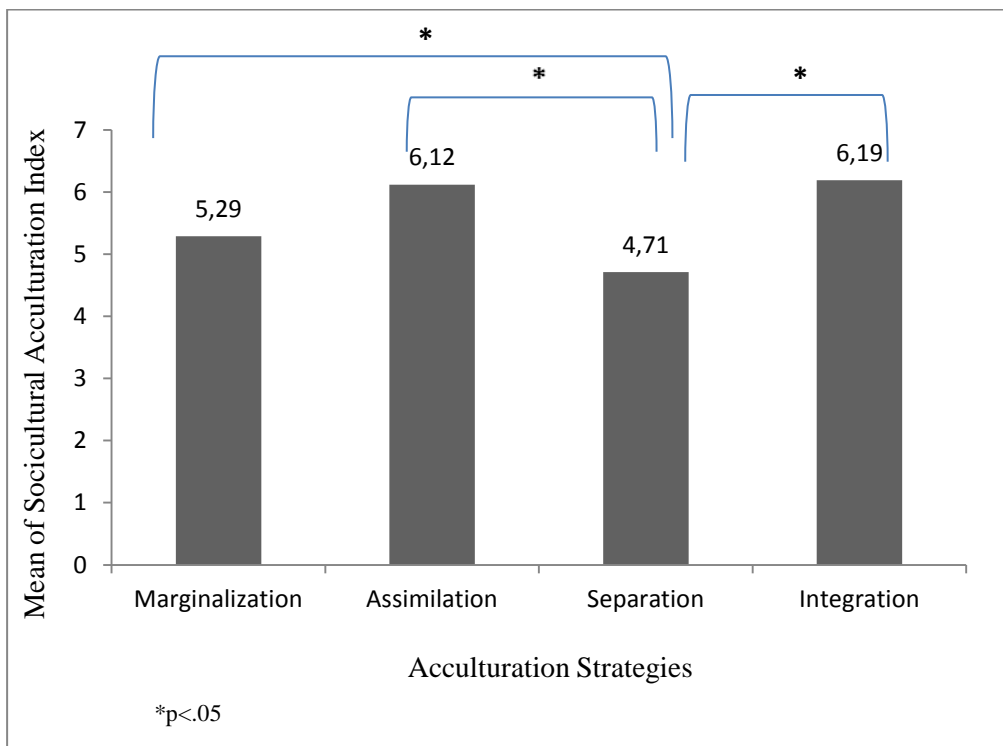


Figure 3.3 Sociocultural adaptation by Acculturation Strategy

Chapter IV - Discussion

4.1 Main Findings

There has been a consensus in the literature and research, that the acculturation strategy delivering the highest levels of psychological adaptation and being preferred among various groups of migrants and in various settings and situations, is Integration (Berry, 1997,1999; 2005; Boski, 2008; Ward, 2008). The literature also agrees that the Marginalization is the strategy that delivers the lowest levels of psychological adaptation (Berry, 1990,1999, 2001; Ward & Kus, 2012).

While International Retired Migration is steadily growing in importance and numbers in Southern Europe, most of the research is focused on Spain (Casado-Díaz, 2006; Rodríguez *et al.*, 2004). In addition, even though Portugal has shown openness to immigrant groups, IRM are different from the other traditional immigrant groups since they have a relative high vitality and status (Harwood *et al.*, 1994; Bourhis *et al.*, 1997).

In this context, this study's aim was to map the acculturation strategies used by the IRM in Portugal and to understand the outcomes in terms of psychological and sociocultural adaptation, as well as perceived prejudice towards foreigners and prejudice due to age.

Our first hypothesis (H1) proposed that the migrants who adopted the Integration or Separation acculturation strategies would present the highest psychological adaptation outcomes, measured as Subjective well-being and Intention of staying. Integration is known to be the strategy that yields the most positive psychological adaptation. Separation could be the strategy that delivers high psychological adaptation for older migrants who might find it too difficult to make fundamental changes in their way of living and who would end up being happier if separated from the host society and closer to other IRM. Our hypothesis was partially verified, since the Integration strategy did in fact deliver the highest level of psychological adaptation through the measurement of Subjective well-being and came in second place in Intention of staying. Contrary to our hypothesis, however, the Separation strategy delivered the lowest level of psychological adaptation, with the lowest scores in both variables. Since only 6% of the sample lived in gated communities or residencies, we believe that this characteristic might be related to this result, since these IRM explicitly decide to live apart from the local communities in the host culture and were not fully represented in this study's sample. It is also possible that the IRM that adopt the Separation strategy are less likely to participate in a study like ours.

Contrary to the consensus in the literature regarding the low psychological adaptation levels of the Marginalization strategy (Berry, 1997, 2005; Ward & Kennedy, 1999), in our study this strategy did not produce the worst results. Furthermore, it is interesting to notice that the Assimilation strategy delivered the highest score in Intention of staying, which is another indicator of psychological adaptation. This leads us to believe that the effort and acculturative stress involved in the processes of cultural shredding and cultural learning are considered to be worthwhile and important for the IRM in Portugal. It also gives us an indication that it is important for the IRM to identify with and feel part of the host culture. This finding is in line with the fact that perceiving oneself as a local has been identified as an important factor in the long term adjustment of lifestyle migrants (Benson & O'Reilly, 2009; Torkington, 2012).

Our second hypothesis (H2) proposed that the highest levels of sociocultural adaptation would be found among the individuals that pursued the Assimilation or Integration strategies. The hypothesis was verified with Integration presenting the highest results followed closely by the Assimilation strategy. Sociocultural adaptation is operationalized by the skills and issues related to dealing with daily life in the new culture, and we found a high and positive correlation between educational level and sociocultural adaptation; so the higher the education level the better the sociocultural adaptation. Thus, the educational level of the IRM is a crucial aspect that can facilitate the process of acquiring social skills to better “fit in” the new culture.

Language proficiency has been identified as one of the most important skills in sociocultural adaptation (Berry, 2005; Park & Kim, 2013; Vedder, 2005; Ward *et al.*, 2001; Ward & Kennedy, 1999). It is interesting to notice that, despite the fact that the majority of the sample is a permanent resident in Portugal, the level of Portuguese was identified as quite low. In our study, some participants commented on this issue in the open-ended question section: “Any problems I have with communications/interactions with Portuguese are because I find the language extremely difficult to learn although I try. Luckily my husband is an excellent speaker so we get by.” Another participant stated the need for help with language in public services: “There is quite a problem communicating with official or business organizations. Even just to have the menu on answering services available in English would be so helpful.”

This is an indication that there is room for improvement in the issues related to communicating with this group in public services and services in general. Workers in the

public services could benefit from English and cultural competence training. The government could design training initiatives in partnership with the tourism and hotel industries that already have a great deal of expertise in catering to the foreign public.

In addition, providing Portuguese lessons to IRM is extremely important in order for them to feel integrated and an actual participant in Portuguese society. Given their age, however, participating in a language course side-by-side with foreign young adults might make them feel out of place. Age stereotype and the threat associated to it can hinder the results of learning a new language, especially in a foreign country (Moztarzadeh & O'Rourke, 2015; Park & Kim, 2013; Nejati & Farshi, 2008).

Since language proficiency is a major issue in developing sociocultural skills, the Portuguese government could develop initiatives with senior universities that already deliver educational services to older adults in the community by offering Portuguese courses targeted at the IRM.

Senior universities, designed to offer education to retired and older adults, have a success record in enhancing the life of older adults in general, and in this particular case they can be a vehicle to help integrate the IRM in their local communities (Fernández-Ballesteros *et al.*, 2013).

Our third hypothesis (H3), which proposed that perceived prejudice towards foreigners and due to age would be higher among the participants that adopted the Marginalization or Separation strategies, was not verified. We did not find statistically-significant differences among the four acculturation strategies regarding these variables.

Regarding prejudice perceived due to age, we found a correlation with educational level - the higher the level of education, the less discriminated the participants feel about their age. Also, not surprisingly, we found that the higher the perceived prejudice against their age, the lower the psychological and sociocultural adaptation.

We found a high and negative correlation between prejudice against being a foreigner and the variables that measure psychological adaptation (Subjective well-being and Intention of staying). The more the IRM feels prejudiced against their condition as a foreigner, the lower their levels of psychological adaptation – they are less satisfied with life and less likely to stay in Portugal. Among the IRM in this study, prejudice against being a foreigner seems to be more salient than prejudice for being older.

These findings tell us that the perceived prejudice against being a foreigner is a relevant issue for this group's psychological adaptation and should be taken into account in

the initiatives the government fosters to attract and maintain the IRM in Portugal. Prejudice issues in general can be mitigated by increasing the IRM's participation in activities of the host society and, at the same time, giving the local population the opportunity to have as much real and unbiased contact with the IRM as possible (Allport, 1954).

In this context, the senior universities can be an avenue towards bridging the gap between the IRM and the population of the host society. The Portuguese government could design and promote incentives for the IRM to participate in courses, travels, artistic and outdoor activities in partnership with the institutions that already serve the local retired community. Fostering volunteer work is also an interesting way for the IRM to participate in the local community's activities, allowing the migrants and the locals to connect and share common experiences.

It seems that the Portuguese Government's initiatives must go beyond tax incentives and financial incentives to buy property, in order to actually promote the integration of this group within the larger society. Not only that, but the initiatives should be both national and local, since a great part of the IRM in this sample lives outside of urban areas. The small communities have the advantage of being able to identify the IRM more easily, therefore integrating and inviting them into the Portuguese pace and way of life.

Furthermore, there is the opportunity for the IRM to participate in activities where they can contribute with their knowledge, such as teaching English, and helping to develop trips to the UK, Netherlands or other countries that they know for the local retired population. This level of personal contact might be just what this group needs to mitigate the biased view that the IRM are an extremely wealthy group of people, somewhat "detached" from the reality in Portugal.

Our study confirmed the research that shows that the IRM is a heterogeneous group (Warnes *et al.*, 1999). Commonly perceived as an extremely wealthy group, our study showed that the subjective income of the IRM in Portugal is not as high as one could imagine, with almost 50% of the sample stating that they are 'Coping on present income', 'Finding it difficult on present income' or 'Finding it very difficult on present income'. Since the subjective level of income of the IRM is not as high as one could think, perhaps the only thing missing from a deeper level of integration is being seen as "equals."

A big portion of the sample in this study stated that they lived outside of urban areas, in small towns, country villages or the countryside. It is possible that these characteristics are somehow linked to the fact that the Marginalization strategy did not present the worst scores

in psychological and sociocultural adaptation: the participants in this study might be interested in exercising their individuality choosing to live in places far from the “beaten road” of the expatriate community. They may even feel comfortable navigating from their original culture to the host culture and in the end not identifying strongly with either one. In fact, one of the participants commented: “I move within ‘new age’ circles, am vegetarian and both in Holland or Portugal hardly interact in a traditional sense.”

The research on acculturation shows that in general the studies present a distribution of the acculturation strategies where Marginalization is by far the one with the least amount of people, sometimes as low as 4% of the sample (Berry & Sabatier, 2011; Ward & Kus, 2012). We found a more balanced distribution, where the participants that adopted the Marginalization strategy accounted for almost 16% of the sample.

While this strategy did not deliver the worst results, it also was not among the higher ones. Expectations regarding a carefree retired life in a sunny country may not have been completely met perhaps because even though Portugal welcomes immigrants in general, the IRM found language barriers and they perceived prejudice for their condition as foreigners. Although this group might in fact be exercising their individuality or navigating between cultures, the ideal of freedom from prior constraints might not have been enough for them to feel completely satisfied – it may be that for this group to be happy in Portugal they do need to participate and feel part of the host society.

4.2 Limitations

This study had a good sample size (N=131) for this type of research in the field of Social Psychology. However, some limitations can be identified. Firstly, the sample is mostly female and this aspect may impact the results, since gender has been shown to be an important aspect when dealing with the experiences of older migrants. The Report of Foreign population in Portugal for 2011 states that around 50% of the immigrants in Portugal are female, so a more balanced sample would be more representative of the immigrant population in general. Furthermore, in an immigration setting, older men are considered to be less prone to adjusting to the new culture (Park & Kim, 2013) so with a more balanced sample in terms of gender perhaps there would be less participants adopting the Integration strategy. Further studies should take gender participation into account and try to have a more balanced sample.

The fact that the recruitment was done via Facebook expatriate groups allowed us to reach a large amount of people in a short time and be assertive by targeting exactly to the expatriate community in Portugal. However, using social media presented some implications:

only respondents that were comfortable using a computer and the internet would have participated in the study. Since it is likely that many older adults have difficulties in using the internet or the computer, future studies should consider allowing participants to fill out the questionnaire off line.

English was the chosen language to perform the study, meaning that both the questionnaire and the expatriate Facebook groups were in English. Although English is widespread, especially when dealing with online questionnaires and social media, this represents a limitation since it excludes nationalities that might not be proficient enough in English to feel comfortable to participate in the study. Perhaps with a greater variety of nationalities we would have found different results. For example, French is more similar to Portuguese and culturally less distant than the UK⁹ so the French IRM would probably have less difficulty in communicating in Portugal and language proficiency might be easier, possibly leading to different results in the study (Hofstede, 2011). Furthermore, small cultural distances have shown to be facilitators in the process of integration so with more culturally similar participants perhaps there would be differences in the results of acculturation strategies choices and their outcomes (Boski, 2008; Ward *et al.*, 2001).

Future studies could translate the questionnaire allowing other nationalities to participate in equal conditions of language proficiency. With more nationalities participating in the study, it would be possible to investigate the effects of cultural distance and how they reflect in the choice of acculturation strategies and influences in psychological and sociocultural adaptation, as well as possible differences in perceived prejudice.

The sample in this study only had 1% of the participants that lived in gated communities and 5% in residences. These locations are known for the sense of exclusiveness, and they advertise the fact that their residents are part of a separate community (Torkington, 2012). In this context, if the sample had more participants with these residential characteristics, perhaps the results would have been different regarding the Separation or Marginalization strategies. Future studies should aim to achieve a more balanced sample with more representation of this type of IRM.

Finally, it would be interesting to further investigate the influence of individual variables such as personality traits in the choice of acculturation strategies and their outcomes. While research regarding acculturation strategies and personality has been developed (Ahadi & Puente-Díaz, 2011; Bakker, Van Der Zee & Van Oudenhoven, 2006; Steunenberg, Braam,

⁹ <http://geert-hofstede.com/portugal.html>

Beekman, Deeg & Kerkhof, 2009), they do not consider the specifics of the demographic of older migrants or IRM. Motivations to migrate, social support, and styles and strategies of coping are all interesting individual level aspects that can be considered in further studies in order to better understand the underlying issues related to the choice of acculturation strategies and the psychological adaptation of the IRM in Portugal (Berry, 1997).

4.3 Conclusion

The study of the acculturation strategies and their outcomes of the IRM in Portugal confirmed that Integration was the strategy that delivered the highest level of psychological and sociocultural adaptation. Although this demographic may have more difficulties in cultural learning, Assimilation was also a strategy with high results. Nonetheless, the IRM that pursued the Marginalization strategy did not yield the lowest results; the Separation strategy was the strategy with the worst performance. Perceived prejudice against being a foreigner was more salient than prejudice against age for this group. In order to attract and maintain the IRM in Portugal, it is important to promote initiatives that integrate the IRM in the Portuguese society. These initiatives should include language courses and the promotion of contact with the local population of similar age and status in order to bridge the gap and foster the participation of the IRM in the Portuguese culture.

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Appendix A - Questionnaire

Thank you for participating in this study!

The following questionnaire is a part of my Master's thesis in Psychology of Intercultural Relations at the university ISCTE (Instituto Universitário de Lisboa) and the research centre CIS-IUL (Centre for Research and Social Intervention). The main aim of this study, which is supervised by Dr. Melanie Vauclair, is to collect information about how retired expatriates adapt in Portugal. At the end of the questionnaire you will receive more detailed information about the aims and goals.

Responding to the questionnaire will take about 10 minutes. Your participation is very important in order to better understand adaptation processes of retired expatriates and to enable data collection for the Master thesis project. There are no risks associated with your participation in this study. Your participation is entirely voluntary. Please note that you can withdraw from this study at any stage if you wish to do so.

In accordance with data protection norms, you will never be identified in this research or in any presentation or publication. The information you provide is confidential and will be coded by number only. Data from all participants in this study will be analysed within the scope of a Master. Please be open and honest when you respond to the questions, as there are no right or wrong answers and we are interested in your personal opinions and perceptions.

Please note that, if you leave your email, you will automatically participate in a draw and be eligible to win a brunch for two people at Choupana Caffé in Lisbon. The draw will be held on August 30th, 2015. We may contact you later to invite you in a follow up interview study. However, you have the option to opt out (at the end of the survey) and your participation in the draw will not be affected by this decision.

If you have any questions, please contact the following researchers via email:

Deborah Dahab (Master thesis student): ddbhe@iscte.pt

Melanie Vauclair (supervisor): melanie.vauclair@iscte.pt

Thank you!

To get started, please tell us a bit about yourself:

1. What is your gender?
 - Male
 - Female
2. What is your marital status?
 - Single

- Married/ Stable relationship
 - Divorced / Separated
 - Widowed
3. When is your birthday? DD/MM/YYYY
4. What is your nationality?
- British
 - Dutch
 - French
 - German
 - Other. Please specify_____
5. What is your status in Portugal?
- Permanent resident
 - Citizen
 - Other. Please specify_____
6. Do you have children?
- Yes
 - No
7. With whom are you living in Portugal?
- Alone
 - With partner
 - With partner and children
 - With children
 - Other. Please specify_____
8. What is the highest level of education you have achieved?
- Not completed primary education
 - Primary or first stage of basic
 - Lower secondary or second stage of basic
 - Upper secondary
 - Post-secondary, non-tertiary
 - First stage of tertiary
 - Second stage of tertiary
9. How well do you speak Portuguese right now?
- Very poor
 - Poor
 - Fair
 - Good
 - Very good

Now we would like to know a bit more about your perceptions of living in Portugal.

The following questions below will refer to your heritage culture, meaning the original culture of your family. It may be the culture of your birth, the culture in which you have been raised, or any culture in your family background. If there are several, pick the one that has influenced you most. If you do not feel that you have been influenced by any other culture, please name a culture that influenced previous generations of your family.

10. What is your heritage culture? _____

Please choose one of the options to the right of each statement to indicate your degree of agreement or disagreement.

The following statements refer to your heritage culture.

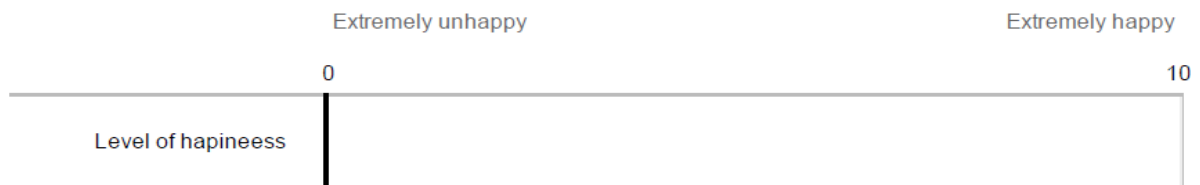
	Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
I often participate in my heritage cultural traditions.									
I get along better with people from my heritage culture.									
I enjoy social activities with people from the same heritage culture as myself.									
I am comfortable interacting with people of the same heritage culture as myself									
I enjoy entertainment (e.g. movies, music) from my heritage culture.									
I often behave in ways that are typical of my heritage culture.									
It is important for me to maintain or develop the practices of my heritage culture.									
I believe in the values of my heritage culture.									
I enjoy the jokes and humor of my heritage culture.									
I am interested in having friends from my heritage culture.									

The following statements refer to the Portuguese culture.

	Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
I often participate in mainstream Portuguese cultural traditions.									
I get along better with Portuguese people.									
I enjoy social activities with typical Portuguese people.									
I am comfortable interacting with typical Portuguese people.									
I enjoy Portuguese entertainment (e.g. movies, music).									
I often behave in ways that are typically Portuguese.									
I believe in mainstream Portuguese values.									
I enjoy Portuguese jokes and humor.									
I am interested in having Portuguese friends.									
In general, I feel that it is quite stressful to adapt to the Portuguese way of life.									

11. Taking all things together, how happy would you say you are in Portugal?

Level of Happiness



12. Below are five statements with which you may agree or disagree. Please choose *one* of the options to the right of each statement to indicate your degree of agreement or disagreement.

	Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
In most ways my current life situation is close to my ideal.									
The current conditions of my life are excellent.									
I am satisfied with my life right now.									
So far I have gotten the important things in Portugal I want in my life.									
If I could rewind my life, I would not change the decision to move to Portugal.									

13. To what extent do you intend to stay in Portugal?

Acculturation Strategies of the IRM in Portugal



14. Please indicate your level of agreement or disagreement to the statements below. Please choose one of the options to the right of each statement to indicate your degree of agreement or disagreement.

	Strongly Disagree	1	2	3	4	5	6	7	Strongly Agree
I find it easy to make friends in Portugal.									
The transport system in Portugal is easy to use.									
I am able to see two sides of an intercultural issue.									
It is easy to communicate with the Portuguese on a daily basis.									
I am used to the pace of life in Portugal.									
I enjoy going shopping in Portugal.									
I find it easy to worship in my usual way in Portugal									
I enjoy going to social events / gatherings / functions in Portugal.									
I feel at ease about myself when interacting with Portuguese people.									
I feel I understand Portuguese jokes and humor.									
I find it easy to deal with unpleasant / cross / aggressive people.									
I have no difficulty in getting used to the population density in Portugal.									
I understand the Portuguese world view.									
It is easy getting used to Portuguese food.									
I understand cultural differences.									
It is easy to follow Portuguese rules and regulations.									
I find it easy to deal with the bureaucracy in Portugal.									
I am comfortable with people staring at me.									
I find it easy to deal with people in authority in Portugal									
I have adapted to the Portuguese etiquette.									
I am comfortable in living away from family members overseas.									
I understand the Portuguese political system.									
I have no difficulty in going to coffee shops, food stalls, restaurants or fast food outlets.									

It is easy to deal with unsatisfactory service in Portugal.																			
I am comfortable in communicating with people of a different ethnic group.																			
I believe I can take a Portuguese perspective on the culture.																			
I understand the Portuguese value system.																			
I have no difficulty in finding my way around in Portugal																			
I believe I am able to see things from the Portuguese point of view.																			
I find it easy to adapt to the accommodation in Portugal.																			
I am comfortable in dealing with people of higher status.																			
I enjoy the climate in Portugal.																			
I understand Portuguese and the local accent.																			
It is easy to make myself understood in Portugal.																			

The following questions are about your experiences as an older expatriate in Portugal.

	Never	Rarely	Sometimes	Very Often
How often has anyone shown you prejudice against you or treated you unfairly because of your age?				
How often has someone treated you badly because of your age, for example by insulting you, abusing (verbally or physically) you or refusing you services?				
How often have you felt that someone showed you a lack of respect because of your age, for instance by ignoring or patronising you?				
How often has anyone shown prejudice against you or treated you unfairly because you are a foreigner?				
How often has someone treated you badly because you are a foreigner, for example by insulting you, abusing (verbally or physically) you or refusing you services?				
How often have you felt that someone showed you a lack of respect because you are a foreigner, for instance by ignoring or patronising you?				

15. Which of the descriptions below comes closest to how you feel about your household's income nowadays?

- Living comfortably on present income
- Coping on present income
- Finding it difficult on present income
- Finding it very difficult on present income

16. Which option best describes your monthly household's total income, after tax and compulsory deductions, from all sources? If you don't know the exact figure, please give an estimate.
- Less than €500
 - Between 500-2,500 €
 - Between 2,500 – 6,000€
 - Between 6,000 – 10,000€
 - More than 10,000€
 - Don't want to respond
17. How is your health in general? Would you say it is:
- Bad
 - Very bad
 - Poor
 - Neither good nor bad
 - Fair
 - Good
 - Very good
18. Did you retire completely from any professional activity?
- Yes
 - No
19. Please tell us when you retired. DD/MM/YYYY
20. If no, do you have a professional postretirement occupation in Portugal?
- Yes
 - No
21. Does your professional postretirement occupation in Portugal entail contact with Portuguese people?
- Yes, mostly with Portuguese people
 - Yes, but only little contact with Portuguese people
 - No
22. How long have you been living in Portugal? _____years_____months
23. How long did it take from the time you had the idea to move until the move actually happened?
- 1 - 6 months
 - 7- 12 months
 - More than 12 months
24. Did you consider other countries besides Portugal to move?
- Yes
 - No
25. Which other countries did you consider?
- Country 1_____

- Country 2 _____
- Country 3 _____

26. What is your housing situation in Portugal?

- Rent short term (up to 12 months)
- Rent long term (more than 12 months)
- Purchased
- Residence
- Gated community
- Other. Please specify _____

27. Which phrase below describes the area where you live?

- A big city
- The suburbs or outskirts of a big city
- A town or a small city
- A country village
- A farm or home in the countryside

28. In what region do you currently live?

- Lisbon
- Cascais/ Estoril
- Algarve
- Other. Please specify _____

29. How many times do you go back to your home country per year?

- Never
- Once
- 2-3 times
- 4-5 times
- 6 or more times

30. On average, how long did you stay when you went back to your home country?

_____ Days

31. Please answer the following questions according to your current situation.

	Yes	No
Do you own a Portuguese phone number?		
Do you own a phone number from your home country?		
Do you keep a house in your home country?		
Did you take Portuguese lessons prior to the move?		
Do you still take Portuguese lessons?		

32. How long did you take Portuguese lessons prior to your move?

_____ Months

33. Do you have any comments regarding this research?