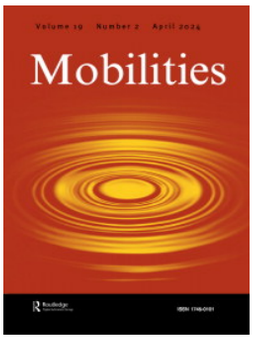

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# A retirement mobilities approach to transnational ageing

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**ABSTRACT**

Transnational ageing processes are usually studied by focusing on the various cross-border practices and mobilities of different categories of ageing migrants. This paper introduces a *retirement mobilities* approach as an analytical framework that draws on both transnational studies and the new mobilities paradigm to widen the theoretical and empirical debates. It argues that both migrant and non-migrant populations, as well as human and non-human cross-border circulations, have to be taken into account when studying transnational ageing. Based on a mixed-methods study combining original data from a quantitative survey conducted in Switzerland with residents 55+ and semi-structured interviews held in Spain and Switzerland with older adults receiving a Swiss pension, we demonstrate the heuristic value of this approach. Indeed, empirical findings indicate that older adults with and without a migration background represent an internationally mobile population with similar mobility aspirations and transnational lifestyles. However, the motivations driving these two groups' transnational mobility differ significantly. Moreover, transnational circulations of financial resources, and in particular retirement pensions, are interlinked with mobility in old age. To conclude, a *retirement mobilities* approach sets a new research agenda, inviting scholars to examine transnational ageing beyond the ageing-migration nexus.

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Transnational ageing; retirement mobilities; transnational lifestyle; mixed-methods; ageing migrants; Switzerland; Spain

## Introduction

Since the early nineties, a new field of research has been steadily growing through the focus on ageing migrants and the 'ageing-migration nexus' (Ciobanu, Fokkema, and Nedelcu 2017, Ciobanu et al. 2020). Within this field, a flourishing scholarship has emerged, which highlights the complexity of interlinked ageing and migration processes from the perspective of different empirical and analytical foci, such as loneliness, care, policy, social security, vulnerability, lifestyle, and well-being. It has also brought to attention a myriad of heterogeneous categories of ageing populations involved in migration, termed as 'ageing in place' (Ciobanu, Fokkema, and Nedelcu 2017), 'returnees' (Percival 2013), 'international retirement migrants' (King, Warnes, and Williams 1998), 'lifestyle migrants' (Benson and O'Reilly 2009), 'flying grannies' (Plaza 2000), 'zero generation grandparents' (Nedelcu 2007, 2009), 'stayers', 'transnational travellers' or 'late in life family joiners' (Horn 2019), among others.

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The use of a transnational analytical lens has given a new impetus to this now consolidated field of research (Horn and Schweppe 2017; Näre, Walsh, and Baldassar 2017; Nedelcu and Wyss 2020; King, Cela, and Fokkema 2021; among others). This lens highlights various ageing migrants' (im)mobility patterns, embedded within diverse configurations of social relationships, as well as material and symbolic exchanges deployed across borders. Thus, recent scholarship increasingly examines transnational ageing, defined as 'the processes of organizing, shaping, and coping with life in old age in contexts which are no longer limited to the frame of a single nation state' (Horn, Schweppe, and Um 2013, 7). These processes reflect various cross-border dynamics in relation to the everyday life experiences of ageing populations, the circulation of resources within dispersed multi-generational families, social security systems, care services, and global politics of ageing (Horn, Schweppe, and Um 2013; Böcker and Hunter 2017; Gehring 2017; Horn and Schweppe 2017; Nedelcu and Wyss 2020). Existing scholarship has usually investigated transnational ageing processes by focusing on older migrants. It has also been shown that various structural and contextual factors, as well as individual aspirations, can motivate older adults without a migration past to age transnationally as 'international retirement migrants' (King, Warnes, and Williams 1998; King, Cela, and Fokkema 2021; Warnes and Williams 2006). Moreover, Walsh and Nare (2016) highlight that older adults are affected by the international mobilities of their relatives, or are dependent on migrant care workers. Yet, up until now, little attention has been paid to the transnational ageing of people who do not change their country of residence in old age. In addition, studies comparing the transnational mobilities of both migrant and non-migrant ageing populations are still lacking.

In this paper, we argue that these gaps should be addressed with a renewed theoretical approach that allows a more comprehensive study and understanding of the transnational ageing processes of (pre)retirement individuals with no previous migration record, or who do not necessarily resettle in old age. First, by underlining the proliferation of ageing migrants' subcategories and overlapping analytical foci, as well as the importance of a transnational approach within the field of 'ageing and migration', we point to the 'migrant exceptionalism' (Hui 2016) dominating inquiries of transnational ageing. Secondly, we introduce a *retirement mobilities* approach by combining the analytical lenses of 'transnational studies' (Levitt and Khagram 2008) and the 'new mobilities paradigm' (Sheller and Urry 2006) to provide a new framework for the study of transnational ageing. In this paper, we empirically implement this approach to comparatively analyse human and non-human transnational mobilities of older adults with and without a migration background. Based on a mixed-methods study conducted in Switzerland and Spain, we show that individuals aged 55 and over residing in Switzerland make up a highly internationally mobile cohort. We then describe and analyse older adults' mobility aspirations for retirement and their transnational lifestyles, questioning the differences and similarities between ageing populations with and without a migration background. Finally, we provide evidence that transnational financial flows, especially pensions, are associated with mobility in old age.

Thus, we argue that the *retirement mobilities* approach sheds new light on transnational ageing by capturing multi-layered cross-border mobility patterns in which (pre)retirees are involved according to different factors, of which the previous migratory experience is important but not exclusive.

## Studying transnational ageing in the research field of 'ageing and migration': a brief state of the art

Over the last twenty years, studies on the intersection of ageing and migration have flourished, producing a large constellation of sub-categories of ageing migrants (Ciobanu et al. 2020). These categories have been usually defined according to the main purpose of older adults' migration

(Torres and Hunter 2023). Much emphasis was initially centred on three main research strands: (1) migrants 'ageing in place', i.e. former labour migrants staying in a destination country after retirement (Fokkema and Naderi 2013; Ciobanu, Fokkema, and Nedelcu 2017); (2) 'return' migrants moving back to their country of origin once they reached retirement age (De Haas and Fokkema 2010; Yahirun 2014; Ciobanu and Ramos 2016); and (3) international retirement migrants (IRM), i.e. 'snowbirds' usually leaving Northern countries in search of a better lifestyle in Southern countries (Sullivan and Stevens 1982; King, Warnes, and Williams 1998; Huber and O'Reilly 2004; Casado-Díaz 2006; Warnes and Williams 2006; Benson and O'Reilly 2009; Bender, Hollstein, and Schweppe 2018).

More recently, new patterns of transnational mobility in ageing populations have come to the fore. They include the return of IRM (Dwyer 2000; Ackers and Dwyer 2004; Giner-Monfort, Hall, and Betty 2016; Hall and Hardill 2016); back-and-forth mobilities of 'Zero generation' transnational grandparents (Nedelcu 2007; Nedelcu and Wyss 2020; see also Plaza 2000; Treas and Mazumdar 2004); family reunification of migrants' ascendants in the countries of destination (Askola 2016; Pellander 2018; Bolzman 2021; Nedelcu 2023); as well as old age care migration (Miles 2015; Bender, Hollstein, and Schweppe 2017; Botterill 2017). We argue that this progressive expansion and diversification of categories of older migrants reflects the current consolidation of the 'ageing and migration' field of research.

In addition, existing scholarship shows that the intersections between ageing and migration processes reflect into various transnational dynamics influenced by global inequalities, care, and mobility regimes, as well as family dispersion. The increasing attention paid to these dynamics has led to several special issues and volumes putting transnational ageing at their core (Ciobanu and Hunter 2017; Horn and Schweppe 2017; Näre, Walsh, and Baldassar 2017; Nedelcu and Wyss 2020; King, Cela, and Fokkema 2021). This literature illustrates that ageing across borders is not experienced differently by these various categories of ageing migrants and that transnational (im)mobility patterns are influenced by several factors.

At the macro level, structural inequalities (e.g. economic status, gender, and migration regimes) impact the decisions to stay, return or move. This is not only the case for former labour migrants (Bolzman, Fibbi, and Vial 2006; Baykara-Krumme 2013; Ciobanu and Ramos 2016), but also for other individuals who are mobile to escape precariousness in retirement (Repetti, Phillipson, and Calasanti 2018). Furthermore, structural inequalities shape the transnational mobilities of older adults who provide or are in need of care (Nedelcu and Wyss 2020). Transnational ageing patterns are also affected by welfare state legislation, and in particular by access to formal health care, social benefits, and pension entitlements (Böcker and Balkir 2012; Böcker and Hunter 2017). It can be added that new and institutionalised forms of transnational ageing are developing in the interstices of global inequalities, with the emergence of long-term care facilities for foreign clients in the Global South (Bender, Hollstein, and Schweppe 2017; Botterill 2017).

At the meso-level, factors such as the geographical dispersion of social and family networks, as well as informal care obligations influence the decision to stay, return or move back-and-forth. This is particularly true for women (Hunter 2011; Gualda and Escriva 2014; Wyss and Nedelcu 2020).

At an individual level, transnational economic resources, such as home ownership and remittances, are indicators of older adults' preferred retirement locations (De Coulon and Wolff 2010; Baykara-Krumme 2013). Furthermore, the 'de-standardisation' of life trajectories (King, Cela, and Fokkema 2021)—exemplified by flexible retirement ages, diversified marriage patterns, and related intergenerational solidarity—has led to more diverse forms of transnational mobility. Life course events and stages of ageing influence these mobilities. For example, the birth of a grandchild can trigger new transnational movements and practices in old age, as in the case of transnational grandparents (Nedelcu and Wyss 2020). Similarly, the death of a partner, illness or disability play an influential role in IRM return movements (Oliver 2012; Giner-Monfort, Hall, and Betty 2016; Hall and Hardill 2016).

Transnational ageing thus manifests as a multi-factorial and multi-level phenomenon, in which individual logics and situations are influenced by structural conditions. In addition, 'transnational mobilities as a way of life' (Bolzman, Kaeser, and Christe 2017) are not the only expression of ageing across borders. As Näre, Walsh, and Baldassar (2017) argue, transnational ageing can be analysed by observing everyday practices and their related transnational imaginaries, family relationships, cultures, and identities. Indeed, as migrants age, cross-border mobilities diminish (Giner-Monfort, Hall, and Betty 2016) and transnational 'ways of being' (i.e. practices) are gradually replaced by transnational 'ways of belonging' (i.e. identities) (Levitt and Glick Schiller 2004; Zontini 2015).

This brief state-of-the-art highlights two research gaps. First, transnational ageing has been studied primarily as a 'migrant exceptionalism' (Hui 2016). This means that, the focus has been on (different categories of) ageing migrants, whereas, non-migrant older adults remain overlooked. Second, other forms of (non-human) transnational circulations in old age are not the subject of systematic inquiries. Thus, while the transnational mobilities of ageing migrants have been at the core of scholarship on transnational ageing, knowledge of other forms of mobilities is lacking.

## Towards a *retirement mobilities* approach to transnational ageing

Based on these considerations, we argue for the expansion of the debate on transnational ageing beyond the focus on ageing migrants and the 'ageing-migration nexus'. To overcome these identified limitations, we introduce the *retirement mobilities* approach as an analytical framework that grounds on the 'transnational studies perspective' (Khagram and Levitt 2008) and the 'new mobilities paradigm' (Sheller and Urry 2006).

On the one hand, the *retirement mobilities* approach adopts a transnational lens that incorporates and goes beyond the transnational migration perspective (Glick Schiller, Basch and Szanton Blanc 1992; Vertovec 2009; among others), which has been intensively and productively used to study ageing migrants' transnationalism (Horn and Schweppe 2017). It relies on a broader argument in favour of a transnational turn in social sciences and adopts a 'transnational studies perspective' that considers social worlds and social processes as inherently transnationally constituted, i.e. 'embedded in and influenced by cross-border and cross-boundary phenomena and dynamics' (Levitt and Khagram 2008, 8). Whilst not undermining the importance of local, regional, national, or global spatial scales, this perspective invites scholars to question social phenomena—e.g. ageing—and related analytical categories without the assumption that they are *a priori* linked to a particular, confined territory. Thus, the transnational lens becomes a heuristically useful tool beyond the specific field of (transnational) migration research, to study ordinary social processes that deploy across borders, independently of the national or ethnic origins of those people involved (Khagram and Levitt 2008; Levitt and Khagram 2008; Amelina and Faist 2012; Dahinden 2016).

From this perspective, a *retirement mobilities* approach makes it possible to 'de-migranticize' (Dahinden 2016) the study of transnational ageing. In other words, it encourages an in-depth analysis of retirement-related transnational practices and mobilities in the case of both migrant and non-migrant ageing populations. In addition, it leads us to observe ageing processes by paying particular attention to the relationship between various local and national territorialities.

On the other hand, the *retirement mobilities* approach grounds on the 'new mobilities paradigm' (Sheller and Urry 2006). This paradigm has advanced the critique of the taken-for granted sedentary construction of societies by shifting the focus from place and territorial embeddedness to movement, circulation, and the mobile production of social phenomena (Urry 2000). Intrinsically, it deconstructs the view that immobility is the normative condition for societies, and assesses 'the analytical purchase of the conceptual perspective of mobility studies to normalize movement' (Salazar 2018a, 167). Because mobility and migration—as

categories of practice, i.e. 'categories of everyday experience, developed and deployed by ordinary social actors' (Brubaker and Cooper 2000, 4)—are ontologically connected in a multitude of ways, one can argue that the mobility lens is particularly relevant in migration studies. Yet, it is only recently that migration scholars have started to explore the potential of using this intersection as a theoretical perspective for shedding new light on migratory phenomena and related (im)mobility practices and politics (D'Amato, Wanner, and Steiner 2019; Salazar 2019). In the field of 'ageing and migration', a few scholars began expressing the need for a 'semantical shift towards mobility and movement' (Gehring 2018, 6; see also Amrith 2018; Sampaio, King, and Walsh 2018). However, scholars studying ageing migrants and their cross-border mobilities have tended to overlook the 'mobility paradigm' perspective, with a few exceptions (Ciobanu and Hunter 2017). Conversely, the debate aroused by this paradigm has downplayed its interest in older adults' international mobilities. Indeed, the 'mobility paradigm' has usually been used to investigate how daily mobility is related to well-being in later life (Nordbakke and Schwanen 2014; Cuignet et al. 2020), or to analyse mobility inequalities among generations in specific urban settings (Murray, Sawchuk, and Jirón 2016).

By placing at its core the mobility lens, a *retirement mobilities* approach takes into account and investigates migrant and non-migrant populations' cross-border mobilities, as well as retirement related non-human circulations as inherent components of transnational ageing. As an analytical tool, this lens requires paying particular attention to what 'flows' across borders within ageing processes. It also means fixing the spotlight on different types of transnational mobilities within a continuum that ranges from occasional/short term cross-border movements to permanent migration, their rationalities and their variations across time, and considering alternate phases of mobility and immobility within ageing populations' life course. While ageing is often accompanied by a decline in the physical stamina required for cross-border travel, geographical mobilities coexist with, or can be replaced by other expressions of transnational life, such as digital technologies, food, memories, or even imagination (Baldassar et al. 2016; Ciobanu and Hunter 2017). The mobility lens is able to capture transnational circulations (e.g. aspirations, care norms and obligations, welfare provisions, financial resources), in parallel with ageing populations' (im)mobilities. It also entails making sense of transnational mobilities within existing power relations embedded in 'regimes of mobility' (Glick-Schiller and Salazar 2013) or 'politics of mobility' (Cresswell 2010) that interfere with ageing processes.

In conclusion, we argue that the *retirement mobilities* approach provides a renewed framework to study and understand ageing in a world in motion. By combining both the transnational and mobility lenses, this approach shifts the focus from ageing migrants to ageing populations more generally, and from human mobility to various cross-border circulations related to ageing processes. Theoretically, this implies conceiving transnational ageing as a combination of cross-border mobilities, processes, and flows in which ageing populations are involved—irrespective of their migration background—in order to meet individual needs and aspirations, fulfill social and family roles, and cope with structural constraints in old age. Methodologically, it requires developing research designs that can grasp transnational ageing and its related dynamics (i.e. changes over time of transnational (im)mobilities and practices), while comparatively and inclusively studying migrant and non-migrant populations (Tomás and Ravazzini 2022).

## Research design, population, and data

The study on which this paper grounds has been conducted in the Swiss context using a *retirement mobilities* approach to investigate processes of transnational ageing in the case of both mobile and immobile (pre)retirees, irrespective of their migration record.

## The mixed-methods study

Empirical observations are drawn from a mixed-methods study that combines original data from a quantitative survey, namely the Transnational Ageing Survey I (TAS I), with qualitative data collected through semi-structured interviews. TAS I was conducted between January and July 2020 with people aged 55+ residing in Switzerland. Qualitative fieldwork was carried out between June 2020 and August 2021 with couples and individuals from two target groups: retired older adults residing in Switzerland who spent at least three months per year in Spain[1] (6 interviews), and retirees who spent part of their working lives in Switzerland and moved to Spain in old age (37 interviews). Thus, both samples were constructed to include respondents that reside or previously resided in Switzerland, regardless of nationality or migration background.

The quantitative survey used the population register (census) as a sampling frame. A stratified sample of 14,860 people was drawn by the Swiss Federal Statistical Office (SFSO), encapsulating the three main linguistic regions of Switzerland, the main nationalities in the population 55+ (namely Swiss, Italian, German, Portuguese, French, and Spanish), as well as three heterogeneous groups of nationals from the Balkans, remaining Europeans and non-Europeans. Data is based on the answers of 3772 respondents (achieved sample), including retirees (60%) and pre-retirement individuals (40%).

The 43 semi-structured interviews were conducted with eight couples and 35 individuals. In total, 51 older adults took part in the qualitative study. To create a diversified sample in terms of nationality and migration background, we collaborated closely with the Organisation of the Swiss Abroad and with the Central Compensation Office (CCO) of Switzerland. The latter strategy was particularly important for the inclusiveness of the qualitative research design and was also the main reason for the focus of the qualitative study on individuals who had reached statutory retirement age (Tomás and Ravazzini 2022). Thanks to these collaborations, we were able to contact older adults who had relocated permanently to Spain (45 participants). At the same time, individuals living in Switzerland who only spent part of the year in Spain were recruited through personal and professional networks (six participants) to complete the study. Interviewees were aged between 64 and 89 years old. In total, we recorded the narratives of 24 women and 27 men.

Although this inclusive mixed-methods design raised specific methodological challenges (e.g. diversified sampling strategies, use of inclusive vocabulary addressing all categories of respondents), it allowed to reach migrant and non-migrant older adults with different patterns of transnational mobility (Tomás and Ravazzini 2022).

## Operationalization

Transnational migration studies have demonstrated that not only newcomers and first-generation migrants develop various transnational relationships and practices, but also naturalized or second-generation migrants (Vertovec 2009). Starting from this premise, we chose to use a dichotomous category of people with and without a migration background, instead of migrants[2] and non-migrants. With this category, we aimed to include people that could still have links with one or multiple other countries through direct, family, or ancestry migration. To define these categories, we relied on the following definition used by the SFSO:

> "The 'population with a migration background' group […] includes foreign nationals and naturalised persons, except for those born in Switzerland and whose parents were both born in Switzerland as well as Swiss-born persons whose two parents were born abroad." (FSO 2020, 17)

Accordingly, we defined 'migration background' by considering the person's nationality, place of birth, and parents' nationality. Thus, this category moves beyond the simplistic distinction between 'nationals' and 'foreigners' and is not based solely on the principles of citizenship or

place of birth, but also takes into consideration the migration record of individuals and their parents. Yet, we are aware that this categorisation still has its limitations (Will 2019).

Among the respondents of TAS I, 981 (26%) had a migration background, while the remaining 2791 respondents (74%) had no migration background. When differentiating the participants in the qualitative interviews along these criteria, we identified 25 retirees with a migration background and 26 without one. This categorisation was made from a Swiss based perspective, i.e. before some of the participants relocated to Spain, to be in line with TAS I.

## Ageing across borders through mobility: an empirical illustration

By using a *retirement mobilities* approach and its underlying conceptual lenses, we analyse transnational ageing by focusing on our respondents' retirement-related transnational (im)mobilities. In particular, we discuss (1) ordinary cross-border movements; (2) aspirations to move to another country when transitioning to retirement; (3) transnational lifestyles; and (4) non-human transnational flows, such as those of financial resources. For this analysis, we use a comparative approach to highlight similarities and differences among ageing populations with and without a migration background.

### *Older adults: an internationally mobile population*

Prominent mobility scholars argued that international mobilities at large have become routine within various populations, taking on different meanings in diverse sociocultural contexts, and contributing to people's quality of life (Salazar 2018b). However, it remains to be seen to what extent this is also the case in ageing populations who often suffer from decreasing mobility (Nordbakke and Schwanen 2014).

The results of the TAS I survey show that adults 55+ constitute a population with high rates of international mobility. Indeed, only 2% of respondents had never been abroad, while 83% had travelled abroad within the previous year, i.e. in 2019. The proportion was higher among people with a migration background (88 *vs.* 78% of respondents without a migration background), but the difference is slight, even though significant, which suggests that cross-border mobility is common among respondents. The reasons for going abroad were diverse, with some particular similarities and differences between the two categories (Figure 1).

For instance, irrespective of a respondent's migration background, leisure was the most important reason for travelling abroad, including holidays (80%), and cultural events (30%). Transnational consumption was also an important factor. Thus, about 50% of people with a migration background crossed the border at least once a year to buy cheaper goods in another country and more than one-third of people without a migration background did so. The frequencies of transnational consumption were however different between the two groups, as people with a migration background crossed the border more often during the year than people without one. Such mobilities are facilitated by common borders with Italy, France, Germany, and Austria, where the price of food and other basic products is lower than in Switzerland.

Other reasons also distinguish these two categories of older adults. Respondents with a migration background were primarily travelling abroad due to their transnational family and personal networks. More than one-fourth of these respondents travelled to visit children and grandchildren, more than 45% to visit friends, and more than 70% to visit other family members. In addition, about 22% of our survey's respondents with a migration background crossed national borders specifically to take care of a family member. These findings are in line with arguments put forward by scholarship on migrant transnationalism (Vertovec 2009) and transnational families (Baldassar 2008) indicating that family ties, as well as

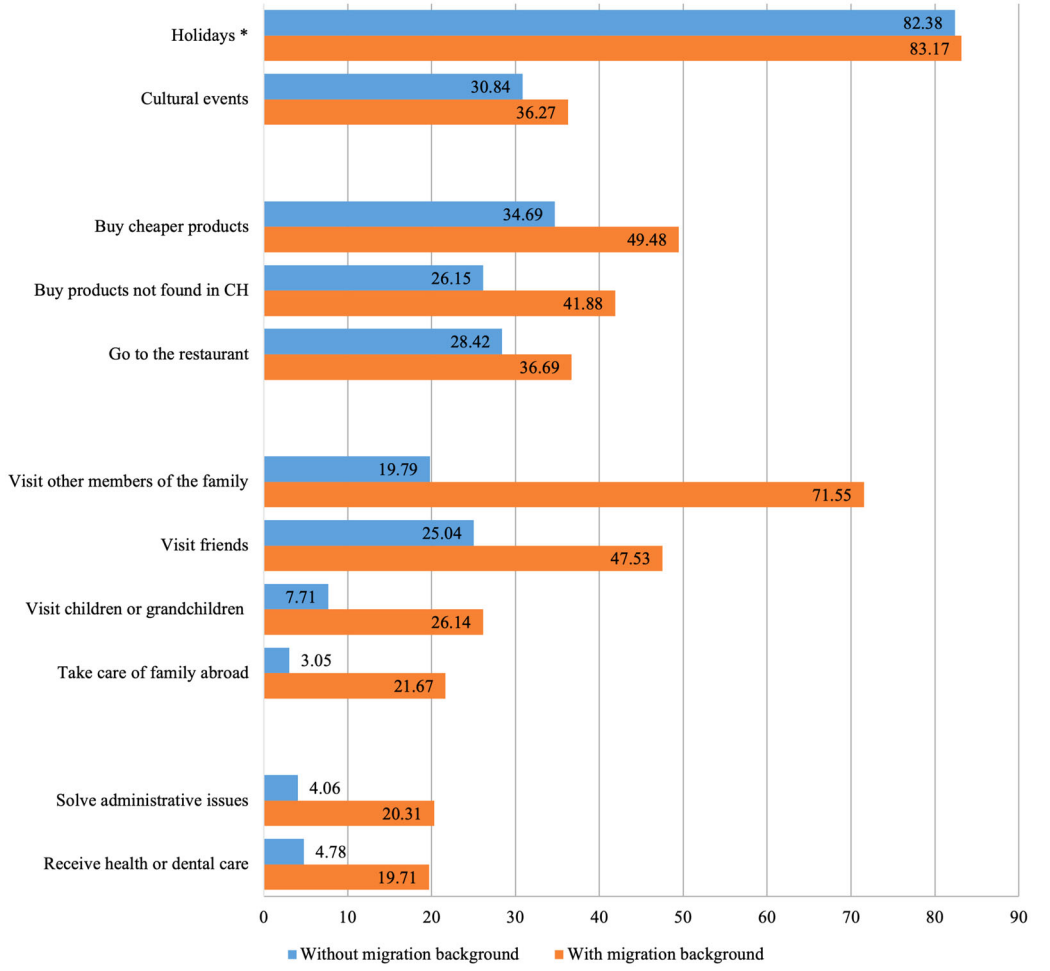


**Figure 1.** Reasons for cross-border mobility, at least once a year.

intergenerational solidarities are powerful drivers for transnational mobilities. At the same time, only a minority of residents 55+ without a migration background crossed Swiss borders for family purposes (20% to visit family and 3% to take care of family members), and one-quarter of them associated travelling abroad to friendship relationships. Yet, these observations suggest that the transnational dispersion of family members and friends also involves people who do not have a migratory background.

Finally, respondents with a migration background travelled abroad more often per year than people without a migration background. Equally, they often crossed borders for more than one purpose at the same time. Indeed, this category ticked on average 4.9 reasons, while people without a migration background indicated only 2.7 reasons for travelling abroad.

This initial examination of older adults' international mobility shows that, despite some notable differences in the reasons for and frequency of such mobility, the two categories of respondents make up a highly mobile cohort.

## *Aspirations to move to another country at retirement*

The literature on mobility aspirations after retirement has mostly investigated the return intentions of ageing labour migrants. It usually shows that although ageing migrants are expected to

return to their country of origin, the decision to stay or to return is influenced by different factors, such as migratory histories, projects, and life course events (De Haas and Fokkema 2010; Albert, Barros, and Ferring 2016). The aspirations of non-migrant populations to retire abroad are rarely examined, and when they are, the literature focuses on how tourism or prior international mobility shape plans for retirement migration (Barbosa, Santos, and Santos 2021). By considering both people with and without a migration background, our findings draw a more nuanced picture of the intentions and aspirations of transnational mobilities among an ageing population. In particular, they show that the realisation of mobility plans greatly depends on current life circumstances.

When our respondents were asked 'where would you like to spend your retirement years, if you would be free to choose', 1300 respondents (35%) mentioned that they would like to live in a country other than Switzerland. Furthermore, 975 (26%) would opt for a dual strategy, i.e. moving back and forth between Switzerland and another country. When looking in greater detail at these findings, 23% of people without a migration background chose Switzerland and another country, and 27% indicated only one other country other than Switzerland as their preferred choice. Thus, about one person in two without a migration background had considered either leaving Switzerland for retirement or leading a transnational lifestyle across two or multiple countries. Comparatively, these proportions are slightly higher among people with a migration background: 29% wished to live in both Switzerland and another country, while 42% chose only one other country. However, a fair proportion of the 28% of people with a migration background indicated that they wished to remain in Switzerland for their retirement years (Figure 2).

Thus, ageing people consider relocation after retirement regardless of their migration background. However, for those who already migrated once, or several times, the transition to retirement rekindles the issue of returning (Bolzman and Bridji 2019), which was sometimes part of the initial migration project.

Limited financial means are the main factor influencing the decision to return, usually to a region where ageing migrants were born (Erdal 2012). But place of birth is not necessarily the reason for the choice of retirement location. Juan, who is in his mid-80s and spends around five months a year in Spain, explains:

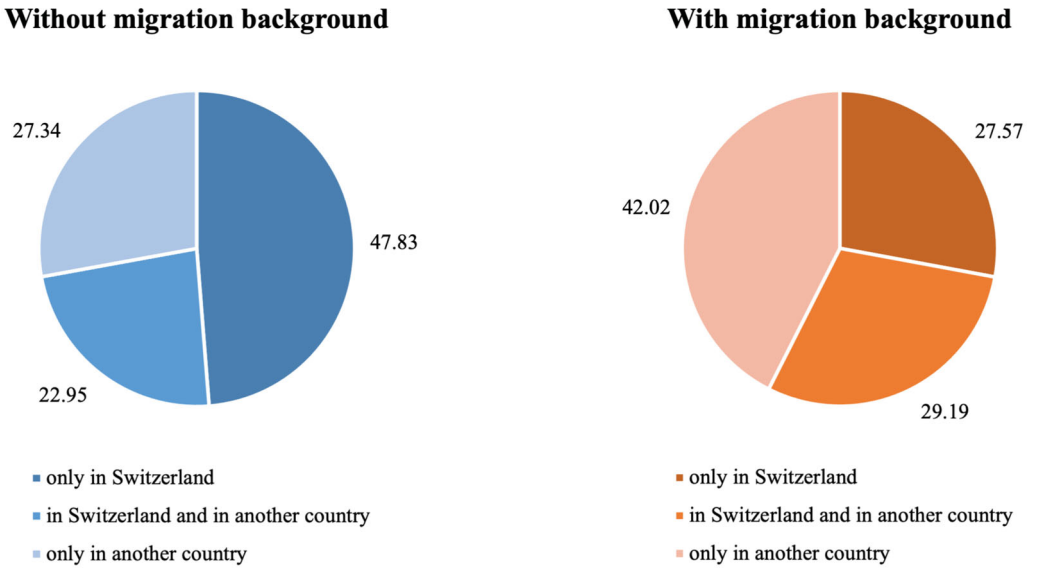


Figure 2. (Im)mobility aspirations during retirement among people with and without a migration background.

*When we decided to buy our apartment in the Valencia area, our friends had already bought their property in this region. They spoke highly of the place and the neighbourhood, so finally, we ended up buying an apartment in the same urban development as theirs in order to have a place of our own.*

The decision to buy an apartment in a region other than the one in which he and his wife grew up, was strongly influenced by quality of life considerations. Indeed, Juan and his friends were looking for a place by the sea where they could enjoy a '*quiet retirement*'.

Regarding people without a migration background's mobility aspirations, Figure 3 shows that 48% of this population wished to stay in Switzerland for their retirement years.

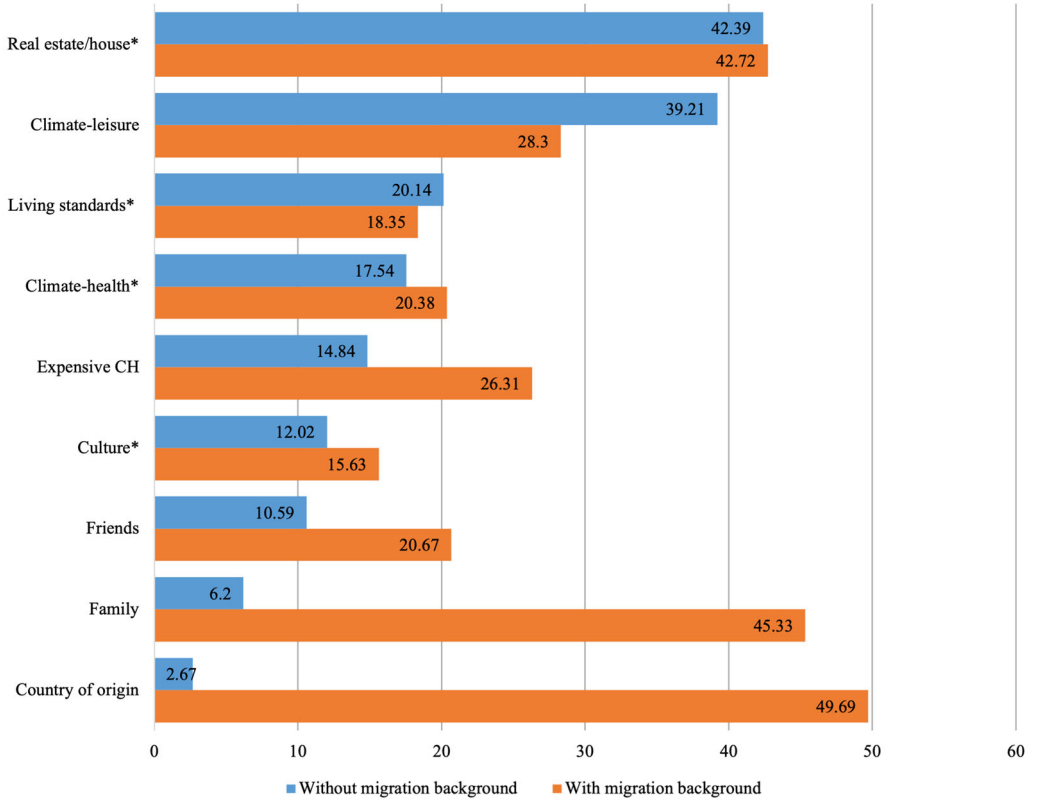


**Figure 3.** Reasons for a transnational lifestyle.

However, circumstances might arise in which people have to forego their plans to remain in Switzerland. This is the case, for example, of Monique who is 70 years old and has been living in Spain for five years:

*If I could have stayed in Switzerland, I would have stayed there. But I said to myself: My God, now I still feel in great shape, I don't want to stay here* [in Switzerland] *and be unable to do anything because I don't have enough money, no. I can't even go and have a cup of coffee as it costs 4 francs. It's horrible, so …*

Monique had to leave Switzerland to make ends meet due to her precarious financial situation. She only receives reduced old age and survivors' insurance (OASI) and small occupational benefits as she invested part of her pension capital to open her own business. In this case, immobility was not an option for this woman without a migration background. She followed in the footsteps of many ageing migrants who choose (re)migration as a strategy to cope with financial vulnerability (Bolzman, Fibbi, and Vial 2006; see also Repetti, Phillipson, and Calasanti 2018).

Mobility aspirations are also not (or cannot be) put into practice as intended, as in the case of Verena. This 75-year-old woman with no migration background, who emigrated to Spain five years ago, had wanted to move abroad for quite some time:

> *I would have liked to leave Switzerland when I was 60 years old, when I sold the house. But then I looked after my mother for 10 years, as she was in need of care after a stroke. Suddenly these 10 years were over. Then, when I was 70 years old, I thought to myself: it's now or never.*

As is seen in these examples, aspirations—to move or to stay—do not always come true. In particular, lack of financial means and unexpected life course events influence plans and aspirations related to retirement (im)mobilities. These examples also suggest that older adults rely on transnational imaginaries to project themselves into a transnational way of life.

## *Mobility dynamics of (pre)retirees with transnational lifestyles*

In a context where travel patterns have become highly diversified (Salazar 2018b), we also investigated the transnational lifestyles of older adults. In our study, such lifestyles are characterised by back-and-forth movements between Switzerland and other countries, and correspond to stays abroad of at least three months per year.[3]

At the time of the survey, around 5% of TAS I respondents were in a situation where their permanent residence was in Switzerland and they lived abroad for at least three months a year. In addition, 55 respondents indicated that they had done so in the past but no longer had this transnational lifestyle, and 192 other respondents declared that they had taken the first steps towards living in another country for three months. Overall, around 13% of respondents were part of this transnational mobility pattern, which was more common among people with a migration background (68%) than those without a migration background (32%).

Transnational lifestyles are already set in place during pre-retirement years. This is not surprising in the case of people with a migration background, as it is well-documented that migrants engage in transnational mobility throughout their lives (Faist, Fauser, and Reisenauer 2013). Yet, almost 40% of respondents without a migration background also develop such mobilities in pre-retirement years.

Different factors are driving transnational lifestyles (Figure 3). The desire to spend time in the country of origin is the main reason for about half of the respondents with a migration background. Compared with people without a migration background, these respondents also stated more frequently that family (45 *vs.* 6%), friends (21 *vs.* 11%) and the expensive cost of living in Switzerland (26 *vs.* 15%) were important reasons for spending part of the year abroad. Thus, transnational families, social ties, and economic factors are the main drivers for people with a migration background' transnational lifestyles. Conversely, participants without a migration background stressed the importance of the warm climate in the country where they spend three months per year (39%). However, 28% of participants with a migration background also indicate climate and leisure as reasons for their transnational mobilities. Other points of convergence are apparent. For instance, a similar percentage of people with and without a migration background (42%) stated home ownership in another country as one of the main reasons for their transnational lifestyle. In addition, the wish to maintain or improve living standards after retirement is common in both categories (18 *vs.* 20%).

It should be noted that it is not just a single reason that triggers transnational lifestyles, as 2.9 answer options on average were ticked by our participants.

A more in-depth analysis based on qualitative data illustrates how the articulation of various motivations and conditions shapes the ways in which transnational lifestyles become a reality upon retirement. In particular, we discuss how ties to the country of origin, family abroad, and home ownership influence respondents' transnational lifestyles in relation to other factors.

In the case of Spanish labour migrants, back-and-forth movements between host and home countries took place throughout their working lives. The short distance between the two countries and affordable transport made annual visits easy. Transnational ties maintained with family, friends, and places over the years, along with home-building and home ownership fostered a 'double presence', in both the contexts of emigration and immigration (Bolzman, Kaeser, and Christe 2017). María Isabel, a 90 years old return migrant, explains: '*We bought a bungalow in the 1980s to spend our summer holidays at the beach with our children*.' Although uninterrupted, this circulation within transnational social spaces varies in frequency over time and during the life course. Indeed, mobility may increase after retirement, once work-related constraints are removed. At that point, (im)mobility depends on other factors, such as health, family obligations, and community engagements. In the case of María Isabel and her husband, they abandoned their transnational lifestyle and relocated permanently to Spain when he became ill.

For older adults without a migration background, home ownership also plays a significant role in developing mobility patterns as well as a sense of belonging to a country other than Switzerland. Some interviewees without a direct connection with Spain, bought or inherited a house there long before they reached retirement age. Heinz, for example, a man in his mid-70s with no migration background, bought an apartment in Catalonia in the 1980s to spend his holidays in Spain. When he married his wife, who is a Swiss-Spanish citizen, he sold his apartment, and they bought a piece of land in the south of Spain where she was born. Since the 1990s, Heinz' connection with Spain has steadily grown stronger, as he and his wife got married in her village. They also have family in the region and have spent most of their vacations there. He explains:

> *For us, it wasn't like spending a vacation in Spain. [ … ] We actually lived in Switzerland as well as in Spain for quite some time.*

He was also prepared to relocate to Spain permanently:

> *I would actually have liked to come to live in Spain. But my wife didn't want to return, as our children and grandchildren are all in Switzerland.*

Thus, regular trips to Spain over the past 30 years, the couple's economic and social ties with Spain, as well as the fact that their close family lives in Switzerland, have all influenced Heinz's current lifestyle.

These results highlight that older adults opt for transnational lifestyles regardless of their migration background. Such lifestyles often reflect the reproduction of back-and-forth mobilities developed in pre-retirement years, pointing to the relevance of previous cross-border movements for transnational ageing. Other important reasons influencing transnational lifestyles are related to life-course, family, and health.

### *Transnational circulation of financial resources*

So far, this paper has presented empirical evidence for different types of human transnational (im)mobilities in old age. To complete the discussion on retirement-related movements, this section focuses on non-human transnational circulations, and more specifically on the example of financial means. To analyse monetary circulations, TAS I included questions on incomes sent to and received from a country other than Switzerland. In Figure 4, which summarises the findings to these questions, it becomes clear that cross-border financial circulations are more common among older adults with a migration background than among individuals without such a background.

More precisely, people with a migration background send money to their own bank account abroad (16%), or to their significant others living in another country to help them financially on a regular (8%) or irregular (12%) basis. The fact that older migrants transfer money to their home country is also documented by Attias-Donfut, Wolff, and Tessier (2005). As in the case of our participants, transnational transactions are usually made for personal saving purposes or to support

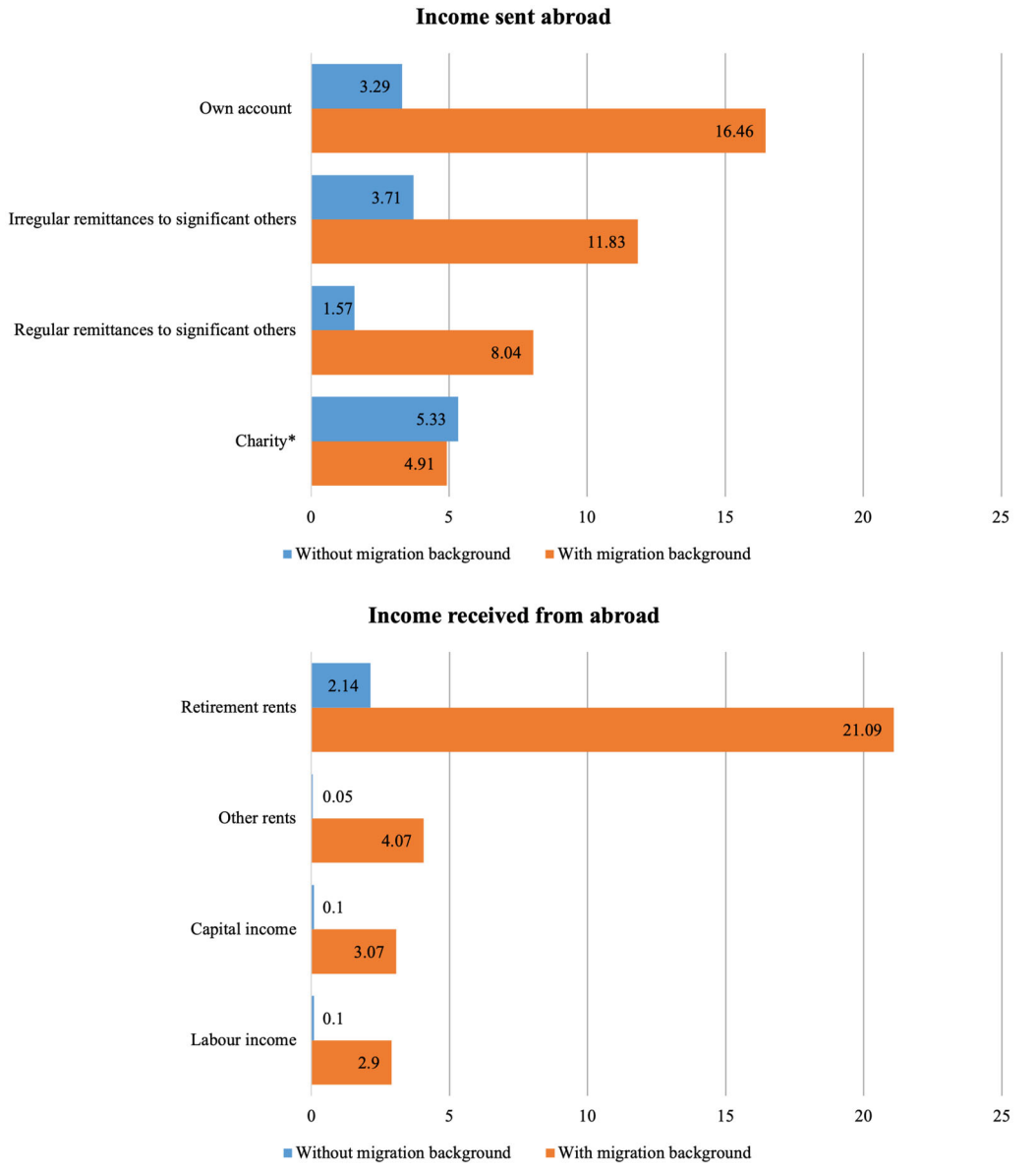


**Figure 4.** Cross-border financial transfers.

family members through remittances (see also Hunter 2015). While these reasons are only of minor importance for older adults without a migration background, 5% of these respondents send income abroad for charitable purposes.

In terms of incomes received from abroad, the differences between older adults with and without a migration background are even more pronounced. Residents in Switzerland with a migration background received retirement rents (21%) and other rents (4%), as well as incomes from capital investments (3%) and labour (3%) from another country. Only a minor percentage of participants without a migration background received retirement rents from another country (2%), while other rents, capital income, and labour income from abroad were not a source of income for them.

The participants in the qualitative interviews rarely mentioned that they sent money from Spain to a country other than Switzerland to help their families, to deposit money in their own bank account or to support charitable projects. Of all these reasons, the latter was mentioned most frequently by older adult interviewees. Susi, a woman without a migration background in her late 80s, explains that it is important for her to financially support charities in Switzerland and abroad:

> *We have also been supporting another project in Indonesia for a long time. They set up schools to offer education and a future for children. We think that this is a good project and thus donate every year.*

The subject of receiving income from abroad was much more widely discussed during the interviews. As in the quantitative survey, this topic mainly concerns older individuals with a migration background. For this population, retirement rents play a crucial role (Böcker and Hunter 2017). Charles, a 81 year old participant, lived and worked in the UK before moving to Switzerland in his mid-20s. Today, his yearly income is made up of his Swiss pension and a pension from the UK, he explains:

> *I receive a small pension from the UK. I did not contribute much in England, so only around 200 euros are transferred to me.*

However, such transnational financial transactions might involve extra work and administrative problems. Wilhelm, for example, receives retirement pensions from two other countries in addition to his OASI from Switzerland:

> *I have a small pension from Germany, because I worked there for a few years. I also receive a pension for my time doing military service in Austria. My wife organised all that. Honestly, I would have dropped it because of the amount of paperwork involved.*

When looking more specifically at retirement pensions transferred from Switzerland to Spain, participants did not mention any difficulties in receiving them. Indeed, when relocating to Spain, older adults had to state their new address and bank account number. Furthermore, Switzerland asks retirees living abroad to send a life certificate to the CCO once a year.

Along with bureaucratic problems, transnational monetary transactions can be further complicated by currency exchanges. Patricia, a participant in her late 60s who moved from Colombia to Switzerland in her mid-30s, explains:

> *If you change money from pesos to euros or Swiss francs, there isn't much left. The money I have in Colombia stays there. I use it during my return travels.*

In sum, when studying retirement-related mobilities, the circulation of pensions is of key importance. The possibility of having such incomes transferred to another country with more or less bureaucratic work and problems adds to the financial burden of ageing populations. This is particularly true for older adults with a migration background, as these individuals often do not have full pension rights in a single country because of their migration record (Böcker and Hunter 2017). However, older adults without a migration background are more likely to send money abroad for charitable purposes.

## Discussion and conclusion

In this paper, we have questioned the focus on older migrants in transnational ageing research. First, we showed that, despite little interest in the international mobilities of ageing individuals, older adults are a population actively involved in ordinary cross-border mobilities. Second, our study revealed that transnational ageing—scrutinized through the prism of older adults' cross-border mobility aspirations, transnational lifestyles, and circulation of financial means—represents a multi-faceted reality, triggered by similar factors for people with and without a migration background. Some differences however remain. Our mixed-methods study shows that people with a migration background are much more likely to engage in family-driven cross-border movements and transnational lifestyles than people

without a migration background (see also Figures 1 and 3). This is not surprising as it reflects the geographical distribution of family members and friends. Moreover, having close family in more than one country may challenge retirees' aspirations to return, relocate or stay.

However, other reasons—such as home ownership, leisure, living standards, and climate—are similarly invoked by respondents with and without a migration background. Owning a property abroad, for instance, is mentioned by more than 40% of respondents in both groups as a motivation for transnational lifestyles. Moreover, keeping a home in Switzerland makes a transnational lifestyle more likely.

Finally, by studying transnational circulations of (retirement-related) financial means, we showed that older adults with and without a migration background are also concerned by cross-border non-human movements.

Based on these findings, we argue that a *retirement mobilities* approach provides a useful analytical framework to deconstruct the 'migrant exceptionalism' (Hui 2016) that still dominates the study of transnational ageing. By adopting an inclusive lens that considers older adults regardless of their migration background, we make a first step to 'de-migranticize' (Dahinden 2016) the study of transnational mobilities in old age. However, we encourage future research implementing a *retirement mobilities* approach to further deconstruct 'migranticized' categories. To do so, scholars should also consider pre- and post-retirement mobility experiences (and not only nationality(ies) and place of birth) as a criterion of comparison.

In conclusion, we argue that by placing the transnational and mobility lenses at the centre of a *retirement mobilities* approach, we open up new avenues for further research on transnational ageing: for instance, by including short-term cross-border movements of people, but also other kinds of mobilities (e.g. of goods, imaginaries, welfare, policies) into the analysis; investigating in greater depth how different patterns of mobility combine, alternate, or replace one another; and analysing why and how older adults' transnational mobilities change over time. Thus, the *retirement mobilities* approach sets a new research agenda inviting scholars to study transnational ageing through a mobility lens, beyond the ageing-migration nexus.

## Notes

1. Spain has been selected as a case study because it is both an important country of origin of former labour migrants (Bolzman and Bridji 2019), and one of the main destination countries for older Swiss citizens living abroad (FDFA 2020).
2. A widely used definition of a migrant is the one formulated by the International Organisation of Migration, i.e. a person who permanently or temporarily moves away from his/her usual country of residence (for more information: https://publications.iom.int/system/files/pdf/iml_34_glossary.pdf [16.12.2022]).
3. We chose the duration of three months because many countries consider this period as a tourist stay, while longer stays require a visa.

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