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Acculturation strategies and adaptation outcomes of international retired migrants in Portugal

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ABSTRACT

International Retired Migration (IRM) is a growing phenomenon worldwide, including in Portugal. However, there has been no psychological research to date that examines the association between acculturation strategies and adaptation outcomes among this specific group of migrants. It is unclear whether they exhibit similar patterns compared to other migrant groups. This article investigates the acculturation strategies adopted by 131 international retirees currently living in Portugal, as well as their psychological and sociocultural adaptation outcomes and their perceptions of prejudice due to their advanced age and foreigner status. We expected that some of the assumptions from the acculturation literature might not hold true, given the unique characteristics of this group, including their age and lifestyle changes associated with retirement. Confirming our hypothesis, the study found that integration was the strategy associated with the highest levels of psychological and socio-cultural adaptation. However, contrary to our expectations regarding the specificities of this population, separation was the strategy linked to the lowest levels of psychological and sociocultural adaptation. Furthermore, the marginalization strategy did not lead to the worst adaptation outcomes, as the literature often suggests for similar populations.

Keywords:

Acculturation

International Retirement Migration

Psychological adaptation

Sociocultural adaptation

Old age

Human migration and ageing are defining issues of the twenty-first century. While most migrants traditionally move to pursue new work opportunities, a relatively new phenomenon is the emergence of international retired migrants. These are individuals who have retired and choose to move to another country, primarily motivated by the desire to enhance their quality of life (Božić 2006). International Retired Migration (IRM) began to gain significant momentum during the 1980s, largely due to the growth of mass tourism and a substantial decrease in travel costs. It is predicted that this phenomenon will continue to grow in the future, driven by factors such as an increase in healthy life expectancy in developed countries, more active years following retirement, increased affluence and accumulated tourism experience of the baby-boomer generation. Additionally, some destination countries have implemented new tax policies to attract international retirees. Portugal is one of the countries that has embraced this trend and has become a popular destination for international retirees, particularly among northern Europeans who seek a sunny climate for their retirement within the European Union (EU) (Williams et al. 2000).

IRM is an interdisciplinary phenomenon that has mainly been studied at the intersection of migration studies, tourism and applied social gerontology. Surprisingly, there is a notable absence of psychological research examining the acculturation processes of this particular group of migrants, despite the fact that acculturation research in psychology has contributed significantly to our understanding the psychological processes involved when individuals and groups adapt to a new culture as they migrate or come into contact with other cultures. Acculturation research in psychology has revolved around three central questions: how well they adapt to intercultural living, whether there are any systematic relationships between how people acculturate; and how well they adapt (Berry 2017). This research strand has also led to the development of standardized measures for assessing the complex and nuanced constructs associated with the acculturation processes, facilitating comparisons across different contexts. However, a search in Psycinfo with the keywords 'internat* retire* migra* AND acculturation' yields only one result, which is a qualitative ethnographic study about the identity narratives of American and Canadian retirees in Mexico (Banks 2004).

The bulk of the psychological literature on acculturation focuses on expatriates, international students or refugees as target populations (Ward, Bochner and Furnham 2001). In contrast, most research on IRM published in interdisciplinary journals typically employs qualitative methods to conduct in-depth examinations of IRM experiences within different societal contexts (King, Cela and Fokkema 2021). Alternatively, it may adopt a descriptive approach to portray the identity and adaptation issues of IRM (Rojas, LeBlanc III and Sunil 2014). However, these qualitative and descriptive approaches can make it more challenging to compare findings across different studies. It is worth noting that the conventional migrant groups that have been studied in psychology differ significantly from international retirees. Expatriates are typically professionally active and usually at the height of their

careers. International students tend to be young and often stay in the host country for shorter periods. Refugees, on the other hand, belong to a socially disadvantaged minority group.

The limited psychological studies that focus on older people as a migrant group often categorize them as a low social status group who immigrate with their families (Park and Kim 2013). However, it is crucial to recognize that international retirees differ significantly from the older age migrant group. They are typically relatively wealthy and well-educated, and they tend to migrate without their families (Benson and O'Reilly 2009). Consequently, international retirees exhibit socio-demographic characteristics that diverge significantly from the groups that are usually studied in the acculturation literature. This raises questions about whether the established models and frameworks from the acculturation literature can effectively capture the acculturation strategies and adaptation outcomes of this unique migrant group.

This article aims to address the research gap within the field of acculturation research in psychology, focusing on the specific population of IRM. It does so by investigating how the acculturation strategies adopted by international retirees in Portugal relate to their psychological and socio-cultural adaptation, as well as to their perceptions of social exclusion in the host country. This study contributes to the acculturation literature by examining a group of migrants that has been overlooked in the psychological literature thus far and one that cannot be equated with any of the migrant groups typically studied in this context.

The IRM phenomenon

IRM pertains to retired individuals who opt to relocate to another country, either temporarily or permanently. Their motivation typically revolves around the desire to enhance their quality of life. This phenomenon has been characterised by various terms, such as 'retired sun-seekers', 'lifestyle migration' and 'amenity migration' (Benson and O'Reilly 2016).

The study of IRM began in the early 1990s, coinciding with the growth of tourism. Initially, research in this area was primarily descriptive, aimed at understanding the demographics of retired migrants were, their reasons for choosing to move to another country and their preferences regarding residence and lifestyle (Dominguez-Mujica et al. 2021). IRM research is highly multidisciplinary and draws from three major research fields: migration studies, tourism and applied social gerontology.

Geographers investigate migration patterns, the connection between IRM and tourism and the physical impacts of IRM on host regions. Anthropologists delve into individual adaptation experiences, mobility trajectories and the social implications for both host and home communities. Sociologists focus on issues related to gender, social class, nation, community and transnational identity formation

among retired migrants. Some contributions also come from public health analysts, political scientists and other social scientists who examine ageing, health, access to healthcare and welfare services and citizenship in the context of IRM (Božić 2006). Surprisingly, despite its multidisciplinary nature, there appears to be a dearth of research on IRM in psychological journals, as a search in PsychINFO using the keywords *internat* retire* migra** returned zero hits.

Studies on IRM have traditionally focused on the migration of northern and western Europeans to destinations in Southern Europe (Casado-Díaz, Kaiser and Warnes 2004; Rodríguez, Fernández-Mayoralas and Rojo 2004). Other common research areas include Canadian citizens retiring to the US sunbelt (Banks 2004) and US-Americans retiring to Central and Latin America (Hayes 2014). More recently, there has been a shift in research focus towards new IRM destinations, including East Asia (Wong and Musa 2014), southeastern Europe (Bahar et al. 2009) and Portugal (Torkington and Perdigão Ribeiro 2019), which has seen an increasing number of retired migrants choosing it as their new home.

Despite this diversity in destination and lifestyle preferences, some general characteristics of international retired migrants have been identified. They tend to have a higher-than-average socio-economic status and level of education. They are predominantly couples in their 50s to early 60s who choose to relocate from colder to warmer climates. The majority of the retired migrants are amenity-led, possessing above-average tourism experience, some financial resources and are no longer constrained by employment and family obligations (Benson and O'Reilly 2016).

General motives for relocating to a foreign country in later life can be categorized under social, economic, psychological and health reasons. IRM is often viewed as a means to enhance the quality of life and, consequently, life satisfaction. This is facilitated by the benefits of a sunny climate that allows for a more active social life and outdoor lifestyle, which is perceived to have positive implications for health (Botterill 2017). Retired individuals, along with the advertising industry promoting international retirement destinations, often associate IRM with positive and successful ageing. Economic motives can also become significant, particularly for those on a tight pension budget, as many destination countries offer a lower cost of living and more affordable housing. Other factors that attract retired migrants to specific destination countries are related to the ease of legal settlement (e.g., efficient visa systems), favourable tax rates, property estate incentives, friendly and welcoming locals, an existing expatriate community and an infrastructure that connects the host country to the home country (King et al. 1998).

Mobility patterns and acculturation

IRM is distinct from other forms of migration in that retired individuals may exhibit intricate mobility patterns, encompassing visits, sojourns and residency positioned along a continuum between permanent migration and tourism. Typically, there is no unidirectional movement from the home to the host country, with many individuals travelling between the two countries in which they possess properties. Reverse migration is also prone to occur, particularly when an individual's marital, health or financial status changes (Bolognani 2014). Additional motivations identified for return migration include a desire for increased involvement with grandchildren residing in the home country, the need to provide support to family members and dissatisfaction with the chosen retirement destination (Sampaio 2018).

The intricate mobility patterns can pose challenges for integration into the host community due to intermittent periods of stay. Furthermore, acculturation in later life can be more difficult given the absence of employment or educational opportunities that typically facilitate integration, along with the cognitive demands of learning a new language and adapt to a different culture. Proficiency in a foreign language is pivotal for effective communication with locals and for navigating bureaucratic matters. When migrant retirees require healthcare in the host country they may experience social isolation, neglect and restricted activities due to the limited availability of communication options in their native language.

Furthermore, some migrant retirees may not seek full integration into the host community, but may simply aim to access local services and engage with the expatriate community. Retirement destinations may at times offer a comprehensive infrastructure tailored to the needs of the expatriate community, often in their own language (e.g., in terms of associations, newspapers, libraries, goods and services). This can present additional challenges to full integration into the host community. An unresolved question pertains to the psychological outcomes for international retirees based on the varying degrees to which they integrate into the host community.

To date, research on the degree of integration of international retirees has employed non-psychological indicators, such foreign language proficiency or membership of foreign or local clubs (Williams and Patterson 1998), but has not operationalized acculturation strategies as proposed by the psychological acculturation literature (Berry 1997).

Acculturation strategies

Acculturation in the host country is among the most vital challenges confronting migrating individuals. Berry's (1997) model of psychological acculturation, one of the most extensively studied in the psychological literature, posits that migrants' acculturation strategies are linked to their daily

interactions with the host society and can be delineated along two principal dimensions: (1) cultural maintenance, signifying the extent to which individuals wish to preserve their cultural identity; and (2) contact and participation, reflecting the extent to which individuals desire engagement in the host culture. These two dimensions intersect to define four distinct acculturation strategies. When individuals actively seek contact and participation in the host culture while eschewing the preservation of their cultural identity, they adopt an *assimilation* strategy. In contrast, when individuals aspire to retain their cultural identity while avoiding engagement with the host culture, they follow a *separation* strategy. The integration strategy emerges when individuals seek to both maintain their cultural identity and engage with the host culture. Finally, the *marginalization* strategy arises when individuals neither wish to preserve their cultural identity nor to engage with the host culture.

Acculturation outcomes

Psychological adaptation

Psychological adaptation pertains to an individual's cognitive and affective responses to acculturation within a host culture (Ward, Bochner and Furnham 2001). Reduced psychological adaptation has been associated with feelings of loneliness, avoidance coping styles and acculturative stress (Ward and Kennedy 1999). Berry (2017) contends that individuals who embrace the integration strategy exhibit higher levels of psychological adjustment. Assimilation and separation are linked to intermediate psychological adaptation outcomes, while marginalization is associated with the least favourable outcome.

In the specific case of IRM, research has shown that their primary motivation is to enhance their wellbeing and quality of life through relocation to another country (Warnes et al. 1999). Nonetheless, relocating to a different country requires some degree of adaptation, involving cultural and language acquisition. While research suggests that there is no age limit for acquiring new skills, advanced age can make learning processes more challenging (Rabbitt 2005). In fact, it has been documented that older migrants may find it difficult to learn a new language, causing them to feel 'blind, deaf and mute' in the host country (Park and Kim 2013: 159). Implicit learning in old age is also more demanding when conditions are challenging (Nejati and Farshi 2008) as is the case with adapting to a new cultural context. Consequently, integrating into a new cultural environment may be perceived as a stressful and arduous experience in later stages of life.

There is well-documented evidence that numerous international retirees do indeed appear to circumvent these learning challenges by seeking access to local services and engaging with expatriate

communities. As King et al. (1998: 102) noted: ‘if you live on an estate surrounded by other English-speaking residents [...] if there are “British” restaurants, pubs and recreational clubs, and local entrepreneurs speak some English anyway [...], why bother to try to learn [...] Portuguese, and why bother to “integrate”.’

Hence, we anticipated that the *separation* strategy would be the favoured acculturation approach among international retirees. Furthermore, we expected that this strategy should also be conducive to the wellbeing of international retirees, as it involves less acculturative stress and aligns with their motivation to enhance their quality of life in the host country. Nevertheless, in line with the broader acculturation literature (Berry 1997; 2017), we also anticipated that those who successfully integrate into Portuguese society would experience a well-being benefit.

Therefore, we hypothesized that:

H1: Significant differences exist in the level of psychological adaptation among international retirees who adopt different acculturation strategies. More specifically, we anticipated that international retirees adopting the *integration* or *separation* strategy would exhibit higher levels of psychological adaptation compared to those adopting the *assimilation* or *marginalization* strategy.

Socio-cultural adaptation

Socio-cultural adaptation pertains to the acquisition of behavioural competence and social skills necessary for everyday tasks and interactions within the host culture (Ward and Kennedy 1999). This adaptation involves changes in behaviour, encompassing both the shedding of one’s original cultural behaviours and the acquisition of new behaviours that enable better integration into the new society. Different acculturation strategies require varying levels of effort to ‘fit in’. Regarding socio-cultural adaptation, the most significant social challenges are associated with separation, intermediate challenges with marginalization and the least challenges with assimilation and integration (Ward and Rana-Deuba 1999).

We anticipated that similar mechanisms would apply to IRM. Those with limited contact with the local culture and its members were expected to face the greatest difficulties in successfully navigating the host culture and achieving social integration. Conversely, those who managed to embrace the host culture’s norms and language, despite the challenges posed by their stage of life, were expected to exhibit better socio-cultural adaptation.

Hence, we expected that:

H2: There are significant differences in the level of socio-cultural adaptation among international retirees adopting different acculturation strategies. International retirees adopting the Separation or Marginalization strategy show significantly lower levels of socio-cultural adaptation than those adopting the Integration or Assimilation strategy.

Perceptions of Social Inclusion

Perceived prejudice and discrimination are commonly regarded as indicators of non-integration within the host society (Berry 1997). Therefore, migrants with limited contact and participation in the host culture may be more likely to perceive prejudice and discrimination directed towards them (see also Berry and Hou 2017). Moving to and living in a different country at this stage of life means that two intersecting social identities become salient, to which international retirees may attribute perceptions of discrimination, i.e., age and their foreigner status in the host country. Therefore, we expected that:

H3: There are significant differences in perceived discrimination (due to age/being a foreigner) among international retirees who adopt different acculturation strategies. International retirees adopting the separation or marginalization strategy show higher levels of perceived discrimination based on their age and foreigner status than retirees adopting the integration or assimilation strategy.

Methods

Participants

Participants were recruited through social media groups aimed at the expatriate community in Portugal ($N = 131$; $M_{age} = 60.95$, $SD_{age} = 8.53$; 73.3% female). The majority of participants were British (78.6%), married or in a stable relationship (78.6%) and fully retired from any professional activity (75.7%). Consistent with previous research on international retirees (Benson and O'Reilly 2009), the sample was characterized by a high level of education (95.2% with upper secondary or higher education) and reported having sufficient income to cope with or live comfortably in the host country (89.4%). Overall, respondents rated their health as good on a seven-point Likert scale (1 = very bad to 7 = very good; $M = 5.70$, $SD = 1.18$).

Respondents had been living in Portugal for an average of 7.55 years ($SD = 7.98$) and the majority had permanent resident status (71.5%). Proficiency in the Portuguese language was rather low, with an average rating of 2.59 ($SD = 1.09$) on a five-point scale ranging from very poor (1) to very good (5). More than half the sample (57.3%) said they lived in rural areas (country village, farm or rural home) while the remainder (42.7%) said they lived in an urban area (city, town or suburbs).

Measures

This study investigated the impact of acculturation strategies on four outcome variables: (1) life satisfaction as a measure of psychological adaptation; (2) socio-cultural adaptation; (3) perceived age-related discrimination; and (4) perceived discrimination based on foreigner status. Established measures from the literature were employed to assess these constructs. As the participants were expected to be English speakers, the measures were not translated into other languages.

The Vancouver Index of Acculturation – VIA scale (Ryder, Alden and Paulhus 2000) was used to group the participants into one of the four distinct acculturation strategies: assimilation, integration, separation or marginalization (Berry 1997). An eight-point Likert Scale (1 = strongly disagree, 8 = strongly agree) was employed to prevent midpoint response bias. The statements from the original scale were adjusted to be relevant to the target group and Portuguese mainstream culture (e.g. the original item ‘I am comfortable “working” with people from the same heritage culture as myself’ was changed into ‘I am comfortable “interacting” with people from the same heritage culture as myself’). Two composite scores were computed: one for items assessing the preservation of the heritage culture ($\alpha = .88$) and another for items assessing the adoption of the host culture ($\alpha = .87$). The midpoint of the scale (4.5) was used to classify participants as either high or low on the respective dimension, thereby placing them into one of the four acculturation strategy groups.

Psychological adaptation was assessed using the ‘satisfaction with life’ scale (five items. Diener [2009]. 1 = strongly disagree, 8 = strongly agree).

Sociocultural adaptation was measured with the Sociocultural Adaptation Scale (SCAS; 34 items. Ward and Kennedy [1999a]. 1 = strongly disagree, 8 = strongly agree). The original SCAS comprises 41 items, but some were excluded because they were deemed inappropriate for the target group (e.g. referring to the student context). The two subscales of the SCAS that pertain to skills and impersonal activities exhibited a very highly correlation ($r = .80, p < .001$), thus a single composite score was generated.

Three items assessing perceived age discrimination were included, which have been previously employed in the European Social Survey (e.g. How often has anyone shown you prejudice against you or treated you unfairly because of your age, 1 = never, 4 = very often; ESS [2004]). These same items were modified to measure perceived discrimination based on being a foreigner.

Results

Descriptive results indicated that, contrary to our expectation, the most prevalent acculturation strategy was integration (36.9%, $N = 38$), followed by assimilation (29.1%, $N = 30$), separation (18.4%, $N = 19$) and marginalization (15.5%, $N = 16$).

The acculturation groups did not exhibit significant differences in terms of their age [$F(3, 99) = 1.10$, $p = .35$], length of time residing in Portugal [$F(3, 99) = 1.22$, $p = .31$], level of proficiency in Portuguese [$F(3, 94) = 0.46$, $p = .71$], health [$F(3, 99) = 1.18$, $p = .84$], level of education [$F(3, 99) = 2.11$, $p = .10$] or subjective income [$F(3, 98) = 0.63$, $p = .60$]. Chi-square tests conducted on the categorical socio-demographic variables also revealed no differences among the acculturation groups in terms of gender [$\chi^2(3) = 0.58$, $p = .90$], marital status¹ [$\chi^2(9) = 16.56$, $p = .06$] and residence area [$\chi^2(12) = 19.22$, $p = .08$]. Consequently, the subsequent ANOVA analyses do not include covariates.¹

A one-way between-groups MANOVA was conducted, revealing statistically significant differences among the acculturation strategies concerning the combined dependent variables, $V = F(12, 291) = 3.54$, $p < .001$. Separate univariate ANOVAs on the outcome variables indicated significant differences among the various acculturation groups and their scores on psychological adaptation, $F(3, 98) = 3.07$, $p < .05$, as well as socio-cultural adaptation, $F(3, 98) = 14.35$, $p < .001$. There were no significant group difference in perceived age discrimination, $F(3, 98) = 0.42$, $p = .74$, or perceived discrimination due to being a foreigner in the host country, $F(3, 98) = 2.67$, $p = .05$ (see Table 1).

Post hoc comparisons using Tukey HSD were employed to determine significant differences between acculturation groups concerning psychological and socio-cultural adaptation. Contrary to Hypothesis 1, integration and separation did not exhibit significant differences from assimilation or marginalization. Figure 1 shows that the separation group had the lowest scores in terms of psychological adaptation and significantly differed from all other acculturation groups.

In line with Hypothesis 2, the results confirmed that the separation and marginalization acculturation groups scored significantly lower on socio-cultural adaptation when compared to the assimilation and integration groups.

While there were no significant differences among the acculturation groups concerning the perceived discrimination variables, the scores suggest a noticeable trend: international retirees who follow the

¹ It is noteworthy that chi-square analyses regarding these variables violated the assumption of expected frequencies to be greater than 5, and, therefore, may have been underpowered to detect differences between the acculturation groups.

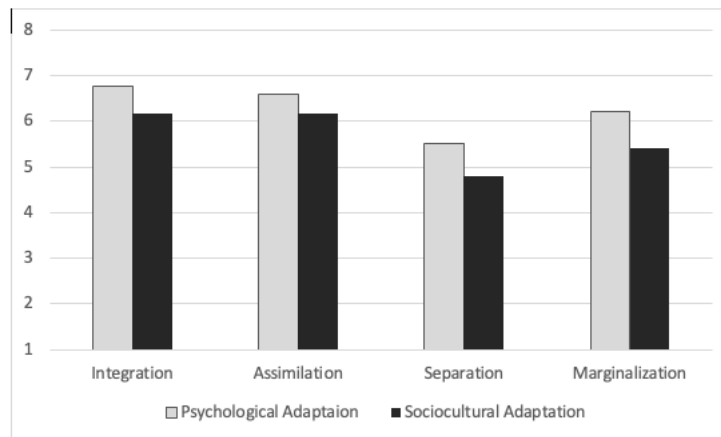
separation strategy tended to report higher levels of perceived discrimination due to being a foreigner compared to all other acculturation group.

Table 1: ANOVA results for the effect of acculturation strategies on the criterion variables

Dependent variables	<i>M (SD)</i>				<i>F (3, 98)</i>	<i>Partial η²</i>
	Integration	Assimilation	Separation	Marginalization		
Psychological Adaptation	6.77 (0.25) ^a	6.60 (0.30) ^a	5.53 (0.34) ^b	6.22 (0.35) ^a	3.07, $p < 0.05$	0.86
Sociocultural Adaptation	6.18 (0.14) ^a	6.16 (0.17) ^a	4.80 (0.19) ^b	5.41 (0.20) ^b	14.35, $p < 0.001$	0.31
Perceived discrimination due to being a foreigner	1.70 (0.13)	1.70 (0.16)	2.21 (0.18)	1.53 (0.19)	2.67, $p = 0.05$	0.08
Perceived age discrimination	1.20 (0.08)	1.27 (0.09)	1.25 (0.10)	1.12 (0.11)	0.42, $p = 0.74$	0.01

Note. Means that do not share a subscript differ significantly from each other on a post-hoc tests using Tukey HSD with a significance level of $p < .05$.

Figure 1: Psychological and sociocultural adaptation as a function of acculturation strategies



Discussion

The present study provides insights into the acculturation and adaptation outcomes of international retired migrants, a group that has been neglected in psychological research but is expected to grow in the future. In line with previous research on other migrant groups, the results confirm that the separation acculturation strategy presents the greatest challenge for migrants' socio-cultural adaptation, followed by marginalization (Ward and Rana-Deuba 1999). This is unsurprising, as a low

level of contact and participation with the host society limits opportunities for migrants to acquire socio-cultural skills.

However, we also expected that the separation strategy would yield different psychological adaptation outcomes for this group of migrants due to their advanced age and migration motives. In their pursuit of an improved quality of life in the host country, it might be less stressful and more satisfying for this group of migrants to take advantage of the infrastructure and services designed for the expatriate community, which also provide opportunities to interact with co-nationals and other expatriates (Sampaio 2011; Torkington et al. 2015; Warnes et al. 1999). Unexpectedly, our results did not support this hypothesis. Contrary to our expectations, the findings showed that integration, not separation, was the preferred acculturation strategy. Those who adopted the separation strategy reported significantly lower levels of psychological adaptation compared to those with an integration strategy (Berry 1999; 2017). Moreover, there was a trend suggesting that separated migrants were more likely to report perceived discrimination based on their foreigner status in the country compared to all other acculturation groups. These findings are important because they indicate that the efforts made in Portuguese society, such as property investments in the form of retirement resorts, to cater for this group of migrants may actually be counterproductive to their wellbeing and could exacerbate their sense of social exclusion. Further research is needed to gain a better understanding of the multidimensional integration barriers that separated the experiences of international retirees in Portugal from those elsewhere.

We also posited that perceptions of age discrimination might signify a lack of integration into the host society and, therefore, be associated with separation and marginalization strategies (Berry and Hou 2017). However, our findings did not support this hypothesis: none of the acculturation groups was linked to perceptions of age discrimination. This could be attributed to the relatively social status of IRM in the host society, as they tend to be well educated and wealthy. Furthermore, the majority of the sample belonged to the baby-boomer generation, which is generally healthier and has longer life expectancies compared to previous generations (Pruchno 2012). Consequently, the negative attributes, typically associated with older individuals, such as lower social status, diminished competence and mental and physical frailty, that often lead to ageist behaviours, are not applicable to this group.

It is noteworthy that the marginalization strategy did not emerge as one of the least effective in terms of outcomes. Although marginalized retirees had relatively low levels of socio-cultural adaptation, their level of psychological adaptation was not significantly different from those adopting an integration strategy. This could be due to the form of ‘anomic marginalization’ or ‘individualism’ (Bourhis et al. 1997) in this particular migrant group. A study by Debrosse, de la Sablonnière and Rossignac-Milon (2015) found that many immigrants adopting the marginalization strategy lead a

happy life and flourish by embracing their sense of “uniqueness”, of the need to feel and to be seen by others as distinct. It is conceivable that IRM who follow the marginalization strategy do not identify with one culture or another, but with many different cultures due to their extensive intercultural experiences as tourists or even expats compared to previous generations. Consequently, they may develop a mosaic-like identity with various but interconnected cultural elements that form a new identity (Benet-Martinez and Hong 2014; Vauclair et al. 2014). Further research is needed to determine whether marginalization does indeed take on a new meaning in this migrant group.

This study has limitations, as it only sampled English-speaking international retired migrants. Other nationalities that are growing among the international retired migrants in Portugal, such as the French, Brazilians, Swedes and Chinese, should be studied to understand the acculturation specificities related to cultural distance. Moreover, IRM could be sampled from areas with a large proportion of international retirees, such as the Algarve in Portugal (Torkington and Perdigão Ribeiro 2019), to gain a better understanding of the psychological effects of segregation. Different acculturation models could be considered to go beyond the fourfold model. For instance, the interactive acculturation model (Bourhis et al. 1997) considers the acculturation process to be shaped by the dynamic interplay between the host community and immigrant acculturation strategies. Most existing research describes a relationship between the host society’s perception of the preferred acculturation strategy and the actual acculturation strategy adopted by a low-status and low-vitality minority group (Binder et al. 2009; Celeste et al. 2014). The case of the IRM is intriguing due to their specific characteristics (high status and high vitality). Furthermore, Portugal’s policies aimed at attracting them, such as tax incentives, may elicit ambiguous perceptions among the Portuguese – on one hand, as an economic opportunity for the country, and on the other, as an economic threat due to the consumption of limited resources like property and healthcare. Thus, several perspectives should be considered to fully understand the acculturation processes of this particular migrant group.

It is also important to note that concepts such as assimilation, social inclusion and marginalization, while employed within the theoretical framework of psychological acculturation processes, have faced criticism for their focus on individual-level factors while overlooking structural elements, including systemic barriers (e.g. the creation of segregated communities for IRM) that limit migrants’ opportunities and outcomes. Moreover, in the case of privileged migrants like the IRM, it is crucial to critically assess these concepts, acknowledging that, due to their socio-economic status and other factors, they may have different experiences and greater access to resources compared to other migrant groups. Consequently, the power dynamics between this migrant group and the host society differ significantly from those involving other migrant groups. It is therefore imperative to critically examine and expand these concepts to better address the complexities of this type of migration (for an example, see Croucher 2018).

While surveys can provide valuable insights by capturing a large volume of responses, they may not fully encapsulate the complexity and nuances of the phenomenon under investigation. Future research might employ qualitative research methods, such as interviews, focus groups or ethnographic observations to delve deeper into the patterns of experiences of IRM in Portugal and gain a profound understanding of the underlying dynamics between this migrant group and the host society.

Qualitative research would allow for the identification of individual experiences, motivations and contextual factors that cannot be comprehensively captured with survey responses alone. For instance, the discovery that separation is linked to the lowest levels of subjective wellbeing suggests that Portuguese investments in property for IRM could inadvertently generate counterproductive effects, including a sense of social exclusion. This potential outcome could be further explored in a qualitative study that permits probing and follow-up questions, facilitating an in-depth exploration of the living experience of IRM.

Moreover, a critical theory approach might prove beneficial in this context, as it allows for the examination of qualitative findings from different angles and the construction of various perspectives by questioning assumptions, identifying biases and exploring alternative interpretations.

The IRM phenomenon combines two key 21st-century societal issues: ageing and migration. A better understanding of the intersectional identities that arise from these societal concerns is key to addressing the diversity challenges and opportunities that societies face today and will encounter in the future. Furthermore, it is anticipated that IRMs will continue to expand, driven by factors such as increased life expectancy, longer active periods in retirement, rising affluence, ease of international travel and communication and the accrued of tourism experience of the baby-boomer generation (Zasada et al. 2010). Consequently, the issues raised are likely to become even more pronounced, making a better understanding of IRM an exceedingly pertinent subject spanning various academic disciplines. This article serves as an initial step in this direction, and we envision it will pave the way for further research, particularly in the field of psychology.

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