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Northern European retired residents in nine southern European areas: characteristics, motivations and adjustment

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ABSTRACT

During the last two decades, northern European retirement residence in the southern European sunbelt has grown strongly and its forms have rapidly changed, but standard demographic and social statistical sources provide no information about the flows, the migrants or their increasingly mobile and complex residential patterns. Considerable primary research has however recently been undertaken into the causes, conditions, experiences and consequences of international retirement migration (IRM) by investigators from Germany, Spain, Switzerland and the United Kingdom. Many collaborated when designing their studies and instruments, and all have subsequently worked together in a *European Science Foundation* Scientific Network. This paper compares the findings of six systematic social surveys in (to be more precise than the title) eight regions of southern Europe and the Canary Islands: all have tackled similar research questions with similar methods and instruments. It presents interpretations of several comparative tables compiled from their original data, with a focus on the socio-economic backgrounds, motivations and behaviour of the various migrant groups and their relationship with the host and home countries. The paper presents new findings about the typical and variant forms of IRM, and additional understanding of the heterogeneity of the retirees of different nations and in the several regions.

KEY WORDS – retirement, international migration, Europe, lifestyle, mobility, residence.

International retirement migration in Europe

The movement of people aged in the fifties or older from northern European countries towards southern Europe for ‘retirement’ is not new. For several decades, many with sufficient resources have moved for the

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climatic and lower cost-of-living advantages, particularly to a few favoured Mediterranean and Atlantic island and coastal regions. The moves are 'amenity-orientated' and similar to the longer-established and well-documented retirement migration flows from the northern industrial and commercial United States and Canada to the US sunbelt (Hazelrigg and Hardy 1995; Longino 1995; Newbold 1996; Serow 1990; Walters 2002). Although retirement moves are but a small percentage of international migrations in Europe, evidence of their rapid growth over the last 20 years comes both from the most favoured destination regions and from social security administrations in northern countries. An analysis of the number of UK state pensions drawn in foreign countries found that, 'the highest rates of increase during 1994–99 were, in descending order, in Italy, Spain, France and the United States' (Warnes 2001: 379). The recent rapid growth has been attributed to spreading affluence, increased home ownership, more early retirement, higher levels of education, increased life expectancy, changes in the life course (such as more education, holidays and work abroad), faster and cheaper international travel, and the spread of telecommunications.

While migration for retirement within France, the British Isles, The Netherlands and other European countries attracted researchers as early as the 1970s (Cribier 1975; Karn 1977; Law and Warnes 1973), research on international moves began only in the mid-1990s, at first through an interest in the spate of foreigners' property purchases in rural France (Barou and Prado 1995; Buller and Hoggart 1994; Hoggart and Buller 1995). Reviews have noted that official and conventional social demographic sources, including population censuses and death registrations, did not enable foreign retired residents to be identified or described (Cribier 1980; Kaiser 2001; O'Reilly 2000; Paniagua 1991; Warnes 1991). Different European countries have different statistical practices and produce non-comparable data, the most pervasive of the difficulties being: (a) the inconsistent definitions of immigrants by nationality, citizenship, place of birth and last residence, (b) the lack of a standard classification of permanent, semi-permanent and seasonal migrants and their differentiation from residential tourists, (c) the definition of 'retired', particularly among the spouses and partners of affluent migrants, and among self-employed and professional people, and (d) the lack of older age-group breakdowns and tabulations in routine statistics.

In response to this data scarcity, investigators in several countries set about developing the evidence through social surveys of the patterns of migration and the socio-demographic backgrounds of the migrants, their motivations and living experiences, and studies of the economic consequences for the destination countries. Many of the early studies were of

small settlements and local concentrations of national retirees (*e.g.* Betty 1997; Mullan 1992; Myklebost 1989; O'Reilly 1995), but large systematic surveys were also established by British, German, Spanish and Swiss investigators. They focused on the living conditions, social contacts, integration and wellbeing of the migrants. Most of the studies by northern European investigators have concentrated on their own nationals – reflecting more the bias of national research funding bodies than the investigators' interests (Breuer 2001; Huber 1999; Kaiser 2002; Karisto 2004; Helset and Lauvli 2004; O'Reilly 2000), and there is one comparative study, of the British in Tuscany, Malta, the Algarve and the Costa del Sol (King, Warnes and Williams 1998, 2000). Spanish researchers have understandably given more attention to both the environmental and human services impacts, and to national differences in a destination region, most particularly as between the German, British and Nordic retirees on the Costa Blanca, the Costa del Sol, and in the Balearic Islands (Casado-Díaz 2001; Casado-Díaz and Rodríguez 2002; Rodríguez, Fernández-Mayoralas and Rojo 1998; Salvà-Tomás 2002).

Apart from inland France and Italy, most of the southern European areas favoured by foreigners for retirement residence are coterminous with or close to 'mass' tourist zones, emphasising the importance of previous holidays in the destination area as a conditioning pathway (Bell and Ward 2000; Casado-Díaz 2001; Cuba 1989; Rodríguez 2001; Truly 2002; Williams and Hall 2000; Williams *et al.* 2000). Repeat tourist visits and the location of a second home particularly influence decisions about where to live in retirement, whether permanently or for part of the year (Gober and Zonn 1983; McHugh 1990; Müller 2002 *b*). A recent case study has shown a high prevalence of seasonal retirement migration to the Spanish coasts, and discussed the social differentiation of older foreign seasonal migrants, tourists and residents (Gustafson 2002).

As a result of the increasing numbers of both tourists and seasonal and permanent retirement migrants, housing developments along accessible Iberian coasts first became evident in the late 1960s, were stimulated during the mid-1980s by house price inflation in northern Europe, and after a lull in the early 1990s are again proliferating. Property developers, building companies and estate agents (realtors) have played an important role in developing new settlement areas, such as the *urbanizaciones* in Spain, and in directing the pace and distribution of the retired migrants' house purchases (Hoggart and Buller 1994). The building boom has stimulated several debates in the Spanish media about the 'invasion' of foreigners, the rise in land prices and the environmental consequences of the destruction of natural habitats along the coasts and in the hinterlands (Friedrich and Kaiser 2002). Many social policy and welfare questions also

arose, about the integration, inclusion or exclusion of the retired migrants in the host communities, and about the likely requirement for expanded health and social services. O'Reilly's (2000) in-depth ethnographic study of British residents and visitors on the Costa del Sol revealed the marginalisation of the foreign community from Spanish society, through both their own and the hosts' actions and behaviour. Huber (1999) has explored the importance of *Heimat* for the Swiss retired migrants in Ciudad Quesada, a Swiss enclave on the Costa Blanca.¹ Buck has analysed the changing structure of German retired migrants' social networks and their social and spatial perception of the environment after settling in their new homes on the Costa Blanca (Friedrich, Kaiser and Buck 2004). Ackers and Dwyer (2002, 2004) have conducted distinctive socio-legal research on the status and formal rights of retirement migrants (of many types) in the context of widespread labour mobility and the elaboration of European Union citizenship.²

This paper is a direct result of collaboration among the investigators who instigated the six systematic surveys of northern European retirement to southern Europe and particularly to the coasts and archipelagos of Spain. Although each project was funded and executed independently, all but one collaborated before the design and instruments were finalised, and all have shared progress and developed their findings through bilateral exchanges and a sequence of 'Exploratory Workshops' and 'Scientific Network' meetings funded by the *European Science Foundation* (ESF).³ The members of the Scientific Network have produced a bibliography and directory with full details of their own and other projects.⁴

Aims and approach

The aim of this paper is to report the findings contained in comparative tables constructed from the databases of the six surveys, presently the principal source of standardised information on the foreign retiree residents in southern Europe.⁵ The exercise began during the ESF Scientific Network meetings at which similarities and differences in the understanding developed by the individual studies were exposed. It became clear that there were differences by nationality and place in the histories of the foreign settlement, the characteristics of the migrants and seasonal residents, and in the participants' annual residential 'usage'. It was therefore agreed to produce both a standard set of demographic tables on the foreign older populations of European countries,⁶ and a set of profiling tabulations of the retirement migrants. Each study team then collaborated with the authors to generate tables to a common specification, *e.g.* with

consistent age and duration of stay inclusion criteria of 55 or more years and living at least four months a year in the destination country.

Initially the frequencies and distributions in the resulting comparative tables conveyed slight meaning to the authors, because we lacked the original investigators' close knowledge of the administration of the surveys and of the participants and the settings. The methodological issues raised by the exercise were unusual and require explanation. The 'social survey' has been a prime instrument of social and health sciences research for more than a century. In the form of nationally representative repeat, panel studies, the method is now methodologically sophisticated and capable of exceptional contributions to factual and conceptual understanding. Indeed the development of gerontological knowledge owes much to both national representative surveys, such as the British *General Household Survey*, and to longitudinal panel studies of ageing, in Europe most notably in Bonn, Berlin and Goteburg (Baltes *et al.* 1993; Lehr 1995).⁷ Nevertheless, to develop our understanding of minority populations and new social formations, specialist, bespoke surveys are still required. As with the six surveys to be reviewed, they are characteristically instigated by researchers who are fascinated by the topic. The understanding contributed by such surveys derives from the investigators close involvement throughout the design, execution, analysis and administration phases. During the analysis, they interrogate the quantitative tables produced from the questionnaires, and test and elaborate tentative understandings by reference to the qualitative insights acquired systematically and informally through contacts with the participants in their social setting. It was concluded that both the validation and interpretation of the comparative tables required inputs from the original investigators, and so agreed that preliminary drafts of the interpretation were returned to them for their revisions and elaborations.⁸

The six surveys of foreign retirement migrants

The main design features and many common features of the six surveys are presented in Table 1. Three were funded by national research councils and sampled exclusively the country's (former) citizens, while the Spanish survey on the Costa del Sol of retirees of all nationalities was funded by the Spanish government.⁹ Two were undertaken for postdoctoral thesis research with grants to support the field inquiry. All the studies used both quantitative and qualitative methods, and the systematic surveys were only one element of their inquiries. All, for example, examined local documents and carried out 'key informant' interviews, as with property agents, consular and local government officers, and ministers of religion. The two most common survey instruments were personal interviews using

TABLE 1. *The six surveys of northern European retirees in southern Europe*

	A	B	C	D	E	F
Title	British retirement migration to southern Europe	Elderly European retired people in Andalusia	International retirement migration in Spain	German retirement migrants in Mallorca, Spain	Swiss retirement migration to the Costa Blanca	German retirement migrants in the Canary Islands
Dates	1995–1996	1995–1997	1997–2001	1999–2003	1999–2001	2000–2002
Funder	UK Economic and Social Research Council	Ministry of Education, Spain	Ministry of Economy and Finance, Spain	German National Science Foundation (DFG)	Swiss National Science Foundation	German National Science Foundation (DFG)
Subjects	British citizens aged 50+ resident >6 months a year	Northern European retirees resident > 2 months a year aged 50+ (fm) and 55+ (m)	German, British and Nordics aged 50+ resident > 3 months per year	Germans aged 55+ who live > 3 months a year	Swiss residents aged 55+ years	Germans aged 55+ who live > 3 months a year
Area	Tuscany (Italy); Malta; Costa del Sol (Spain); Algarve (Portugal)	Costa del Sol (Málaga and Granada provinces, Spain)	Torreveija (Alicante, Spain)	Mallorca (Spain)	Costa Blanca (Spain)	Tenerife, Gran Canaria, Fuerteventura, La Palma (Spain)
Sample Sampling method	SCQ (957) Through social and resident associations and snowballing, using quotas from consular lists ¹	SCQ (300) Quota by foreigners' distribution at municipal level	SCQ (266) Through social and resident associations	TI (635); IAQ (360) Systematic sampling of German names in telephone directory and snowballing	SCQ (1114)	IAQ (316) Through social and residential associations, ecclesiastical and other public meeting points
Investigators	Russell King, Allan Williams, Tony Warnes, Guy Patterson	Vicente Rodríguez	María Angeles Casado-Díaz	Klaus Friedrich, Claudia Kaiser	Andreas Huber	Toni Breuer
Sources	King, Warnes and Williams 2000	Rodríguez, Fernández-Mayoralas and Rojo 1998	Casado-Díaz 2001	Friedrich and Kaiser 2001	Huber 2003	Breuer 2001

Notes: Methods: SCQ – self completion questionnaires distributed and collected by post or hand; IAQ – interviewer administered questionnaires; TI – telephone administered personal interviews. 1. In Malta, systematic sample of aliens electoral roll.

semi-structured questionnaires, and self-completion forms with mainly structured questions that were distributed and collected by post or hand, but the Mallorca survey first used telephone interviews to contact and filter the target group and then conducted personal household interviews with a semi-structured questionnaire. Some put more reliance than others on extended, in-depth, biographical and 'life review' interviews. All the surveys were faced with the unavailability of a precise sample frame. The Malta survey was able to draw a systematic sample from the 1995 aliens' electoral roll (Warnes and Patterson 1998), the survey of Swiss residents on the Costa Blanca utilised a comprehensive list of Swiss residents compiled by the Swiss consulate (Huber 2003: 138–44),¹⁰ and the Mallorca survey developed a sample frame by listing all the German family names in the island's telephone directory. None claim, however, to have identified a comprehensive or fully up-to-date list of *de facto* 'retired' or permanently resident individuals. Otherwise, the sampling strategies had to rely on opportunist combinations of surveillance, local property lists, the membership lists and attenders of voluntary associations, and snowballing.

All but one research team had copies of and drew from the questionnaire developed for the British research (Williams, King and Warnes 1997).¹¹ Both modifications and translations were required. While any survey collects basic personal descriptors, the early collaboration promoted a common set of questions and variables on former residence, housing characteristics, the motives for migration and the destination selection, the advantages and disadvantages of the move and the chosen destination, social contacts with expatriate and host society individuals and associations, language competence, and connections with the countries of origin. Nonetheless, the methodological differences must be borne in mind, particularly the use of self-completion and interviewer-administered face-to-face and telephone interviews, and the fact that some items were collected variously with open-ended and pre-coded questions.

The exercise required standardised age, annual duration of residence, and economically-active status inclusion criteria and consistent categories for educational attainment, motivations and expressed advantages and disadvantages.¹² While the authors were able to use the surveys' primary data sources, it nonetheless proved impossible to create a single occupational status classification from the various national taxa. Apart from the limitations of forcing different national stages of educational attainment into a common scheme, it was particularly difficult to produce a uniform classification of motivations and opinions. There are both subtle and substantial differences in the meaning that different nationalities attach to phrases that are straightforward to translate, such as 'moving for my health', 'negative views of the home country', or 'the attractions of the

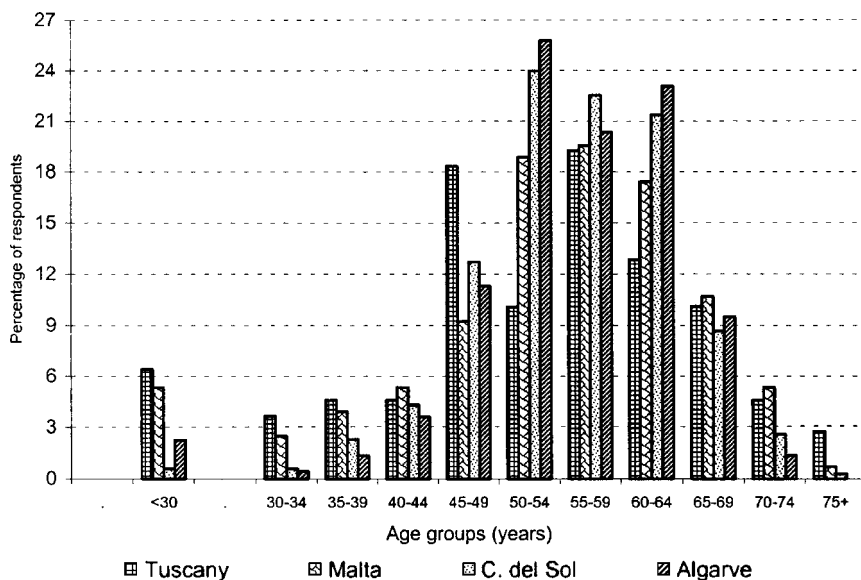


Figure 1. The age at which British migrants settled in the four southern European areas.

social life'. It has not been possible to investigate the extent or nature of such differences in meaning.

Findings

Socio-demographic characteristics of European retired migrants

All studies agree that retirement migration from north to south in Europe is undertaken predominantly by couples (without others) aged in the fifties and early sixties. Nearly two-thirds (61.7%) of the respondents to the British study settled in the destination area between the ages of 50 and 64 years (Figure 1). Foreign retirement migration is pre-eminently a 'third age' choice. There was greater age dispersal of the arrivals in Tuscany and Malta than in the Iberian areas, and this was associated with a relatively high prevalence of dual-nationality couples and more complex households. Most retired migrants are owner-occupiers, and finance the move by the sale of their home in the origin country or with a new mortgage, and most have at least one occupational or private pension. They are drawn then from the middle and upper-income groups of society.

A slightly higher number of men than women responded to all but two of the studies (Table 2). One problem with self-completion questionnaires delivered to couple households in the current cohorts of older people is

TABLE 2. *Gender, age, housing types and years settled in the adopted area among resident retired migrants aged 55 or more years in nine southern European areas*

Survey ¹ area: Nationality:	A Tuscany British	A Malta British	A Costa del Sol British	A Algarve British	A Total British	B Costa del Sol N. Euro.	C Torrevieja N. Euro.	D Mallorca German	E Costa Blanca Swiss	F Canary Isles German
<i>Percentages</i>										
Gender										
Male	66.0	54.1	52.3	61.5	56.5	51.2	47.2	48.9	52.4	53.3
Female	33.0	45.9	47.7	38.5	43.5	48.2	52.8	51.1	47.6	46.7
Age (years)										
55-64	23.5	30.7	36.5	42.9	34.9	39.5	47.8	46.9	40.5	29.5
65-74	39.8	40.5	48.0	40.0	43.0	41.9	50.9	35.8	42.3	41.9
75+	36.7	28.8	15.5	17.1	22.1	18.5	1.2	17.3	17.2	28.6
Average age	70.1	68.4	65.8	65.8	67.0	66.1	62.7	65.6	65.9	68.4
Years settled in the area										
0-4.9	17.9	18.8	14.9	20.2	17.6	19.4	52.7	42.0	30.6	26.6
5-9.9	26.3	29.0	30.3	36.0	30.8	29.4	21.0	19.9	24.9	26.9
10+	55.8	52.2	54.8	43.8	51.6	51.2	26.3	38.1	44.5	46.5
Av. duration	10.2	10.0	10.3	9.3	10.0	9.9	6.6	7.9	8.9	9.2
Type of accommodation										
House/villa	70.3	43.8	53.2	89.3	60.8	58.9	15.4	49.3	84.1	37.0
Apartment	26.4	55.4	45.5	9.7	37.8	41.1	84.0	50.7	15.5	57.9
Other	3.3	0.8	1.3	1.0	1.3	n.c.	0.6		0.4	5.1
Tenure of home										
Owned	81.9	65.3	91.6	94.9	83.6	87.0	91.7	86.5	98.0	76.3
Rented	11.7	32.7	7.7	3.6	14.5	8.5	8.3	13.5	1.3	20.3
Other	6.4	2.0	0.7	1.5	1.9	4.5	0.0		0.7	3.5
Sample size	98	257	323	205	883	248	163	360	1114	316

Notes: The origin surveys are described in Table 1.

1. The letters A to F refer to Table 1, which gives methodological details of the surveys, the names of the investigators, funding bodies, and sources.

that men tend to over-represent themselves by self-selection. While the surveys actively sought to prevent this bias, they were not entirely successful. But some northern European expatriate older populations in southern Europe do have high male-to-female ratios. The strongest evidence is from the 2001 Spanish population census, which reported a slight male predominance among foreign European older residents, and from the 1995 Malta aliens' electoral roll, which enumerated 233 British men and 222 British women aged 70–79 years, reversing the normal predominance of women at these ages (Warnes and Patterson 1998). The reason in Malta is the presence of many ex-armed forces British men – some never-married, some widowed, and some with Maltese wives. More generally, foreign retired populations in southern Europe have fewer widowed women in advanced old age than northern home populations, because of the recent rapid increase of young old-age (or 'third age') couples, and because many women who are widowed either return to their home countries or move elsewhere.

Turning to the age distributions, in all the study areas the respondents were a relatively young older population, the overall average age being 66 years. Over 42 per cent of the migrants were aged 65–74 years, and only 19 per cent were older. The oldest age structures were in Tuscany and Malta, where the retirement settlement has the longest history, and in the Canary Islands. In these three areas, those aged 75 or more years accounted for around 30 per cent of the sample. The youngest sample age-structures were from the Spanish mainland coasts, the Balearic Islands, and the Algarve in southern Portugal, where residential property development for foreign retirees became prolific only in the 1980s. The youngest of all the samples was in Torrevieja on the Costa Blanca, where the new housing developments began in the 1990s. Before that time, the town was relatively inaccessible from northern Europe in comparison to the Costa del Sol or Mallorca, but the new Murcia airport has now opened.

The years of arrival and the durations of residence in the chosen areas correlate closely with the age-distributions of the samples. In Tuscany, Malta, and the Costa del Sol, the majority of the migrants arrived more than a decade before the survey and the average duration of residence was around 10 years (Table 2). By contrast, on the Costa Blanca and in Mallorca, the majority had lived in the area for less than 10 years. The average duration of residence was exceptionally short in Torrevieja (6.6 years), again reflecting its very recent rapid expansion.

International migration for retirement is no longer the preserve of the rich or of professional and artistic elites, but it remains selective of the more affluent and is strongly patterned by the socio-economic background of the migrants, as shown most clearly by the British samples (to which

consistent educational and occupational status measures applied) (King, Warnes and Williams 1998). The educational level of British older residents in Tuscany and Umbria was higher than in the other destinations: indeed, the area is especially favoured by those from the creative arts and higher education (Table 3). The educational level was also high in the multi-national Costa del Sol sample, particularly among the Nordic respondents. The British study found above-average representations of former employers and managers on the Costa del Sol, while that region and Malta were the only areas with more than a few from manual occupational backgrounds. The majority of those interviewed for the different surveys stated that they were no longer working (a filter question in all but two surveys), although a minority of the respondents in the Costa del Sol and Mallorca surveys noted that they were still economically-active. As Rodríguez, Fernández-Mayoralas and Rojo (1998) pointed out for the Costa del Sol, those who claimed to be employed were mainly involved in unpaid voluntary work. Evidence of phased retirement, or the retention of part-time, locum and free-lance paid work, was most common among two groups: highly-educated professionals and business entrepreneurs.

Migration decision and destination selection

The most commonly expressed reasons for making the move and of the advantages of residence in the areas were 'the climate', other environmental factors, health reasons, and cost-of-living and housing advantages (Table 4). In their first three expressed reasons, around four-in-five migrants mentioned the climate, but references to it are enigmatic and the expanded comments referred to health promotion, lifestyle, morale and even financial components, *i.e.* lower heating costs, and to both 'push' and 'pull' reasons. The Mediterranean winter climate enables outside activities (from patio meals to golf), while being able to avoid the cold, wet northern winters is a widely appreciated advantage. Many are however repelled by the summer heat (and the tourists it attracts), and this stimulates the large exodus in mid-summer.

Financial advantages are still the second most prevalent group of expressed reasons for the move although, as the longest-established respondents confirmed, the cost-of-living differential between southern and northern Europe of a generation ago has greatly reduced. House price differentials remain, particularly for those moving from the largest cities of northern Europe, and many see the purchase of a home in the expanding retirement market as an investment and an element of a long-term personal finance strategy. Other common responses are the attraction of the Mediterranean 'way of life', which refers to selected aspects of the cuisine,

TABLE 3. *Social and educational backgrounds and current annual residential pattern of the retired migrants*

Survey area:	A Tuscany	A Malta	A Costa del Sol	A Algarve	A Total	B Costa del Sol	C Torrevieja	D Mallorca	E Costa Blanca	F Canary Isles
<i>Percentages</i>										
Economically active status										
Retired	100.0	100.0	100.0	100.0	100.0	78.9	100.0	84.0	96.7	100.0
Employed	0.0	0.0	0.0	0.0	0.0	21.1	0.0	16.0	3.3	0.0
Highest education										
Basic	20.4	54.0	54.5	41.2	47.5	7.8	76.7	43.7	21.6	63.2
Secondary/further	34.4	32.3	26.9	36.7	31.6	50.8	0.0	22.5	73.3	13.1
Higher/university	45.2	13.7	18.6	22.1	20.9	41.4	23.3	33.8	5.1	23.6
Months in area										
4–6	5.3	5.2	10.6	8.3	7.8	19.0	0.0	32.0	0.1	52.1
7–9	8.5	6.7	11.6	7.3	8.8	81.0 ¹	27.0	13.3	13.2	16.6
9+	80.9	86.5	75.9	81.5	80.9		73.0	54.7	86.7	31.3
Months in origin country										
0	47.7	45.6	39.6	38.5	42.0				69.6	7.8
1–2	39.4	37.4	35.3	33.9	36.1		50.5 ³	56.4 ³	22.6	31.5
3–4	6.4	13.2	13.0	19.9	13.9		17.2	11.1	7.7	9.4
5+	6.4	3.9	12.1	7.7	8.0		32.0	32.5	0.1	51.3
Home in country of origin	18.9	19.1	24.8	18.8	21.2		37.6	67.8	20.4	51.3
Lived abroad ²	74.2	53.9	42.2	48.3	50.6	30.2	4.3	19.6	32.4	17.8

Notes: The origin surveys are described in Table 1.

1. More than 6 months.

2. Had lived abroad at some time in adult life before moving to the area.

3. 0–2 months.

TABLE 4. *Most common main reasons for moving to the case study area and the most common advantages of the locations*

	A Tuscany	A Malta	A Costa del Sol	A Algarve	A Total	B Costa del Sol	C Torrevieja	D Mallorca	E Costa Blanca	F Canary Isles
<i>Percentages¹</i>										
Reasons for moving to area										
Climate	25.5	62.3	72.8	72.2	64.3	91.3	93.9	79.4	70.2	92.4
Financial reasons	5.1	37.4	31.0	42.4	32.6	31.5	37.4	9.4	45.7	30.3
Mediterranean way of life	41.8 ²	19.1	30.3	31.2	28.5	60.1	38.0	41.7	10.1	n.c.
Health reasons	9.2	12.8	23.2	19.0	17.7	23.0	54.6	25.8	29.9	62.1
Social life	5.1	27.6	8.4	10.7	14.2	11.3	n.c.	n.c.	n.c.	n.c.
Work-related	25.5	6.2	4.6	8.8	8.4	0.0	0.6	6.4	1.9	5.3
Leisure activities	1.0	5.1	5.3	7.8	5.3	9.3	n.c.	9.2	n.c.	26.5
Environmental	15.3	2.7	3.7	5.4	5.1	0.8	n.c.	21.7	n.c.	n.c.
Advantages of living in area										
Climate	42.9	75.9	80.2	83.9	75.7	42.3		80.8	96.0	95.6 ³
Social life	41.8	42.2	39.9	37.6	40.0	n.c.		2.7	n.c.	37.3
Mediterranean way of life	62.2 ²	26.5	36.5	47.8	39.1	64.9		40.0	49.7	48.0
Financial	6.1	38.5	29.4	31.7	30.0	n.c.		7.5	79.4	59.8
For health	11.2	10.9	18.6	15.6	14.8	41.5		16.1	57.1	n.c. ³
Environmental	36.7	2.7	8.0	11.2	10.4	58.9		21.7	72.2	n.c.
Leisure activities	3.1	4.7	11.1	15.6	9.4	n.c.		15.8	38.9	95.5
Personal	12.2	5.1	1.5	1.0	3.6	n.c.		0.0	n.c.	n.c.
Easy access	0.0	1.6	5.3	4.4	3.4	n.c.		3.6	37.1	67.0
Avoiding home country	5.1	0.4	1.5	2.4	1.8	2.4		3.3	22.4	48.0
Work-related	2.0	0.0	0.6	1.5	0.8	n.c.		1.4	7.6	n.c.

Notes: The origin surveys are described in Table 1. n.c. not collected.

1. The data are the percentage of references to the named factors among three 'main reasons' or 'main advantages'.
2. Many respondents in Tuscany expressed 'admiration of the country'.
3. Climate and for health combined.

wine, a slower pace of life, and again an outdoors lifestyle. Most of the surveys found the percentage of the respondents who said that the social life was an advantage to be three times the percentage who said it was a reason for their move. In the Costa Blanca, Costa del Sol and the Canary Islands, easy and cheap access to the country of origin was often mentioned as an important advantage (many skilfully obtain very cheap flight tickets on the frequent charter planes).

The relative importance of the most commonly cited factors differed by nationality, socio-economic group and location. The warmer and sunnier climate was most important among those moving to Spain and the Algarve, but they applied less in Tuscany, where work-related reasons and antipathy towards the country of origin were more often cited. Cost-of-living advantages were most frequently mentioned by lower income groups, and so among the migrants to Malta and to the apartment districts of the Spanish coasts and islands. Family-oriented reasons were mostly reported by the dual-nationality couples who had settled in Malta and Tuscany. There were also discernable differences in the migration rationale between the non-British and British in Andalusia, with the former more frequently referring to health benefits and the attractions of Spanish culture, and the latter more frequently mentioning the Spanish lifestyle and the climate.

Turning specifically to the selection of the destination area, one of the most important links with the case study area was previous holidays in the destination area (Table 5). Different forms of tourist residence have differential influence, and second-home acquisition is most important, but other important connections mentioned by a minority of respondents, particularly in Tuscany and Malta, were childhood residence and family and work connections, which in some cases had developed over several generations (King, Warnes and Williams 1998). Similar patterns are emerging in the Costa del Sol, for after four decades of residential and small business development for tourists, an increasing number of northern European retirees have relatives and friends of working-age living in the area (Casado-Díaz 2001; O'Reilly 2000; Rodríguez, Fernández-Mayoralas and Rojo 1998).

Concerning the chosen property, there was clearly a widespread preference for houses (as opposed to apartments) in Tuscany, the Algarve and on the Costa Blanca, but in Malta and on the Costa del Sol more lived in apartments (Table 2). In Torrevieja and on the Canary Islands, by contrast, there was a predominance of flats over houses. Irrespective of the type of accommodation, the great majority of those interviewed owned their properties. The only exception was in Malta, where the comparatively high density of population and more controls and taxes on property

TABLE 5. *Relationships with home and destination countries*

	A Tuscany	A Malta	A Costa del Sol	A Algarve	A Total	B Costa del Sol	C Torrevieja	D Mallorca	E Costa Blanca	F Canary Isles
<i>Percentages</i>										
Prior connections to the study area										
Holidays	76.8	78.4	95.7	93.2	88.1	20.2	50.3	92.1	—	67.5
Childhood	19.5	21.6	1.1	1.1	9.0	n.c.	0.0	n.c.	—	11.8
Work	14.6	22.5	2.9	5.7	10.5	1.6	0.0	1.3	—	6.6
Other	20.7	14.7	5.0	5.7	9.7	23.4	25.8	19.6	—	14.1
Language skills										
Very fluent	25.0	2.4	4.4	2.0	5.5	28.6 ¹	0.6	8.5	23.2	16.3 ²
Quite fluent	47.9	3.9	20.6	24.5	19.7	n.c.	8.6	19.3	46.9	n.c.
Some knowledge	24.0	28.7	63.9	53.9	47.0	n.c.	63.8	61.1	24.7	14.8
Few words/none	3.1	65.0	11.2	19.6	27.9	71.4	27.0	11.1	5.2	68.9
Participation in associations										
Mainly own national	6.3	40.6	59.3	28.9	39.3	51.6	35.3	22.1	—	87.9
Mainly expatriates	7.4	35.7	62.7	45.6	43.4	5.4	20.6	14.9	—	0.6
Mainly host society	29.8	30.2	12.9	8.9	19.7	4.3	0.0	16.6	—	11.5
Totally mixed	20.2	66.3	66.5	57.8	59.1	38.7	44.0	0.0	—	0.0

Notes: The origin surveys are described in Table 1.

n.c. not coded.

1. Some command.

2. Fluent.

ownerships by foreigners have encouraged renting and, as a consequence, less residential segregation by age or nationality.

Permanent and seasonal residence

Table 3 suggests the existence of two contrasting residence and mobility patterns; one characterised by short stays (four months or less), no retained property, and relatively few contacts in and long stays at the destination; the other is characterised by more contacts with, a retained property in, and stays of at least five months in the country of origin. Many cases of the contrasting types are described in the full reports of the six surveys (Breuer 2001; Casado-Díaz 2001; Friedrich and Kaiser 2002; King, Warnes and Williams 2000). Müller (2002*a*, 2002*b*) has argued that regular visits to several or many different places have become common and partially substitute for migration to one place. Referring particularly to mobility among second home-owners, he distinguished between 'circulation' (e.g. frequent weekend visits) and 'seasonal migration' (use of the second home for extended periods once or twice a year). A high prevalence of seasonal migration among northern European retired second home-owners was found in Torrevieja, Costa Blanca and on the Canary Isles (Breuer 2004; Casado-Díaz 2001, 2004). Previous vacations in the area, and knowledge that friends or relatives also holidayed nearby were among the most important reasons for choosing to retire to Torrevieja.

Seasonal mobility was apparent in all the study areas, but was most striking among the German retired residents on the Canary Islands (Table 3).¹³ Detailed data on the seasonal residence pattern were collected in this survey both from the respondents and through interviews with informants from, among others, property-leasing companies and local government staff (Breuer 2003). Both sources agreed that German retirees' occupation of their properties on the islands varied from around 30 per cent in July and August, to 90 per cent or more from December to March. Only around three-in-ten remain for most of the year, and the majority are seasonal migrants (Figure 2). A strong seasonal pattern of residence in two (or more) countries is strongly associated with the younger (or 'third') ages and the maintenance of a home in the country of origin, the latter being reported among the German respondents by 51 per cent in the Canary Islands and by 68 per cent in Mallorca, from where the relative proximity to southern Germany facilitates frequent visits.

Further evidence of the mobile lifestyles led by these migrants is in the high percentages with experience of living abroad prior to the retirement move. Three-quarters of the respondents in Tuscany and a half in Malta

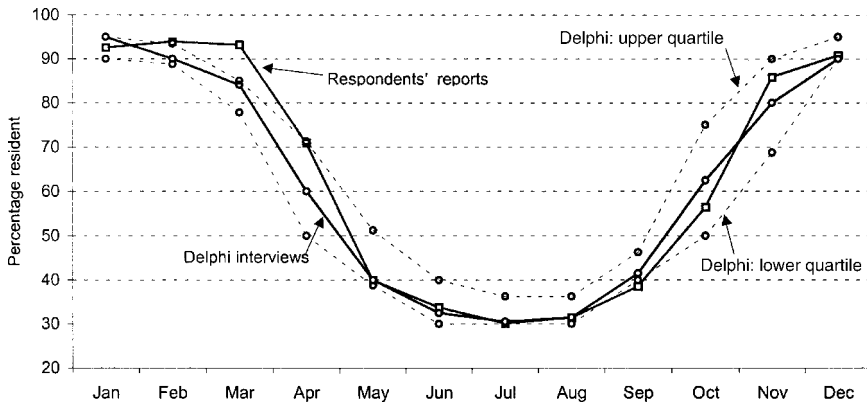


Figure 2. Seasonal pattern of residence of German retired people in the Canary Islands.

and the Algarve reported prior foreign residence, the most common regions being west Europe, the United States, Australia and southern and eastern Africa. On the other hand, among the relatively low socio-economic retirees in Torrevieja, only 4.3 per cent had previously lived abroad. Another dimension of a mobile biography is having been a long-stay tourist or having owned or leased a house abroad. More than 10 per cent of foreigners who had retired to the Costa del Sol reported such histories (Rodríguez, Fernández-Mayoralas and Rojo 1998). Once settled in a destination area, retired residents adopt a relatively settled lifestyle, certainly in comparison with the tourists who visit the same areas. Touring in the adopted country and abroad, and return visits to the country of origin, are a strong feature of the lifestyles of those aged in the fifties and sixties, but decline at older ages (Figure 3).

Social contacts and integration

Many investigations of northern European migration to the south have been particularly interested in the social contacts of the participants in both the destination and origin areas. The recurrent questions are the extent to which the retired migrants build social relationships with their neighbours and the host society, and retain close ties with their relatives and long-standing friends. The detail collected on these topics varied among the six surveys, and was most extensive in Huber's study of Swiss migrants. Two comparative indicators are available, language ability and participation in social associations, and additionally from the four-nation British study, childhood and family connections with the area and the number and composition of overnight visitors.

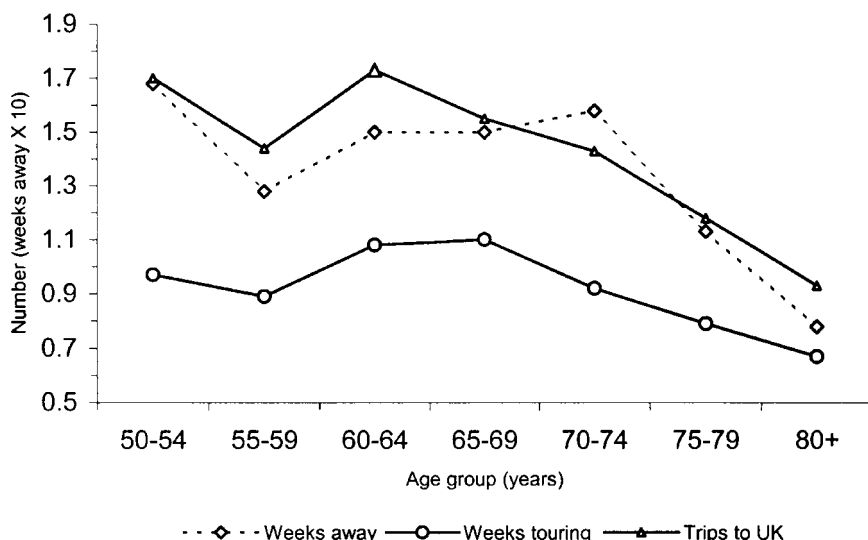


Figure 3. The number of weeks in the year spent away from the retirement home and touring, and the number of trips to the UK by age: British retirees in Tuscany, Malta, the Costa del Sol and the Algarve, 1995–96.

With regard to language ability, Table 5 shows that in most destinations a majority of the respondents claimed either some knowledge of or fluency in the local language: the exceptions were in Malta and the Canary Islands. Even allowing that the respondents' self-assessments may inflate the level of proficiency, the differential claims are consistent with the histories of the various settlements and socio-economic differences. Only the British retirees in Tuscany and the Swiss on the Costa Blanca reported a high level of fluency. King, Warnes and Williams (1998) linked the language skills of those living in Tuscany to their higher education and the dispersed settlement (which generates a greater need to communicate in the local language), while Huber (2003) related the proficiency of the Swiss respondents to their native bilingualism, their relatively low command of English and their exceptional commitment to a new life in Spain. Ability in the local language was exceptionally low in Malta, where 65 per cent of the British sample knew no Maltese or only a few words (but English is widely spoken in the country), and among the Germans in the Canary Islands (69%). While few British residents on the Costa del Sol said that they knew only a few Spanish words, only a minority (25%) claimed more than the command sufficient to shop or to order restaurant meals. In the areas of the densest concentrations of British and German tourists and residents, particularly in Malta, Portugal and Spain, they have little need to learn the local language, for their native languages have become the

lingua franca in commerce and personal services (although not widely in the health and social services).

While none of the six surveys collected detailed information on social networks, social activities and the use of time, a shared question about participation in social clubs differentiated national, foreigner or expatriate, host country national and 'open' associations. The results suggest that, with the exception of Tuscany, in most areas the respondents mainly participated in associations of their own nationals or of multinational expatriates. Their activities are publicised in widely circulated newspapers published in the northern European languages, such as *Costa Blanca News* in Alicante, *Sur* in Málaga and, in the Balearic Islands, *Mallorca Zeitung* and *Mallorca Magazin*. Most associations have exclusively social and recreational purposes, but some take on information and welfare advisory roles, as with the *British Residents' Association* in Malta, and *Lux Mundi*, an ecumenical social and welfare centre in Fuengirola, Costa del Sol. A German Lutheran association, *Diakoniewerk Es Castellot* runs a nursing home in Mallorca and, most exceptionally, the *Asociación para Cuidados del Cáncer* [Association for Cancer Care] in the Costa del Sol provides hospice and home-based end-of-life care on the Costa del Sol for natives and expatriates. It was founded in 1991 by a British woman, Joan Hunt, and has been developed with considerable support from volunteer fund-raisers of many nations and from Spanish physicians, lawyers and politicians (Hunt and Martin 1997).

Most of the first generation of social surveys reviewed in this paper have focused on the most manifest concentrations of northern European resident retirees in southern Europe. Even in these locations, however, not all participants were a member of a household that made a clear-cut move from a northern to a southern European country, e.g. 26 per cent of the British respondents on the Costa del Sol had lived exclusively abroad during the five years before they retired to Spain, and only 68 per cent had lived exclusively in the United Kingdom. In Tuscany and Malta, the histories and provenance of the movers were remarkably diverse. Among the Tuscan respondents, only 37 per cent had lived exclusively in the United Kingdom during the five years before they settled in Italy, and 39 per cent had lived exclusively in third countries.

These contrasts reflect marked differences in the prevalence of childhood and family connections with the areas (Table 6). In Malta, around one-in-five of the respondents had had childhood connections with the country or had married a native (or both). Childhood connections were even more prevalent in the Tuscan sample, but only two respondents had married an Italian. In the two Iberian areas, such connections were however rare. Some Anglo-Maltese couples had returned to the native country of either the husband or wife, and in some of these cases, the

TABLE 6. *Childhood and family connections with the retirement area and the number and composition of overnight visitors*

	Tuscany	Malta	Costa del Sol	Algarve	Total
Childhood and family connections (percentages)					
Childhood	14.7	12.1	0.6	0.9	5.6
Married native	1.8	8.5	0.3	1.4	2.5
Family connections	9.2	7.5	6.4	5.9	5.9
Number of visitors					
Non-kin adults	5.9	1.6	2.7	4.6	3.2
Non-kin children	0.8	0.1	0.1	0.7	0.3
Grandchildren	0.8	0.7	1.0	1.3	1.0
Adult children	1.1	0.8	1.0	1.5	1.1
Total	10.1	4.3	6.2	10.1	7.0
Composition of visitors					
Non-kin (percentage)	65.7	39.0	46.8	51.7	50.0
Descendants (percentage)	18.8	34.9	32.3	27.7	30.0
Sample size	109	281	346	221	957

house left in the UK was occupied by the household of a young Maltese relative. These complexities reflect the great diversity of international retirement migration, which includes numerous inter-continental moves by Europeans to join or live near relatives in Australia, Canada and the United States (Friedrich and Warnes 2000).

Socio-economic differences are an important factor in the differentiation of the retired migrants' aspirations for their social life and the forms that are achieved. These are indicated by the number and kin position of the visitors that stayed in the migrants' homes during the 12 months prior to the surveys. The number of overnight visitors ranged from 10.1 in Tuscany and the Algarve to 4.3 in Malta, and similarly the percentage that were non-kin varied from 65.7 in Tuscany to 39.0 in Malta (Table 6). By contrast, descendants formed around a third of the visitors in Malta and the Costa del Sol, but only 18.8 per cent in Tuscany. The number and composition of the visitors varied by socio-economic status (as measured by the UK official classification of (former) occupations), but the relationship was not linear. Relatively many visitors were received by respondents in social classes I and II (professional and managerial) and in the manual sub-group of social class III (7.1 and 6.8 respectively), and relatively few by those in the non-manual sub-group of social class III (intermediate white collar workers) and in social classes IV and V combined (skilled and unskilled manual workers) (5.8 and 6.0 respectively). The most striking finding, however, was the very high number (10.8) of visitors to respondents who had formerly been in the armed services, and an exceptionally low percentage of these were kin (39.0 %).

Later-life residential consumption and migration: diversity and prospects

It is undisputed that the destinations of the international older migrant flows that have developed in Europe over the last three decades have been strongly influenced by tourists' and second home-owners' location and environmental preferences. New forms of residential consumption, involving multiple homes, circulation and seasonal moves, have recently attracted considerable research interest, for the new forms are both a manifestation of post-modern self-actualising and amenity-oriented lifestyles and may substitute for conventional 'total displacement' migrations (Gustafson 2002; Flognfeldt 2002; Williams and Hall 2000). International retirement migration reflects the growth of affluence and housing assets among older people, and although its current forms are already complex, they are likely to diversify further over time (Müller 2002*a*: 83).

International retirement migrations also stimulate derivative or following migrations. The greatest concentrations of northern European tourists and resident retirees in southern Europe have attracted younger compatriots who see business and employment opportunities in providing services to the expatriate populations (O'Reilly 2000). Such labour migration flows have become substantial to some Spanish coastal provinces, in which the number of young-adult EU residents has rapidly increased.¹⁴ This sequence replicates the experience of northern European and American holiday and retirement resorts during the 20th century: settlements which initially grow through their attractiveness for holiday makers and retirement residence change over time as their economies diversify. Another derivative migration flow, about which little is known, is the following and sponsored move (in either direction) by relatives and carers. The frequent visits between the retired migrants and their relatives and friends spreads first-hand knowledge of the advantages of residence abroad and may encourage further migration (Cuba 1989; Gober and Zonn 1983). Similarly, those who have been left behind, such as adult children raising families, might consider moving to be near their parents if they see local job opportunities, and to access the family support that they have lost.

Another derivative of retirement migration that requires more attention are the circumstances that precipitate return migrations to the country of origin. A large majority of the respondents to the surveys expressed a strong commitment to their new regions of residence and envisaged few circumstances that would bring about a return (Warnes *et al.* 1999). From the key informant and in-depth interviews, however, it is clear that return migrations are not rare. Many of them follow bereavement or the onset of a seriously-disabling illness or financial difficulties. In great contrast to the volitional and developmental character of the original moves, they are

impelled and defensive (and to very dispersed destinations), and consequently are much more difficult to research. More information about these moves would enable fuller assessments of the net benefits and risks of international retirement migration, and therefore inform both individual migration decisions and health and social service agencies in the destination regions about the incidence and severity of needs that lead to acute stress and moves away. The survey of Swiss retirees in Alicante, Spain, identified the lack of family support for the migrants who became ill and disabled, and the need for greater investment in long-term care for older people in the retirement settlements (Huber 2003). This raises more general issues about the long-term impact of the concentrations of foreign older residents on the destination areas and their health and social service agencies, for these matters have not yet attracted considerable research.

Conclusions

This article has reviewed comparatively the principal findings of six systematic surveys of northern European retirees who have made their principal residence in nine areas of the European sunbelt (including the Canary Islands extension). The findings amply demonstrate the many shared features among the various northern European nationals and of the different destinations. The motivation for the move is predominantly to improve the quality of life, particularly during the winter, and the climate is the principal attraction. Foreign house purchases in the third age are also often a conscious element of a financial strategy for maximising material wellbeing in late life. Mainly couples migrate, and most do so when aged in the fifties or early sixties. While they have relatively infrequent face-to-face contacts with their close relatives, this is not inconsistent with a strong family orientation, as there are many spur-of-the-moment journeys and reverse migrations when a parent, child or grandchild needs their presence and support. The new transport and telecommunications technologies have not only enabled international 'amenity seeking' residential circulation and migrations, but also made them consistent with close emotional and instrumental bonds between consanguineous and other households separated by long distances.

The surveys have also revealed that northern European older migrants to the south are far from homogeneous, and suggest that diversity in the migrant households and their motivations is likely to increase. The variation is not just a matter of socio-economic differences in purchasing power and environmental and lifestyle preferences, important as they are in distinguishing the German and British retirees in Tuscany from those in

the apartment blocks of Mallorca or on the Costa del Sol. The migrants in Tuscany were most dispersed and most likely to be living in former farmhouses and small rural settlements, and they had the highest levels of education, the best language skills and the closest integration with the host society. In contrast, most migrants in the coastal areas of Spain lived in newly-developed *urbanizaciones* or apartment blocks with a high prevalence of second homes. The retirement migrants who had selected these destinations spend shorter periods in their Mediterranean homes, have low language skills and integrate little with the host society. The surveys also provide suggestive evidence of a difference in the social life of British and German retirement migrants, with the former participating rather more in their own nationality's associations, clubs and events, and the Germans reporting more private intra-national social contacts.

The other important influential factor is the longevity, number and form of prior connections with the adopted region for retirement. As the examples of Tuscany and Malta show most clearly, long-established connections between the northern and southern populations lead to intermarriage and to family, school and work connections and social security entitlements in (at least) both locations. How widespread will be the development over generations of multi-national kin and social networks in the destination areas, and will residential tourist and retirement areas as much as the major commercial and administrative cities of Europe be in the vanguard of the formation of pan-European populations and identities? The answer may lie partly in the resolution of the emerging contest between, on the one hand, those who wish to promote European citizenship and a 'social Europe' and, on the other, the national governments that resist any weakening of their control of social and health policies and spending (particularly social security) (Ackers and Dwyer 2002; Warnes 2002). However, the political participation of older migrants in the destination areas, both as voters and candidates, might play an important role in the future development of public policy at the local level.

The ESF Scientific Network researchers all agree that both the quantitative and qualitative 'evidence bases' for this field require considerable strengthening. A fundamental problem in the analysis of late-life migration is the definition, identification and recording of migrants and residents. Official statistical agencies, from the level of the European Union to municipalities, have not solved the problem of gathering representative and reliable data on migrant, foreign and unregistered or temporarily-resident populations, so it remains impossible in most areas to construct basic socio-demographic profiles. It will only be possible to monitor and respond to the rapid changes in the residential behaviour of the older population (and other age groups) if European and national statistical agencies harmonise

their definitions and collection procedures. Local government agencies can play an important role, by improving the registration of migrants and temporary residents, as has been done in Torrevieja, Costa Blanca, and Mijas, Costa del Sol (Casado-Díaz 2001; Rodríguez, Fernández-Mayoralas and Rojo 1998).

The anticipated increase of the European affluent older population will almost certainly translate into a continuing rapid growth in the demand for permanent and seasonal retirement residence in southern Europe. Moreover, the spread of travel and residential tourism, the increase of educational and job-related spatial mobility, further reductions in the cost of international flights, and more fluid marital, intimate, family and household arrangements suggest that foreign retirement migration and residence are likely to become a more widespread feature of affluent older people's lives. It is also very likely that the available destinations for the new forms of residential consumption will expand and diversify. The German market, for example, is being actively cultivated by Croatian land-owners and entrepreneurs, and the Black Sea coast of Bulgaria is already seen as a potentially important development zone (Longino and Warnes 2004). As regards many other frequently-asked questions about the daily lives and welfare of older foreign residents, namely their health and wellbeing, intimate relationships, social networks and participation, civic involvement, and future need for health and social services, research has so far only scratched the surface.

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NOTES

- 1 See also Huber and O'Reilly 2004, in this issue.
- 2 See also Ackers and Dwyer 2004, in this issue.
- 3 The *European Science Foundation* supported 'Exploratory Research Workshops' on 'European Dimensions of Changing Retirement' in 1998, and an expanded group

that formed the 'Scientific Network on International Migration in Europe: Policy and Practice Implications for Older People' during 2000–03. The network was directed by Tony Warnes and the members of the Co-ordination Committee were Alberto Bonaguidi (Italy), Sasa Bozic (Croatia), Klaus Friedrich (Germany), Andreas Huber (Switzerland), Ulla Lundh (Sweden), Vicente Rodríguez (Spain), Silva Tedre (Finland) and Sandra Torres (Sweden). For further details, see the ESF Scientific Network's website (<http://www.shef.ac.uk/sisa/esf>) and Warnes *et al.* (2004), in this issue.

- 4 The bibliography and directory of research projects on retirement migration (Casado-Díaz, Lundh and Warnes 2002) is available online at http://www.shef.ac.uk/sisa/esf/EW_Bibliography.shtml
- 5 Central, autonomous region and provincial governments have however carried out a great deal of work to develop basic demographic statistics (number, age and sex) of the foreign retired population in Spain. Reports of the latest outputs can be reviewed in Rodríguez, Casado-Díaz and Huber (2004). The paper does not attempt to synthesise the qualitative evidence generated by the same studies and by other primarily ethnographic work, as by O'Reilly (2000), for which the publications stemming from the individual studies should be consulted.
- 6 This exercise has proved impossible to complete for all European Union countries.
- 7 Moreover, new findings are beginning to appear from the European Community Household Panel (Spiess and Schneider 2003); the first wave of the *European Social Survey* has been completed and the data are now available freely on several websites including the UK Data Archive (<http://www.dataarchive.ac.uk>).
- 8 The authors acknowledge the contributions to this paper by Toni Breuer, Klaus Friedrich, Andreas Huber, Russell King, Vicente Rodríguez and Allan Williams.
- 9 The *Retired European Immigrants in Andalusia* project (REIA) was commissioned to study retired Europeans living on the Costa del Sol, their reasons for moving, the advantages and disadvantages of their lives in Spain; and the influences on the local economy and society. It was funded by the Ministry of Education of Spain (Grant SEC 95-0120). Quota sampling by age, gender, dwelling, length of stay and nationalities proportionate to the foreign population in the provinces of Málaga and Granada was used, and 300 self-completion questionnaires and 20 in-depth interviews were undertaken.
- 10 All Swiss nationals aged 55 or more years registered as resident in the Province of Alicante were sent the self-completion questionnaire (in German and French) at the end of 2000. It had 43 questions, including several supplementary to the British instrument on housing histories, continuing connections with Switzerland, social contacts in both countries, the respondent's health including scores on the Instrumental and basic Activities of Daily Living scales, and intentions and plans concerning future housing and location of residence. The response rate was 36.1 per cent. Men were slightly over-represented (52.3% as compared to 47.3 per cent in the frame).
- 11 The study of British retirees in the Algarve, Malta, the Costa del Sol and the Algarve was funded by the UK Economic and Social Research Council (Grant R000235688), and the principal investigators were Russell King, Alan Williams and Tony Warnes, and the research associate Guy Patterson. The principal report of the methodology and findings is King, Warnes and Williams (2000). Further information about the projects is also available at: <http://www.shef.ac.uk/sisa/esf/Findings.shtml>
- 12 This exercise does not of course change the fact that there is no necessary equivalence in x years schooling in different countries of Europe (and in different decades): the curricula, teacher–pupil ratios and quality of the education have differed by country and era.

- 13 The other surveys concentrated on permanent residents and excluded short-term (<3–6 month) residents. One problem with such an exclusion criterion is that over a number of years, many of those with property in the retirement areas alternate their use between ‘permanent’ and ‘seasonal’ patterns. The study findings have made clear that sunbelt residence patterns are so dynamic and variegated that all forms should be studied.
- 14 Substantial increases over the last decade were revealed by the 2001 Census of Population: see www.ine.es

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