

# Defining lifestyle migration

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## Abstract

This paper seeks to provide a conceptual framework for studying migration to the Algarve by Northern Europeans. 'Lifestyle migration' is suggested as a generic term for this trend, which is part of a recent but flourishing global social phenomenon. I also point to the glaring gap in the literature as far as empirical studies based in the Algarve are concerned, and make suggestions for a research agenda.

**Keywords:** lifestyle migration; Northern Europeans; Algarve

## Introduction

No-one in the Algarve can have failed to notice that not all of the Northern Europeans encountered in the region are tourists; there are growing numbers of people - particularly from Great Britain but also from countries such as Germany, Holland, Ireland and Sweden, among others - who *live* in the area. What is more, not all of these Northern European residents can be classified as part of the International Retirement Migration (IRM) trend (see, for example King, Warnes & Williams, 2000; Williams, King, Warnes & Patterson, 2000) since many of them are clearly not of retirement age.<sup>1</sup> On the other hand, it is not difficult to see how representations of Northern European tourists and more permanent residents are conflated into a single category. Their behaviour is often very similar: they do not speak the local language (or at least not enough of it to carry out more than a simple service transaction); they stay or live in the same areas, in the same types of accommodation (apartments, 'townhouses' or villas in *aldeamentos* or 'integrated resorts'); they look physically similar, wear the same styles of clothes

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<sup>1</sup> A recent survey of more than 850 northern Europeans living in Portugal, conducted by *The Portugal News* weekly English language newspaper, found that 68.25% of respondents were between 36 and 65 years of age, with less than 25% being over 65.

and go to places (bars, restaurants, sports and fitness clubs) where they meet up with their compatriots.

It is perhaps not surprising therefore that the umbrella term employed by public and private sector organizations as well as by academics in Portugal to describe this phenomenon is *turismo residencial* (residential tourism). This generic term seems to make no distinction among seasonal visitors, second-home owners and more permanent settlers, but it does appear to be restricted to Northern Europeans. The label 'immigrant' is reserved primarily for those of African, Asian, or Brazilian origin (i.e. migrants from the former Portuguese colonies) as well as Eastern European labour migrants, so when 'immigration' is discussed in the Portuguese media or academic circles it never seems to include Northern Europeans.<sup>2</sup> This difference in referential strategy does appear to create a difference in the way these migrant groups are viewed by Portuguese society: *immigrants* certainly have a more problematic status than *resident tourists*, but on the other hand, *resident tourists* have the somewhat ambivalent status of being considered as much tourist as resident, even if Portugal is now their principal (or indeed *only*) home. These more permanent settlers certainly do not see themselves as tourists, however; my own PhD research amongst the British who live in the Algarve has found that the 'tourist' identity label is strongly rejected.

In fact, there is clearly a kind of continuum from short tourist stays at one extreme to permanent settlement in the Algarve at the other. Although many of these Northern Europeans would fall somewhere in between, at some place along the continuum where they are neither 'tourist' nor 'settler' (for example those who are seasonal, return or peripatetic visitors<sup>3</sup> to the Algarve), it has to be recognised that there are many whose only current 'home' (in the sense of place of residence) is the Algarve. I want to suggest therefore that it makes no sense to conceptualise this latter social group as 'resident tourists'.

In short, it cannot be denied that growing numbers of Northern Europeans are *migrating* to Portugal (i.e. they are orienting towards making a *home* in the

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<sup>2</sup> O'Reilly (2003:309) notes the same discursive phenomenon in relation to migration in Spain.

<sup>3</sup> Terms used by the sociologist Karen O'Reilly in her extensive fieldwork on British migration to southern Spain (O'Reilly, 2000, 2002, 2003, 2004).

Algarve rather than using the region as a holiday destination). I would therefore propose that this phenomenon is, for the purposes of academic study, treated as a particular form of contemporary migration. Recent literature on contemporary mobilities often points to the fuzzy boundaries and increasing interplay between tourism and migration (e.g. Bell & Ward, 2000; O'Reilly, 2003; Urry, 2000; Williams & Hall, 2000). Whilst there are clearly many different forms of migration involving heterogeneous groups of people, the phenomenon as a whole is generally distinguished from tourism in terms of time and behaviour. The temporal distinction claims that migration leads to a long, more or less permanent move to a new destination, while the behaviour in the destination place is generally seen as being characterised by residence and settlement (see, for example, Scott & Marshall, 2009: 470).

It is true that both of these distinguishing criteria are problematic. For instance, how long is a 'more or less permanent' stay? There is no apparent agreement on this. Warnes notes that for demographers, 'permanent' changes of residence are commonly taken to be those of more than six months (Warnes, 1991), whilst Jordan and Duvell claim that migration "involves stays of over a year" (2003: 5). This stipulation of time has presumably been made in view of the commonly used World Tourism Organization definition of tourism as involving stays away from one's usual place of residence of *not* more than a year. However, as the distinction between tourism and migration is becoming increasingly blurred, attempts to make a temporal distinction between the two are not particularly helpful. Furthermore, the concept of 'settlement' is also vague. It might be that migrants spend many years in a place without making any attempt to 'settle'. For this reason, many sociologists and geographers prefer to talk of taking up 'residence' in a new place, which seems to be less emotionally charged. Even so, there are certainly people nowadays who see themselves as having more than one place of residence. In this case, they might be better described as *transmigrants*, characterised by their 'dual' lives that are lived out (physically and symbolically) across borders and whose networks and activities cut across national boundaries (Glick Schiller, Basch & Szanton Blanc, 1992).

Notwithstanding the inevitable pitfalls in trying to define the concept of migration, I want to argue that there is a strong case for describing the majority of the Northern Europeans who choose to make a home in the Algarve as *lifestyle migrants*. This type of migration is clearly not motivated by economic hardship or the search for work or some form of financial security. Lifestyle migrants are not post-industrial migrants seeking employment in a more de-regulated and flexible labour market, nor are they part of the transnational flows of highly mobile corporate and intellectual elites (for if work is involved, it is rather a means to an end). The most useful definition I have found to date is that they are «relatively affluent individuals moving (...) to places which, for various reasons, signify for the migrants something loosely defined as quality of life» (Benson & O'Reilly, 2009: 621). They are people who have made a conscious choice not only about *how* to live but also about *where* to live (Hoey, 2005). Whilst the lifestyle orientations and motivations of these migrants may differ, perhaps the one unifying factor of this group is their belief that a *change of residential place* will lead not simply to better opportunities in life, but rather to something which might be described as a better *lifestyle* and/or a more fulfilling *way of life*. The direction of movement, which can be simply described as being predominantly north-south, runs counter to what have been identified as the typical migration flows around the world (see, for example, Castles & Miller, 2003; Papastergiadis, 2000). It is, of course, in parallel with the typical sun-seeking tourism routes; the most sought after destinations are those already associated with and developed for tourism.

Throughout the small, but growing body of empirical work on migration from the north to the south of Europe over the last decade, lifestyle is consistently given by migrants as a major reason for undertaking the move abroad (O'Reilly, 2007a). The authors of a recent Institute for Public Policy Research (IPPR) report on emigration from Britain (Sriskandarajah & Drew, 2006) state that one of the most «striking findings» of their research is the escalation of emigration from Britain to European destinations in recent decades, a trend which they attribute to «the growth in importance of *lifestyle* as the

predominant or even the only factor that determines emigrant behaviour» (*ibid.*: 40, my emphasis). In an exploratory survey aiming at profiling lifestyle migrants in the Algarve that I carried out in 2007, lifestyle was the second most cited motivation for moving to the region (after 'climate'). This corresponds exactly to the data gathered by the Portugal News 2009 Survey.<sup>4</sup>

It has also been shown that certain factors are consistently associated with what Benson & O'Reilly (2009: 610) call «the search for the good life as a comparative project». This comparative project entails a «re-negotiation of the work/life balance, quality of life and freedom from prior constraints» (*ibid.*) and the (imagined) way of life in a particular place must be constantly compared with the way of life in other places. The better quality of life sought out by lifestyle migrants is most usually associated with both material advantages, for instance a lower cost of living and cheaper property prices in the destination places, as well as the more intangible benefits which are perceived as stemming from living in a place with a more amenable climate (somewhere with plenty of sunshine and year-round warmer temperatures is generally a prerequisite), a slower pace of life, a better, healthier diet, a more sociable culture and more leisure opportunities, (O'Reilly, 2007c; Sriskandarajah & Drew, 2006). In the case of young families, the main motivation is often stated to be a better life for the children in terms of education opportunities, a safer environment and a greater cultural respect for children afforded by the destination place (O'Reilly, 2007a). All of these affordances of place in the chosen destination are constantly compared against what are seen as the negative factors of the country of origin.

### **Explaining lifestyle migration**

The processes of globalization and time-space compression (Harvey, 1989) have led to an increased sense that the world is a 'smaller' place, or that all places in the world are accessible to many of its citizens, creating a 'compulsion

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<sup>4</sup> See note (1) above.

to mobility' (Urry, 1999/ 2003). The rising levels of mobilities throughout the world, including the phenomenal development and evolution of tourism, have simultaneously contributed to this sense and emerge from it.

Other *macro-level* factors that have enabled the trend of international lifestyle migration to flourish are those typically associated with globalization, such as the spread of mass information and communications technologies; expanding networks of faster and cheaper forms of transport; the flexibility of the labour market; the rise in living standards in the western world, increased amounts of and commitment to leisure time as well as increased opportunities for flexible forms of working lives and early retirement. The phenomenon has also been greatly aided by the European political situation, with the opening up of intra-European borders (within the EU) and the relaxed regulations among EU member-states regarding employment and the transfer of personal finances, and of course by the development of mass tourism and related infrastructures.

Social changes over the late twentieth-century have also been far-reaching in other, less tangible ways. In the post-traditionalist era, social roles are no longer so inflexibly dealt out by society. Social differentiation has become less dependent on a fixed social hierarchy and individuals are correspondingly less constrained by social structures and categories (Beck, 1992; Beck & Beck-Gernsheim, 2002). One of the decisive features of what Beck and Beck-Gernsheim call the 'second modernity' of Western society is the process of 'individualization'. According to these authors, this is not a social condition that is arrived at by the free will of individuals, but one that is *required* by the complex, non-linear systems of the present era. Thus, active contributions by individuals «to create, to stage manage, not only one's own biography but the bonds and networks surrounding it» (Beck & Beck-Gernsheim, 2002: 4) are not merely permitted, but actively demanded.

In a similar fashion, Giddens argues that as self-identity is no longer so constrained by tradition and culture and we are therefore no longer bound to fixed, socially-determined identity positions, modern subjects face both the burden and the liberation of constructing their own identities, for «we have no

choice but to choose how to be and how to act» (Giddens, 1994: 75). Self-identity is thus constructed through what Giddens (1991) calls ‘the reflexive project of the self’. For Giddens, the concept of lifestyle in contemporary society is crucial since it is a fundamental part of the reflexive project of the self. A lifestyle, which Giddens (1991: 81) defines as «a more or less integrated set of practices which an individual embraces, not only because such practices fulfil utilitarian needs, but because they give material form to a particular narrative of self-identity» might thus be seen as a kind of template for the narrative of the self.

The quest for the right kind of lifestyle can be argued, then, to be an integral part of the late-modern social world. In short, this argument implies that since it is now up to individuals to construct their own sense of identity, choosing and engaging in an appropriate kind of lifestyle that makes a statement about who one is or wants to be is a central part of contemporary life (Sweetman, 2003: 529). Choosing a place to live which is seen to fit with other lifestyle practices is of crucial importance.

At the *micro-level* of migration, then, we need to examine how individual agency interacts with the macro-level structures and contexts outlined above. It is at the micro-level that migrants themselves construct their own versions of their migratory processes and migrant identities. The stories they tell about their experiences, for example, are informed by their individual values and beliefs, needs, expectations, motivations and identities, as well as socially shared representations of local places, which might in turn be informed by such processes as place-branding. These socio-cognitive representations are the basis of collective forms of identities and ideologies, and it is crucial to consider them at this micro-level along with individual agency.

Yet although these two levels of the migration process (macro- and micro-levels) certainly interact with one another, there is also an important interface - what Faist (2000: 31) has termed the «crucial meso-level» of migration. To understand how the *meso-level* works involves exploring how networks and other links evolve and develop to facilitate (or, in some cases, to exploit) the process of

migration. The typical social networks involved are, for example, those of friends and family already in the destination area, and increasingly the cyber-networks created by blogs, forums and other user-generated sites on the internet. It also includes what Castles and Miller (2003: 28) refer to as the «booming migration industry» – the intermediaries who make some form of business out of the migration process. I would also add to this meso-level the discursive practices surrounding migration in the places of departure and arrival, including the ways in which discourses on particular forms of migration are (re)produced, distributed and received (e.g. through the mass media).

It is important to note that the three ‘levels’ in this model of migration are not to be considered as separable and separate kinds of reality in any attempt to explain migratory processes. They can only be useful analytical categories when taken as a complex, interwoven whole which will differ to some degree from case to case, but nevertheless provide a pertinent starting point for exploring particular types of migration.

### **Researching lifestyle migration**

As it is a recent phenomenon, lifestyle migration has not been the object of much academic study to date. In fact, the migration of relatively affluent people has been largely ignored in the migration studies literature (Benson & O'Reilly, 2009: 609). However, some researchers, notably sociologists, social anthropologists and geographers, have begun to explore the trend in different locations and among different social groups around the world,<sup>5</sup> producing a growing body of work.

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<sup>5</sup> See, for example, Sato (2001) for an ethnography of Japanese lifestyle migrants in Australia; Hoey (2005) for an account of lifestyle migration among Americans with successful corporate careers who relocate to rural areas in search of ‘the good life’; Fechter (2007) for Euro-American residents in Indonesia; and McWatters’ (2009) study of ‘residential tourism’ in Panama which explores the experiences of both members of North American retirement communities and their ‘hosts’, the local population.



Within Europe, the first empirical studies focused on International Retirement Migration (IRM), that is, flows of Northern European retirees moving to southern European destinations, either full-time or for part of the year. This social group continues to be the most widely researched within the field (e.g. Ackers & Dwyer, 2004; Casado-Diaz, Kaiser & Warnes, 2004; Gustafson, 2001, 2008; Huber & O'Reilly, 2004; Janoschka, 2008; King et al., 2000; Rodriguez, Casado-Diaz & Huber, 2005; Rodriguez, Fernandez-Mayoralas & Rojo, 1998; Warnes, 1991; Williams et al., 2000; Williams & Patterson, 1998). There are relatively few studies that have explored the north-south international lifestyle migration patterns, behaviour and experiences of other social groups, the exceptions being so-called entrepreneurial migrants (e.g. Lardiés, 1999; Stone & Stubbs, 2007), the British in France (e.g. Benson, forthcoming; Bruillon, 2007; Geoffroy, 2005, 2007; Puzzo, 2007; Smallwood, 2007), and the British in the south of Spain (notably O'Reilly, 2000, 2002, 2003, 2004, 2007a, 2007b).

### **The potential for research into lifestyle migration in the Algarve**

What stands out is the lack of published research on Northern European migration into Portugal, despite the undeniable growth in numbers.<sup>6</sup> For example, one of the largest national groups is the British. The number of British legally registered residents in Portugal increased from around 2,500 in 1980 to almost 20,000 in 2005,<sup>7</sup> with the Algarve, as the most sought area of residence, accounting for somewhere between one half and two-thirds of these numbers. However, it should be noted that these figures only tell part of the story. Many British migrants choose not to register as resident in Portugal, for one reason or another, even in cases where Portugal is their principal, or perhaps only, home. The British Embassy in Lisbon estimates that there are currently 60,000 to

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<sup>6</sup> Exceptions being the inclusion of the Algarve in a very small number of comparative IRM studies (e.g. Casado-Diaz et al., 2004; King et al., 2000; Williams et al., 2000) and the recent doctoral work of Claudia Ribeiro Almeida on residential tourism in the Algarve (Almeida, 2009; Almeida, Ferreira, & Costa, 2009).

<sup>7</sup> Source: Instituto Nacional de Estatística (INE) [www.ine.pt](http://www.ine.pt).

70,000 British nationals living part-time or permanently in Portugal, with around 40,000 of these in the Algarve.<sup>8</sup> Since the official total population of the Algarve region is around 400,000, the number of British nationals appears to be equivalent to around 10% of the total regional population. If we are to add to this the migrants from Germany, Holland, Belgium, Ireland, Sweden, Denmark and Finland, the numbers become even more significant.<sup>9</sup> It seems clear, then, that this is a social trend which is increasingly difficult to ignore. As both a tourism-related form of contemporary mobility *and* as a highly distinctive migration process in its own right, lifestyle migration is undoubtedly a worthy object of study.

There are many possibilities for research in this area. Lifestyle migration in all its guises (temporary, seasonal, full-time, etc) is clearly having impacts on the Algarve region, in socio-cultural, economic, political and environmental terms, and there can be no doubt that the empirical study of these impacts from the point of view of the region is of fundamental importance. On the other hand, to better understand why the Algarve is such a popular destination for lifestyle migration, there is also a need to investigate it from the perspective of the migrants themselves. As migration should be seen as a process, rather than a one-off move (Castles & Miller, 2003; Papastergiadis, 2000), the process needs exploring at a variety of levels. Besides looking at what motivates people to make the move, we also need to look at their continuing experiences of living in the Algarve and what makes them decide to stay or to move back to their country of origin, or, indeed a different destination (for example, what are the effects of the current economic situation?). Also of great interest is the evolving 'meso-level' of social and cultural networks (including clubs, associations), information networks, support services and intermediaries, material conditions (available housing stock, infrastructures, accessibility, etc), education opportunities for the children of migrants, links with countries of origin (availability of own-language media,

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<sup>8</sup> <http://ukinportugal.fco.gov.uk/en>, accessed 21 April 2009.

<sup>9</sup> In 2004, the combined total of legally resident citizens from these countries in the Algarve was around 20,000 (INE). The 'true' figure is generally considered to be 4 to 5 times more.

food products, ICT use, etc), leisure facilities and entertainment venues, and so on.

As a final suggestion, I think it is of crucial importance to look at the integration and interaction practices of these ‘new residents’. How do they interact with other social groups in the Algarve? What kind of social practices are they involved in (or not) that are aimed at some form of integration into local society? Are they politically (in the broad sense of the term) active? How are language issues managed? What are the spatial practices and organisation of these migrants? How do they relate to the local place they have chosen as a home-place? And what about their children, who we might call ‘circumstantial’ lifestyle migrants – how do they feel about being brought up in Portugal? To what extent do they integrate into local life? Do they stay/intend to stay here when they have grown up? What are the typical discursive representations of lifestyle migration in the media (national, regional, local press)?

The list of potential research questions is, indeed, not only long but also wide-reaching. The key to grasping the complex motivations, impacts, dimensions, experiences and consequences of lifestyle migration is, without a doubt, an interdisciplinary and multi-method approach. At the same time, such research would make a much needed contribution to the theoretical and conceptual development of the mobilities and migration research paradigm.

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