

Migrant Selectivity in International Retirement Migration

A new type of migration was born with rising levels of globalization, ease of mobility, and individualization. International retirement migration (IRM) includes people who emigrate from a high-income country after they retire. This move is often fueled by the warm climate, culture, and the lower cost of living in the destination country. IRM differs from other types of migration that are often triggered by employment opportunities by showing a different kind of migrant profile than the young and work driven. Though there has been research studying IRM, there is a gap in literature for a representative sample to investigate the characteristics of international retirement migrants and to compare the emigrants from those who did not migrate. In this endeavor, we ask the following research question; what are the demographic, socio-economic, and personality characteristics that facilitate migration after retirement? This is crucial to get an accurate picture of international retirement migrants to both expand theories on migrant selectivity in flows other than labor migration and to further understand whether these characteristics might also play a role how the migrants fare in the destination country.

What we know so far about the characteristics of retirement migrants come from the sample descriptives of few quantitative IRM research. The profile that emerges from the literature indicates that most of the retirement migrants are in their third age (65-80 years) (Casado-Díaz, 2006; King et al., 1998), in the higher spectrum of socioeconomic status (SES) with high education, high income, have highly skilled jobs (Amin & Ingman, 2010; Williams & Patterson, 1998). While some studies show that there are slightly more men than women (King et al., 1998; Rojas et al., 2014), they also show that retirement migrants are mostly married or cohabiting with a partner (Huber & O'Reilly, 2004). However, this picture is far from complete as IRM has become more accessible to a varied group of people over the years, especially to those who are financially not as well off as shown in several qualitative research (O'Reilly, 2007; Repetti et al., 2018). Overall, it seems that the retirement migrant population is diverse, with people having different characteristics, needs, and motivations. However, the lack of research with representative sample as well as a lack of comparison group of non-migrants make it difficult to generalize findings of existing research.

According to transition theories, income growth, improved education, and access to information as well as improved communication and transport links increase people's capabilities to migrate

over increasingly large distances (Castles, Haas, Miller, 2014, p. 47). But not everyone makes this decision to move, especially after establishing their life in a place for more than 50 years. In theory of migration, Everett Lee (1966, p. 56) hypothesizes about the selectivity of migrants and argues that “migrants are not a random sample of the population at origin”. For example, in labor migration, emigrants from the poorest areas often come from relatively well-off families, and they are younger, higher educated, and less likely to be married compared to non-migrants (Castles, Haas, Miller, 2014). For retirement migrants we expect to corroborate the previous research on IRM that show that retirement migrants are relatively younger and married, and we add several new variables that would investigate the ties in the country of origin into the question. Therefore, we hypothesize that those who are relatively younger are more likely to move than others as they are likely to be healthier and can live independently. We do not expect relationship between marital status and migration decision as most of the individuals are married at that age. We expect a negative linear relationship between having children and extended family and likelihood of moving as it indicates less ties to the country of origin.

The non-random nature of migrant selectivity can be positive or negative (Lee, 1966). Positively selected migrants are those who are high quality and negative selection the opposite. In this definition, positive or negative selection is still a vague concept due to the indefinite nature of what high and low quality is. According to Borjas' (1987), another important name in migrant selectivity research, positive selection is associated with migrants who are likely to do well in the labor market and negative selection is those who are likely to do poorly in the labor market. But how can we apply this logic to migration flows that are not labor related? Are those higher in socioeconomic status already positive and low-SES negative? This might not be as clear cut when it comes to IRM. Firstly, for retirement migrants, economic and social aspects of status might indicate different likelihood of migration. For the social aspect of status, higher education levels might indicate more chances to be affiliated with the destination country and the idea of moving. Thus, we hypothesize that there will be a positive linear effect of social aspect of status on likelihood of moving as. For economic aspect of status, the relationship is more complex. On the one hand, moving to a country that has a lower cost of living could help live a more luxurious life for the retirement migrants who with a mid-economic status. On the other hand, individuals who have higher-economic status are likely to own houses in both countries and act more transnational rather than move permanently to a new country, and those with lower economic status are likely to have

less opportunities to move to a new country, in accordance with previous research. Thus, we hypothesize that there will be a non-linear effect in economic aspect of status, meaning that those who are in mid-economic status are more likely to move than those who are low or high.

Selection can be associated with both observable, such as wealth and education, and unobservable individual characteristics (Catteneo, 2007), such as personality traits. For example, while studying the Big-5 personality traits, researchers have found higher levels of extraversion and openness to experience being associated with a higher likelihood of moving between states (Jokela, 2009; Crown, Gheasi, Faggian, 2020). As personality traits have never been studied in international retirement migrants, it would be interesting to see whether this migrant personality can be seen in retirement migrants. We hypothesize, in accordance with research on migrant personality, adventurousness as a sub dimension of openness to experience will be positively associated with a higher likelihood of moving. However, we do expect a non-linear relationship when it comes to extraversion. Considering that those who are lower on extraversion that require less contact from outside might have less considerations of all the ties they have with their country of origin and would be likely to move, and those who are higher on extraversion would be more likely to move in accordance with previous research on labor migrants.

Data & Methods

Data and Sample

Two surveys were employed in analyzing migrant selectivity in IRM. Survey of International Retirement Migration (SIRM) was employed to represent the retirement migrants as it has data on individuals who were born in the Netherlands, who are between ages 66-90, who worked at least 35 years in the Netherlands and are receiving their pension in another country (Henkens, Kalmijn, Van Dalen, Savas, Spaan, 2021). It covers 40 countries as a country of destination, with the Netherlands as the country of origin for every individual. SIRM is a web and paper based self-administered questionnaire. This survey is in the process of being collected with a 40 per cent response rate up to now (N = ~ 5100). The second survey is the eighth wave of Longitudinal Internet studies for the Social Sciences (LISS), a web-based questionnaire collected in 2021 from those between ages 66-90, born and still reside in the Netherlands (N = 1,349). Both surveys' original language was Dutch. The LISS comparison group was merged to the migrant group since the measures were the same for the variables investigated.

Analysis Plan

A discrete-time event history model will be used to answer our research question. This analysis is chosen for three main reasons; (1) it explains why some individuals are more likely to experience an event than others, (2) it considers when people move, and (3) it accounts for possible censoring in the non-migrant group. In this model, the event, or the dependent variable in question is migrating after retirement. This dependent variable is a binary indicator, $d_{it} = 1$ if a person moved after age of 55, $d_{it} = 0$ if otherwise. The independent variables are demographic characteristics, socioeconomic characteristics, and personality characteristics. *Demographic characteristics* include age, gender (M/F/other), partnership (none/with a partner), if they have children (yes/no), and whether they have extended family, such as grandchildren and parents (yes/no). The questions about children and extended family were asked to indicate whether they had any familial relations or anyone to take care of in the country of origin. *Socio-economic characteristics* include education (seven levels of Dutch education) for the cultural aspect of status, occupation (eight occupational groups), and housing situation (nine characteristics of housing) before their emigration for the economic aspect of status. *Personality characteristics* include extraversion and adventurousness in a scale of 1 (Absolutely correct) to 5 (Completely wrong). Adventurousness was chosen as it is a sub dimension of the openness to experience scale that includes questions relevant to opinions on having new experiences, such as “prefer variety to routine”.

Expected findings

The analysis will be conducted once the data collection for SIRM is finalized in December 2021. In accordance with the migrant selectivity hypothesis tested before in studies of labor or internal migration, we expect to find differences between the migrant and the non-migrant in demographic, socio-economic, and personality trait categories. By identifying the different characteristics of migrants to non-migrants, we aim to see whether retirement migrants are positively or negatively selected. Studying the demographic, socio-economic, personality triggers of migration is important to widen our understanding of migrant selectivity in different types of migration flows.

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