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Swimming Against the Current: The Migration of Elders to the South

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Abstract

Every day there are more elderly people who decide to live in a different country from their country of birth. This phenomenon of older migrants reveals a distinct counter-current from the economically more-developed Northern countries to the less-developed and developing South, therefore requiring a new and different theoretical analysis that does not fit into the pre-existing frameworks of labour migration and development. For some researchers, these migrants are considered residential tourists, who have no home or place of belonging neither in the developing and less-developed areas nor within existing theoretical frameworks. In order to conceptualize trends and identify the patterns of this phenomenon, this investigation will examine the migration of retirees and/or pensioners from the northern hemisphere who have settled in Vilcabamba (Southern Ecuador) through a theoretically informed engagement with key informants and a series of qualitative semi-structured interviews. It is hoped that this project will enable further research in this largely uncharted line of research on the flow of migration that 'swims against the current'.

Keywords: Pensioner migration; residential migration; ageing migration; privileged migration; Ecuador.

Introduction

Migration, by definition, implies the ability of human beings to adapt when moving from one place to another; this displacement entails the experience of new relationships, sensations, languages and changes in every sense. In the era of globalization, people are constantly moving, migrating, immigrating and travelling more so than ever before in the history of humankind. Current societies can be described as 'liquid' (Bauman, 2006) or 'mobile' (Urry, 2007; Hiernaux, 2012). Movements of populations have brought about changes in society at a local and global level, changes that are rooted in contemporary globalized capitalism and subsequent transformations of power relations, societal structures, patterns of consumption, food and culture, and sustained development in the technological, communications, and transportation sectors.

North-South migration (especially of pensioners) has been a marginal trend and remains largely unexplored in the Latin-American countries at any rate. In other latitudes, such as in Spain and North Africa, there is some research regarding this phenomenon, in which they have focused on the retirees from Northern Europe (especially from the United Kingdom and France) who seek a better quality of life in the Mediterranean weather (Mantecón, 2008, 2015, O'Reilly & Benson, 2016). Overall, this type of relatively privileged migration, coming mostly from the global North to the South, is little known at the moment, and therefore, has received little academic attention.

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However, in recent years there has been an increased interest in deepening our understanding of the impact of retired migrants; economically, culturally, and socially in the places that they settle. This is a relatively new phenomenon that is developing ahead of the theoretical concepts and academic literature. From the pioneering work developed by Russell King, for 30 years he has investigated the ageing migration nexus (King, 2016) or his works where he theorizes and conceptualizes ageing, gender, tourism and migration (King, 2014). The works on north-south migration have also been extensive but mostly focused on the migration of British retirees to the Mediterranean (King, 2000, Huete & Mantecon, 2010) or the works of (Huete & Mantecon, 2016, Korpela, 2014, Benson, 2013, Oliver, 2012) where they criticize the concepts of “residential tourism, and deepening empirical studies of retirees in the Mediterranean.

Theorizing pensioner migration

Authors, such as Cohen & Sirkeci, 2011, argue that the decision to migrate is not only economic but also cultural; the social practice, meaning and symbolic logic of migrating go beyond simple economic logic. The theoretical scaffolding developed by Bourdieu is a useful tool to understand those dispositions and schemes of action, and to discover how retirees consider their social position when deciding to migrate. Bourdieu (1979) considers a key factor to be the habitus, a concept strongly linked to that of social capital. However, the habitus is also conceived as an essential dimension of the social class of the subjects; it is the “incorporated class”. The incorporated class, created by the social class, is the body, unlike the objectified class which is the position of the subject in social relations. This habitus of class, having been generated by certain social conditions and manifested in a bodily way unconsciously, is key in the social reproduction and thus reproduces through its continuous and constant updating. That is to say that the decision to migrate or seek a different life after working is strongly influenced by one’s whole social context.

In her book *The Transnational Villagers* (2010) Peggy Levitt coined the term ‘social remittances’, emphasizing that migrants send more back to their country of origin than just money. Social remittances can circulate in different senses and levels, from phone calls, Skype calls, and blogs, to political, religious, and cultural ideas, such as ways of dressing and talking, etc. In this way, the decision to migrate and subsequently send remittances cannot be framed only by the economic sphere; there are other factors that give meaning to and reinforce migration. Retirement migration is not exempt from being exposed to these values, ideas and behaviours. The arrival of the Internet, for example, has changed the way older people consider retirement and has motivated them to consider global destinations.

In the context of economic globalization, migration has become more important over the past thirty years, not only from the southern regions to the north, but also between southern regions, and in recent years, from northern regions to the south within certain migratory flows, such as pensioners seeking a higher level of quality of life.

Radical changes in means of transport and information technologies, the ageing population in highly-developed countries, and the negative impacts of economic policies of structural adjustment following the 2008 crisis in the North, have combined to provoke massive departures from the North. This, alongside the interdependence of North-South labour markets and other factors, leads Stephen Castles and his colleagues to characterize the current situation as ‘the era of migration’ (Castles & De Haas, 2014).



The concept of the “weary world traveler” coined by Cohen & Sirkeci (2011: 4-5) nicely fits this category of human mobility (pensioner migration), whereas conceptual frameworks and theories developed in order to understand the labour migrant, refugee, and asylum seeker, are not adequate to analyze and understand the mobility of retirees. It is thus imperative to develop new concepts or approaches that might enable us to understand this specific type of mobility better.

There is a pressing need to concretely conceptualize retirement migration focusing on the complicated lines that separate it from other types of migration. These subjects are not considered tourists, for they stay for months or years; therefore, some would categorize them as irregular migrants. This ambiguity and discrepancy mean that this type of migration is not well defined. Theorists have taken varying standpoints; it has been defined as privileged migration (Croucher, 2012: 2), residential migration (Huete & Mantecón, 2011), ‘life-style’ migration (O’Reilly & Benson, 2009, 2016; Korpela, 2009, 2014; Torkington, 2012), ‘amenities migration’ (Bustamante, 2012; Pera, 2008), or as ‘ageing migration’ and ‘ageing in place’ (Johansson et al., 2012), amongst others. In addition, some scholars approach the subject with the goal of studying the link between where the elderly reside and the changes they produce in their respective communities (Prisuta et al., 2006).

Much of the literature fails to explain why older adults decide to leave their country of origin. Many conceptualizations take a post-structuralist approach, omitting the historical, social and economic contexts of the places of origin. The assumption is that the virtues of the destination sites—beaches, low housing costs, good weather all year round, tranquillity, etc.—are the simple and sole answers. As Hayes (2013) comments, it is necessary to develop a perspective that goes beyond a focus on ‘rational choice’ and that integrates structure and agency in the analysis and where there is a close and meticulous analysis of social processes.

The migration of pensioners from North to South

Capitalism has in its nature to increase its profits insatiably, accumulation is its defining matrix, and to achieve this, the system can opt for different ways of investing that surplus, its final phase being financialization (Arrighi, 2014). Capitalism is, therefore, able to integrate agents that provide revenue by increasing accumulation and expel those they do not require, thus creating a split between the socially integrated and expelled. Labour migrants, in whose countries of origin, may not be considered a productive economic agent may, therefore, look for opportunities in other places. The global financial crisis initiated in 2007, was strongly linked to the financialization of personal income and savings, more explicitly through mortgage loans which were granted to workers from the economic north who decided to invest in the purchase of financial packages (including pensioners) such as the ‘sub-prime mortgages’. These mortgage loans proved to be toxic as the vast majority of the pensioners’ interests, and the quality of life in retirement was negatively affected to an extreme degree. As a result, many of them decided to clear their debts and emigrate to a country with a lower cost of living and that would allow them to extend the value of their pensions. Paradoxically, those expelled from the capitalist accumulation machine in the economic north were integrated into capitalism in the economic south.

Data indicates that between 2005 and 2010 in the USA, there were more than 13.3 million mortgage foreclosure notices, approximately 9.3 million of which ended in eviction. Sassen estimates that around 35 million people were affected with an average of 10,000 U.S. households a day lost their homes in 2008 once the crisis hit (Sassen, 2015). This intense “capital extraction” was

accompanied by the collapse of personal savings in the US. The sharp drop in personal savings was a remarkable event for a mature capitalist country and indicates that there is an underlying weakness in terms of real accumulation, as well as a change in the relationship between real wages and consumption (Lapavistas, 2014).

This goes to show how objectives, values, stories and mythologies are capitalized and commercialized; that is the nub of the concept of “imaginary social meanings” (Castoriadis, 2013). The French philosopher Lipovetsky, (2016) argues that global capitalism focuses its accumulation on exploiting people’s well-being- obtaining benefits from enjoyment, fun, leisure and having unique experiences- and that it justifies this through the discourse of maximizing ‘quality of life’ and individual well-being.

Capitalism has found a niche market in retirement migration, rooted in a discourse based on the individualization of the subject and a rampant consumerist ideology. These are no longer the old discourses of liberalism that concocted an argument based on freedom and democracy; nowadays, only the individual remains, who is bombarded with images, stimuli, stories, paradisiacal photographic panoramas, and a factory of utopias commercialized by the media.

This new capitalism not only produces goods and services also offers experiences and symbolic productions. Thus, American pensioners in Ecuador recreate a social imaginary full of significant mythologies, in which the choice of destination is determined by the quality and well-being of life that can be allowed and by the information received (marketing), created by blogs, specialized websites which recommend the best places for retirement, friends, stories, etc. Several of the interviewees reported that their decision was determined by trips they made in the past to that place, while others moved there because of stories of other colleagues who travelled or settled there before. Many others mentioned reviewing websites and after living in different South American countries arriving in Vilcabamba. In this way, the images and the stories transmit and build an ideology of retirement in peace and with a quality of life that they cannot obtain with their pension in their countries of origin. On the other hand, other pensioners have devoted themselves to the ostentatious desire to experience authentic intercultural encounters, or to know places as far away as possible from their place of origin, tourism ‘off the beaten track’ (O’Reilly, 2006).

Migration for comfort or “amenities migration”, despite being a relatively old phenomenon, did not seem to impact academic debates on the topic. It was in the 1950s when Edward Ullman (1954) labelled this elderly migrating population as ‘reverse migration’; having completed their work cycle, Ullman himself decided to migrate to climatologically better places in the western United States, following this trend.

According to Green, migration ‘for convenience’ can be defined as those cases in which the non-commercialized qualities of a location have made it an attractive place to live or work in (Green, 2001). Said amenities in the great majority of cases are associated with particular characteristics such as landscapes, biodiversity, favourable climate, cultural offer, nature, tranquillity, etc. We may judge these characteristics due to their subjective quality, but the use-value of use of these places typically prevails in terms of the decision by individuals to change their place of residence.

In recent years, Ecuador has gained popularity among retired migrants, with Cuenca being the favourite place for foreigners to settle. We have focused our study in the southern town of Vilcabamba as a microcosm of these relatively new phenomena. Our purpose is to deepen our



understanding of North-South “ageing migration”, by focusing on a site that has been little studied, but which in the last ten years has experienced a significant increase in its non- native population.

With the influx of the population of foreign origin in Ecuador, a boom in the interest to know the reality of retired migration increased there. The change of composition of the population in certain localities modifies patterns of consumption and culture, which in turn led to an increase of rental and land prices. The result is the transformation of these localities into small enclaves of retired migrants that have had a considerable impact on the development process. Vilcabamba, located south of the Equator, with a population of no more than 5000 inhabitants and a subtropical-dry climate throughout the year, has served as an attraction hot-spot for retired migrants, mainly but not exclusively from the US.

Our study was conducted through in-depth interviews with retired migrants who had been residing in the town of Vilcabamba for more than a year between 2016-2017. The sampling method was intentional convenience and a snowball technique, where the number of interviews was based on the point of saturation and where the information provided by the migrants began to repeat itself. Sixteen interviews were conducted in total, of which ten subjects were men and six were women.

In terms of the decision to migrate, we can define two common factors: the first being those retired migrants who had previous experience of the area, whether for work or holidays, etc. Several of the interviewees in Vilcabamba reported having travelled in their youth through South America and have had a prior visit before moving to live there. Other interviewees were persuaded or invited by recommendations of friends or acquaintances that were travelling or living in the area. They were predominantly motivated by the stories and experiences of their colleagues. The second most common factor was the engagement in some type of previous research of the site, through the Internet, travel guides and/or magazines. The publication or medium most mentioned by retired expatriates were the websites ‘International Living’ and ‘Retire in Ecuador’, while others commented on the article published in Forbes in 2009, where the cost of living for pensioners in different places was listed, alongside articles of activities that are carried out in the destination, as well as the estimated prices to buy or rent a house, have been factors that motivated them to choose the destination. Finally, the choice of destination was influenced by a comparison between the places they prefer, looking for sites that covered the greatest amount of needs: from good health services, gerontological hospitals, housing cost, personal security, a flexible migration policy, and tax benefits, among others. The increase in the migration of pensioners to the global south has opened a niche market, where opportunities open up to numerous types of businesses to provide the goods and services that this population demands.

The choice of destination and travel planning is made through the means of communication, marketing and information provided; the Internet in this sense has created an imaginary in which an opportunity is offered for the pensioner to rebuild his or her life, to exploit their hobbies (painting, music, yoga courses, permaculture, etc.) to maintain or increase the quality of life, to start a different life and best of all combine it with a decent retirement in a place with certain characteristics. This, to the majority of the retired audience, is to migrate to paradise, a calm place far from the agglomerations and chaos of the North American and / or European metropolis. The Internet has played a fundamental role in attracting new residents to the Vilcabamba area. Although the town of Vilcabamba is small, there are many specialized sites for retired migrants, who work to co-opt potential clients and offer them a number of goods and services; often offered just to foreign pensioners.

Vilcabamba; the Andean Shangri-La?

In novelist James Hilton's *Lost Horizon*, (1960) he recounts the arrival of a group of foreigners to the Tibetan monastery of Shangri-La, a utopian and paradisiacal place in the Himalayas. The Shangri-La is considered the prototype or metaphor for a place where oriental spirituality and longevity can be found. Shangri-La can be used as an analogy in our case since the majority of retired migrants living in the valley of Vilcabamba indicate being in search of a place full of peace and tranquillity, this being coupled with the area's reputation as 'the valley of longevity'.

The healthy lifestyle, as a result of the temperature enabling the possibility of self-production of organic food and clean water from the mountain, are just some of the reasons why many foreigners choose to enjoy their "golden years" in this valley in the south of Ecuador. It was in the 1970s with the research of Dr Leaf and the publication in National Geographic that the valley began its reputation as being of the people of longevity and gained international fame as an attraction for those looking to prolong their life (Leaf, 1973).

At the moment, the number of inhabitants of Vilcabamba oscillates around the 5,000 inhabitants with foreign residents estimated at between 450-500 (10% approximately), a number which is growing every year. The search for better living conditions was a constant response in the interviews. For example, Daniel, a retired (67 years old) American who arrived in Vilcabamba in 2010, stated that his decision to settle was determined by his quality of life in the valley. After working for more than 30 years in Denver, Colorado and with a pension budget of \$ 1,500 per month, he opted to enrol with *internationalliving.com*. Months later, after travelling through South America, he acquired a farm in the valley and now spends his days among pensioned friends. David's acquaintance, Dennis (64 years old, From US), arrived in Vilcabamba in 2011, for the same reasons as Daniel. Both consider themselves fortunate to have a retirement in a place like Vilcabamba, taking advantage of the low costs in food, housing and health services, things that David says he could not afford in his native United States.

It is clear that the low cost of living in Ecuador for a retired migrant is a benefit for them, a place where they can maximize their pensions. In the interviews conducted, the majority of retired migrants perceived themselves as partners in the development of the local economy. Respondents also felt that remittances from the north play a key role within the community of Vilcabamba, resulting in their being a dynamic agent through the creation of jobs, opening of enterprises, increasing demands for hotel services, transportation, or even just the consumption they generate. However, the local population and some government officials do not share this notion; they observe that retired migrants live in an "alternative economy" in an "expatriate bubble". They claim that the retired migrants themselves are the ones that open up focused endeavours to other expats. Such undertakings have raised the prices of basic products (food, juices, clothing, personal hygiene supplies) and are being served by the same migrants, creating in the Vilcabamba community ethnic enclaves, where you can differentiate between commercial areas (restaurants, coffee shops, grocery store etc.) designed for foreign consumers versus the places catering for the locals.

During the interviews, the majority of the retired migrants expressed the words "quality of life" when describing their decision to migrate. Some perceive that the low cost of goods and services in the destination converts to a better quality of life. This mindset leads us to link this migration exclusively to the economic factor and maximizing of one's pension. However, for others, the quality of life and their decision to migrate also involve cultural motivations. Many saw their values



as being immersed in new places where family, neighbourhood and community ties are valued differently from their places of origin.

We can learn a lot about the migration of retirees to southern countries; however, the lack of data in the Ecuadorian case makes the quantitative studies imprecise. However, there is information from the role of public policies in the countries of origin. These policies play an important role in promoting this migration, where the lack of social security sponsored by the state is seen as a key factor, particularly since the 2007-09 great financial crises through which many Americans saw their savings reduced for retirement and therefore concluded that their quality of life would be affected. The interviews conducted and the literature reviewed also stressed the lower costs of goods, services, and taxes in comparison to the places of origin as determining factors in the decision to migrate.

Within the spaces for retired migrants, there is a clear intergenerational and economic class differentiation. It was noted that the first wave of retired migrants (those who arrived in the 1980s and 1990s) usually interacted with the resident community, they can be seen walking around the garden, consuming in the centre's businesses for locals or in the central market. Many of them reported being informed and concerned about the current economic and political situation of Ecuador. While the next wave of retired migrants, those who arrived during and after the crash of 2007, tend to live on the outskirts of Vilcabamba, in the former Hacienda of San Joaquín, where there are approximately 100 families living on the land of an ex-hacienda acquired by a foreigner which he, in turn, subdivided it into more than 120 lots for sale to build residential houses. This group of retired migrants seem to live in the Shangri-La type lifestyle, at a distance from others and unconcerned about their surroundings, alien to the society of Vilcabamba and mostly relating only to neighbours of the former Hacienda San Joaquín or other retired migrants.

With little integration with the host society and minimal interaction with the local population, those who live in the former Hacienda of San Joaquín create a clear segmentation of social and economic status. There is a perceived air of discomfort among some locals interviewed, and some hinted at the fact, that if the migrants come, they should at least contribute something to the society that welcomes them. Some noted that many of the migrants are highly professional retirees that could offer many benefits to the community, including teaching courses, training, workshops, or English classes and in return, they would receive some money, integrate into society, or even learn Spanish. However, some migrants prefer to live their retirement only among fellow 'expats' with no interest in integrating themselves into the wider society.

Another possible problem commented on by the interviewed locals is the fact that some retired migrants sell products created or cultivated by themselves and only among themselves, in their homes or through Internet pages. Such transactions outside the law, enabling them to avoid taxes, which is seen as unfair competition for locals that do pay employees, taxes, basic services, etc. In this way, the tensions between public officials, natives and retired migrants have seemed to intensify over time. Even some of the pensioners themselves, admitted to being part of the problem, as they arrive and modify the community, change consumption patterns. Adam (66 years old, British), fed up with a chaotic life as a psychotherapist in London, decided to move to Bolivia, after passing through Ecuador. However, in the end, he decided to settle in Vilcabamba for 7 years. During the interview, he admitted that it must not be easy for Ecuadorians to see so many "gringos", however, in his defence; he argued that in the beginning, it was not easy for the English to see so much Ecuadorian in England. Burnaby (72 years old, Canadian) settled in the area in 1984, he is

categorized as a guest, who must respect the rules and do the minimum so that the locals do not feel uncomfortable; nevertheless, he claimed witness to the increased discomfort in the growing presence of foreigners provoked within the autochthonous community.

Finally, we note that some local government officials are beginning to realize that the increase of retired migrants, rather than being perceived as an opportunity for local development, is being perceived as a problem. Many of the retirees do not have legal status in Ecuador; many do not care to integrate or contribute to the quality of life of the locality, and only seek their own welfare. Officials have also noticed that the prices of housing have skyrocketed, creating alternative economies for migrants, since it is only they who can pay for certain products or goods.

The Andes mountains range and its steep and remote sites have served to create a segmented market of housing, providing migrants with greater economic capacity, life in an earthly paradise away from society and all the comforts of the 21st century. Other areas, such as the Hacienda of San Joaquín, are private neighbourhoods, where only the private owners can access the land, as it is separated by a wall and a guard. They live their retirement in a different way from the first wave of retired migrants who arrived at the valley, integrated, cared about the community, regularized their stay and lived in or near the town centre. The other more recent migrants seem to have built walls between the locals and themselves.

Conclusion

The migration of pensioners to Vilcabamba in the 1980s and 1990s is explained as a strategy of retired workers in the global North who seek an alternative life with greater well-being in the South, where they can maximize their pension income, take advantage of transportation, media and health services, along with good weather, food, natural resources and safety. There is also a cultural or counter-cultural strategy at play here.

This flow has grown in the last thirty years to represent 10% of the local population at least, generating a small, local, enclave-oriented economy to meet their diverse needs for tourist services, transportation, food, medical services, leisure and other products. While this has a positive economic impact on employment in certain sectors, on the other hand, the receiving of remittances and local spending has inflationary effects on consumer goods, transport and in particular on housing as urban and rural land becomes a market altered by the investments of foreigners that often put the land out of reach for local buyers.

It is important to highlight, in addition to the economic impacts, that there are social, cultural and political impacts, with the immigrant pensioner community socially reproducing their cultural patterns of consumption, leisure and life. Some natives may feel threatened by the introduction of new forms of behaviour by retired immigrants. They may feel that they have lost control of the city and that they are now only serving the foreigners. This represents a challenge for the local and regional authorities as they must learn how to reconcile the existence of the new migrant community, the first and second waves, (Castles & De Haas, 2014) and (Papastergiadis, 2018) with the needs of the rooted native inhabitants. They must do so through inclusive public policies that allow for the coexistence and harmonious collaboration in the same territory, characterized by a 'progressive transnationalization' generated by the immigration of retirees from the North.

Lastly, the media and particularly the Internet, are a fundamental tool in the process of deciding to migrate and choosing the destination as different magazines and websites have commercialized the desire to live retirement abroad. It is clear that we are facing a migratory process in development,



driven by global capitalism and enhanced by technological innovations in communications and transport. Nevertheless, the phenomenon attests to different nuances and edges, which I aim to shed light on for future lines of research on the increase in ageing migration to new places. The perception of Ecuadorians towards foreigners can give us another angle of the phenomenon and deepen our understanding of the degree to which integration of the migrant population into the community that receives them happens. Future research could focus on the fluid and shifting social relationships between natives and migrants or the projects that lead to new creative cities, where the knowledge, tools and information that retirees have can be used for the improvement of the locality. State public policies might also act as more dynamic integrating agents of retirees and the population of origin in order to make the most of the skills and knowledge possessed by retired migrants.

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