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The aging of international migrants and strategic transnational practice in later life: Exploring Portuguese seniors in Toronto, Canada

SHORT TITLE: Aging and transnational later life

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The Portuguese community in Toronto is the largest in North America; however, its immigrant population is now aging. This paper addresses senior immigrants who had a transnational "later life" and discussed this practice in the transatlantic context, using a lifecycle model of transnational migration. Later life is a life stage that is highly feasible for transnational migration, as seniors are mostly disentangled from various obligations, such as work, child rearing, and caregiving for parents. Transnational senior migrants in Europe and North America can be categorized into four groups: Intra-Europe Rich, Intra-Europe Immigrant, North American Snowbird, and Trans-Atlantic Immigrant. Trans-Atlantic Immigrant seniors, the target group of this paper, differ from the other groups on several points, including seasonal preference for transnational migration, motivations, and legal regulations. The paper considers the questions of why senior Portuguese immigrants choose to stay in Portugal for an extended period each year, while mainly living in Canada, and how their later life is structured between the two countries. Transnational later life is a strategic practice of senior Portuguese immigrants in Canada in the last stage of their lifecycle, allowing them to maximize government pension payments while simultaneously enjoying the highest quality of life possible in both countries.

Keywords: transnationalism, dual citizenship, social security, senior immigrant, transatlantic context

Key messages:

- Immigration from Portugal to Canada accelerated in the 1960s and 1970s, and this immigrant population is now aging.
- The senior Trans-Atlantic Immigrant is significantly different from other transnational senior groups in Europe and North America, in terms of seasonal preference for transnational migration, motivations, and legal regulations.
- Transnational later life is a strategic practice of senior Portuguese immigrants in Canada in the last stage of their lifecycle.

Le vieillissement des migrants internationaux et les stratégies transnationales au troisième âge : une analyse des personnes âgées portugaises à Toronto, Canada

La communauté portugaise de Toronto est la plus importante d'Amérique du Nord. Cependant,

cette population immigrante est aujourd'hui vieillissante. Cet article traite des immigrants âgés qui ont eu une « vie transnationale tardive » et étudie cette pratique dans le contexte transatlantique, en utilisant un modèle de cycle de vie de la migration transnationale. L'âge avancé est une étape de la vie qui se prête bien à la migration transnationale, car les personnes âgées sont généralement libérées de diverses obligations, telles que le travail, l'éducation des enfants et la prise en charge des parents. Les migrants âgés transnationaux en Europe et en Amérique du Nord peuvent être classés en différentes catégories. Les personnes âgées immigrées transatlantiques, le groupe cible de notre recherche, diffèrent des autres groupes à plusieurs égards, notamment en termes de saisonnalité des mouvements, de motivations inhérentes et de spécificité des réglementations. Ce texte analyse les raisons pour lesquelles les immigrants portugais âgés choisissent de rester au Portugal pendant une période prolongée chaque année, tout en vivant principalement au Canada, et comment leur vie est structurée entre les deux pays. Au final, la vie transnationale tardive s'avère une pratique stratégique qui permet de maximiser les paiements des pensions gouvernementales tout en bénéficiant simultanément de la meilleure qualité de vie possible dans les deux pays.

Mots-clés : transnationalisme, double citoyenneté, sécurité sociale, immigrant aîné, contexte transatlantique

Introduction

Reflecting the extension of average human life expectancy, globally in 2019, 1 in 11 people (9.1%) were aged 65 or older. The United Nations estimates that this proportion will reach 1 in 6 people (15.9%) by 2050 (United Nations 2019). Most countries within the Organization for Economic Co-operation and Development have experienced rapid aging. Canada's aging rate, or the percentage of population aged 65 or older in the total population, has increased from 7.9% in 1970 to 18.0% in 2020, while Japan has the highest aging rate, at 28.8% in 2020, followed by Italy at 23.4%, Greece at 22.4%, and Portugal at 22.3% (OECD 2021).

Throughout their lifetimes, people around the world seek better lives, and migration is one way they pursue this goal. While Canada is a developed country with a high rate of aging population, it is also a multicultural country comprising over 200 ethnic groups. Currently, immigrants in Canada are older than the national average, and they face different experiences from non-immigrants and older migrants who have already returned to their home country (Durst 2005). This paper focuses on Portuguese immigrants, who also represent a higher aging rate (28.5%) than Canada's national average. Portuguese immigrants have settled in Canada after crossing national borders to improve their standard of living and quality of life, and have eventually aged there.

This paper considers the questions of why these senior Portuguese immigrants did not choose return migration, and instead chose to stay in Portugal for an extended period each year, while mainly living in Canada, and how their later life is structured between two countries. Many of these migrants are disentangled from the obligation of caregiving for their parents, who have already passed away, although some still have living parents, as well as child rearing and employment responsibilities. The respondents in this study are also characterized as relatively healthy as they can still move between countries across the Atlantic. With special attention to familial and legal elements—namely, individual family situations, dual citizenship, and social

security—this study aims to identify the facilitators and constraints of transnational later life for Portuguese immigrants in Toronto, Canada, and discusses this practice in the transatlantic context.

This paper is organized as follows. First, the paper's framework is described and a lifecycle model of transnational migration is proposed. Second, the significance of this study is identified by drawing on prior studies on transnationalism and the aging of international migrants, while classifying later life migrants in Europe and North America. Third, materials and methods for the analyses are described. Fourth, using statistical data, the changes in migration flow from Portugal to Canada and the process of the aging of Portuguese immigrants in Canada are analyzed. Fifth, determinants for both facilitating and constraining transnational later life across the Atlantic Ocean are disclosed through qualitative analyses, namely interviews with senior migrants and knowledgeable persons in the Portuguese community. Finally, the later life of the Portuguese immigrants in Canada is discussed in the trans-Atlantic context, concluding with a description of how these immigrants integrate the practice of balancing financial considerations with their desire to enjoy quality of life in both countries, through this last stage of their lifecycle.

Framework: A lifecycle model of transnational migration

Transnationalism and transnational migration have drawn a great deal of interest from scholars since the early 1990s (Faist 2012; Faist et al. 2013). Currently, to varying degrees, migrants are simultaneously embedded in the multiple sites and layers of the transnational social fields in which they live (Levitt and Jaworsky 2007). Many studies have described the transnational phenomena of international migrants (e.g., Guarnizo 1994; Ley 2004). However, these forms of transnational mobility have primarily been associated with people of working age (Bolzman et al. 2017). In this transnational era, as Ley and Kobayashi (2005) demonstrated using the case of Hong Kong returnees from Canada, migration was strategically undertaken at different stages of the lifecycle. Nevertheless, few studies have shed light on transnational migrants during the last stage of the lifecycle, or later life, specifically in the context of the trans-Atlantic migration.

Transnational migration is the flow of population in which migrants move between two or more countries more often and fluidly than the conventional one-way migration with permanent settlement and return migration. In order to better understand the general background of this involved phenomenon, systematically analyzing its mechanisms is important. This paper proposes a lifecycle model of transnational migration comprising four major individual determinants (work, health, children, parents), which operate as both constraints and facilitators. The model also includes two cross-cutting foundational determinants—economic and legal factors; as contextual factors, these determinants modify the individual determinants (Figure 1).

PLACE FIGURE 1 APPROXIMATELY HERE

The major determinants of transnational migration comprise four factors—work, health, children, and parents—which can be strongly related to the amount of time that migrants can spare for transnational migration. The presence, duration, and number of these major determinants varies according to where a person is in their life course. For instance, people are not restricted by some factors, such as work and children, during their infancy, childhood, and adolescence. However, during these life stages, they are almost fully constrained by their

parents; hence, moving freely based on their own free will is difficult even if there are only two key constraints.

The work factor, comprising working conditions and employment status, affects potential international migrants' mobility between two countries. For those of working age, living in both countries for extensive periods may be unrealistic because of a lack of free time for travel. While people working for transnational companies or other specific occupations may move beyond national borders often, most do not have a right to decide their destination countries; instead, their company decides. The health factor, i.e., people's health condition, is critical in making transnational migration possible. This factor, by and large, heavily relies on age. According to the World Health Organization (2019), the global healthy life expectancy (HALE) at birth was 63.7 years in 2019. HALE at birth and age 60 in Canada was 71.3 and 18.99 years, respectively, whereas HALE at birth and age 60 in Portugal was 71 and 18.65 years, respectively (WHO 2019). Therefore, it is assumed that senior Portuguese immigrants in Canada, on average, have about 14 years to enjoy their later life with a healthy body if they retire at the age of 65. Finally, the third and fourth major determinants revolve around the family unit, which is strongly related to the lifecycle; namely, child(ren) as the object of parenting and parent(s) as the subject of parenting and the object of old age care. When a person is in their childhood, they are both protected and restricted in their behaviours by their parents. Parents may make almost all the decisions about their children instead of the children making decisions themselves; they may also be pressed for time due to child-rearing. When the parents are older, adult children conversely owe a duty of care toward their senior parents; it may cause an unavoidable transnational practice when the parent(s) live in a different country. When elderly parents pass away, adult children are released from the related responsibilities, which can affect their choices about transnational later life.

One of the two foundational determinants is the economic factor; sufficient economic resources establish a foundation that allows international migrants to move beyond borders. Even if a person without enough resources aspires to migrate abroad, it remains merely a dream that never comes true. The other foundational determinant is the legal factor; legal status, which could vary depending on renewed immigration laws and bilateral agreements between sending and receiving countries, stipulates who can enter the countries, what rights and duties they receive and owe, how long they remain in each country, and so forth. These two foundational determinants predominantly involve external features; they represent non-self-reliant features, as both factors are heavily dependent on where the people were born and lived. Moreover, the legal factor, specifically, operates differently based on the life stage as it is related to a broad range of issues, such as social security, which is connected deeply with the later life stage. Hence, this factor is considered important particularly for the older population in the context of international migration, including transnational migration.

The interplay of the four major determinants (work, health, children, parents) and the two foundational determinants (economic, legal) wields a particular influence in later life. Given the changes in these factors, and their associated responsibilities, that take place in this life stage, later life can open up possibilities for transnational migration and mobiility—particularly in the first half of the life stage, when migrants are in a better health condition than later. This study scrutinizes the transnational migrants at later life in the trans-Atlantic context with particular focus on two major determinants (children, parents) and two foundational determinants (economic, legal).

Literature review: A typology of transnational migration at later life

In relation to the lifecycle, the family unit matters when examining transnational migration, as family-building and its development—including marriage, birth of children, parenting the children, and caregiving for parents, which involve repetitions of dependence and independence under the aging process of family members—can both restrict and facilitate mobility. During childhood, the mobility of people relies on their parents' decisions. Some parents, with a certain amount of financial resources but burdened with other restrictive factors, send their children abroad alone as *parachute kids* (Sun 2014); some parents (one or both) accompany their kid(s) when the son and/or daughter reach schooling age (Alaggia et al. 2001; Abelmann et al. 2014). Waters (2005) explored the trans-Pacific mobility of middle-class families from Hong Kong to Vancouver. She elucidated the role of education in the family strategies of recent East Asian migrants; namely, children play the imperative role within a wider family project of capital accumulation. Transnational migration, however, often involves negative aspect of familial sacrifice. In the United States (US), for instance, in the context of the feminization of migration, Salvadoran migrants who seek a better life for their family ironically struggle with the painful separation from parents and children (Abrego 2014). Moreover, the young children that Mexican migrants leave behind in Mexico are more likely to have behavioural and emotional problems than children living with non-migrant parents in Mexico (Lahaie et al. 2009). Migrants who leave parents behind in their home country face caregiving issues when their parent becomes disabled, and suffer from guilt due to a moral obligation to return (Baldassar et al. 2007; Brijnath 2009; Krzyżowski and Mucha 2014; Baldassar 2015). In Quebec, Canada, Portuguese immigrants from the Azores Islands practice various forms of transnational caregiving for older family members in their homeland, based on their generation, position in the family, and life course (Gherghel and Le Gall 2010). Several studies have focused directly or indirectly on the lifecycle and family unit to comprehend transnational migration. While many studies have explored working-age adult migrants as the central figure in the nuclear and/or extended family, along with their young children in some cases, few studies have paid specific attention to senior transnational migrants.

This study focuses specifically on migrants' retirement, or later life, which is posited as the last stage of the lifecycle before death. While some senior migrants still need to take care of their parents in later life, for a majority of them, this responsibility has come to an end. Their decisions at this life stage vary depending on their economic, legal, health, and other individual situations, and are split between return migration to the home country, permanent settlement in the host country, and a transnational later life. In Norway, Carling and Pettersen (2014) revealed that the most likely prospective returnees were men in their forties who had spent approximately half their life in the host country. This group was more likely to see return as an option for retirement than an immediate plan. Klinthäll (2006) identified the "retirement effect" in Sweden, which detailed that the probability of return migration increased (particularly for men) upon reaching the age of 65, the legal retirement age in the country. The effect of retirement was immediate, and the probability of return migration declined again beyond the age of 65.

While several previous studies addressing return migration revealed an association between retirement and return migration among international migrants, and a great number of studies have examined the permanent settlement and assimilation processes of migrants in host countries (e.g., Gordon1964; Alba and Nee 2003), not many have illuminated the transnational practices of senior migrants who maintained residence in their host country and also spent an

extended period of the year in their country of origin. When the existing studies on senior migrants in Europe and North America are integrated, four categories (*Intra-Europe Rich*, *Intra-Europe Immigrant*, *North American Snowbirds*, *Trans-Atlantic Immigrant*) are found (Table 1). The typology also includes some seniors' national migratory behaviours, so that the whole picture of the population at this life stage may be comprehended.

PLACE TABLE 1 APPROXIMATELY HERE

The first group of four senior migrant groups is the *Intra-Europe Rich* senior, whose migratory behaviours occur within Europe; for instance, those who migrate from the United Kingdom (UK) to Spain or another European country. They are, in general, a well-off population whose motivation for moving is often warmer weather. As Bolzman et al. (2006) mentioned, migration literature already recognised the existence of a "third option" used by people in this category, of dividing one's residence between two countries or regions. However, the propensity toward this option has mainly been observed in intra-country migration (Bond 1990) and the north-to-south, one-directional migration in Europe exemplified by wealthy northern European retirees who migrate to southern Europe (Casado-Diaz et al. 2004).

The second group is the *Intra-Europe Immigrant* senior—immigrants from less-developed European countries who are now living in more developed European countries. Transnational migration, for international European migrants whose initial migration is from south-to-north, has not been adequately reported despite its adoption by people of both high and low socio-economic status (Bolzman et al. 2006). According to Hunter (2011), migrant worker hostel residents in France indicated that, despite a lack of integration, they tended not to return to their place of origin at retirement; instead, their preference was for regular return trips. Bolzman et al. (2017) examined the way of life among older Spanish, Italian, and Portuguese migrants who spent their working years in Switzerland. The authors argued that their geographic mobility can take different forms and is adapted to legal constraints, family configurations, and individual situations.

The third group, or the counterpart in Canada and the northern part of the US of the Intra-Europe Rich senior, is seen in the *North American Snowbirds*, typically wealthy seniors who seasonally move south to regions such as the American Sunbelt, Mexico, and the Caribbean, to seek a warmer climate in the winter (Craig 1992; McHugh and Mings 1994; Coates et al. 2002; Happel and Hogan 2002; Smith and House 2006; Bjelde and Sanders 2012). Although these studies depict the later life transnationalism of those living in North America, it does not disclose the connection of international migrants with their host country; rather it illustrates aspects of the wealthy native-born population.

The target group of this study falls into the fourth group of the typology—the *Trans-Atlantic Immigrant* senior. Prior literature on the transnationality of European senior immigrants is unevenly distributed within the territory of Europe (e.g., Gustafson 2008; Oliver 2016). Typically, the transnational behaviours of European immigrant seniors, including those from less-developed countries, such as Portugal, are not considered substantially in North America. The context of intra-European migration and transnationality differs significantly to other cases because the European Union (EU) is a supranational union within the European continent and its legal regulations are less strict than those in other cases, such as in Euro-North American migration. In addition to the countries that are EU members, other countries on the European continent, including Switzerland, have also entered agreements with the EU, such as ones

relating to the free movement of persons, the *European Economic Area Agreement* between three European Free Trade Association countries (Iceland, Liechtenstein, and Norway) and the EU, which came into effect in 1994, and the *Agreement on the Free Movement of Persons (AFMP)* between Switzerland and the EU (it also applies to the three EFTA countries), which came into effect in 2002. In summary, this paper contributes to a less examined area of research by scrutinizing the transnational later lives of senior Portuguese migrants in the Atlantic context.

Materials and methods

This study applied a mixed analytical method using both quantitative and qualitative data. Quantitative data were obtained from the Census of Canada, and qualitative data were drawn from interviews.

The study utilized the 25% sample data on immigrant (first) generations and their places of birth from the Canadian 2016 Census (Statistics Canada 2016). Additionally, interviews using a questionnaire were conducted with senior first-generation Portuguese immigrants at major Portuguese Canadian sociocultural associations and ethnic businesses in Toronto, which has the largest Portuguese-origin population in North America. These ethnic sociocultural associations provide various opportunities for Portuguese seniors to interact on a regular basis, including through participation in dance and game events. In addition to visiting Portuguese businesses, such as grocery stores and restaurants in ethnic neighbourhoods (Takahashi 2013, 2015, 2016, 2017), the seniors connect through the ethnic associations' events. The questionnaire includes immigration year, age at immigration, familial situations, housing tenures in Portugal and Canada, and so on. In order to grasp the general information on Portuguese seniors and the ethnic community broadly, interviews were also conducted from 2014 through 2018 with the presidents and staff of the ethnic associations and Portuguese Canadians who are knowledgeable about the community.

A total of 21 senior Portuguese immigrants were interviewed in June and July 2016. Eight respondents who were aged 60 and over and who had stayed in Portugal for at least two months in the preceding year were identified as valid study participants (Table 2). The ineligible participants included Portuguese seniors who had stayed in Canada throughout the year and in Portugal for less than two months. This implies that not all Portuguese seniors (can) necessarily practice a transnational later life, owing to their economic, health, and familial situations. The respondents included in this study comprised six males and two females whose ages ranged from their 60s to their 80s. Their hometowns varied greatly, ranging from the European continent (n=4) to the Azores Islands (n=3) and Madeira Islands (n=1). Despite the lack of data regarding the Portuguese immigrants' regions of origin, Teixeira and Da Rosa (2009) estimated that over half of the Portuguese population in Canada was Azorean, particularly from the island of Sao Miguel. Hence, the composition of the respondents in this study predominantly reflected the proportion of the Portuguese-origin population in Canada. The qualitative data were analyzed, along with legal characteristics, such as dual citizenship and social security status. Pseudonyms have been assigned to all study participants mentioned in this paper.

PLACE TABLE 2 APPROXIMATELY HERE

Aging of Portuguese immigrants in Canada

On May 13, 1953, a group of Portuguese immigrants aboard the steamship *Saturnia* landed at Pier 21, in Halifax, Nova Scotia. The number of Portuguese immigrants increased in the 1950s, when Canada was promoting immigration to meet national needs for the agricultural and construction sectors (Anderson and Higgs 1976). These pioneers, who were mostly young males from the Azores Islands, first settled in rural areas, and later relocated to major cities such as Toronto and Montreal (Toronto Historical Board 1993; Takahashi 2015). Sponsorship and family reunification accelerated immigration, particularly through the 1960s and 1970s (Teixeira and Da Rosa 2009). The cumulative number reached 200,000 by the early 1990s; however, from the 1980s, the migration flow decelerated and mass migration ceased after the turn of the century. Table 3 shows the changes in the number of Portuguese immigrants to Canada.

PLACE TABLE 3 APPROXIMATELY HERE

In the 2016 Census 25% sample data, people aged 65 and older exceeded 5 million, accounting for 15.9% of the total population in Canada (Table 4). In the Toronto Census Metropolitan Area (CMA), the aging rate was 13.9%, much lower than those for both Canada as a whole and the province of Ontario. While in 2016 the population of ethnic Portuguese was 482,605 throughout the country, 324,930 were concentrated in Ontario (67.3%), especially in the Toronto CMA with a population of 210,420 (43.6%). Hence, over two in three Portuguese Canadians resided around Ontario, and nearly one in two lived in the Toronto CMA. This indicates that Ontario, especially Toronto, is the centre of the ethnic Portuguese community in Canada.

PLACE TABLE 4 APPROXIMATELY HERE

Today, the Portuguese Canadian population is sustained mainly through natural increase rather than international migration (Statistics Canada 2016). The Portuguese community in Canada comprises the first, second, and further younger generations. The first generation, or immigrants, accounted for 42.5% (205,230), 44.1% (143,460), and 48.3% (101,675) of the population in Canada, Ontario, and the Toronto CMA, respectively. The Portuguese-origin population aged 65 and older and their proportion to the total Portuguese-origin population in each spatial unit was 61,060 (12.7%), 42,095 (13.0%), and 28,800 (13.7%) in Canada, Ontario, and the Toronto CMA, respectively. The first-generation Portuguese population aged 65 and over reached 58,435 (28.5% of the total first-generation Portuguese-origin population), 41,535 (29.0%), 28,640 (28.2%) in Canada, Ontario, and the Toronto CMA, respectively. The immigrants are no longer the majority in this ethnic community; however, they still accounted for over 40% of the population in all geographical scales, demonstrating that this ethnic community is only just experiencing a generational change. It is assumed that at least one in four immigrants from Portugal, statistically or legally remaining in Canada, is now in retirement.

Table 5 describes the 2016 age distribution of immigrants who were born in Portugal and who obtained Canadian citizenship (Statistics Canada 2016). As these data were based on the "place of birth" answers, all the respondents here were first-generation immigrants. In 2016, those aged 55–64 years (35,985) formed the largest age cohort among the Portuguese immigrants in Canada, followed by those aged 45–54 years (33,280), 65–74 years (27,720), and

75 years and older (20,445). The immigrants aged under 45 years numbered only 22,010, 15.8% of the total. These data indicate that first-generation Portuguese Canadian immigrants were unevenly distributed in high-age cohorts due to the end of mass migration in the previous century.

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Of the cohort aged 55–64 years, 86.7% (31,205) had already acquired Canadian citizenship. Moreover, those aged 65–74 years and 75 years and older also had high citizenship rates of 91.0% (25,220) and 89.2% (18,245), respectively (Statistics Canada 2016). Younger age groups showed lower percentages: 35.3% (270), 48.7% (675), 61.8% (4,270), 72.6% (9,410), and 81.8% (27,235) for those aged 0–14, 15–24, 25–34, 35–44, and 45–54 years, respectively. As these demographic data indicate, in general, the older the immigrants' age, the higher the citizenship rate. This suggests that immigrants have more opportunities to apply for citizenship in the host country with the passage of time. Whether immigrants under 18 hold Canadian citizenship depends on their parents: "they must have at least one parent (includes legally adoptive parent) who is a Canadian citizen or who will become a citizen at the same time as the minor (applying together as a family)" (IRCC 2021a).

Citizenship rates among immigrants aged 18 years and older who meet the requirements are gradually increasing, from 81.6% in 1991, through 84.5% in 2001, to 86.2% in 2016 (Hou and Picot 2019). To apply for Canadian citizenship, an applicant must be a Canadian permanent resident and have been physically present in Canada for at least 1,095 days (or 3 years) in the 5 years immediately preceding the date they sign their application (IRCC 2021b). To keep permanent resident status, immigrants must have been in Canada for at least 730 days during the last 5 years; however, these 730 days need not be continuous (IRCC 2021c). In short, it seems that most Portuguese immigrants are eligible for Canadian citizenship. However, permanent residence in Canada already provides immigrants with several rights; thus, citizenship may not be an immediate need for some. By earning Canadian citizenship, they would acquire rights to political participation, access to all jobs, and Canadian passports. According to Bloemraad (2002, 2009), Portuguese immigrants in Canada are more likely to retain citizenship to their host country than those in the US. Based on the high proportion of immigrants acquiring citizenship, Portuguese Canadians have been active political participants (Takahashi 2022). In accordance with Bloemraad (2002, 2009), this study found that a high percentage of the Portuguese-origin population in Canada acquired Canadian citizenship, especially the older population.

Nowadays, Portuguese immigrants can also choose dual citizenship, reflecting an amendment of Portugal's nationality law in 1981 (Bloemraad 2004, 2006). Canada also removed its restrictions on multiple citizenship in 1977, 30 years after establishment of the 1947 act that had strictly limited it. As Portugal's new nationality law includes a change in requirements for Portuguese citizenship, from *jus soli* to *jus sanguinis*, it is assumed that many of the second-generation and younger generation members of Portuguese-origin populations in Canada now hold dual citizenship. Contrastingly, the statistical data show that only 18.1% of first-generation immigrants hold dual citizenship. The age cohort of 65–74 had the highest percentage (21.3%), followed by the 75 and older (18.8%) and 55–64 (18.1%) cohorts. Even seniors' rates of acquiring dual citizenship were not very high, considering their longstanding residence in Canada and their attachment to Portugal. Both the home and host countries changed their nationality laws on dual citizenship around the same time, which overlapped with the latter half

of the mass-migration era; therefore, some Portuguese immigrants who arrived before the nationality laws were amended may have renounced their Portuguese citizenship to become Canadian citizens.

Facilitators and constraints to the transnational later life of senior immigrants

Overview of the senior Portuguese study respondents in Canada

All of the eight respondents migrated to Canada between the 1950s and 1980s, during the mass-migration era. All were in their teens or twenties when they arrived, except for respondent Maria. Out of the eight seniors surveyed, six came to Canada to seek better living conditions and opportunities to work during the Antonio de Oliveira Salazar dictatorship in Portugal and the lingering colonial wars in Africa. The islanders tended to arrive in Canada earlier than those from the continental region: the islanders included in this study arrived in Canada from 1954–1967, while those from the continent landed from 1971–1989. This tendency corresponded with a prior report on Portuguese business owners in Toronto (Takahashi 2015), that suggested that the islanders were older than the other sub-groups, and that the aging of the immigrant generation in Canada may have progressed more rapidly among the islanders than those from the continent. Moreover, according to Noivo (1997) and Gherghel and Le Gall (2010), while the migrants from continental Portugal largely intended to return to their home country as part of the initial migration, the Azoreans recognized the permanence of migration, characterized by definitive settlement in the host country. Although the interviewees in this study generally agreed with this view, the study also found cases of transnational migrants originally from continental Portugal. The following sections scrutinize the individual family situations and status of the senior Portuguese study respondents in Toronto, Canada, with relation to their home country, Portugal.

Older adult care by immigrant seniors across the Atlantic

Maria was born in 1940s in a town near Porto, the second-largest city in Portugal. Due to her father's job, she lived in Mozambique for over 20 years, when it was still a Portuguese colony. She moved back to Portugal in 1975 and eventually migrated to Canada in 1989 seeking to better her life. Her life path depicts the crucial contemporary global history of Portugal; that is, the loss of the country's last African colonies. The end of the imperial state in Portugal, which drew to a close in the mid-1970s, affected some Portuguese people's individual migration patterns.

In the year preceding the interview, Maria travelled to Portugal three times (in May, August to October, and December), spending a total of 4 months there. She travelled back and forth across the Atlantic because her elderly mother who lived in Portugal needed caregiving and no immediate family members were available. In May, the purpose of her visit was to celebrate her mother's birthday, while her December visit was for Christmas. In the interview, she stated that she wished she could stay longer in Canada and hoped that her mother could be more active. She flew to Portugal several times throughout the year with some reluctance, although she loves her mother; hence she visited her mother to celebrate important annual events. This Portuguese Canadian woman provided transnational care for her mother as often as she could and devoted a substantial part of her later life to that task. This case shows that older adult parents who require care pose a considerable challenge for older adult immigrant children living in a different country. This is especially true in the transatlantic context, compared to Portuguese immigrants living in other European countries. Moreover, Maria's hometown is in continental Portugal,

which is farther than the Azores Islands. Although bringing their parent(s) to Canada is, no doubt, an effective option to solve the problem, moving abroad is challenging for parent(s), who often want to remain in the country where they spent their entire lives. For senior immigrants, the meaning of transnational practices between the host and home countries varies depending on one's family situation, especially considering parental caregiving. Unlike other senior immigrants, who are already free of caregiving responsibilities, the transnational mobility of senior immigrants with parent(s) in Portugal occurs inevitably and often with obligation rather than delight.

Seasonal selection and dual citizenship that prolongs a stay

Antonio was born in 1920s and was raised on an island in the Azores. He decided to leave his hometown and move to Canada in 1954, when he was in his 20s. Upon his arrival, after first labouring as a railway construction worker and subsequently as a factory worker, he opened and operated a retail store in Toronto until his retirement. He used to visit his home island with his wife every year when she was alive. All his close family members, three brothers and one sister, now live in Canada and only some nieces and nephews remain in Portugal. However, even after his wife passed away six years ago, he still visited the island to see old friends.

The respondent indicated that he had stayed in Portugal from the beginning of November to the end of March in the preceding year, mainly for seasonal reasons (winter in Toronto was too cold). Differences in the climate characteristics between two regions was a key determinant in deciding his stay season. However, unlike Antonio, five of the eight respondents only travelled to Portugal during the summer. According to the president of a major Portuguese Canadian sociocultural association, many first-generation immigrant seniors leave for Portugal in April or May and return to Canada in October, as the immigrants hope to spend Christmas with their immediate family members living in Canada. He also mentioned that, even though Portugal has a warmer climate overall, the more effective temperature control systems in Toronto mean that people are also generally comfortable there. Thus, environmental determinism cannot simply be applied to seasonal selection by transnational Portuguese Canadian seniors.

Fundamentally, dual citizenship facilitates a transnational later life for older Portuguese immigrants in Canada. In the previous year, Antonio stayed in Portugal for approximately 5 months and in Canada for the rest of the year. As a nation-state, Portugal only allows foreign citizens, except for EU residents with sufficient resources (including pension), to stay in the country for 90 days. Additionally, under the *Schengen Agreement*, citizens in non-Schengen member countries can only stay in the Schengen Area for 90 days in any 180-day period. Hence, Portuguese Canadians who only have Canadian citizenship are subject to this 90-day rule. In contrast, this does not apply to Portuguese Canadians with dual citizenship who can generally stay or live in both Canada and Portugal without restriction on length of stay. Senior Portuguese immigrants can now enjoy their later lives and cross the Atlantic Ocean almost freely, thanks to the system of dual citizenship adopted by both countries.

Constraints of social security on transnational later life

Most Portuguese seniors arrived in Canada in their younger days, worked for years, and eventually retired there. Consequently, they have the right to receive pensions from the Canadian government. As mentioned briefly above, senior immigrants may be able to stay in each country "de facto freely," if they hold dual citizenship. This seemingly disentangles them from the nation-state's legal confinements. However, dual citizenship only tolerates conditions for

transnational life between the host and home countries in a limited way.

Social security is imperative, specifically for seniors, and Canada provides well-established programs. In addition to the health care system, pensions are vital social security services provided to seniors by the government. The public pension system in Canada comprises two programs: the Canada Pension Plan (CPP) and Old Age Security (OAS). Only the Province of Quebec manages an independent pension program, the Quebec Pension Plan (QPP), instead of the CPP; OAS is effective throughout the country, including Quebec. ~~From~~ For 2019, the maximum monthly amount provided to a new CPP recipient, who started receiving their pension at age 65, is C$1,154.58, and the average monthly amount is C$679.16. Regarding OAS, the maximum monthly payment from January to March 2021 was C$615.37, while the amount a pensioner receives depends on how long they lived in Canada or specific countries after age 18. The CPP provides a retirement pension whose monthly amount is based on the average earnings throughout the recipient's working life, namely, their contribution to the CPP. This amount also varies according to when the individual starts receiving their CPP pension. The standard age is 65; however, pensioners can take an advance at 60 or delay until they turn 70. Pensioners can receive smaller amounts every month if they start earlier, whereas the recipients are able to maximize their monthly pay-outs by waiting until they reach the age of 70. Contrastingly, OAS is a basic pension plan for seniors aged 65 or older who meet the legal status and residence requirements. Those who have lived in Canada for 40 years or more (after the age of 18 years) can receive the full OAS pension payout, while people who have lived in the country for less than 40 years receive a partial payment proportionate to the number of years lived in Canada divided by 40. If an OAS pension recipient is living outside of Canada, they must have resided in Canada for at least 20 years after the age of 18 years to receive the pension, while a pensioner living in Canada must only have lived in the country for 10 years. Additionally, Canada provides a financial safety net, the Guaranteed Income Supplement (GIS), to seniors aged 65 years or older who live in Canada, have obtained their OAS pension, and whose annual income is below specific thresholds. As of February 2021, the prescribed income for single, widowed, or divorced persons, is below C$18,648. If a recipient has a spouse or common-law partner, the personal income plus the income of the spouse/common-law partner is as follows: 1) C$24,624 if the spouse/common-law partner receives a full OAS pension; 2) C$44,688 if the spouse/common-law partner does not receive an OAS pension; and 3) C$44,688 if the spouse/common-law partner receives an allowance.

Most first-generation Portuguese immigrants in Canada, and all the respondents who were surveyed, are eligible for both the CPP and OAS. This is because they migrated between the 1950s and 1980s and worked in Canada for approximately 30–60 years. Regarding OAS, some immigrants receive the full amount and others receive a partial amount. Unlike the CPP, which is based on a social insurance system, OAS is a tax-based pension. Thus, to receive the pension while living in Portugal, recipients must have lived in Canada for at least 20 years after turning 18. If they do not qualify to receive OAS outside Canada, their payment will stop if they remain outside the country for more than six months. However, this rule does not have a significant impact on the senior Portuguese population because they have typically lived in Canada for much longer than 20 years after turning 18.

The most important benefit is the GIS. If a pensioner is away from Canada for more than six months, they cannot collect their GIS payment, regardless of their length of residence. Therefore, to maximize their full pension (including the CPP, OAS, and GIS), these seniors cannot live in Portugal for more than six months. The fact that none of the respondents stayed in

Portugal for longer than six months clearly reflects this legal and economic stipulation. Antonio, who stayed in Portugal for five months, had the longest stay in his home country. Here, Canada's pension system acts as a constraint for the later life behaviours of Portuguese immigrants living transnationally across the Atlantic. Paradoxically, they can maximize their economic resources as long as they stay in Canada for less than six months each year, and use it for enjoying their later life.

Discussion and conclusion

This paper addressed senior Portuguese Canadian migrants who had not chosen return migration to their home country, but who had transnational later lives between their host and home countries. It also identified specific facilitators and constraints for these senior population in the trans-Atlantic context. I proposed a lifecycle model encompassing key determinants for transnational migration. Based on this model, it is understood that later life is the life stage during which the feasibility of transnational migration is extremely heightened, as these seniors are relieved of many obligations, such as work, child rearing, and caregiving for parents. The lifecycle model of transnational migration proposed in this study does not necessarily only apply to transnational migration and later life migration; rather, it can be used in a wide range of migration and life stages.

Existing studies on transnational practices of international migrants are unevenly distributed; many studies focus on working-age adults (and their young children in some cases). It has been confirmed that prior research on seniors' transnational practices was mainly conducted within one country, looking at retirees who moved from wealthy northern European countries to less-developed southern European countries, or the Intra-Europe Rich seniors, and the snowbirds in the North American context. Studies on senior European transnational migrants who initially migrated from less-developed countries to more-developed countries—namely the Intra-Europe Immigrant seniors and the Trans-Atlantic Immigrant seniors—are less common, especially in the transatlantic context. By supplementing this scant area of research, this study contributes to transnational studies where the broader disciplines overlap—migration studies, ethnic studies, population geography, and social geography. Through a mixed analytical method using both statistical data based on the Census and qualitative data taken from interviews, the aging of Portuguese immigrants in Canada is characterized, and aspects of transnational later life for these senior immigrants are described.

Beginning with the mass migration to Canada in 1953, the number of Portuguese immigrants boomed in the 1960s and 1970s, then decreased after the turn of the century. Reflecting this migration pattern, the Portuguese immigrant population in Canada has been aging, and over one in four first-generation immigrants are aged 65 and over. As a general tendency among first-generation immigrants, it is confirmed that the older the group, the higher the acquisition rate for Canadian citizenship. While four in five first-generation immigrants acquire Canadian citizenship, one in five hold dual citizenship based on nationality law amendments in both countries.

The Portuguese population in Canada comprises mainlanders and two groups of islanders, from the Azores and Madeira Islands. This study included transnational senior migrants from all three regions. The main findings on the migrants' transnational later life were extracted from interviews with the seniors and central figures in the ethnic community. Although

most of the senior Portuguese respondents had experienced the loss of their parents, this study included one senior who flew between the two countries to take care of her mother and celebrate important holidays with her. Living in a different country from other family members enhances their transnational practices; however, senior immigrants who provide care for older adult parents living across the Atlantic may feel burdened. The meaning of transnational later life may vary depending on individuals' circumstances, specifically familial situations.

Due to the 90-day rule, Portuguese immigrants who only hold Canadian citizenship experience greater border restrictions than Portuguese immigrants living in the EU and other European countries that have bilateral agreements with the EU. Concerning this point, therefore, the target group of this study is markedly different from the Intra-Europe Immigrant seniors, including Portuguese immigrant seniors within Europe, and to the Intra-Europe Rich seniors. In this sense, this study provides a new insight into existing research.

Contrastingly, Canadian and Portuguese dual citizenship functions as an facilitator for staying in Portugal longer than 90 days. However, Portuguese-origin seniors in Canada are restricted in how long they can stay abroad per year with relation to Canada's national pension program. They must physically stay in Canada for more than six months to collect a full pension. If they leave the country for longer than six months, they are not eligible to receive the GIS. The national pension system, therefore, can work as a constraint on transnational later life for senior immigrants. This rule of the Canadian pension program may be why the balancing of revenue and expenditure of the national welfare system is more complicated and/or unique. As the transnational senior immigrants tend to own residences in both Canada and Portugal, because they live in the countries for long periods of time every year, they are required to pay property tax in Canada, as well as Portugal. At the same time, reflecting its extended duration, it may be assumed that they frequently use Canadian medical services during their stay in the country, which increases the pressure on this national benefit expenditure.

Whether the transnational migrants stay in their host or home countries does not necessarily depend on the climate gap between Portugal and Canada. Regarding seasonal selection, the transnational life of senior Portuguese immigrants in Canada cannot be explained by environmental determinism. The family situation is one of the key determinants for when they stay in Canada or Portugal. At this point, they clearly differ from the Intra-Europe Rich and North American Snowbird who seek a warmer climate.

In conclusion, various legal and economic supports act both as facilitators and constraints for Portuguese immigrants' transnational later lives and, even in the present era, the nation-state world system has residual influence. The context of the transatlantic senior migrants is significantly different from that of intra-European senior migrants—namely, the Intra-Europe Rich seniors and the Intra-Europe Immigrant seniors—in terms of legal aspects, in addition to a geographical distance which matters specifically for those from continental Portugal. Moreover, senior Portuguese immigrants in Toronto, Canada are not generally snowbirds whose seasonal selection is primarily based on better climate—their transnational practices consist of more involved factors, such as the importance of special occasions with their family and friends, dual citizenship, and social security. Their motivations for and restrictions on transnational migration are different from those of the other three groups. Transnational later life is a strategic practice by senior Portuguese immigrants in Canada in the last stage of their lifecycle; they work to balance maximizing government pension payments and enjoying as much quality of life as possible in both countries. The conclusions of this paper could also apply to later life transnational migration of other European ethnic groups in North America, specifically Canada.

This study has several limitations. While this study found senior Portuguese immigrants from all regions of Portugal, the collected materials also hint at differences between home regions. Continental Portuguese tend to own housing only in Portugal and have more immediate family members there, in comparison to the Azorean and Madeiran Portuguese. There is no doubt that the Azores Islands are located much closer to North America than the Madeira Islands and continental Portugal, and that there are differences in their socio-economic status before initial migration to Canada and in the preserved social customs. Hence, there may also be more unexplored distinctions and/or divisions among the sub-groups of the Portuguese community. Presumably, these could be better explained using an approach with richer direct quotes from respondents. Furthermore, differences based on gender were not analyzed in this study; it is considered that there are a variety of distinctions between all the gender groups in terms of life expectancy, life philosophy, and so on. It is also undeniable that the COVID-19 pandemic has affected transnational later lives. However, since these points were not the focus of this study, they could form the basis for future research.

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Tables

Table 1. Typology of transnational migrants at later life in Europe and North America.

Type	Primary place of residence	Native / immigrant	Economic condition	Climate factor	Migration scale
Intra-Europe Rich	Europe (Well-developed country)	Mainly native-born	Relatively high	Strong	National or regional (Europe)
Intra-Europe Immigrant	Europe (Well-developed country)	Immigrant	Low – High	Weak	Regional (Europe)
North American Snowbird	North America	Mainly native-born	Relatively high	Strong	National or regional (America)
Trans-Atlantic Immigrant	North America	Immigrant	Middle – High	Weak	Inter-regional (Inter-continent)

Table 2. Attributes of senior Portuguese migrant participants.

Pseudonym	Gender	Age	Home region	Migration year	Age at migration	Locations of family members			Housing tenure		Months to visit Portugal	Total months
						Canada	Portugal	Others	Canada	Portugal		
Jose	M	60s	Madeira	1967	20s	●▲▲▲		◎	Own	Own	Jun.-Jul.	2
Maria	F	60s	Continent	1989	40s	▲▲	◎		Rent	Own	May, Aug.-Oct, Dec.	4
Ana	F	70s	Azores	1965	10s	▲△			Own	Own	Jul.-Aug.	2
Mario	M	60s	Continent	1974	20s	△△	●▲▲▲		Rent	Own	Jan., Sep.	2
Carlos	M	60s	Continent	1976	20s	●▲▲▲	△△△△△△		Own	Own	Jun.-Aug.	2.5
Gustavo	M	70s	Continent	1971	20s	●▲▲	△△△		Own	Own	Jun.-Aug.	2.5
Antonio	M	80s	Azores	1954	20s	△△△△			Own	Own	Nov.-Mar.	5
Fernando	M	70s	Azores	1964	20s	●▲△	△△		Own	Own	May-Jun.	2

Legend: husband or wife: ●, son or daughter: ▲, mother: ◎, siblings: △

SOURCE: Interview.

Table 3. The transition of immigrants from Portugal to Canada, from 1950 through 2012.

Year	Number of arrivals
1950–59	17,114
1960–69	59,667
1970–79	79,891
1980–89	38,187
1990–99	19,235
2000–09	4,158
2010–16	4,653

SOURCE: Teixeira and Da Rosa (2009), and IRCC (2016).

Table 4. Demographics of the Portuguese-origin population in Canada, 2016.

	Canada	Ontario	Toronto CMA[1]
Total population	34,460,065	13,242,160	5,862,855
Total population aged 65 or older	5,479,910	2,113,520	815,460
Aging rate of the total population	15.9%	16.0%	13.9%
Total first-generation population	8,219,555	4,122,840	2,874,265
Total Portuguese population	482,605	324,930	210,420
Percentage of Portuguese population to the total population	1.4%	2.5%	3.6%
Portuguese population aged 65 or older	61,060	42,095	28,800
Aging rate of Portuguese population	12.7%	13.0%	13.7%
Total first-generation Portuguese population	205,230	143,360	101,675
Percentage of first-generation to the total Portuguese population	42.5%	44.1%	48.3%
First-generation Portuguese population aged 65 or older	58,435	41,535	28,640
Aging rate of first-generation Portuguese population	28.5%	29.0%	28.2%

The data above are based on both single and multiple "ethnic origin" responses in 25% sample data.
The numbers for the 25% sample data do not precisely accord with the numbers in the general count of the Canadian census.
[1] CMA is an abbreviation of Census Metropolitan Area.

SOURCE: Statistics Canada (2016).

Table 5. Age composition and citizenship status of immigrants from Portugal, 2016.

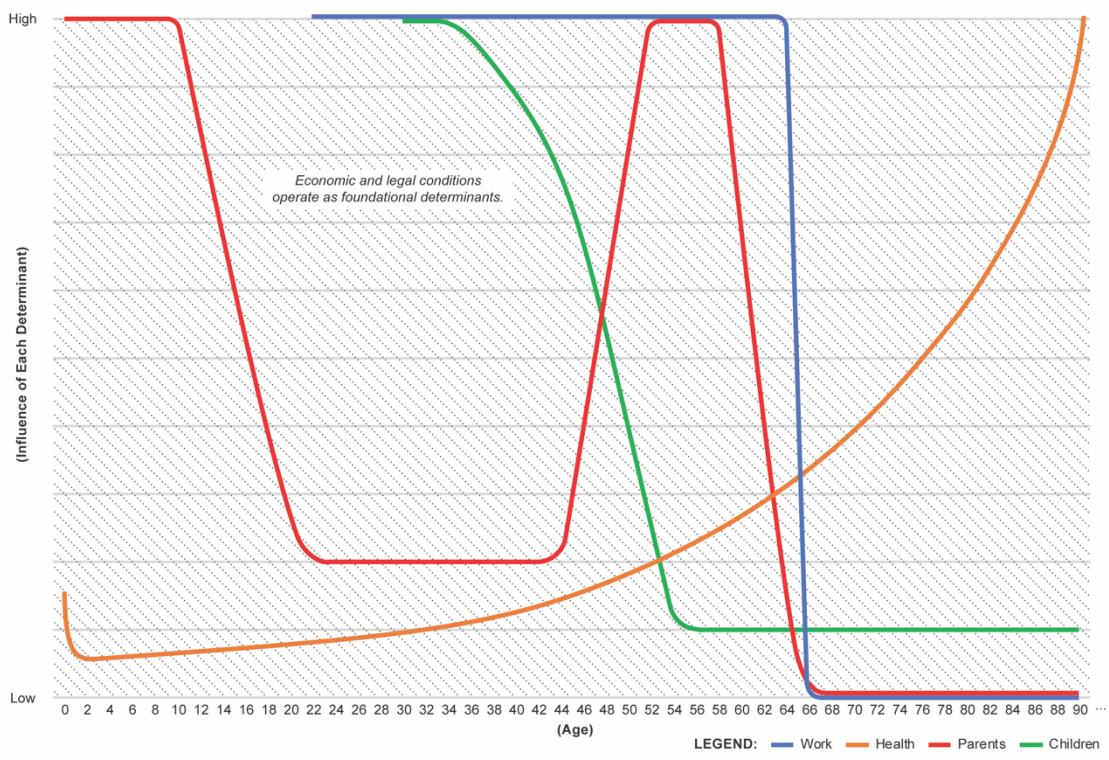
Age	Total population	Not Canadian citizens	Canadian citizens	Canadian citizenship only	Multiple citizenship	% of Canadian citizenship	% of multiple citizenship
0-14	765	500	270	185	80	35.3%	10.5%
15-24	1,385	715	675	480	190	48.7%	13.7%
25-34	6,905	2,635	4,270	3,110	1,165	61.8%	16.9%
35-44	12,955	3,545	9,410	7,220	2,190	72.6%	16.9%
45-54	33,280	6,050	27,235	21,935	5,295	81.8%	15.9%
55-64	35,985	4,780	31,205	24,705	6,500	86.7%	18.1%
65-74	27,720	2,500	25,220	19,315	5,905	91.0%	21.3%
75 ≦	20,445	2,205	18,245	14,400	3,845	89.2%	18.8%
Total	139,440	22,930	116,530	91,350	25,170	83.6%	18.1%

The data above are based on the respondents whose “place of birth” is Portugal, meaning they are immigrants.
The total numbers do not necessarily correspond with the sum of relevant parts, since it is estimated data based on 25% sample data.

SOURCE: Statistics Canada (2016).

Figure Caption

Figure 1. Lifecycle model of transnational migration combined with four key determinants.


High
Low
(Influence of Each Determinant)
Economic and legal conditions
operate as foundational determinants.
0 2 4 6 8 10 12 14 16 18 20 22 24 26 28 30 32 34 36 38 40 42 44 46 48 50 52 54 56 58 60 62 64 66 68 70 72 74 76 78 80 82 84 86 88 90 ...
(Age)
LEGEND: Work Health Parents Children