Retirement Migration and Transnationalism in Northern Mexico

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Abstract

This article examines the phenomenon of transnationalism among retired immigrants living in border areas of northern Mexico. Using in-depth interviews conducted with U.S. retirees residing in Baja California, Mexico, we seek to examine how transnational aging is constructed through different practices, relationships, networks and exchanges between both cultures and countries. We analyze several analytical dimensions of transnationalism including social, economic, cultural, identity and belonging conditions. In particular, networks and exchanges among these elderly migrants are most frequently constructed across social and family networks, economic transfers, access to healthcare, and culture. Additionally, we find that these maintained transnational practices in northern Mexico parallel those of international retired migrants living in other parts of the world. However, we argue that the proximity to the U.S. border enables and encourages many types of connections of varying intensities. Finally, we discuss the implications for future research linking transnationalism with International Retirement Migration.

Keywords: Retirement, Migration, Transnationalism, Elderly, Mexico

Introduction

Transnationalism has gained importance in the study of international migration (Pries 1999), given the evidence that international migrants retain and develop substantial bonds with their countries of origin (Levitt and Jaworsky 2007; Vertovec 2009). Several studies theorizing on migrant transnationalism focus on the migration of workers or refugees (Ariza and Portes 2007). However, to this day, little is known of other migrants in transnational settings, particularly those moving from core to peripheral regions, such as the elderly or retired (Gustafson 2001, 2008; Montes de Oca et al. 2008). While the rapid development of communication and transportation technologies has allowed migrants to engage in transnational lifestyles, little is known about how they maintain reciprocal ties with their home countries (Casado-Díaz, 2012). Additionally, very little research on transnationalism has analyzed the impact of proximity between country of origin and country of destination, focusing primarily on migrants who are significantly far away from their home country (Gustafson 2008). Our work, on the other hand, examines how short distances between country of origin and country of destination also foster transnationalism among elderly, white Americans retiring close to the U.S.-Mexico border in northern Mexico.

This article focuses on elderly, white (non-Hispanic) Americans who migrate to Mexico for retirement, a group that is quickly growing in number and importance in Mexico (Lizárraga 2008b; MPI 2006). We seek to examine to what extent and in what ways American retirees residing in Baja California, Mexico, can be described as transnational by exploring transnational characteristics related to mobility and locational attachment, social networks, cultural and economic practices, political ties and issues of identity/belongings. We examine if these practices arise in daily experiences and the ties and networks created and maintained with family members and institutions in their country of origin. Specifically, we analyze the influence of the border on transnational ties and if the distance to the U.S. is a conditioning factor in establishing contacts.

To that effect, first, we explore the conceptualization of transnationalism. Second, we briefly analyze the IRM phenomenon with a particular focus on Mexico and the research on

transnationalism. Third, we discuss our methodology. Fourth, and according to the described analytical dimensions, we present our findings, focusing on the presence (or absence) and strength of transnational ties among these expatriates. Fifth, we review the factors and functions of transnationalism, paying attention to the importance of life-stage, language, and occupational and socio-professional conditions as key factors. Finally, we provide recommendations for future research on transnationalism related to IRM between the U.S. and Mexico.

Theoretical Framework: Transnationalism

Many scholars (Levitt and Jaworsky 2007; Pries 1999) have viewed migrant communities, including those of retired migrants (Basch, Glick-Schiller and Szanton 1994; Casado-Díaz 2012; Gustafson 2008), as people or institutions that achieve the conceptual or material transcendence of national boundaries (Bozic 2006; Vertovec 2009). Bozic (2006:3) finds that transnationalism is distinguishable as:

> "the intensified transfer or exchange of information, cultural contents, goods, services and people between nation-states in such a way that their boundaries are weakened as separators of these political, economic or cultural units. The transfers involve not only simple cross-border movements or transactions but also types of mobility that are self-replicating (in the manner of a 'virus'), and which increasingly challenge the relevance and functions of the national boundaries."

While several scholars have outlined the dimensions of transnationalism (Portes, Guarnizo, and Landolt 1999; Vertovec 2009), Gustafson (2004:70) suggests a model with the following analytical dimensions, at the 'macro' and 'micro' level, which can be considered and adapted for this study on IRM:

- *Mobility*: patterns, practices infrastructures and ideals of mobility.
- *Place attachment*: collective and individual place-related identities, (re)construction of place, and emotional bonds.
- *Politics and legislation*: political-legal frames and transnational political activities, adaptation to legal frames, and political participation and activism.
- *Economy:* sources of income, trade, investments, capital transfers, fiscal issues and consumption patterns.
- *Social life:* social structures, institutions, social relations and interactions.
- *Culture:* cultural structures and institutions, cultural practices, and strategies of cultural adaptation.

Additionally, the frequency, regularity and intensity of ties maintained by migrants are also of importance for transnationalism. Scott (2004) identified that all expatriates lead transnational lives; however, Portes, Guarnizo and Landolt (1999) recognize that considerable internal diversity exists.

International Retirement Migration and Transnationalism in Mexico

IRM is an emerging trend in contemporary societies involving thousands of people, not only in Europe (Casado-Díaz 2009; King, Warnes and Williams 2000), but also in Asia and the Americas (MPI 2006). Although IRM in North America is recent, Mexico stands out as the primary country of destination (Croucher, 2012), followed by Panama and Costa Rica (MPI 2006). Currently, census data shows that the arrival of foreign immigrants, in particular those

from the U.S., to Mexico has continuously increased since the 1970s, especially between 2000 and 2010 (Table 1).

Table 1. Total number of foreign-born residents in Mexico, 1970-2010

Years	Total Population	Born in other country	%	Born in U.S.	% of U.S. / Other country
1970	48,225,238	191,159	0.40	97,229	50.9
1980	66,846,833	268,900	0.40	157,117	58.4
1990	81,249,645	340,824	0.42	194,619	57.1
2000	97,014,732	492,617	0.51	358,614	69.0
2010	112,336,538	961,121	0.85	738,103	76.8

Source: Calculated by authors using data from INEGI (2010).

Among the primary reasons for migration to Mexico is the improved quality of life, which includes environmental factors such as climate and low-density urbanization (Coates, Healy and Morrison 2002; Croucher 2012; Sunil, Rojas and Bradley 2007; Truly 2002). Other reasons include geographical proximity, accessibility to amenities and pastimes, previous tourism experiences in the country, and economic opportunities (lower prices) (MPI 2006) linked to the availability of inexpensive medical treatment, medicines, and housing (Kiy and McEnany 2010a; Lizárraga 2012).

In relation to the important links between tourism and IRM (Casado-Díaz, Casado-Díaz and Casado-Díaz 2014), Americans have imposed on Mexico a fictitious narrative of individuality and tranquility that has become the model for residential tourism, characterized by consumerism and overcrowding (Hiernaux 2009). Furthermore, it is common that prior to relocating to Mexico for retirement, the majority of American retirees vacationed there, developing different forms of temporary and permanent residential mobility between both countries (Coates, Healy and Morrison 2002).

Although most of the research focused on IRM in Mexico has not directly examined transnationalism, it is assumed that lifestyles among these immigrants are maintained primarily in a broad network of contacts and relationships between the sending and receiving country (Croucher 2012). Lizárraga (2006, 2008a) and Banks (2009) have drawn attention to the existence of multiple networks and social, economic, and cultural practices among American retirees residing in Mexico and the U.S., which produce social spaces and transnational households. Therefore, analyzing the IRM phenomenon through a transnational lens is necessary since the lifestyle and characteristics of retirees enable them to officially and more freely choose to live in foreign countries, sharing and introducing new cultural elements into their lives. Additionally, they develop new mixed identities and multiple memberships in local communities. These elements highlight that IRM, or at least some of its elements, are at the ‘edges of transnationalism’ (Bozic 2006: 1417).

In contrast to Latin America and the Caribbean, transnationalism linked to IRM has been analyzed more in Europe. For example, the relevance of transnational social networks among British retired migrants living on the coast of Alicante, Spain, has been examined with a particular interest in the intensity of the bidirectional flows produced between both countries (Casado-Díaz 2009; Casado-Díaz, Casado-Díaz and Casado-Díaz 2014). Additionally, Gustafson (2001, 2004) analyzed the multiple place attachment and cultural differences among Swedish retirees pursuing seasonal migration between Sweden and Spain, finding

some instances of transnationalism among those who are retired (Gustafson 2008). Simó Noguera, Herzog and Fleerackers (2013) provide similar results in their analysis of social capital and transnational practices found in European retirement migrants living in Valencia, Spain.

Methodology

Scott (2004) finds that measuring the degree of transnationality is more important than the quantification. To 'objectively' measure and quantify transnationalism among retirees is a difficult task and thus we opted to examine qualitative dimensions to transnationalism that are just as important as frequency and regularity of particular behaviours. Therefore, our analysis focuses on varying types, degrees and manifestations of transnationalism, While our research does not employ all of the dimensions outlined by Gustafson (2004) in the theoretical framework, we do focus primarily on socio-cultural and economic exchanges given that our fieldwork does not show evidence of much involvement in political exchange among American retirees.

The focus of this research is on white, non-Hispanic Americans, born in the U.S., who have resided and worked in any state in the U.S. throughout their lives, and who have decided to permanently retire in the border area in the northwest of Mexico near San Diego, California (U.S.). Research includes migrants who retired from any economic activities in the U.S., including, those who actively chose early retirement in anticipation of their departure from work, as well few migrants who are still engaged in economic activities in the U.S. The length of residence among interviewees ranges from several years to decades. The majority engages in volunteer activities in Mexico without participating in formal or regulated employment.

Twenty-nine in-depth, semi-structured interviews were conducted with American retirees age 55 or older, between June and July 2009. The interviews were conducted in English, audio-recorded and later transcribed. Since the sample is non-representative, we do not intend to generalize from our sample to an entire population. Instead, we aim to highlight the analytical themes and typologies that are theoretically relevant. The analysis of common patterns as well as of variation in the interviews is important in these efforts (Miles and Huberman 1994).

We selected this region for data collection because of the large number of retirees living in the border region along the coastal tourist corridor between Ensenada and the U.S. (Lardiés-Bosque 2011). Interviews were conducted in the municipality of Playas de Rosarito (30 kilometers from the U.S.-Mexico border area of Tijuana) as well as in San Antonio del Mar, a residential area in the Tijuana municipality, in the state of Baja California.

Participants were recruited with the assistance of the Foreign Resident Attention Office (FRAO), an office located in Playas de Rosarito and created by the local government to serve the foreign community, which poses a recruitment limitation in our sample. FRAO provided us with a list of associations and clubs for retirees, given that it is common practice for many foreign retirees, especially Americans, to belong to retirement associations in Mexico. Despite unofficial information from locals indicating high rates of participation in associations by American retirees and considering the number of these associations, we estimate that the average number of retirees involved in these associations reaches approximately 200 people. Previous research conducted on retirement in Mexico (Kiy and McEnany 2010b) and more specifically in Mazatlán (Lizárraga 2008a) similarly highlights high participation rates in

these types of associations among American retirees and acknowledges the difficulty in documenting an exact percentage of participation.

The interview schedule consisted of blocks dedicated to investigating the socio-demographic characteristics of interviewees, place of birth, current household characteristics and issues of migration and residential mobility (previous and current), leisure and social relationships, activities developed, and contacts maintained with the country of origin. Table 2 shows basic socio-demographic characteristics.

Table 2. Sociodemographic Characteristics of American Retirees Residing in Baja California

Variables	n
Gender (n = 29)	
Male	15
Female	14
Age (n = 29)	
55-64 years	11
65-74 years	14
75 or older	4
Socioeconomic status, self-identified (n = 29)	
Lower class	6
Middle class	13
Upper class	3
No response	7
Marital status and living arrangement (n = 29)	
Married/in couple/with other people	17
Single/Widow/Live alone	12
Previous State of residence in U.S. (n = 29)	
California	20
Other State	9
Type of household in Mexico (n = 29)	
Own	27
Rent	2

Findings on IRM and Transnationalism in Mexico

Findings are structured according to the dimensions previously mentioned relating to sociocultural, economic, and political aspects, as well as those related to identity and belonging.

Social and cultural transnationalism

According to Kiy and McEnany's (2010b) research on American retirees residing in Mexico, retirees maintained strong ties to the U.S. Specifically, 85% of participants said they remain in contact with friends and family in the U.S. through the Internet, 64% via telephone, and 33% using Skype.

In this study, we account for numerous contacts among retirees, which contribute to the creation of a large structure of transnational practices with family members (primarily children, grandchildren and siblings) and friends left behind and residing in the U.S. However, there is very little evidence to support other types of transnational practices associated with transnational caregiving, such as the care of younger children or parents. Our evidence suggests that many retirees' parents have already passed away and those who have not, reside in the U.S. in close proximity to other family members who are their primary caretakers. Those with living parents express missing the proximity to them, but that the distance is shortened with relatively frequent visits.

Bidirectional or multidirectional visits maintained with family members and friends are relatively constant and tied to tourism. A conditioning factor for visits, both received and undertaken by the retirees, is the distance between the place of origin and destination (Baja California). The frequency of visits diminishes as the distance increases and vice versa. However, as the number of annual trips increases because of reduced distance, the duration of each of these trips decreases and vice versa. For example, Karen, a 59-year old former resident of California, said the following when asked about contact with family members in the U.S.:

> Yes, we do; more by telephone these days. But no, I visit Florida maybe once a year and sometimes twice a year I visit Michigan where some of my relatives are and I visit in Arizona. They also come here to visit me.

The largest group of retirees in our sample previously resided in California while several others were from locations no further than 3-4 hours driving distance from Tijuana. These individuals tend to develop more mobility to locations of previous residence, approximately about one to two times more per month than those residing in further away areas in the U.S. whose trips diminish in frequency although they increase in duration. Additionally, when distances are shorter a family vehicle is used, whereas longer distances necessitate the use of air travel, as evidenced in the experience of Herb, a 73-year-old former resident of California, who discusses his wife's family:

> Her mother lives in California and her whole family is near San Francisco. She doesn't drive […]. Her mother is old and she wants to be near her mother as long as possible. So we had to be near the San Diego airport.

In this sense, several retirees highlighted the proximity to the San Diego and Tijuana airports as important factors for residential location. Distance was not the only factor affecting mobility—interviewees mentioned that the pace of life and other commitments limit the number of trips to the U.S. Sylvia, a 60-year-old former resident of Nevada, said:

> I have family on the East coast, so I only see them once a year. In fact, my brother is coming next week for a week visit with his wife. So our life is here. Our traveling is vacations; we travel maybe three times a year.

Despite the physical displacement**,** American retirees are very much in contact via telephone and the Internet thanks to the development of new technologies such as e-mail and video chat technologies. All interviewees had Internet in their homes and inclusively many made online purchases of products available in the U.S. that could be picked up in San Diego or delivered to their home in Mexico. Additionally, the consumption of products and services in English,

such as newspapers, radio, and television, is another way of maintaining contact with the culture of origin.

Other motives, identifiable as transnational, led retirees to maintain social and economic connections with the U.S. Participating in leisure activities such as going to the movies, theater, and dinner, as well as purchasing clothes and shoes, food and other products, and accessing cultural and religious services, tend to be common reasons for crossing the border to San Diego.

However, as we will discuss later, the most important form of socialization develops in associations and clubs established in the area of residence. Kiy and McEnany (2010b) highlight that American retirees retain a strong desire to belong to socially engaged organizations in their adoptive communities. Particularly, they found that in 2009, 42% of surveyed American retirees in Mexico actively participated in at least one or two community organization and 11% participated in more than three organizations. Lizárraga's (2008a) study on retired residents in Mazatlán found that 54% of interviewees belonged to some organization for U.S. nationals. Similarly, our research indicates that the participation rate of retired immigrants in the Tijuana area is quite high or even higher. The majority of retirees interviewed for this study mentioned participating in one or several of these associations. Moreover, they asserted that the majority of their compatriots living in the area belonged to one or several of these.

Similar to Kiy and McEnany's (2010b) research based on all of Mexico, the type of organizations that our research participants participated in focused on education and culture (theatre), poverty, youth, animals, completion of community projects (libraries), or conserving the environment. These organizations, created by Americans in Mexico, based on civic engagement and assisting Mexican society, are the most common. To a lesser extent, other civic organizations dedicated to promoting the values of the U.S. exist in these areas, which fit with and foster transnationalism.

According to Kiy and McEnany (2010b), 46% of interviewees in Mexico participated in these organizations because members, including those on the board, spoke English, and cited a lack of command of Spanish as an influential factor in volunteering. Similarly, interviewees expressed similar issues with language and found ease in organizations where English is the language commonly used among the members. For example, Kathy, a 55-year-old former resident of California, said, "I don't speak Spanish but the people that I associate with do speak English." Another reason for participating in these organizations is the desire to help the Mexican community given the lack of initiative by the Mexican government and the many needs of the country.

These associations are based on the establishment of strong ties between immigrant co-nationals in the area of destination and the creation of "cultural bubbles", based on the use of the same language and the retention of particular cultural values (Croucher 2012). Portes, Guarnizo and Landolt (1999) argue that these bubbles avoid and hinder integration, as Robbie (a 57-year-old former resident of Illinois) discloses in the following: "I really would [to be more in contact with Mexican people], I don't feel like I live in Mexico here. I feel like I live in San Diego. I don't have to change money". This shows the scarce contact between American retirees and the local Mexican population. Among retirees in our research we find evidence of this, as the isolation generated by affiliation with these organizations limits contact with the local community. Even if the purpose of these organizations is charitable,

direct ties with the Mexican population are not formed, and the result is not always integration. Nonetheless, interviewees did not recognize the contradiction of feeling locally and culturally integrated to Mexico while simultaneously participating in associations that contribute to their isolation from the Mexican community.

Economic transnationalism

Among American retirees living in the border area between the U.S. and Mexico, we identified three types of monetary flows related to economic transactions between both countries: 1) pensions from Social Security, retirement investments (e.g., 401K, etc.), and personal savings, 2) access to healthcare, consumption services and products, and 3) the acquisition or maintenance of properties or households.

Regarding pensions, Gustafson (2008) identifies that among Swedish retirees in Spain, economic flows are generally directed from Sweden to Spain through the sending of pensions while those from Spain to Sweden are very scarce. Our research indicates that 15 of the 29 interviewees were in the age range (66 years and older) to access Social Security benefits; however, it is not clear from our data how many of these indeed used this type of resource for retirement. The economic transactions identified among our participants primarily come from prior savings and a combination of several retirement plans (401K and other Individual Retirement Arrangement –IRA- investments) originating in the U.S. and collected in Mexico. The majority of research participants mentioned selling a household or previously owned property in the U.S., generally the household they resided in, at the time of relocation to Mexico. Therefore, these international retirement migrants count with important economic resources at the time of migration. However, it is worth nothing that only 31.03% of participants (9 of 29) or their partners, receive income from the U.S. Paul, a 68-year-old former resident of Texas, says the following of his financial transactions:

> We have U.S. accounts; [my pension] it's deposited in our accounts. Most of my banking is done on-line, through the Internet with my U.S. bank. Then if I need money in Mexico I just take my card and go to a machine and get out pesos and they're at the exact same rates.

The incidence of income from rental properties is uncommon given the sale of homes and other properties prior to migration. Income generated from any gainful economic activities maintained in the U.S. was also unlikely; nevertheless, a couple of participants mentioned sustaining business partnerships in the U.S. Indeed, there are several types of economic flows from the U.S. to Mexico, primarily in the form of personal savings. However, flows from Mexico to the U.S. are scarce given that this particular group of immigrants does not generate an income in Mexico nor do they have relatives, such as children or elderly parents, to support.

The majority of retirees received their savings in Mexico through branches of U.S. banks in Mexico, through Mexican banks providing this type of service for American expatriates, or by cashing checks from the U.S. at a post office in Rosarito. These practices foster the creation of transnational economic spaces. However, a more limited number of retirees continue to be faithful to banks located in the U.S., periodically traveling to bank branches in San Diego. This behaviour is particularly valuable among those who maintain a household or close family in the U.S., taking advantage of the trip to make several errands.

The second type of economic flow identified as transnational is related to access to various products of consumption and health services in the U.S. Shopping in the U.S. tends to occur

when there is a lack of access to certain products in Mexico, but is also based on trust in product manufacture and commercial chains in which they are purchased. Dean, a 60-year-old former resident of California, discusses the effect of living on a limited income and the access to products of consumption:

> About every 10 days […] we just tie in other errands, medical appointments and familiar stores that carry what we like. There's not anything that we buy up there that we could not buy down here, but we do have memberships in some stores that are more affordable up there. Because the same products down here are imported, so it's only a few cents but we're on retirement budget and so we pay more for some things.

Retirees also engage in economic transfers and travel with the sole purpose of accessing healthcare services both in Mexico and the U.S. On one hand, the lessened expense of medicine and healthcare and the high regard for doctors in the private sector in Mexico, are important factors in relocating to Mexico (Sloane et al. 2013). Once retirees become residents of Mexico, it is a widespread practice to seek less intrusive or general treatments provided by dentists and general practitioners, in which they inject economic flows from the health sector previously received in the U.S. Ed, a 71-year-old former resident of California, negotiates what medical services he seeks by location. He uses medical services in the U.S. simply "because I have insurance and it covers it […]. I use the dentist in Mexico. I imagine if I had a small emergency I would go here in Mexico, yes."

Over half (18 of 29) of the interviewees in our study had access to medical coverage (*Medicare;* accessible at age 65) in the U.S. simply by crossing the border. Nevertheless, there are also retirees who travel longer distances in the U.S. to seek medical assistance in areas of former residence and generally take advantage of the trip to take care of several tasks, including visiting family and friends or maintaining a household. Dean, a 60-year-old former resident of California, values this proximity, "It still is kind of a security factor, and we still have our doctors in the U.S. [...]. We're both covered by medical health care programs that require that we use United States doctors".

Lastly, economic transnational practices are also supported by flows produced between both countries in the acquisition of households in Mexico. The property tax on Mexican real estate is less than that of the U.S. and taxes paid on capital gains following the sale of real estate may be declared invalid depending on household characteristics, time of residence in Mexico, or if the retiree has an FM-2 (permanent residence) or FM-3 (permit to live or work for more than 180 days in Mexico) visa (in 2012, more rigorous requirements regarding income and capital gains were outlined (implemented in 2014) for those seeking FM-2 and FM-3 visas; however, our interviews took place in 2009, prior to this change). This, along with the lower priced households relative to the U.S. leads many retirees to access real estate, either through the purchase of land to later build a home on or by purchasing an already built residence. Another option is purchasing a condominium, although this is less common.

With regard to former residences in the U.S., 5 of the 29 interviewees did not sell their American properties to purchase new ones in Mexico. These retirees continue to maintain residences, generally locked up or rented out, which justifies much of their mobility and the flow of rental income generated in the U.S. to Mexico.

In short, these practices give way to various economic transactions between both countries, identifiable as transnational. Among the causes we must also consider the existence of political and legislative measures that act in favor of this type of economic exchange such as

the "Fideicomiso," or trust, that allows foreigners to purchase property outright in Mexico's Restricted Zone, located 100 kilometers from the U.S. border.

Politics, Identity and Belonging

Among interviewees, approximately half regularized their stay in Mexico as permanent residents (FM-2), while the other half continued to renew their residency for periods up to four years (FM-3). Both of these visas allow for the possibility of voting from local (Americans with FM-3 visas still have an address in the U.S.) to presidential elections (FM-2 and FM-3) in the U.S. since American citizenship is not renounced. The ability to vote in federal elections from Mexico is accessible by registering as an absentee voter, submitting ballots via physical mail, and, is indeed a significant transnational practice. These migrants have higher border mobility linked to voting in local elections, political education, and showcase more transnational political behaviour favored by proximity to the border and the ability to return to the U.S. to vote. Those residing permanently in Mexico who vote absentee in U.S. elections exemplify how migration status conditions this transnational political practice.

While the norm is to show interest in voting (locally and nationally), only a few retirees admitted not participating in voting practices and cited bureaucratic formalities for foreigners residing in Mexico as reasons for feeling dissuaded from political participation. Others expressed growing tired of American politics, an issue also highlighted by Sunil, Rojas and Bradley (2007). In contrast, research on IRM in Spain shows that active involvement among foreign retirees engaging in electoral politics, in either Spain or sending countries, has been virtually non-existent (Gustafson 2008).

Among interviewees we found that examples of transnational political participation were limited to voting in elections in the U.S. However, we did not find evidence of other forms of engagement in political activism, particularly those linked with participation and support of political parties in Mexico, unlike political patterns found among other retirees living in different parts of Mexico. The primary regions where American retirees settle in Mexico are San Miguel de Allende, Lake Chapala and Mexico City. In these locations, political participation is an important dimension of transnational exchanges among American retirees who engage in organized local chapters of Democrats and Republicans Abroad and who mobilize in support of political candidates and parties that will represent them (Croucher 2009a, 2009b).

Questions of socio-economic and political networks are closely related to cultural practices, but also to a sense of belonging, home and identity (Basch, Glick-Schiller and Szanton 1994; O'Reilly 2000). Among this group of retirees living in Mexico, we can identify mixed identities emerging from the mixture of elements of the "here" and "there" and the development of mixed cultural forms giving way to hybrid processes (Casado-Díaz 2009). Marsh, a 73-year-old, former resident of San Diego, reflects this hybridity:

> I usually read the Union Tribune from San Diego and I also […] the newspaper online, I always read the New York Times […] I read Mexican newspapers every day. Yeah, El Mexicano, Frontera, I read Ecos […] I read a lot better than I speak, so yeah.

Marsh also affirms his new identity, saying, "… yesterday a guy asked me, 'are you visiting?' No, I live here. So if somebody says, where are you from, I'm from Rosarito". Thus, both

cultures are shared in this space even as interviewees felt like residents and as belonging in their new country of residence.

Most retirees do not identify exclusively with the receiving society, but maintain and develop individual and collective identities in reference to the country of origin. On one hand, they maintain U.S. culture, language, religion and celebrations. Immigrant associations play a crucial role in providing institutionalized settings for cultural flows and cultural practices and allow the development of a perceived cultural similarity, sense of common origin, and a sense of community among Americans. On the other hand, it is also common for immigrant retirees to develop an identification with the country of destination and thus, develop different forms of hybridity; in this sense, interviewees claimed to be as much "at home" in Mexico as in the U.S., while continuing to identify as U.S. nationals. In fact, many retirees identified with Mexico and its culture although they did not feel integrated.

Discussion: Factors and Functions of Transnationalism

Several practices of transnationalism among this group of retired immigrants have been identified in the social, cultural and economic fields, while other political transnational instances are more limited. The ties maintained by retirees with family members and friends who still reside in the U.S. are strong and sustained thanks to technology and frequent visits between both countries, which increase when the distance between origin and destination is reduced, usually in a one to three hour driving range. Economically, interviewees discussed the importance of different transnational monetary flows from the U.S. to Mexico in the form of savings and other monetary flows, which are very important for the maintenance of their level of consumption and in terms of economic impact on the area of destination.

Additionally, cross-border mobility is significantly high in terms of contacts satisfying the increasing demand for health and medical assistance from the U.S.; this physical mobility is possible given the proximity to San Diego, California. There is no doubt that the physical proximity facilitates several exchanges and promotes multiple modes of mobility to the other side of the border among retired immigrants. This proximity differentiates this transnationalism to that found among migrants with greater distances separating their country of origin and their country of destination.

On one hand, these transnational practices are limited to private and familial spheres, and are also channeled via participation in associations/organizations instead of other types of political activism that support and promote their national culture. These are representative of 'banal' transnationalism (Aksoy and Robins 2002) involving retired migrants who maintain individualised or familial links with home that remain relatively private and hidden.

On the other hand, more formal, organized and institutional transnational forces also structure the transnational lives of retirees. It would be careless to ignore factors related to the economic changes in North America or the emergence of marketing promoting an international lifestyle (Hayes 2014), as well as other fiscal and tax agreements, rules of movement, American corporate conditions permitting the use of services in Mexico, or the work of agencies promoting the acquisition of homes in Mexico. All of these forces are of utmost importance, however analysis of these exceeds the scope of our project.

International migration literature shows how some types of migrants are more likely to be transnational than others. Portes, Guarnizo and Landolt (1999: 224) note that 'immigrant

communities with greater average economic resources and human capital (education and professional skills) should register higher levels of transnationalism'. Scott (2004) also finds that as time away from country of origin grows, behaviour and identity evolve, and immigrants become more integrated in the social networks of their host country. In this way, the findings we present address a notable gap within the academic literature regarding migrants in general.

While different types and forms of transnationalism are evident among economically active migrants, our research shows limited results. On one hand, based on socioeconomic self-identification, 13 of 29 interviewees identified as middle class; seven did not respond; three identified as upper class; and, six identified as lower class (Table 2). Based on the responses we did receive, 16 of 22 retirees self-identified as middle class or above, by U.S. standards, making them a privileged group of migrants relative to migrants from low socioeconomic status. Some may even be considered "affluent" migrants who, given their particular class status, have advantages, such as access and use of technology, available activities, and ease of travel, which allow them to maintain contact with their country of origin. Therefore, we agree with Scott (2004) that certain socioeconomic statuses facilitate the maintenance of transnational relationships and activities.

On the other hand, our participants reflect a level of homogeneity given their retirement age and the affordability of living off of savings in Mexico. This homogeneity makes any comparative analysis to working-age migrants very difficult. Scott (2004) shows evidence that 'elite professionals', 'high-level', executive and managerial professionals depend less on particular transnational practices. However, this is mostly applicable to economically active migrants, not retirees. In this regard, doctors and businessmen, although already retired, still occasionally maintain some professional contact with colleagues and friends in the U.S., who are still engaged in professional activities on the other side of the border. In this case, relationships develop outside the family sphere and within the professional sphere, primarily only among those who maintain professional contacts in the U.S.

The length of time abroad is an important variable related to transnational exchanges among immigrants, with levels of social integration and cultural assimilation broadly increasing with time away from the country of origin (Scott 2004). Nevertheless, spending more time abroad is not a guarantee that retirees will become more 'integrated' or will abandon certain transnational practices. On the contrary, while many interviewees lived in Mexico for long periods of time while not learning Spanish, they said they still felt American, showing little to no differences in terms of assimilation and integration relative to those residing in the area for just a few years. Among our participants, the average length of residence in Mexico was of 7.5 years; the majority had already resided in the area for four to five years; and, 7 of the 29 (24.1%) had resided in the area for over ten years. It is quite common that, independent of age, time of arrival and residence, most retirees develop similar relationships despite their family and friends still living in the U.S., and reproduce the socio-cultural insularity that generates 'expatriate bubbles' (Croucher 2012). Thus, the duration of stay, combined with age, seem to have no effect on the type and intensity of exchanges with the U.S.

With regard to the factors identified in relation to the demand, type and intensity of transnational links and exchanges among these retirees, engaging (or not engaging) in work is of importance. This indicates that a conditioning element of transnationalism among these aged expatriates is related to the life-stage transition, which is a generational issue related to age and occupational and socio-professional conditions. Given that these elderly individuals

are not linked to finding employment, the possibility of integration and contact with the local population is reduced, supporting findings from previous research (Gustafson 2001). This migration occurs at an advanced stage in life, where length of time in the area of destination is relatively short and influences an immigrant's willingness to learn a new language, and local habits and customs. Both these factors are important for understanding why these immigrants retain social and cultural bonds with their previous life and are not able to dive more into the new local life. Following this argument, Scott (2004) detects more transnational ties among employed, skilled migrants living in Paris than those not working.

According to Scott's (2004) research on skilled British migrants in Paris, France, another important factor in reducing the influence of the homeland on belonging is the enduring presence of a partner originally from the country of destination. Nonetheless, most of the partners of retirees we interviewed were originally from the U.S. and it was quite rare for retirees to find a Mexican partner after moving to Mexico, even after becoming widowed. We found that very few retirees relocated to Mexico to find a partner, and those who did were primarily single or widowed men. Even in those rare instances, retirees did not feel any less American nor did they cut off relationships with their contacts and previously established networks in the U.S.

Furthermore, life-stage and the occupational situation affect interest level and ability to learn and speak the language of the host country. According to previous findings (King, Warnes and Williams 2000; O'Reilly 2000) on retired migrants, language represents a big cultural barrier difficult to overcome. This barrier contributes to the creation of socio-cultural isolation and perhaps increases dependence on ties and contact maintained in the country of origin. The possibility and ability of returning to country of origin also influences maintaining contact.

Geographical proximity to the U.S. is a main factor affecting transnationalism among retired Americans living in this border area. The impact of the home-host context on transnational outcomes demonstrates the importance of context to the study of transnationalism, which shows similarities to transnational communities elsewhere (Scott 2004). The distance between the area of origin and destination plays an important role in conditioning the number of movements across the border and the type and intensity of those movements, whereas the physical proximity to the U.S. conditions the maintenance of most exchanges and transnational contacts. For most retirees, movement across the border to San Diego allows access to consumption and commodities, which carry the emotional and symbolic importance of 'home'. Therefore, the context, level of proximity, and overlap (geographical, social, cultural, political and economic) between home and host country are important (Scott 2004).

Engaging with the home country also has several meanings. Among these retirees, the 'connections' may be underpinned by a sense of cultural 'comfort' similar to those detected by Scott (2004) among British migrants living in Paris. Moreover, transnational information channels help stay up-to-date with American society and events, addressing linguistic and cultural needs and desires. The same could be said for newspapers, satellite television or radio, which enable patterns of media 'consumption' and sharing topics of conversation and matters. American commodities and products are purchased as a form of cultural identification with their home country, which produces combined cultural elements, justifies a degree of geographical and sentimental distance from home, while simultaneously being part of, apart from, and common 'observers' of Americans affairs. A common general feeling among retirees is of existing in a liminal space where they are not entirely immersed in their

own culture, nor are they located entirely outside, and, instead occupy a position somewhere in between.

Participation in American associations carries several meanings and advantages. For the majority of retirees it is the primary means of socialization in the absence of family and friends in the area of destination, which improves happiness and quality of life. Also, the engagement in these groups provides the comfort and social contact of socializing with compatriots, speaking the same language, and in general are spaces where English can be spoken, read, listened to, creating a home-away-from-home environment that enables Americans more access to overcoming the difficulties and challenges associated with the migration process and new spatial scenery. Indeed, these social networks often provide practical help of crucial importance for migrants (Gustafson 2008), such as mutual assistance in local life conditions, migration opportunities, or accessing social activities, including physical activities, housekeeping, etc.

Participation among American retirees in Mexico also increased their sense of belonging in Mexico (Croucher 2009b; Kiy and McEnany 2010b), while contributing to the development of a larger sense of community among neighbors and friends in this particular area. Considering that the majority of the members of these groups are Americans speaking their own language, we support Croucher's (2012) observation that Americans residing in Mexico live in an 'expatriate bubble' that socially and culturally isolates them and contributes to the lack of integration to the host society. Kathy, again, discusses this below:

> Usually, it seems that those associations are run by Americans. The average Mexican is out there having to work for their beans and rice whereas we're retired and we have that freedom to do that. We need something to fill our time.

The information presented in earlier paragraphs shows elements of 'reactive transnationalism theory' (Itzigsohn and Giorguli-Saucedo 2005). According to this theory, transnational practices are a reaction to a negative experience of incorporation and the difficulties encountered in the country of destination, along with a form of refuge and identification with their country of origin (Goldring 1998). Transnationalism is then a reaction to the loss of social and cultural position and status achieved prior to migration. After relocating to Mexico, many retirees find themselves in a vulnerable position, not because of a decrease in economic resources, but rather a decrease in social, cultural and political positions given their diminished social circles and levels of influence following migration. Thus, a hostile or exclusionary reception in the host country may foster greater transnational ties (Croucher 2009b). American retirees living in Mexico are not a population marginalized by Mexican society; instead they are welcomed, despite the social isolation. In this situation, transnational activities are influenced by the lack of dense social networks but are more likely shaped by family relationships, home ownership, etc. The cultural baggage and practices brought by retirees from their country of origin lose value in the country of destination, and they find themselves in need of creating their own "transnational social space" (Simó Noguera, Herzog and Fleerackers 2013; Casado-Díaz 2009). Furthermore, the creation of ties with the country of origin poses less difficulties than formalization and adaptation within the Mexican state, often described as too complicated.

Thus, this participation contributes to the maintenance of a significant amount of cultural elements from both 'here' and 'there', generating a sense of belonging to both the U.S. and Mexico while also developing a cultural mix of both countries and cultures. Indeed, participation in voluntary associations helps to construct an American 'sense of place'.

Conclusion

The aim of this paper is to analyze the creation and maintenance of transnational exchanges and transnational time-space activity patterns among retired immigrants living in a border area between the U.S. and Mexico, an issue that presents potential challenges to both countries. Our research indicates that the transnational perspective has an important advantage over the traditional understandings of migration that only consider migration from a receiving-country perspective.

Similar to research conducted by Bozic (2006) on retirees residing away from their home country, we find that a large number of relationships are established in the home country primarily because of life-stage, socio-professional conditions, and some socio-demographic factors. Undoubtedly, the lack of participation in an economic activity affects the number and type of transnational relationships that are maintained; however, being retired also fosters other types of relationships. Nevertheless, there are several factors necessitating further analysis among the retired in northern Mexico, including those related to sociodemographic characteristics and themes such as time (periods spent away and migratory trajectories in life) and space (urban *versus* rural, or living in areas more or less geographically concentrated).

The novelty in our research lies in studying the differences in transnational exchanges among retirees living away from their home country *versus* those living just few kilometers away from the border. Several similarities exist between the retirees examined in this article and those residing in other parts of Mexico; however, there is also an important difference—given that many of these retirees formerly resided in California, this proximity to the area of origin is significant in the maintenance of transnational networks and contacts on both sides of the border. Particularly, this proximity has allowed for the creation and fostering of networks among those from other, non-border, locations in the U.S.

This increased mobility around the border reflects the integrity of national boundaries, and how these retired migrants test and challenge "the bureaucratic legitimacy of these boundaries" (Bozic 2006: 1423). We do acknowledge that further analyses examining how international retirement migrants perceive, evaluate and treat national borders, especially with regards to distance or proximity between the country of origin and country of destination, would be valuable and worth exploring in future research.

Furthermore, a deeper discussion of the reasons behind the lesser importance of political transnationalism developed in this border area is needed. Comparative explorations of the causes, consequences and variations in retired immigrants' transnational practices in border areas are also very needed. Knowledge of these transnational spaces from northern Mexico to the south of the U.S. may form the base for future health and sociocultural policies between Mexico and the U.S. The best example of this is in the push to extend healthcare coverage (such as Medicare) to Americans residing in Mexico. Some research (Warner, Vijalapuram and Mundie 2007) proposes major changes to Medicare regulations so that Americans residing in Mexico may access these services outside of the U.S., however this same research also shows mixed verdicts about the feasibility of these propositions.

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