

An aerial photograph of a dense green forest with a winding asphalt road that snakes through the trees. The road has white markings and is bordered by reddish-brown earth in some places. The text is overlaid on the top left of the image.

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OPEN RESEARCH DATA NCCR NETWORK VENTURES

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Eva Fernández GG
University of Geneva

Andreas Perret Lundberg
nccr → on the move

IP 33: Transnational Ageing: Post-retirement Mobilities, Transnational Lifestyles and Care Configurations

Research team:

IP Leaders: Mihaela Nedelcu & Eric Crettaz

**Eva Fernández GG(postdoc), Laura Ravazzini (postdoc), Livia Tomas (PhD student)
& Malika Wyss (scientific collaborator)**

AIMS:

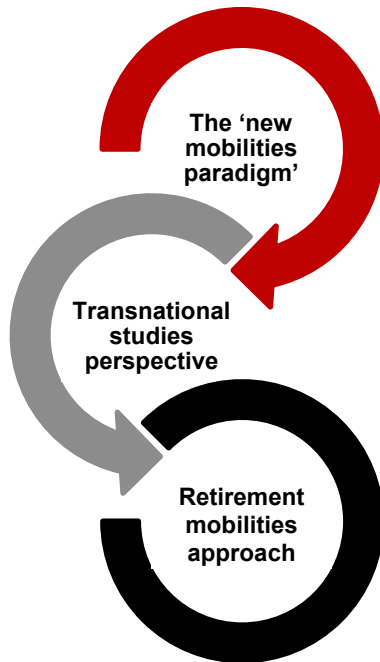
To study and identify the variety of transnational practices and mobility patterns of the elderly who reside in, or have reside a part of their life in Switzerland.

- Which mobility patterns can we observe among ageing populations?
- What factors shape individual trajectories of transnational ageing mobility?
- What kind of transnational practices can we observe among ageing populations?

We contribute to debates on the interplay between ageing and migration by introducing a ‘retirement mobilities approach’ to study transnational ageing with a focus on :
migrant and non-migrant ageing populations
mobile and immobile ageing populations

WHY?

**Variety of mobility patterns; Intentions of retirement mobilities;
Transnational lifestyles**



Nedelcu, M., Tomás, L., Ravazzini, L., Azevedo, L. (forthcoming) Retirement Mobilities: A Migration-Mobility Nexus Perspective on (Transnational) Ageing.

WHO, WHERE AND WHAT?

LIFE BEFORE RETIREMENT

Born in Latin America – Dual Swiss national

Early 90s: First visit to Switzerland

Followed by the decision to move to Switzerland with nuclear family

Moved to Switzerland

PRE-RETIREMENT

Working period in Switzerland less than 30 years – access to a reduced pension

RETIREMENT & NOW

Between Spain & Switzerland

Limited financial resources for living in Switzerland

Extended family and social contacts in Catalonia

Knowledge of the region and linguistic skills

Bought a flat in Catalonia

RETIREMENT

Moved to Spain

INTERNATIONAL MOBILITIES

Practices

Travels to Switzerland at least twice a year – intergenerational & social contacts

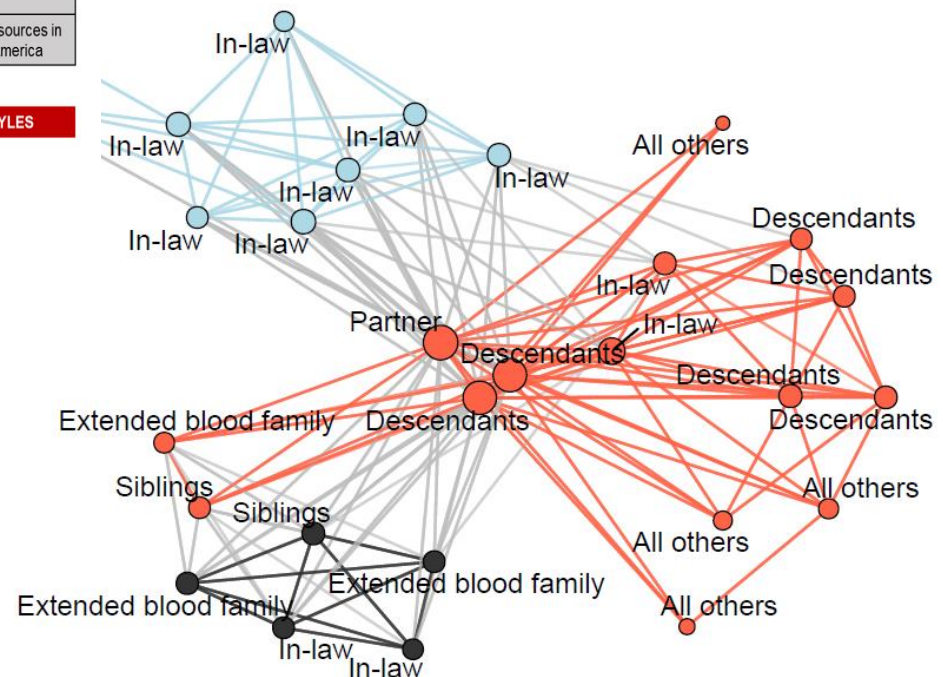
Travels to Latin America every three years – social contacts

Monthly transnational banking transactions

Political participation in Switzerland: Voting behavior

Follows international media sources in Switzerland, Spain & Latin America

TRANSNATIONAL LIFESTYLES



How?

Mixed methods design

- **Quantitative survey TAS I (N=3772)**

In **Switzerland** with people aged 55+
Residents of **all nationalities**

- **Quantitative survey TAS II (N=4700)**

Swiss citizens aged 55+ living **abroad**

- **Qualitative fieldwork**

Semi-structured interviews in **Spain** (N=45), **Morocco** (N=5) and **Switzerland** (N=12) with retirees who get Swiss pension benefits.



Target population
55+



Swiss & Non-Swiss
citizens



Mobile & Non-mobile
people



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Connecting the dots...



DMP IP33



National Center of Competence in Research –
The Migration-Mobility Nexus
nccr-onthemove.ch

II_IP33 AGEING

Mihaela Nedelcu
(University of Neuchâtel)
and Eric Crettaz (HES-SO
Geneva)

Accepted

Transnational Ageing: Post-Retirement Mobilities, Transnational Lifestyles and Care Configurations

Collection methods, mapped from the full proposal description:

Qualitative interviews
Standardized interviews - by e-mail

Retirees living (part of the year) abroad
Survey in Switzerland and abroad

Contact Person

Eric Crettaz (HES-SO Geneva), eric.crettaz@hesge.ch

Connecting the dots...



Collect store and document

Part 1

Relevant collection for II_IP33 AGEING:

Qualitative interviews with *Swiss retirees abroad*

Qualitative fieldwork will take place in **two destination countries - Spain (as an EU member state) and Morocco (as a non-EU country)** - corresponding to two case-studies that will **combine qualitative interviews**.

Qualitative semi-structured interviews will be conducted with Swiss retirees residing permanently in Spain and Morocco, or who move back-and-forth between Switzerland and one of these countries in which they spend several months per year. The number of interviews will be determined according to the saturation criteria; nevertheless, **at least 30 interviews per case-study** will be carried out.

The qualitative interviews will be **conducted by the PhD student** under the supervision of the two project leaders following an interview grid, in order **to collect data about:** the mobility patterns Swiss retirees develop, their motivations to engage in mobility, as well as the individual, family and structural factors influencing these patterns.

The interviews will be recorded and transcribed. The transcriptions will then be loaded in an aggregated file, coded and analyzed by using the MaxQDA software.

A synthetic spreadsheet will be created, listing interviews and specific salient characteristics such as:

- Name of the person(s) who collected the data.
- Sociodemographic characteristics of the respondent.
- Date, place and duration of the interview.
- Description of the interview's context.
- Interview thematic grid.
- Interview content memo.

Collect store and document Part 2

Relevant collection for II_IP33 AGEING:
Qualitative interviews with *Swiss retirees abroad*

The following documentation and data will be made available to other researchers:

- Interview grid.
- Synthetic spreadsheet as mentioned above.
- Analytical grid.

Leitfaden & Postskript: nccr-on the move (IP33)

Date et lieu de l'entretien : _____

Nom : _____

Mot de bienvenue & formulaire de consentement

- Avez-vous encore des questions sur le projet ou le déroulement de l'entretien ?

Questions introductives sur la personne

J'aimerais bien clarifier quelques éléments sur votre personne avant de commencer l'entretien.

- Où êtes-vous né.e ?
- Quel âge avez-vous ?
- Combien de temps avez-vous vécu en Suisse ? / Depuis combien de temps vivez-vous en Suisse ?
- Quel(s) nationalité(s) avez-vous ?
- Quel est votre situation familiale (état civil, enfants) ?
- Travaillez-vous encore (de manière bénévole ou salariée) ? Si oui, pour quelles raisons travaillez-vous encore ?
- Parlez-moi s'il vous plaît de votre vie avant votre retraite.

Data security and protection

Anonymized respondents'
information & sensitive data
stored on secured partition

- Main selection criteria:
 - Retirees residing permanently in Spain and Morocco.
 - Living at least three months per year in Morocco or Spain.
 - Entitled to the old-age and survivor's insurance (OASI).

Challenges?

How can we contact these individuals?

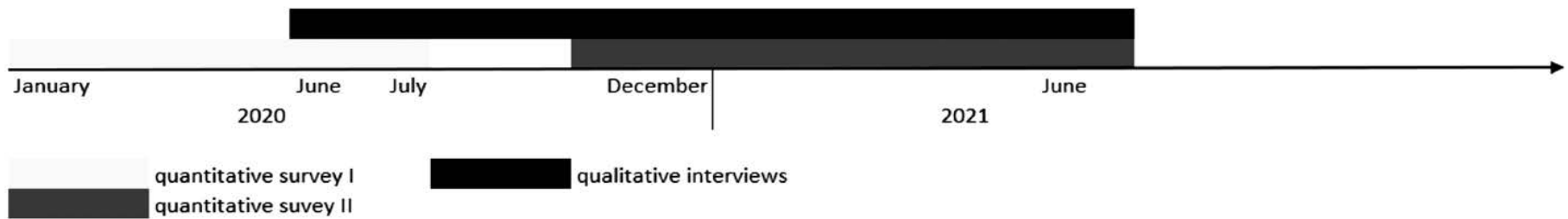


Figure 1. Timeline for quantitative and qualitative data collection.

Connecting the dots...



Quantitative data collection

- ❖ **Survey I:** conducted in Switzerland with residents of all nationalities. Collaboration with the Federal Statistical Office (FSO). (completed)
- ❖ **Survey II:** conducted with Swiss citizens living abroad. Collaboration with the Federal Department of Foreign Affairs (FDFA). (completed)



Survey I in Switzerland

- Residents of all nationalities aged 55+
- Sample size = 15'000
- Start of data collection: End of January 2020
- N = 3772 (06.2020)
- Push to web and PAPI
- Survey available in French, German, Italian, Portuguese, Spanish and English

World wide survey II

- Swiss living abroad aged 55+; 43 countries around the world
- Sample size = 10'000
- Start of data collection: Nov. 2020
- N = 4689 → Aimed N = 2500
- Push to web and PAPI
- Survey available in French, German, Italian, Portuguese, Spanish and English

Quantitative Research: Challenges



- Survey with 110 questions and many filters.
- Semantics of the questions to widen inclusiveness for both Swiss, binational, and non-Swiss nationals.
- Translation of the survey in six languages with first contact letter and reminders. (Team → through comparisons with SHARE and ESS surveys)
- Push to web did not work well.

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Codebooks

Transnational Ageing Survey 2020

Transnational Ageing Survey 2020 (TAS I)
Survey on the life and travel experiences of people 55+ in 2020

Overview

Abstract Retirement years are often years of change. In retirement is no longer a phase of immobility. It have made international mobility easier and as across countries. In normal times, retirees could world outside, travel more or even settle in a d To provide a better understanding of internatio of people who live or lived in Switzerland, the I Transnational-Ageing Surveys. The first Trans in the first half of 2020 providing valuable i retirees who live at least part of the year in nationals of least 55 years old were invited Participants are mainly asked questions ab international mobility, their present travels retirement plans. Other topics include fam health and well-being and overall living co

Version of the microdata v2.0: Edited, Scientific Use File

State of data 21 November 2021

Type Other Household Survey [hh/oth]

Kind of Data Sample survey data [ssd]

Persistent Identifier 10.5281/zenodo.5775519

Scope

Scope A. Past and present international mobility
B. Transnational lifestyles
C. Other links with Switzerland and other
D. Family in Switzerland and abroad
E. Socio-demographic information

Transnational Ageing Survey 2020

Overview

Accessibility

Access Authority Gina Fiore Walder (nccr – on the move) , info@nccr-onthemove.ch

Contact(s) Gina Fiore Walder (nccr-on the move) , gina.fiore@nccr-onthemove.ch

Depositor(s)

Confidentiality

The personal information delivered by the SFSO was deleted upon completion of the Transnational Ageing Survey. Only the contact information of respondents who agreed to receive the results of the survey per email were securely retained by the Survey Institute.

The dataset will be transferred to a public register to make the data available to other researchers. These files do not contain any personal information.

In any case, compliance with the statistical secrecy and other data protection regulations listed in the Data Management Plan is guaranteed.

Access Conditions

Data applicants must commit to:

- Inform the data provider in written form about the research question(s) and the intended analyses (brief description) no later than at the time of data transfer.
 - Comply with current laws and regulations on data protection when working with the data, and not to undertake any effort to identify individuals based on the data.
 - Use the data carefully, considering the associated documentation and specifications.
 - Not to make the data available to a third party. In a research team, all users have to sign the contract individually.
 - Not to link the data with other individual data and not to use the data for commercial purposes.
 - Not to publish results based on less than 5 observations.
 - Forward or publish the results of my analyses in such a way that individual persons remain unidentifiable.
 - Cite all used data and documents conforming with accepted scientific standards.
- In case of publication of the results, the data provider is informed and any copies of publications, papers, and/or presentations based in whole or in part on the data is transferred.

Citation

Requirements

Transnational Ageing Survey I, initiated and funded by the nccr - on the move and the Swiss National Science Foundation SNSF. <https://nccr-onthemove.ch/research/transnational-ageing-survey/>.

the German speaking part of the survey, there was a higher response from mono-national or dual national Italians (304 in total). Other Europeans answered in line with the main nationalities we covered in our sample, indicating that the proposed language options allowed them to participate in the survey. People from the Balkan region had the lowest response rate (7%). The decision not to translate the questionnaire into certain languages had, thus, direct consequences on the response rate.

Exercise 1
Challenges?
Inconsistency
Cleaning and harmonization
Open-ended questions...

We surveyed respondents' network members by asking participants to list family members and indicate whether or not they lived in Switzerland. This survey question specifically listed members under the categories of parents, children, grand-children, stepparents, siblings, as well as an open-ended "*other*" category, also allowing respondents to name up to seven other persons they considered important.

The category other included 5740 entries in five different languages. Data processing involved: the construction of an English dictionary, data entry cleaning using text analysis methods and data reduction into 15 unique family member categories, mentioned by at least 4% of respondents.

Should this particular piece of work should be part of the stored data and we should provide access (scripts & dictionaries)?



Figure 1. Timeline for quantitative and qualitative data collection.
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Mixed methods research design

- Two quantitative surveys
- Two qualitative case studies
- Different sample strategies

Key elements:

Target population

Overlapping time frame (smallest possible time difference)

In-depth vs generalizable

Team composition

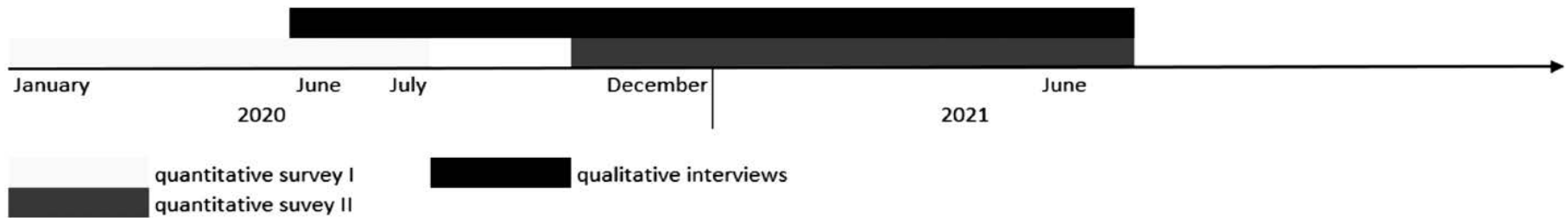


Figure 1. Timeline for quantitative and qualitative data collection.

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Conclusions

- High complexity in the elaboration of surveys, interview guides and contact channels.
- Greater workload: Many languages involved.
- Collaborations with federal institutions are essential.
- Mixed methods strategy requires and early connections with shared working timeline (better developed since project proposal and DMP creation).

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University of Applied Sciences and Arts
Western Switzerland

Thank you for your attention!

