

## RESEARCH

# Heading for a 'Better Life'? Why Swedes Move to Portugal

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This article discusses the drivers behind why Swedes move to Portugal and who these migrants are. The conceptual framework is based on lifestyle migration and considers migration as a process. Using a semi-structured interview guide, designed according to a life-course approach, 36 in-depth interviews with Swedes permanently residing in Portugal were conducted. The findings display that only a small minority of the respondents claimed that the climate, the sense of privilege/affluence and the prospects of being a permanent tourist made them move to Portugal. A majority of the respondents expressed a disenchantment with Sweden, political correctness and a perceived collapse of the Swedish welfare system. Simultaneously, the respondents describe an escape from everyday problems. Notably, it is not the Swedish middle class that seems to be moving, and emigrants come from mainly the top or bottom of the social hierarchy.

**Keywords:** Migration drivers; Disenchantment; Lifestyle migration; Migration process; 'Elsewhereness'

## Introduction

During the last 20 years, a lifestyle-related migration has emerged as a major migration type, alongside traditional labour market-related migration, refugee migration and tied movers (Vandermotten et al. 2004; Haas 2011). The prospect of being a permanent tourist (O'Reilly 2007; Ibrahim & Tremblay 2017; Åkerlund 2015), retirement (Casado-Díaz 2006; King, Warnes & Williams 2000; Gustafsson 2009) and the feeling of affluence and being privileged (Janoschka & Haas 2013; Benson 2014) have stimulated, for example, French to Morocco (Therrien 2013; Therrien & Pellegrini 2015), Brits to France (Benson 2009, 2010, 2011, 2013b), Spain (O'Reilly 2000, 2009) and Portugal (Torkington 2010, 2015; Torkington & Perdigão Ribeiro 2019), Americans to Panama (Jackiewicz & Craine 2010; Benson 2013a) and Swedes to Spain (Gustafsson 2001; Olsson 2017; Woube 2017) and Malta (Åkerlund 2013, 2017; Åkerlund & Sandberg 2014).

*Lifestyle migration* is an inductive concept, based on empirical findings rather than theory (Benson & O'Reilly 2016), with a basic assumption that the migrant tries to 'escape' from her/his current life and that a desired lifestyle appears to be the main driver in many cases of migration (Benson & O'Reilly 2009). To catch the dynamics of the migration *process* and the

agency of migrants, an *aspirations–capabilities* framework can be used (Haas 2011). People will only migrate if they perceive better opportunities elsewhere and have the capabilities to move. In turn, this implies choice and agency. Migration depends on more than income levels and structural conflicts; at an individual level, migration can be assumed to be a function of the individual's aspirations and capabilities to migrate (Carling & Schewel 2018).

Retirement migration contains complex issues of identity, consumption and changing lifestyles (Williams et al. 2000), and is strongly correlated with a desire to increase personal well-being in the later stages of life (Warnes et al. 1999; King et al. 2000; Benson 2011). Other studies argue that lifestyle migration is about escape: escape from somewhere and something while simultaneously being an escape to self-fulfilment and a new life—a recreation, restoration or rediscovery of oneself, one's personal potential or one's 'true' desires (O'Reilly & Benson 2009). Much of the literature also considers migration to be 'tourism' related (Williams et al. 2000; Williams & Hall 2002; Tremblay & O'Reilly 2004; O'Reilly 2000, 2007, 2009). Regardless of the desire to escape and reinvent, expats appear to reproduce class structures and inequalities in the host country (Ibrahim & Tremblay 2017; Oliver & O'Reilly 2010), an example of the self-presentation of British living in rural France, which is influenced by a middle-class habitus despite their allegations that they had left Britain to escape 'keeping up with the Joneses' (Benson 2009).

Most studies on Swedes in Mediterranean Europe have focused on retirement migration (Gustafsson 2001, 2008, 2009; Åkerlund 2013, 2017; Åkerlund & Sandberg 2014) and residential tourism (Woube 2017; Åkerlund 2017). In some studies, explicitly financially strong migrants are focused (Åkerlund 2013, 2017). The two countries studied the most are Spain (Gustafsson 2001, 2008, 2009; Woube 2017) and Malta (Åkerlund 2013, 2017; Åkerlund and Sandberg 2014). One common denominator for these studies is that they focus on seasonal migration; another is the desire of the migrant to improve the perceived quality of life.

Rauhut and Laine (2020) discuss how the de-bordering of Europe, through the free mobility of persons, has had an impact on the migration of Swedes to Portugal. The finding is that *people move because they can*, regardless their age. Obtaining a permanent resident permit or work permit is not an issue for EU citizens in Portugal and hence there is no major structural factor hindering mobility. These findings are in line with the results by Ackers and Dwyer (2004) on intra-EU retirement migration.

Previous researches on Swedes in Mediterranean Europe focused on retired persons, seasonal migrants and residential tourism; why Swedes decide to become *permanent* residents in a Mediterranean country is unexplored. It is a bold assumption that the permanent residents move for the same reasons as seasonal migrants and residential tourists. Moreover, the migration drivers for persons who are *neither* retired nor seeking residential tourism may actually differ from retirees and residential tourists.

The aim of this study is to discuss why Swedes leave Sweden to permanently reside in Portugal. Two questions will be answered: (1) Who are the Swedes permanently residing in Portugal in terms of age, socio-economic background, location etc.? (2) Why do the Swedish citizens leave Sweden to permanently reside in Portugal? The empirical material is based on the answers for the questions posed in 36 in-depth interviews. By unpacking the migration process, focussing on capabilities and agency, the drivers behind the migration appear far more complex and multifaceted than just practicing privilege, enjoying the climate and tax rules.

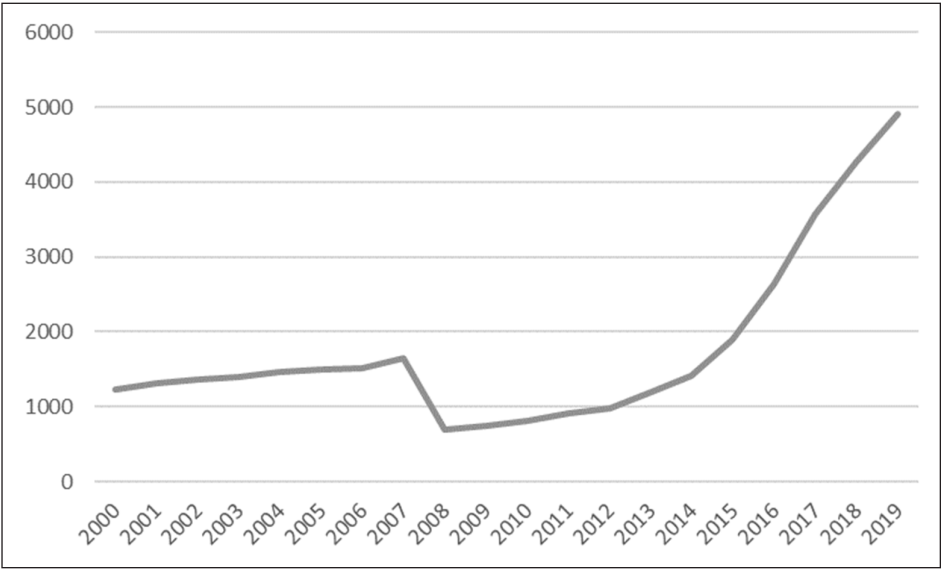
## The Swedes in Portugal

Although the migration flows between Portugal and Sweden have been marginal, noteworthy changes have occurred in the number of the Swedish citizens permanently residing in Portugal (**Figure 1**). From approximately 1520 persons in 2006, the number halved in 1 year

when the financial crisis hit Portugal in 2008 (INE 2020). The increase in the stock of the Swedish citizens permanently residing in Portugal is marked after 2014, with a steady growth reaching slightly more than 4900 people in 2019.

Since 2008, the Swedish citizens residing in Portugal have clustered around the Algarve and Lisbon metropolitan regions (**Table 1**). The absolute numbers of the resident Swedish citizens have increased in all the Portuguese regions except Madeira.

The origins of the Swedish immigrants in Sweden display a dominance for the three metropolitan areas around the regions of *Stockholm*, *Västra Götaland* and *Skåne* in 2008 and also *Halland* in southern Sweden. In 2018, two major trends emerge: (1) the migration of Swedes from all parts of Sweden to Portugal and (2) the prevalence of the dominance of the



**Figure 1:** The number of Swedish citizens permanently residing in Portugal 2000–2019. Source: INE (2020).

**Table 1:** Settlement regions of Swedish citizens in in Portugal 2008 and 2017.

	Absolute numbers		Relative numbers (%)	
	2008	2017	2008	2017
Norte	79	86	11,3	2,4
Algarve	210	1539	30,2	43,2
Centro	46	189	6,6	5,3
Área Metropolitana de Lisboa	214	1568	30,8	44,0
Alentejo	18	40	2,6	1,1
Região Autónoma dos Açores	15	34	2,1	1,0
Região Autónoma da Madeira	114	108	16,4	3,0
<b>TOTAL</b>	<b>696</b>	<b>3564</b>	<b>100</b>	<b>100</b>

Source: INE (2018).

three metropolitan areas and Halland. Moreover, the regions with bigger cities (>100,000 inhabitants) also stand out as emigrant areas to Portugal (Rauhut & Laine 2020).

Among the Swedes permanently residing in Portugal, 1318 were aged 65+ (INE 2020), only 768, or 60 per cent of them, were entitled to a Swedish pension 2018 (Swedish Pensions Agency 2019). About 30 per cent of the Swedes permanently residing in Portugal in 2018 were aged 65+ (INE 2020), whereas the corresponding share in Sweden was about 25 per cent (Statistics Sweden 2020). Approximately 5 per cent of the Swedes permanently residing in Portugal are minors (INE 2020). In Sweden, the share of population aged 18–64 is 57 per cent (Statistics Sweden 2020), whereas the corresponding share among the Swedes permanently residing in Portugal is 65 per cent (INE 2020).

### A conceptual framework

The used conceptual framework is built on three general assumptions. The first assumption is elementary but needs to be recalled: Migration decisions are neither always rational nor based on complete information. Moreover, the outcomes of migration are seldom as the migrant foresaw (Lee 1966). Second, migration is not only caused by demand and supply factors in the labour market but also by migration types such as retirement migration, leisure migration, (international) counter-urbanisation, second home ownership, amenity-seeking and seasonal migration (King et al. 2000; Rodríguez, Casado-Díaz & Huber 2005; Casado-Díaz 2006). Later, the potential of a better quality of life has coined a new type of migration: *lifestyle migration* (Benson & O'Reilly 2009). This type of migration is about the material and social construction of particular places offering an alternative way of living and explains the exact destinations chosen, revealing the role of imagination, myth and landscape within the decision to migrate (O'Reilly & Benson 2009). Third, migration is seen as a *process*, also at the individual level (Haas 2011). Migration should not be considered as a single constrained process but as constituting a part of life's trajectory (Castles 2010).

Although the first assumption—that migration is not based on complete information and is not always rational—needs no further explanation, the two other assumptions need to be discussed. In lifestyle migration, the drivers are predominantly related to

'escape, from monotony and routine, or from the individualism, materialism and consumerism of contemporary lifestyles. Sometimes the migrants are fleeing as a result of real experiences such as redundancy, divorce or crime; at other times it is unpredictability and risk in their working lives, uncertainty about economic futures or anxiety about crime that they describe as driving their mobility'. (O'Reilly & Benson 2009: 4)

Lifestyle migrants believe that changing their place of residence will result in a more fulfilling way of life (Torkington 2010), rather than being an assessment of where they can find better economic opportunities (Benson & O'Reilly 2009). Lifestyle migrants do not only choose how they would like to live their lives but also choose where they would like to live (Hoey 2005).

'Elsewhereness' is seen as the place where self-fulfilment and a better quality of life can be achieved; this is where to go for an escape and a potential for self-fulfilment. It is also seen as a way out from the perceived problems, providing a better quality of life. It is the dream of 'elsewhereness' that takes the migrant to a certain place (Therrien & Pellegrini 2015). For some individuals, the feeling of affluence and being privileged when moving to relatively less developed countries is an important component in the migration decision (Benson 2014; Janoschka & Haas 2013), whereas others are motivated by the potential encounter with 'the Other' (Therrien & Pellegrini 2015).

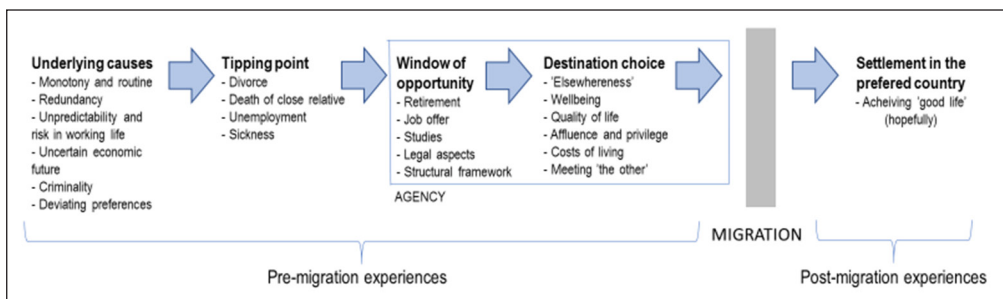
The neoclassical migration theory in the 1960s discussed that legal aspects constitute obstacles to migration flows between countries (Lee 1966). It is not only about rights to residency but also about inclusion in the social welfare system in the country of destination. Although European Union citizenship grants residency rights to all EU nationals, social welfare inclusion still matters (Ackers & Dwyer 2004). Basic civil rights are also important, and these rights are granted for EU citizens in another EU country (Rauhut & Laine 2020). These legal aspects form a structural framework, which the lifestyle migrant has to manoeuvre to enjoy the opportunities of lifestyle migration (Åkerlund 2017). It is worth noting that in the study by Rauhut and Laine (2020) the legal aspects or structural framework stands prior to the decision on which country to be headed for. In any case, to large extent the window of opportunity is under the influence of legal aspects and structural frameworks.

All kinds of factors have to take into account, 'legal aspects', 'structural frameworks' or 'obstacles to migration', when planning a move from country A to country B. Nobody wants to move to another country if they know that they will be worse off by doing so. One thing that may not always appear rational is that the migrant does not possess full information and the underlying cause for migration is, but still the migrants hope for something better than they experience where they are currently staying. This is unique not only for lifestyle migrants alone but also for labour migrants and refugees.

The third assumption considers migration as *a process at the individual level*. The migration drivers as hitherto presented in lifestyle migration are not structured along a timeline; the drivers do not relate to a *process* of events in the life trajectory of the migrant. In **Figure 2**, the key components of the lifestyle migration concept have been ordered to explicate the process of stages a migrant pass through the pre-migration experiences, leading to migration.

Persons who are content with their current life will not consider migrating. Therefore, a person must experience something that troubles them. O'Reilly and Benson (2009) mention several such *underlying causes* of migration: monotony and routine, the feeling of redundancy, unpredictability and risk in working life, uncertain economic future and criminality. They also mention deviating preferences when they argue that people want to move when they do not share individualism, materialism and consumerism of contemporary lifestyles.

The next step in the process is when an individual reaches a point where s/he is forced to re-evaluate the life she/he has lived until that point. O'Reilly and Benson (2009) provide several examples of such *tipping points*, for example, divorce, death of a close relative, unemployment, sickness. When the tipping point is reached, the individual decides to change his/her life.



**Figure 2:** The migration process from a lifestyle migration perspective. Source: Own elaboration.

During the next step in the process, *window of opportunity*, practical aspects related to migration are important: how to make a living? This problem is solved for those who meet the criteria for retirement. Others look for job offers or marriage (Therrien & Pellegrini 2015). The legal issues or structural framework is also important during this phase of the process. What paperwork has to be done? Are residence permits required? Social insurance? Tax rules? The importance of these aspects has been surveyed by researchers such as Åkerlund (2017), Ackers and Dwyer (2004) and Rauhut and Laine (2020).

In the next step, *destination choice*, aspects such as 'elsewhereness' (Therrien 2013), well-being (Warnes et al. 1999) and quality of life (Therrien & Pellegrini 2015), and the feeling of affluence and being privileged (Janoschka & Haas 2013; Benson 2014) assert a major influence on the decision where to migrate.

To deal with sentiments such as escape and disenchantment, the migrant has to demonstrate *agency* to take control and arrange a move to self-fulfilment in a foreign country (Korpela 2014). At this stage, the capability and ability of migrant to migrate will be crucial. This agency is also required when settled in the new country (Benson 2009; Therrien 2013).

The last stage in the migration process is settlement in the new country. Although the first four stages in the migration process occur before migration, this stage is a post-migration experience. As post-migration experiences are not discussed in this article, this stage will also not be further discussed.

## Materials and Methods

To understand why Swedes migrate for Portugal, 36 in-depth interviews were conducted with the permanent Swedes residents in Portugal. The selection of the respondents was not randomised: a notice was created in Facebook of the closed groups 'Svenska Portugalvänner' ['Swedish Portugal Friends'] and 'Svenskar i Portugal' ['Swedes in Portugal'] that interviewees for this study were searched for. Technically, the used sampling method, convenience sample, is a type of non-probability sampling method. There are no criteria to the sampling method except that people are available and willing to participate. Collected samples may not represent the population of interest and can therefore be biased. This kind of sampling method is good for pilot studies and when the researcher wants to get in touch with groups who may be difficult to reach (Rubin & Babbie, 2010). According to the standards of qualitative methodology, generalisations to the whole population cannot be made (Robson 2002). Rather than generalising the results from sample to population, this study has the ambition to explicate relevant analytical themes and stereotypes on who the migrants to Portugal are and why they left Sweden.

In total, 75 persons responded and 38 were selected. Two interviews never took place. The main selection criterion was that the respondent was a *permanent resident* in Portugal. Most interviews took place in the home of the interviewee and some in cafés or restaurants chosen by the interviewee. As some of the respondents lived in remote areas and in the Azores/Madeira, five interviews were conducted over Skype. A profile of the respondents is presented in **Table 2**. As one person conducted the interviews, the 'interviewer effect' has been reduced (Holme & Solvang 2010).

The questions asked followed a semi-structured interview guide format, which was designed according to a life-course approach. Such approach is used to identify complex motivations in the life–work interface of the interviewees and outlines the pre-migration and post-migration trajectories as they unfold in the life-course of the immigrants (and of their significant others), and to understand migration processes from the perspective of the migrants (McAuliffe et al. 2018). Such research design enables a deeper understanding of the dynamic factors influencing the migration process, as well as the embedded interrelationships of those









#	Sex	Age	Lives in	Lived in	Education	Profession	Abroad before	Years in Por- tugal	Speaks Portu- guese	Pre-mig ties to Portu- gal	Income Sweden	Income Portu- gal	Political sympathies	Social life Sweden	Social life Portugal	Return to Sweden
26	M	55	Algarve	Northern	Secondary school	Consultant	No	3	Some	none	High	High	Conservative	Active	Active (mixed)	No
27	W	49	Algarve	Southern	Secondary school	Diverse	No	2	Some	none	Low	Low	n/a	Active	Some (mixed)	No
28	M	46	Algarve	Southern	University	Consultant	Yes	2	No	none	High	High	Left	Little	Some (EU expats)	No
29	M	43	Greater Lisbon	Southern	University	Entrepreneur	Yes	2	Some	none	High	High	Liberal	Active	Active (mixed)	No
30	M	43	Greater Lisbon	Southern	Secondary school	Entrepreneur	Yes	1	No	?	High	none	Extreme right	Little	Active (mixed)	No
31	M	40	Other Portugal	Western	University	Health care	No	1	No	none	Medium	High	Extreme right	Little	Active (Portuguese)	No
32	W	39	Greater Lisbon	Stockholm	University	Health care	No	10	Yes	yes	Medium	Low	Social Dem.	Little	Little (mixed)	No
33	W	31	Other Portugal	Stockholm	University	Sales	No	10	Yes	none	none	Medium	'non left'	Active	Active (Portuguese)	No
34	W	30	Greater Lisbon	Stockholm	University	Social sector	No	1	Some	none	Medium	Low	Left party	Active	Little (mixed)	No
35	W	29	Other Portugal	Western	University	Health care	No	1	Some	none	Medium	none	Extreme right	Little	Active (Portuguese)	No
36	W	28	Greater Lisbon	Southern	University	Media/Com.	Yes	3	Yes	yes	Low	Medium	Liberal	Little	Active (Portuguese)	No

factors. The posed questions covered contextual factors (e.g. employment situation, education, income, family background, other cultural frameworks) and also why the respondents decided to leave Sweden for Portugal as well as how they experienced the process leading to migration. The coding of the interviews followed the keywords listed in **Figure 2** and the related discussion.

### **Who are the Swedes residing permanently in Portugal?**

The background of the respondents is heterogeneous. Respondent #5 made an interesting observation when saying 'you're easily misled to believe that those moving to Portugal are well-off and real high-income earners. Well, they exist /.../ but they don't constitute the majority. Most of us here are ordinary people who have worked in ordinary professions for ordinary salaries'.

Several of the respondents reported health problems. Two respondents had chronic diseases, but after the move to Portugal the problems were mitigated. Another respondent had a burnout and was thrown out of the social-insurance system after 2 years. Because of mental illness, one respondent was institutionalised for almost 5 years.

Unemployment and a weak position at the labour market were also a common denominator by the respondents. Job offers brought four respondents to Portugal. Most of the respondents had little social life in Sweden, either because they worked too much or because they had moved around to different places in Sweden or abroad. A majority of the respondents explicitly stated an issue of weak social networks in Sweden (**Table 2**).

Most of the respondents had worked in professions where they—to a large extent—controlled their own time management. Some were senior managers, others were in the creative sector and some were street-level bureaucrats or entrepreneurs (see **Table 2**). An entrepreneur, Respondent #30, claims, 'follows the opportunities'. Three of the respondents are 'digital nomads'. One works on distance for a Swedish company and two have their own companies with clients in the Nordic countries; everything is done online, with few personal meetings. Few of the respondents followed the 'normal' social conventions in Sweden in listening to the opinion of the majority and voicing the same opinion so as not to stick out from the crowd. On the contrary, a majority of the respondents had strong opinions of their own, and the 'political correctness' in Sweden disturbed them. As displayed in **Table 2**, a majority of the respondents have political sympathies predominantly to the centre-right parties, which may be the underlying reason for criticising the political correctness in Sweden.

Most of the respondents neither have any pre-migration ties to Portugal nor know anyone who had emigrated to Portugal (**Table 2**). Their decision to emigrate was not influenced by others and they all identified Portugal as an attractive country of destination by themselves. Those who had pre-migration ties to Portugal either worked in Portugal before or had family ties to Portugal.

### **The drivers behind migration**

#### ***Disenchantment and Frustration***

The political correctness in Sweden upset several respondents, and they were simply fed up with the need to voice 'correct' political phrases every now and then. 'In Sweden, you're under some sort of opinion control', complains Respondent #5. Respondent #14 argues that 'Swedes are quite restricted and narrowminded, we are quite consensus oriented, you have to be politically correct /.../ You must not stick out of the crowd'. Respondent #25 complains that 'you can't talk about the actual problems; instead, a lot of pseudo-problems are debated'.

Some themes among the narratives of the respondents are recurring: an increasing level of criminality and violence in Sweden, the decreasing quality and accessibility of health

care, decreasing quality in the school system, bad infrastructure, and so on, tended to make most respondents frustrated with their home country. In Portugal, Respondent #16 argues, 'the trains run, the medical care is very good, the police is present—always visible and they are happy to help you—and there is discipline and structure in the schools... The pupils learn what they have to learn'. 'To what use is it to be the most gender equal country in the world when the medical care doesn't work and police can't solve crime?', asks Respondent #34. There is 'an increasing violence and criminality, also in small towns', Respondent #26 says, 'nowadays there's a lot of shootings in the streets everywhere'. To many of the respondents, the failure of integrating immigrants caused not only frustration but also anger. Several also expressed concerns to what extent Sweden can host more refugees.

There are more things causing frustration. 'More and more services in Sweden are provided without any personal contact', says Respondent #6. When with regard to contacts with government agencies, Respondent #25 argues, 'you can't even talk to them over the phone in Sweden /.../ it feels as if society is about to be closed down'. The anonymous large-scale shopping centres in Sweden cannot compete with the Portuguese 'small-scale and local society', Respondent #25 concludes.

Many respondents were frustrated with a feeling of being stuck on the treadmill, for example, eat, sleep, work, take the children to school and their different activities after school, hear their neighbours and colleagues brag about their new 48" flat screen TV, their new car, or their last vacation trip. Several respondents had other preferences and ambitions than just to live a materially rich life. 'We saw other people in Sweden live with their expensive cars and really fashionable houses... and everyone seems unhappy. People are not at home with their children, they tuck them into a kindergarten when they are 1 year old. It's a lifestyle that just feels completely unreasonable to us', declares Respondent #31. Parallel to this, the same people complained that Sweden is an emotionally cold country. Many had only a few (if any) close friends, and although some of the respondents were very active socially, it did not provide them with close friends.

Some also mentioned a relative level of deprivation and poverty as forming an underlying driver of migration. Two respondents grew up in low-income household in high-income areas. 'What is often valued in Sweden was the economic, the status, the material things', says Respondent #23. 'It was a materialistic incitement', Respondent #33 recalls, 'but I didn't have any money'. She had to live with her parents after she left school, and she had to pay rent for her room. Two other respondents reported similar experiences: a weak position at the labour market, no regular income, no money to rent a flat. 'After I was thrown out of the social insurance system, I had no income', sighs Respondent #34. 'I had to move back home and live with my mum'.

An overwhelming majority of the respondents reported a significant disenchantment and frustration over their life in Sweden. In one way or another, most of them wanted to escape from the troubles of everyday life.

### ***Tipping Point***

All except two of the respondents reported that they had been confronted with a situation that forced them to think about themselves and their lives in different or new ways. Several respondents claimed that their divorce was such a tipping point or the fact that their children moved away from home and did not need them anymore. 'When the children moved out, we decided to divorce', says Respondent #26. For some, the tipping point was that they lost their job and/or suddenly experienced a marginal position at the labour market. Others pointed at the death of close relatives. Respondent #5 recalls his tipping point: 'my wife died in 2011,

just a few years before my retirement... I was sitting in the little forest village in northern Sweden where I lived... well, what to do now, I thought?'.

Long-term sickness leaves because of physical or mental illness were also presented as a tipping point: 'As I was about to be discharged from the psychiatric clinic, I started to think about what to do... I didn't have anywhere to live... nothing' (Respondent #8). Some tipping points were traumatic. One respondent did not catch the *Estonia* ferry and lost most of her colleagues when the ship sank, which turned her life upside-down. Another respondent went through bankruptcy. For some respondents, the tipping point was that they met their future partner in another country, and some respondents were suddenly offered career opportunities abroad.

### ***Windows of Opportunity***

Disenchantment and tipping points alone were not enough to make the respondents emigrate. 'Many times, you have a desire but then you are locked in by work, family or something like that', says Respondent #25 when reflecting on moving abroad. He continues: 'When all of those knots suddenly disappear, you can do something you wanted to do. Should I do it? Yes, why not!'.

For several respondents, retirement offered a financial opportunity to move. Others saw the tax rules in Portugal for capital incomes and occupational pensions from the private sector as the window of opportunity. Respondent #22 says that 'I have always said that I won't work as an operational manager after I am 60 years old /.../ the tax rules made it possible for me [to retire at 60]'. The mentioned *tax rules* play an important role in the public debate in Sweden. In 2009, Portugal introduced a 'Non-Habitual Resident' (NHR) regime to attract well-educated Portuguese with key competences living abroad to return to Portugal and to attract financially strong foreigners to immigrate. Private occupational pensions and capital incomes from abroad are almost exempted from Portuguese tax (Living in Portugal 2020). The Swedish Government was very upset with how Portugal has become a tax haven for the wealthy Swedish pensioners who want to avoid paying tax in Sweden, and in the media, the Swedish Government has frequently criticised those Swedish pensioners who have immigrated to Portugal (Svt 2018; Dagens Arena 2017; Dagens Industri 2018; Aftonbladet 2019). In 2020, Sweden and Portugal signed a new bilateral tax treaty, in which the possibility to be completely exempted from tax payments for Swedes permanently residing in Portugal was reduced (Government of Sweden 2020).

However, the NHR rules appear to play a less important role than expected, partly because persons who have worked in the public sector and with no capital income cannot benefit from them. Moreover, changes in the tax rules for persons with NHR status appear to affect them marginally. 'Economically, it doesn't mean much', Respondent #11 argues. 'It is worse that the exchange rate has deteriorated – I've lost 15% of my pension due to this'.

Some of the respondents work in the 'creative' sector and consider themselves as 'digital nomads'. For these persons, modern IT-solutions offer a window of opportunity. 'My clients work on distance as well /.../ it doesn't matter if I sit in the office or somewhere else... or in Portugal' (Respondent #26).

A majority of the respondents argue, albeit to various extents, that the EU had an impact on the decision on destination country because of the intra-EU rules. 'We can move wherever we want in the EU. It's not just youngsters who can', says Respondent #21. To move somewhere outside the EU would have caused them much more paperwork. 'Within the EU, because it is less complicated', states Respondent #10 when talking about potential destinations. In short, when the opportunity to move emerged, the EU provided a legal framework, which

many realised that they could use. This made Portugal an interesting country to many of the respondents.

Two women migrated to Portugal to settled down with a Portuguese man. Two other interviewees moved to Portugal because of other family ties. Job offers were the windows of opportunity for several respondents.

### **Destination**

Almost all of the respondents claimed that the climate and the food made them chose Portugal as a country of destination. Unanimously, the respondents also highlighted the friendliness, politeness and welcoming mentality of the Portuguese, which played an important role for the choice of destination. However, these were not the only reasons for choosing Portugal.

For low-income earners, the cost of living in Portugal was attractive. Respondent #9 concludes that 'with the money we have today, we would not have been able to live in Sweden'. '[I] don't make a lot of money, but at the same time it's not that expensive either', says Respondent #27. Several other respondents report similar views. However, six respondents choose Portugal because of the tax rules. 'I have to admit that the tax rules definitely made me consider Portugal', Respondent #22 admits.

The 'elsewhereness' was illuminated when the respondents described what they found attractive in Portugal. A majority of the respondents also claimed that the low criminality and the high personal safety in Portugal played a significant role in their choice of destination. 'The security in Portugal is probably what I would list as number one' (Respondent #5). 'It is very positive that the criminality is so low here' (Respondent #13). Several respondents express a similar opinion. A better healthcare system and better schools and infrastructure were also mentioned as 'pull' factors in the migration decision. Respondent #9 states that 'There is, like a superstition, that everything is much better in Sweden'. 'I still meet people who think that Portugal is a poor country /.../ Health care is superb, which people do not believe', says Respondent #12. Similar opinions are frequent in the narratives of the respondents.

Several of the respondents emphasised *the importance of a local society*. 'You still have a butcher you go to and you get fantastic raw materials only when it comes to meat, vegetables on the market – it is really locally produced /.../ And wine ... where you can also go directly to the vineyard and buy', Respondent #18 says. Portugal reminds them of Sweden when they were young in the 1960s and 1970s. 'Portugal reminds me of Sweden when I was a kid /.../ and this is something I like', says Respondent #30. Respondent #5 adds 'this community works the way I want a community to work'. What the respondents describe here is their perception of 'elsewhereness', the kind of life they would like to live and how this contributes to their subjective self-fulfilment.

Respondent #6 returned to Europe when she retired. 'During the last years we worked in Mozambique we spent our vacations in Portugal so that our daughters, but also friends and family, could come and see us /.../ When we retired we decided to move to Portugal permanently'. Two respondents had lived and worked in Asia. When returning to Europe, Portugal was attractive because of the climate and its relative closeness to Sweden, which enabled relatives and friends to visit them.

### **Discussion**

The Swedes permanently residing in Portugal are a heterogeneous group of people. Roughly, slightly more than 40 per cent of Swedes settle in the Algarve; some settle in the rural countryside with only Portuguese as neighbours, and others settle in towns or gated communities

along the coast where they only socialise with Swedes and other expats, and do not bother to learn to speak Portuguese. Many persons from this particular group demand supermarkets with the Swedish products, the Swedish artisans, the Swedish restaurants, and so on. About 45 per cent of Swedes settle in the Lisbon Metropolitan Region. A majority of these are of working age and have families, and there is a Swedish school in Lisbon. The remaining number of Swedes (around 13 per cent) are scattered over the rest of Portugal. Most of them have little contact with other Swedes in Portugal, they speak Portuguese and are integrated into the Portuguese society (Rauhut & Esteves 2020). A high share of these is still of working age.

Despite this heterogeneity, the respondents have passed all stages in the migration process outlined in the conceptual framework: underlying causes, tipping point, window of opportunity, destination choice and settlement in the new country. All respondents but two provide answers to fill the different stages in the analytical scheme; one respondent provided information that almost fills all stages and for one respondent there was some missing information.

A majority of the respondents expressed a disenchantment with Sweden and a perceived collapse of the Swedish welfare system. In particular, the healthcare system in Sweden was seen not to work well, the schools do not work well, there is an increasing level of criminality/violence and the police cannot deal with it, the integration of immigrants does not work well, and so on. Sweden is seen as going in the wrong direction, and this was stated regardless of political sympathies. To highlight the strong local society in Portugal and how the Portuguese society is organised are ideological statements that implicitly criticise the Swedish welfare state. To criticise the political correctness in Sweden is also ideological. These opinions are expected. Research on political sympathies among Swedes living abroad reports similar opinions and disenchantment (Bergh, Jordahl & Öhrvall 2016). As displayed in **Table 2**, the political sympathies of the respondents are predominantly to the political right. According to Oscarsson (2016), this is what the political sympathies generally look like among Swedes living abroad, and the Swedes permanently residing in Portugal appear not to deviate from this.

However, this disenchantment can be seen as what is termed *underlying causes* in the conceptual framework. Moreover, many of the respondents questioned the preferences of the middle class in Sweden, as well as the presence of consumerism and materialism in Sweden, and this is in line with the concept of lifestyle migration (O'Reilly & Benson 2009). This is also an underlying migration cause.

For the respondents who have left Sweden because of personal problems (e.g. bankruptcy, poverty and relative deprivation, low pension, homelessness, mental or physical unhealth), the low costs of living made them chose Portugal. This group of respondents feel let down by the Swedish welfare system. Also, the 'digital nomads' are attracted by low costs of living. The six well-off persons in the sample who qualify for NHR status were attracted by the tax level, the climate and practicing privilege. For the respondents who have worked outside Europe or in the EU administration, factors such as a friendly population, low cost of living, culture but also the climate made Portugal an attractive destination (it is not so simple to return to the Swedish climate after 20 years in tropical countries, as one respondent put it). The persons who moved to Portugal because of job offers and the persons with close family ties in Portugal only state the job offer and family ties as the cause of migration.

When passing the *tipping point*, the need for change became clear to the respondents. At this stage, Spain was the country most respondents focused at. During the search for a *window of opportunity*, the advantages of Portugal being an EU country emerged. In combination with a well-known quality of life, low costs of living and a friendly population, Portugal was then seen as a very competitive country for self-fulfilment in 'elsewhereness' (Rauhut & Laine 2020). This relates to what is termed *destination choice* in the conceptual framework.



Only a minority of the respondents stated that the climate and the prospects of being a 'permanent tourist' or to enjoy life made them move to Portugal. This is actually in line with the findings of the previous research, indicating that only 6 per cent of those emigrating from Sweden do so because of a desire to enjoy life and being a permanent tourist (Solevid 2016). The lifestyle migration theory, however, puts an emphasis on this driver.

More than half of the respondents try hard to be a part of the Portuguese community in which they live in and have a strong self-perceived feeling of being integrated to Portugal (Rauhut & Esteves 2020). Most respondents agreed that the improvements in their quality of life and well-being in general exceeded the expectations they had for their future life. Improvements in quality of life and personal well-being are mentioned as important drivers in the lifestyle migration theory (Benson & O'Reilly 2009). However, none of the respondents expressed that a feeling of affluence or privilege from a relatively wealthy country made Portugal an interesting country of destination. On the contrary, several respondents pointed at the low costs of living in Portugal, and that this made it possible for them have a qualitatively better life than in Sweden. Now, this is not the same thing as seeking affluence or privilege.

In the lifestyle migration literature, the feeling of affluence and being privileged (Janoschka & Haas 2013; Benson 2014) assert a major influence on the decision where to migrate. The respondents choose Portugal for other reasons. Actually, more respondents report that they choose Portugal because of the food and climate than of the feeling of affluence, practicing privilege and tax rules. This finding supports the importance of well-being (Warnes et al. 1999) and quality of life (Therrien & Pellegrini 2015) for the *destination choice*. Also, 'elsewhereness' (Therrien 2013) has a major impact on the destination choice among the respondents.

Korpela (2014) stresses the migrant's capability and ability to demonstrate *agency* to take control and arrange a move to self-fulfilment in a foreign country. All the respondents actually show this, also the ones with limited financial resources. The respondents clearly report that leaving Sweden for Portugal is not about having the money to move, but to take control over his/her own life and arrange a move. This is in line with the findings of Carling and Schewel (2018).

## Conclusion

In this article, on why Swedes leave Sweden to permanently reside in Portugal has been discussed, the concept of lifestyle migration has been applied to explain other migration types than just for retirees and residential tourism. Moreover, the lifestyle migration approach used in this article has been designed to reflect the *process* a migrant experiences during the pre-migration phase. This approach is an added value for this article.

Who are the Swedes residing permanently in Portugal? Residential tourists are filtered away as only permanent residents in Portugal are included in the study. An overwhelming majority migrate for other reasons than for low taxes in Portugal, some for work or marriage, and some to try and escape unemployment and illness. Most do not even qualify for the NHR rules, and a surprisingly high share of the respondents were low-income earners in Sweden or had experienced long-term periods of sickness leave or long periods of unemployment. Furthermore, the share of respondents reporting few social networks in Sweden and few friends is high, which indicates a weak attachment to Sweden in the first place.

The second question has been posed to identify why Swedes leave Sweden to reside permanently in Portugal. Regardless of political sympathies, a majority of the respondents perceived a collapse of the Swedish welfare system. Most respondents expressed a disenchantment with Sweden and how Sweden has developed. Sweden is simply going in the wrong direction. The



healthcare system, schools, the increasing criminality (and the police being unable to deal with it) and that the integration of immigrants does not work well were the prime targets of the criticism.

A prevailing impression left by the interviews is that a majority of the respondents have, in effect, voted with their feet. They have a profound disenchantment with how contemporary Sweden has developed, and they do not have faith that these developments will change in the near future. Many of the interviewees feel that they have been let down by Sweden in one way or another. They have paid high taxes for many years, yet when they need services and support from society, society is not there to help them. The Portuguese society is seen as better at providing welfare to its citizens than Sweden. This sentiment was expressed in relation to issues of an insufficient availability of health care, low pensions, protection from increased criminality, unemployment, housing shortages, political correctness, and so on, so generating this need for change—'elsewhereness'. Thus, those persons experiencing this type of need do not move to Portugal to enjoy life or to get a better life, but simply because they feel that they have little other choices.

Some of the respondents had lived in Spain before migrating to Portugal, and a driver for this second move was that the values of the Swedish 'middle class' were deeply rooted among the Swedish expats in Spain (Rauhut & Laine 2020). Such a cultivation of 'middle class-ness' has also been observed among British expats in Mediterranean Europe (Benson 2009; Ibrahim & Tremblay 2017; Oliver & O'Reilly 2010). The migration drivers may not necessarily be the same for those settling down on a permanent basis and those who are residential tourists. Thus, a topic for future research could be to analyse Swedes permanently residing in Spain and explore if and in what way they differ from the Swedes permanently residing in Portugal. Similar studies could also be conducted for the Swedish expats living in, for example, France, Italy, Greece, Thailand, and would increase the knowledge on the Swedish citizens abroad, along with the understanding of their migration drivers.

Hitherto, public debate in Sweden has focused on the rich leaving Sweden for Portugal. However, when a majority of these emigrants leave Sweden because of the relative deprivation or economic hardship, then in combination with a failure of the home welfare system to provide support, it is obvious that the scope of this debate needs to be enlarged. This is a second added value for this article. The findings in this study indicate that it is not the wider middle class who are leaving Sweden for Portugal, and although a few of the emigrants are very wealthy indeed, the majority of the respondents are to be found on the lower level of the social hierarchy. Poignantly, the majority of this latter group does not move to get a better life; they move to get a life.

### Competing Interests

The author has no competing interests to declare.

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