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**Towards an Institutional Approach to
Post-Retirement Migration**

- A Case Study of Waikanae -

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Abstract

Post-retirement migration theory is reviewed and examined and the disparate state of current theory is noted concerning motivations to migrate. The arising institutional approaches are a possible conceptual framework within which to integrate current post-retirement migration theory more fully. In these approaches, institutions are viewed as the mediating context between social processes and individuals, and this can assist in accounting for the discrepancies between theory and observed migration patterns. This institutional model is assessed in its ability to integrate theory with the empirically observed situation at Waikanae (east coast, southern North Island, New Zealand).

The social and institutional context of Waikanae is examined by interview with institutional managers. Migrant interactions with and response to this context are examined through a questionnaire survey. The effectiveness of institutions in meeting needs are used as a key indicator in the attractiveness of Waikanae to retirees. The findings indicate that migrants are filtered from the wider retired population by institutional discrimination. Those qualified for access to institutional resources are able to migrate, resulting in the concentration of retirees from similar socio-economic and ethnic backgrounds in Waikanae. This confirms that post-retirement migration theory needs to take greater recognition of the influence of institutions on retiree migration and future work is suggested in order to more fully substantiate this.

For Robyn, in appreciation

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I would like to thank Geoff Thomas for his patient support and guidance, my wonderful and understanding wife Robyn for putting up with me through it all, and the people of Waikanae without whose co-operation this thesis would not have been possible. I hope that in some small way this thesis can contribute a little more to that town which is so quickly growing up.

To God be the Glory

Table of Contents

Abstract	i
Acknowledgements	ii
Table of Contents	iii
List of figures	v
List of Tables	v
Preface	vi
Chapter 1	
Post-Retirement Internal Migration Literature Review	1
1.1 Introduction	1
1.2 Post-Retirement Migration: The New Zealand Context	3
1.3 Post-Retirement Migration: Theoretical Basis	4
Gerontological Theory	5
Behaviouralistic Approaches	6
Structural Approaches	7
Summary	9
1.4 Who Migrates Where, and Why	10
1.5 The Consequences of Migration	13
1.6 Critique and Summary Of Literature	15
Chapter 2	
Institutional Approaches	17
2.1 Introduction	17
2.2 What is an Institutional Approach?	18
Theoretical Development	19
Institutional Approaches and Geography	22
2.3 Towards An Institutional Analysis	26
Common Themes	26
A Definition	29
2.5 Summary	31
Chapter 3	
Case Study Methodology	32
3.1 Justification of Methodology	32
Context Specificity	32
Hidden Agendas	33
3.2 Key Concepts Outlined	34
Discrimination	34
Needs	36
3.3 Outline of Case Study	40
Aims	40
Underlying Assumptions	41
Hypotheses	42
The Study Area	44
The Selected Institutions	45

Table of Contents

Abstract	i
Acknowledgements	ii
Table of Contents	iii
List of figures	v
List of Tables	v
Preface	vi
Chapter 1	
Post-Retirement Internal Migration Literature Review	1
1.1 Introduction	1
1.2 Post-Retirement Migration: The New Zealand Context	3
1.3 Post-Retirement Migration: Theoretical Basis	4
Gerontological Theory	5
Behaviouralistic Approaches	6
Structural Approaches	7
Summary	9
1.4 Who Migrates Where, and Why	10
1.5 The Consequences of Migration	13
1.6 Critique and Summary Of Literature	15
Chapter 2	
Institutional Approaches	17
2.1 Introduction	17
2.2 What is an Institutional Approach?	18
Theoretical Development	19
Institutional Approaches and Geography	22
2.3 Towards An Institutional Analysis	26
Common Themes	26
A Definition	29
2.5 Summary	31
Chapter 3	
Case Study Methodology	32
3.1 Justification of Methodology	32
Context Specificity	32
Hidden Agendas	33
3.2 Key Concepts Outlined	34
Discrimination	34
Needs	36
3.3 Outline of Case Study	40
Aims	40
Underlying Assumptions	41
Hypotheses	42
The Study Area	44
The Selected Institutions	45

3.4 Methodology.....	46
(1) Background Information.....	46
(2) Institutional Perception.....	47
(3) Elderly Political Response.....	47
(4) Elderly Migrant Survey.....	48
(5) Needs Assessment.....	50
(6) Relate Case Study to Hypotheses.....	51
Chapter 4	
Summary of Findings.....	52
Part A	
Social and Institutional Context.....	52
4.1 Social Background.....	52
History	52
Demographics	53
Summary	56
4.2 Institutional Perception.....	56
Key Public Providers	56
Key Private Providers	61
Voluntary Providers	66
Summary	71
Part B	
Elderly Perceptions And Needs Assessment	73
4.3 Elderly Political Response.....	73
Indirectly Representative Organizations.....	73
Directly Representative Organizations.....	76
Summary	78
4.4 Post-Retirement Migration Survey	79
An Overview of Responses	79
Key Interactions.....	87
Summary	89
4.5 Needs Assessment	89
Interpretation of Table 4.3.....	92
Summary	96
Chapter 5	
Thesis Conclusions and Critique.....	97
5.1 Case Study Conclusions	97
Conclusions in Light of Hypotheses.....	97
Implications for Post-Retirement Migration Theory.....	99
Conclusions in Light of Aim 2	101
5.2 Critique of Methodology	103
Case Study Methodology - Problems and Solutions.....	103
Institutional Approaches and Post-Retirement Migration	105
5.3 Concluding Remarks - Future Directions.....	108
Bibliography.....	110

Appendices

Appendix 1		
	Location Map of Waikanae.....	115
	Map of Waikanae Township and Beach Settlement.....	116
Appendix 2		
	Key Individuals and Organizations Contacted for Interviews.....	117
Appendix 3		
	General Interview Schedule.....	119
Appendix 4		
	Copy of Questionnaire.....	121
Appendix 5		
	Tally of Questionnaire Results.....	126

LIST OF FIGURES

Figure	Description	Page
Figure 1.1	Behavioural migration model	12
Figure 2.1	Institutional migration model	30
Figure 3.1	Model of definitions of 'Need'	38
Figure 4.1	Waikanae population growth	53
Figure 4.2	Kapiti Coast net migration 1981-1986	54
Figure 4.3	Waikanae age/sex pyramid	55
Figure 4.4	Sample age/sex structure	80
Figure 4.5	Sample age spread	81
Figure 4.6	Pre and post-retirement incomes	82
Figure 4.7	Origin of migrants	83
Figure 4.8	Motivations to migrate	84
Figure 4.9	Cause of timing of migration	85
Figure 4.10	Factors in future migration	86

LIST OF TABLES

Table	Description	Page
Table 1.1	A typology of elderly migration	11
Table 3.1	Social needs table	39
Table 3.2	Modified social needs table	50
Table 4.1	Comparison of proposed and current GRI	77
Table 4.2	Chi-square table of service satisfaction	87
Table 4.3	Assessment of needs table	91

Preface

This thesis seeks to examine the relationship between individuals and the collective structures they create and are a part of. This complex and dynamic relationship is always changing. These changes affect the elderly in our society more than most others, for of all groups, these are the most likely to feel insecure and be least able to adapt to rapid social change. This thesis seeks to examine only one aspect of life as it affects some elderly, namely the phenomena of post-retirement migration and how it is influenced by the institutional contexts in which it occurs. The reason for this topic stems from the author's background and interest in both spatial demography and social geography and the interactions between these two spheres of social life. In the case of post-retirement migration, relatively little theoretical understanding has grown to account for this disparate process. Yet these processes do have certain factors in common, namely the phenomena of retirement itself, movement through the real estate market, attraction of services, and a range of other institutional variables. Despite this however, the literature on elderly migration rarely mentions these common institutional contexts within which post-retirement migration takes place. As a result, the author in this thesis seeks to examine the impacts of institutions upon post-retirement migrants in order to assess whether or not these factors can allow a greater explanation of the patterns of migration observed.

This topic is explored in the following chapters:

CHAPTER 1 reviews the state and development of research and theory concerning post-retirement migration over the recent past.

CHAPTER 2 reviews the development of the social analysis of institutions, both in wider social science and geography.

CHAPTER 3 in which the chosen methodology is defended and outlined further. Waikanae is selected as a case study region due to its high level of attraction for post-retirement migrants.

CHAPTER 4 where the results of the methodology are summarised, and

CHAPTER 5 where there is an assessment of the results of the case study and conclusions. Also a critique of the methodology generally and the future potential of institutional insights into post-retirement migration is given, along with some suggestions for possible future work.

The aim of the above approach is to provide a framework which can better assist social planners in meeting elderly need, as well as increasing the knowledge of factors affecting post-retirement migration. This utility and theory supporting capability of the institutional approach will be illustrated from the use of the Waikanae case study. The success of this would mean a greater recognition of the way in which society influences its individuals and vice versa, an issue which is of growing importance in a time of general economic decline and retraction of public social services. However to achieve this, the phenomenon of post-retirement migration must first be examined . . .