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

- A Case Study of Waikanae -

Chris A. Good

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Department of Geography
Massey University
Palmerston North
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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

Acknowledgements

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

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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 . . .

Chapter 1

Post-Retirement Internal Migration

Literature Review

1.1 Introduction

This chapter seeks to review one of the least researched geographical phenomena within gerontology, namely the causes and outcomes of elderly post-retirement migration¹. In recent years geographers have been contributing to a spatial emphasis within gerontological study². This interest and contribution has stemmed from the growing influence of the elderly within society and their calls for more recognition by planners, as well as the concern by many social policy makers of the impacts of ageing societies on the distribution of social resources. As a result, more is being learned about both the causes and impacts of the distributions of the elderly within western societies. Yet because of the diversity of the elderly population and their lack of an essential economic motivation, work in the area of the migration of the elderly has been relatively limited. Consequently, this chapter will focus on summarising the developments and progress in research in the area of post-retirement elderly migration with a view to addressing this 'imbalance' in the later chapters of this thesis.

Prior to such a review, it is relevant to outline the conceptual context of elderly migration, namely the dynamics contributing to the spatial patterns of elderly. It is recognised in the study of elderly human populations, especially from a spatial aspect, that local concentrations (proportions) and congregations (aggregate numbers) of elderly relative to the general population are a result of three basic factors:

1 Birth Rates

In a closed population system, a decline in the birth rate over an extended period of time results in an ageing population as those cohorts that are the result of previous higher birth rates move up the age/sex pyramid. This is the single most important determinant of an ageing population structure at the

¹ Due to the fact that almost all retirees are over sixty years old, this thesis will only concentrate on elderly post-retirement migration.

² Such work has also been extensively reviewed elsewhere. For example see Murphy (1979), Warnes (1981), Rudzitis (1982), Golant (1984), Rowles (1986) and Rhor-Zänder (1989), etc.

national level (assuming borders are relatively 'closed' to immigration). This phenomena of ageing in a closed geographical system is often known as 'ageing in place'.

2 Mortality Rates

In modern western societies there remains relatively little chance of a significant decline in elderly death rates, with disease and other factors having been reduced to a relatively low level. Medical technology is currently quite close to the physiological limits in expected life-spans. Consequently mortality amongst the elderly has had little impact on age structure, especially due to their relatively small numbers. The major influence of mortality is rather more indirect, primarily through its influence on the birth rate. Over the last few centuries, the massive decline in infant mortality has resulted in more children surviving into adulthood, often prior to an actual decline in birth rate creating a huge population 'bulge' which, as it moves up through the age cohorts, causes great problems in service provision. (This can be seen today in many recently developing countries, such as China, Japan, Korea, etc, most of which are predicting great strains on their welfare systems as larger numbers of dependent elderly appear in the society.)

3 Migration

Migration is most important at the local level in explaining differences between regions. Ageing in place can be extenuated by the out-migration of younger age groups, the in-migration of elderly or the net outcome of the two. Hence there can often be a wide divergence from the national average proportion of elderly between regions as a result of migration. The first major problem for migration research then, lies in identifying elderly migrants and their contribution to the concentration and congregation of elderly in a region as distinct from other migrants, mortality and birthrate factors.

Nevertheless, despite this initial problem, the increasing mobility of the elderly since World War 2 has become a key factor in elderly spatial demography at the local level. This is especially so in light of declining fertility and birth rates meaning that migration plays a larger role in the growth or decline of any area's population (Lowe 1988) . Consequently, the reasons why an area contains a higher or lower than average number of elderly is growing more attributable to elderly migration (Hitt 1954 for the

United States, Heenan and Moffat 1986b for New Zealand). This has strong implications for the ability to predict the future distribution of elderly populations for providing social services. Consequently much of the research relating to demographic ageing and internal migration has concentrated on identifying the distinctives of elderly migration, as against general population migration, with a view to targeting resources for social planners (Wiseman and Roseman 1979 : 324-325, Serow 1987, etc). The recognition of the growing importance of migration in social planning for the aged has led to research which reveals elderly migration to be "nearly . . . the most volatile of the processes [births, deaths and general migration], yet in some ways the most poorly understood" (Serow 1987 : 95). This chapter will overview the current state of knowledge of elderly migration as well as outlining the recognised areas of deficiency in understanding, suggesting reasons for this lack.

1.2 Post-Retirement Migration: The New Zealand context

Before embarking on an in-depth analysis, it is practicable to have a brief description of the recent trends in migration patterns and the distribution of elderly in New Zealand so that we may be able to suggest causes behind these patterns resulting from elderly migration. Elderly migration study in the New Zealand context has been extensively dominated by descriptive studies of aggregate migration patterns (drawn usually from census data) as well as statistical profiles of those moving. As a result there is a strong empirical conceptualization of elderly migration in the New Zealand literature, but little indigenous theoretical development, with theory being borrowed from findings overseas. This pattern is evidenced in the following:

The descriptive nature of New Zealand research on the elderly is readily apparent. Much of this has sought to find distinctives between general and elderly internal migration. For example, relative to general population migration³, the number of elderly migrants³ for western countries is small. For internal migrants in New Zealand the pattern is similar, with the elderly (65yrs+) consisting of approximately 6% of all migrants. Around one in four people aged 65+ move within intercensal years, the majority of these being female (Heenan and Moffat 1986a : 109). The aggregate number of elderly New Zealanders moving has been increasing, but the proportion of those

³ Henceforth 'migrant' and 'migration' will refer to internal migrants and/or migration.

moving has remained static since the early 1970s. In regard to distance moved, the general pattern for elderly migration is that it is over shorter distances than for younger populations, the highest levels being for movement to adjacent regions (eg. Wellington to Horowhenua, Waikato to South Auckland, etc). Long distance migration occurs but this is far less significant than for younger cohorts (Heenan and Moffat 1986a : 114). The direction of net migration in New Zealand follows a similar pattern to that of the general population, a northwards drift to warmer, urbanised regions such as Auckland, with counter-flows between all regions. This, coupled with the relatively high out-migration of working age people to the North Island explains the higher proportion of elderly found in the South Island generally (Forrest and Johnston 1973). The process of movement also follows the classical stepwise pattern from rural to urban, smaller towns to larger, less developed regions to more developed as elderly are attracted to urban services and amenities (Heenan and Moffat 1986a : 112-113). This, along with a higher average income (thereby enabling migration), helps explain the relatively low proportion of elderly in rural areas relative to other Western nations (Kearsley 1975 : 24-39).

From this brief review it can be said that for New Zealand (as for Australian) elderly migration study ". . . the available [research] literature, although growing, is rather limited, a reflection in part of the lack of well developed theory . . ." (Murphy 1979: 84). This lack of a common theoretical perspective reflects not only a failure to develop an indigenous body of theory, but also the conflict in overseas theoretical understandings from which researchers in New Zealand borrow. The justification for looking to overseas explanations for patterns of elderly migration in New Zealand lies in the fact that the empirical findings suggest common patterns of movement to those found in other industrialised nations. Consequently, this review must expand to overseas work to assess the full current understanding of elderly migration in New Zealand.

1.3 Post-Retirement Migration: Theoretical Basis

As already noted, attempts to develop a unified elderly migration theory have been largely unsuccessful. This fact is widely acknowledged in the literature and is evidenced in the large number of mainly ad hoc, local and inductive studies to address specific issues. (The great bulk of these are in the form of reports to health departments, social service organisations,

banks, and so on for the purpose of resource management and/or marketing, etc). From this ". . . it is clear that the emerging literature lacks the firm theoretical base to integrate specific research findings and for directing further research efforts" (Wiseman and Roseman 1979 : 325). Most of the theoretical work has sought to provide generalised models and hypotheses which can be tested with empirical data for adequacy of explanation. What theory that exists has been primarily dominated by that from the wider field of gerontology.

GERONTOLOGICAL THEORY

Gerontological study has been dominated by three basic theoretical understandings of the interactions between the elderly and the rest of society:

1 Activity Theory

Elderly will strive to maintain past activities as long as possible (Key concept: identification of self with activities. Limitation: ignores external factors (eg health); assumes denial of ageing);

2 Disengagement Theory

Elderly will seek to change activities (Key concept: conformation to social and personal stereotypes of 'elderly behaviour'. Limitation: ignores external factors; assumes self-acceptance of ageing); and

3 Continuity Theory

Reason for activity will remain the same although the activity may change. (Key Concept: Recognises both desire to maintain lifestyle and increasing physical, social or other constraints on activities. Limitation: too difficult to obtain information on original intentions for doing an activity to effectively test or assess. Reasons for activity may change with time).

All three theories continue to be hotly debated as to their usefulness for gerontological study. Their utility is severely curtailed because of the high level of generalization and tendency to treat the elderly as a homogeneous group. Findings have suggested that all three have some relevance in the cases of certain groups of elderly (Rhee 1974: Chapter 7). These theories however, continue to act as the basis for much policy formation. For example, activity theory encourages programs which maintain elderly involvement in the community, such as access to shops, theatre and other

public domains and community care schemes, while disengagement theory tends towards institutional solutions such as retirement villages. Consequently, if one theory dominates a public institution, the needs of other elderly sub-groups may be overlooked.

BEHAVIOURALISTIC APPROACHES

Migration theorists, as opposed to wider population theorists, are generally quite critical of these orthodox gerontological approaches to the study of the elderly as a result of being faced with radically differing profiles behind different elderly migration patterns. For example, as a result of their study and typology, Wiseman and Roseman discovered that:

"... Conflicting profiles of elderly movers at local and interstate scales, as well as differing profiles among groups at the local scale, indicate that elderly migrants cannot be viewed as a homogeneous group. It appears that many patterns of elderly migration exist and that different subgroups of older people move for different reasons"

(1979 : 325).

The elderly then, cannot be viewed merely on the basis of age. (Indeed, age may be about all that the 'elderly' have in common as a group). In the context of migration, the problem of analysing elderly migration is increased when it is realised that employment, the prime motivator for younger migrants, no longer greatly affects elderly migrants. Murphy points out that:

"... Theory in dealing with labour force mobility is well developed and has been the subject of a wide body of research, but given the looser attachment of the elderly to the labour force, they may well migrate for substantially different reasons from those of younger persons, and theory applicable to the labour force may not apply for the elderly"

(1979 : 84).

Wiseman (1980) therefore, argues for an inductive approach and presents a decision-making model based on his 1979 typology (see figure 1.1 and table 1.1). He argues that the fact that different elderly move for different reasons greatly increases the difficulty of finding a common theoretical base, certainly such a search may prove specious if the 'elderly' are indeed made up of many different heterogeneous groups. Consequently, focus should be on the determining factors in decision making, then generalizations could be

drawn up for various groups of elderly and predictions for planning developed. Wiseman's approach has been the dominant one in the study of elderly migration since the late 1970s.

STRUCTURAL APPROACHES

Gerontological theory and the behaviouralistic approaches, although more dominant, have not been the only source drawn on. Approaches to elderly migration have also come from wider philosophical perspectives, such as from the structuralist and political-economy perspectives.

Political-Economy Perspectives

The most notable example of a political economy approach comes from Hitt (1954) who, taking a Marxian position, saw elderly migration resulting from the consequences of structural changes taking place in mid-twentieth century western societies. He suggested a range of possible factors that could increase elderly propensity to migrate, namely:

- rapid transition of society from agricultural to industrial base resulting in a loss of aged control and ownership over property. Consequently there is a decline in status leading to decreasing role of social responsibility;
- increasing effectiveness of mass media alerting elderly to areas of better climatic, geographic, etc features;
- decreasing numbers of workers who have to retire at certain age, therefore encouraging on a 'pool' of non-committed 'elderly' to a propensity to migrate;
- growth of social security giving regular post-retirement income regardless of residential location;
- growing trend of smaller families leading to less familial commitments at post-retirement age, and
- growing practice of transferring labour (via relocation for promotion, transfer, retraining, etc) may mean that by post-retirement many have not developed 'roots or 'attachment' to a locality.

Hitt then proceeded to test these factors. His findings, and those in subsequent literatures, tend to confirm these proposed explanations of increased levels of elderly migration in western countries at the aggregate level.

Mobility Transition Theory

Another structural migration theory which has had a limited influence on elderly migration study is that of Zelinski (1971) on 'Mobility Transition'. This theory is closely connected with the better known 'Demographic Transition Model', and postulates that not only are there characteristic birth and death rate patterns for each stage of the modernization process but also characteristic migration patterns. Hence the pre-industrialised phase is distinguished by low migration rates, followed by a large increase in rural to urban migration as the industrial revolution proceeds, then intra-urban as mobility increases in society, etc. Circular (exploratory) migration is seen to lead to permanent migration, such as in frontier settlement. Some have seen evidence for this theory in elderly migration. For example, the seasonal migration ('snowbirding') of the elderly to warmer areas in winter months. (Often this migration develops into permanent migration destinations, such as Sun City in Florida - Hugo 1987 : 1374). Others however, are critical of Zelinski's model because it suffers from the same criticisms as the demographic transition model, with many third world countries seemingly not following the same 'development curve'. For example, there are numerous instances where permanent migration of enough elderly can trigger circular migration of friends, the opposite order to Zelinski's model. Many other examples could be given of such variances from the theory.

Because of such evidence, critics of these structural approaches argue that the high level of generalization and emphasis on external, structural factors, means that these theories are unable to account for why elderly move where they do, especially at the local levels. This low utility accounts for why these theories have not played a dominant role in elderly migration study, especially when coupled with the fact that assumptions that apply to the whole general population often do not apply to elderly migrants moving for different motives. Their contribution to elderly migration study however has been to balance the findings from migrant centred approaches, forcing a recognition of the influence of social, institutional and economic structures on elderly migrants.

Modified Labour Theory

In an attempt to overcome these problems, some authors (for example Lemon 1973, Serow 1987, Fournier et. al. 1988a and 1988b, etc) have suggested a loose connection between the labour theory of migration and

elderly migration. They note the net direction of elderly migration towards lower cost regions (in terms primarily of income per capita and housing costs) and suggested that this was in response to trying to minimise unnecessary expenditure on a fixed income. In this way elderly migration could be viewed as something analogous to wage opportunity migration of lower income earners or unemployed persons to lower cost regions to minimise expenditure. Alternatively, they would move to obtain a higher income, but this option is generally unavailable to retired elderly). Once again however, this does not explain the strong counter-flows of elderly migrants to higher cost areas moving for health family or other reasons and again displays the difficulty of trying to formulate a unified theory for a highly heterogeneous group.

SUMMARY

The above review shows that the study of elderly migration, in common with the elderly study generally, lacks any agreed theoretical or conceptual base. Indeed, given the diverse profiles of elderly the search for a common theoretical base may prove futile as different factors are involved in promoting migratory movement of certain elderly and not others of similar profiles. As a result, an 'integrationist' perspective has increasingly come to be the means of approach to elderly migration study as researchers from various disciplines bring a range of theoretical insights to illumine on the complex situation which is post-retirement migration. The heterogeneity of the elderly means that no one theoretical perspective can claim a monopoly on the explanation of elderly migration, and consequently we can see in the literature a wide range of and an increasing acceptance for a breadth of theoretical approaches and explanations. This raises a problem for planning researchers who are forced to choose an approach which caters for their needs at a given time, but doing so may mean that other valuable areas of information may have to be missed due to time/cost restraints and a lack of co-ordination in research between various organizations, or even departments. This can result in costly doubling up of studies.

Planners are primarily interested in predicting both significant movements of the elderly and the outcomes of these movements for purposes of social planning. The following sections will briefly look at the general findings that have been discovered.

1.4 Who Migrates Where, and Why

An extensive amount of work overseas and in New Zealand has been done to try and determine which subgroups of the elderly are likely to migrate. The great bulk of the research done has been to build up statistical profiles of those who move and draw generalizations from this. From such work various typologies have arisen which have sought to link migration patterns with the individuals who are most likely to move as a result of some common profiles. It has been widely recognised that there are at least three primary differential factors promoting elderly migration, namely migration in preparation for ageing (usually on or at pre-retirement), for amenities (consisting of mainly 'younger' and wealthier migrants) or for assistance (usually older and poorer migrants moving for necessity, such as health problems - see Meyer and Speare 1985). Perhaps the most detailed and comprehensive typology so far devised is that of Wiseman and Roseman (1979). They created a typological system of western elderly migration based on the geographical nature of the movement and various factors concerning decision making behind the move. Contained within this typology was a summary from a behaviouralist perspective of reasons why elderly migrate given in much previous literature (see table 1.1 over page). Their findings have since been substantially confirmed in later work, such as that of Meyer and Speare's (1985) study of elderly on Rhode Island, New York. Such attempts at creating typologies indicate the first stage efforts in trying to bridge the gap between the large amounts of empirical data becoming available as a result of improving data gathering and processing technology with the lack of any substantial theory on distinctively elderly migration. From these studies, a behavioural model was developed (see figure 1.1 over page).

Yet this apparently simple situation is, upon closer examination, far more complex, especially at the individual level where only some elderly of an identical or very similar profiles will move. This problem in the area of movement for health assistance, for example, has been closely examined by Findley (1988). He discovered that the argument that deteriorating health promoted elderly migration was actually too simplistic, and that in many cases that deteriorating health prevented the elderly person from migrating. He also noted that many relatively 'healthy' younger elderly also have a propensity to migrate. Findley criticised the typologies that have been developed for presenting the variables influencing migration as independent, rather than seeking to look at the far more likely, but more

Table 1.1

A Typology of Elderly Migration

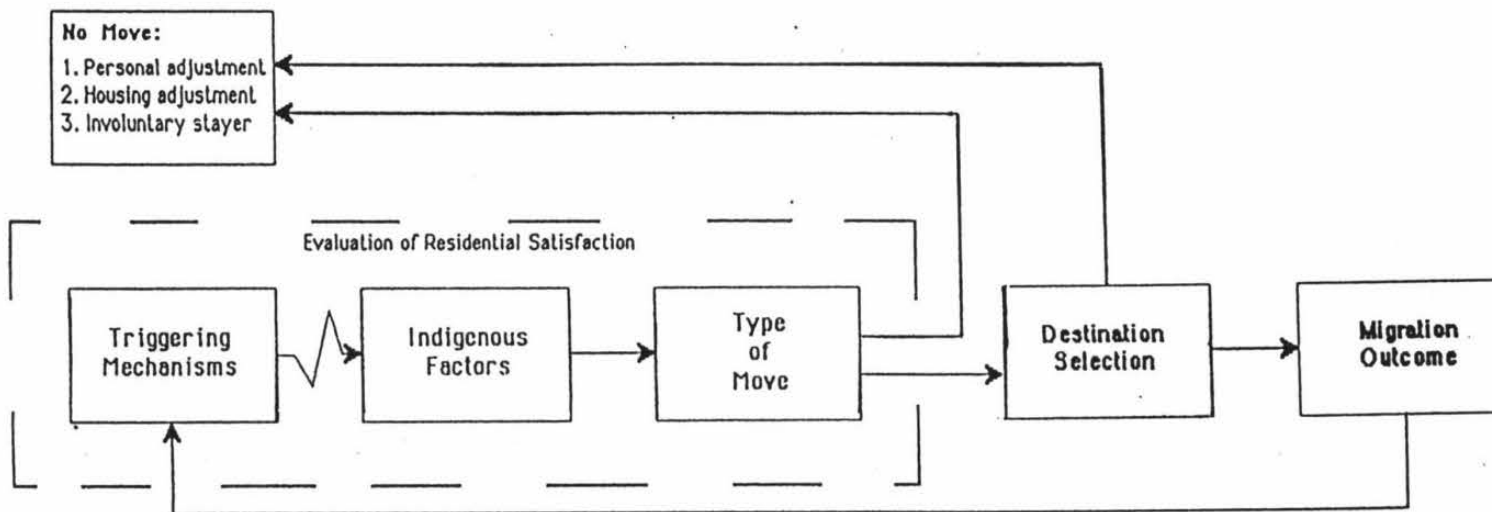
TYPE	Decision Maker	Differential (of Mover)	Reasons for Moving	Search Space	Housing Outcome
Suburbanization and ex-urbanization	Mover	Pre-retirement middle and upper income; 'younger' couples.	Housing and neighbourhood environment	Suburban area	Home ownership
Inner city relocation	Mover; Gov't Bodies	Lower income	Inner-city stress; forced	Limited; short distance	Rental home or apartment
Apartmentalization	Mover	Middle and upper income	Changing space and maintenance needs	Entire urban area	apartment; condominium
Communalization	Mover	Singles; older	Need for socialization; limited assistance	Limited to a few specific places	High density communal
Homes of kin	Mover and family	Singles; older	Need for limited care; loss of spouse	Very limited to location of kin	Family home
Institutionalization	Family; social worker doctor	Singles; older	Need for personal care	Limited to specific facilities	Institution
Amenity area	Mover	Retirees; middle and upper income	Retirement; amenity environment	Formed by vacation experience and migration of friends	All types except institutions
Return	Mover	Retirees; middle and lower income	Retirement; importance of childhood home	Formed by previous residential experience	Family home; apartment; institution
Kinship	Mover and family	Singles; older	Need for limited care; loss of spouse	Locations of family members	Family home; apartment; institution

Source: Wiseman and Roseman (1979 : 332)

Figure 1.1

Theoretical Model of Elderly Migration Process

(Source: Wiseman 1980: 145)



Triggering Mechanisms.

1. Change in life cycle
2. Age related loss/critical events
3. Environmental incongruence
4. Change in preferred lifestyle
5. Forced movements

Push Factors.

1. Independence loss
2. Loss of spouse
3. Environmental stress

Pull factors.

1. Retirement amenities
2. Relocated friendship and/or kinship networks
3. 'successful' relocation by friends
4. Environmental amenities

Indigenous Factors.

1. Personal resources (eg income, self-concept, etc)
2. Former migration experience
3. Community ties
4. Perception of likely outcomes

Exogenous Factors.

1. Housing market
2. Cost of living
3. Attrition or movement of social network

Type of Move.

1. Migration
2. Seasonal migration
3. Relocation

Destination Selection.

1. Knowledge of potential locations
2. Former travel, vacation and residential experience
3. Location of needed assistance or desired amenities
4. Promotional efforts and inducements of migrant recruiters
5. Location of friends and others who will assist in move and/or adjustment

Migration Outcomes.

1. Distance moved
2. Living arrangement
3. housing type and tenure
4. Neighborhood type

analytically difficult issue of the impact of interacting variables to motivate migration. This problem of the interaction of variables can also be evidenced in other areas. For example, high income may allow one to migrate, but any range of factors may mean it does not occur, such as topophilia towards their present location, proximity to family, previous travel and/or migration experience, availability of information etc. Alternatively, an elderly person may wish to migrate, but be 'trapped' due to lack of finance. The lack of any overriding primary motivation for migration (such as employment for younger cohorts) keeps generalisations and predictions limited and curtails the wider utility of many studies.

If the questions of detecting 'who' migrates and 'why' is difficult, the question of the 'where to' of migration is a far easier thing to predict. The direction of migration is a result of the decision to migrate and the purpose of migration (Lee 1966). If an elderly person is migrating for amenities, then it logically follows that they will choose between the possible destinations where such amenities are located. The choice of which amenity location to go to then comes down to other considerations. This can be illustrated in an example of the case study of Cheng and Liaw (1987) who identified environmental variables as more important than housing considerations in elderly amenity migration. They identified factors such as climate warmth, population size and housing market growth (as positive attractions) and climate coldness, distance, cultural dissimilarity and gross rent (as negative factors) to an amenity area. These findings suggest that climate and investment considerations are important factors for elderly amenity migrants, a limited confirmation of the labour theory related work of Lemon 1973, Serow 1987, Fournier et. al. 1988a and 1988b, etc. These and other similar findings have been incorporated into many typological studies, such as Wiseman and Roseman (1979), Meyer and Speare (1985), etc., with the destination often being a key defining factor in their typologies due to the relative ease of detection and analysis (say from census results or surveys, etc). The aim of this is that once having detected the motives for migration, the direction of it may be predicted thereby aiding social planning.

1.5 The Consequences of Migration.

If indeed, as this review suggests, development of theory in the field is relatively weak, the ability to anticipate future consequences of elderly migration patterns would be severely curtailed. In response to this problem,

there have been several calls for more outcome orientated study to aid social planning: "Research . . . which focuses upon outcomes [of elderly location decisions], is policy relevant in that it can guide future planning for social services, housing programs, and broader community issues" (Wiseman and Roseman 1979 : 335). The result of a lack of research for efficient targeting of social resources can be significant, with organizational responses being relatively slow to new needs of migrants. Often organizations either miss those in need or include many non-needy in their resource allocation because of the difficulty of distinguishing between the sub-groups of elderly. Obviously ". . . The range of mobility types, coupled with the heterogeneity of the elderly population, requires [further] careful analysis and discussion . . ." (Meyer and Speare 1985 : 87) if useful advances are to be made.

There have been nevertheless, a few studies which have sought to discover the overall impacts of elderly migration into an area, notably smaller urban areas. Lemon (1973) sought to examine the impact of elderly migration to Norfolk and Suffolk. The majority of migrants in these cases were recent retirees searching for a 'quality' environment and a means of investment and cost reduction by moving to smaller, cheaper housing (which, in turn, lowers other costs such as rates, heating, etc). Lemon traced mainly economic impacts of elderly in the town, discovering that the elderly created a demand for goods and services which stimulated the tertiary sector. Public facilities, such as parks, libraries, schools, etc remained largely unaffected by increased elderly demand. Health care services however, seemed to be put under considerable strain in trying to meet elderly demand for quality specialised health care. Lemon's greatest concern about elderly in-migration was the growing dependence created in the economy toward the elderly migrants. A change away from attraction to other locations, or a decline in relative income pre-retirement could quickly lower in-migration rates and bring an economic decline, especially in those towns far from industrial areas. His work has been largely confirmed by Law and Warnes (1973) and other studies of elderly seaside resort towns.

The findings of such studies all point to the need for further work, but preliminary conclusions suggest that the in-migration of the elderly does not bring a growing dependency burden, as is so often stereotyped. The great bulk of such elderly persons are relatively able-bodied and, far from bringing

a need to develop extensive support services, actually bring a growth in demand and income into the local community.

1.6 Critique and Summary Of Literature.

From this review of literature it becomes readily apparent that elderly migration is indeed "nearly . . . the most volatile of the processes [births, deaths and general migration], yet in some ways the most poorly understood" (Serow 1987 : 95) and that ". . . the available literature, although growing, is rather limited, a reflection in part of the lack of well developed theory . . ." (Murphy 1979: 84).

This explains why the New Zealand literature in the area of elderly migration is largely uncoordinated and ad hoc. Much of the research effort amongst the elderly being focused at the local level, primarily with a view to assisting social planners in allocating resource distribution (most of these mainly in the form of intra-organizational reports), or in studies based on aggregations of empirical data such as the census.

This situation is also mirrored overseas where various literatures have come up with apparently contradictory conclusions, primarily because of the highly heterogeneous nature of elderly populations. Indeed, in light of the diversity of the elderly it would probably be unrealistic to expect otherwise, despite calls for a common theory, except at the most aggregate and highly generalised levels (in which case the utility of any theory would become very low). In response to these problems, most researchers have taken the path of Wiseman (1980) and focused on determinants on the decision making process and generalised for very specific groups of elderly. This approach however, is limited in its utility due to the fact that organizations have to expand generalisations from one group of elderly to others due to the high costs in resources and time of such localised studies. Also the approach tends to ignore the possibility of extending theory through the recognition of common factors working on many elderly, such as retirement, cohort ageing, physiological ageing, etc.

Because of these problems however, there is in the literature a growing call for a more integrated approach, despite differences in philosophical approaches. As Wiseman and Roseman point out:

"Although several studies of elderly migration have been undertaken, the disparate nature of the emerging body of literature reflects the need for an integrative conceptual framework"

(1979 : 324)

This issue is now addressed in the next two chapters which seek to outline and provide a possible integrating cognitive framework that would enable a greater co-ordination of research efforts and a greater utility for planners.

Chapter 2

Institutional Approaches

2.1 Introduction

In light of the lack of well developed theory in the area of elderly migration and the search for some common frame of reference to guide research, the rise of institutional approaches will now be reviewed as a technique which can be put forward as a possible methodological framework into which apparently unrelated research may be integrated.

Institutional approaches have become increasingly popular as a means of closing the 'gap' between theory and the observed within the social sciences. This gap arises because social science has traditionally sought general statements to offer explanation for specific events, while at the same time seeking relevance to address social issues. The problem with this however, has been that the theories developed were based on assumptions simplified to the point where it is difficult to relate them to the empirical world (for example, the pure rational economic Man in classical economic theory; activity, disengagement and continuity theory in gerontology, etc). One major reason why such highly abstracted assumptions cannot easily give accurate insight at the micro level is because these assumptions overlook the fact that there are variations in the opportunities, choices and constraints available to individuals, often as a result of the variation in institutional constraints operating through space and time. The fact that this is increasingly being realised is reflected in changing trends in research towards approaches which acknowledge institutional influences on behaviour.

For example, from Chapter 1 we have seen that most elderly migration theory is of this highly generalised nature and this has contributed to its low utility. To counter this, attempts have been made to recognise the highly heterogeneous nature of the elderly population, but such studies seem to be leading in the direction of being applicable only on a highly specific, case-by-case basis. There has been a growing recognition that what is needed is a recognition of the mediating institutional factors through which migration occurs and is directed if a workable, generalised model linking theory and empirical findings is to be achieved. Such is already appearing in the literature, with an Australasian example being Hugo's (1986) recognition of

the significant impact of changing government policies on housing, pensions, early retirement, privatisation of services, etc, as well as cohort life-cycle influences on elderly migration patterns.

The institutional approaches have the ability to achieve this recognition. They involve primarily a descriptive analysis of constraints and opportunities and are an analytical tool compatible with a wide range of social science philosophies, from the 'scientific' method through political-economy to even some humanistic approaches¹. As a result, the institutional approach has been widely adopted throughout most areas of human geographical research, and indeed the social sciences in general. For example, cultural geography has adopted the institutional approach in studying modern Western societies because institutions offer a distinctive and organised social context in which to research, to replace the small, isolated tribe in primal societies. Institutions are therefore viewed as transmitters and formers of culture (Wagner 1975). Institutions can also be understood as mediative between individuals and the physical environment in that institutions generally define the range of responses possible to environmental issues and therefore is highly relevant to environmentally orientated disciplines. Institutional analysis, because it deals with societies' organizational structures, has a strong planning value. The institutional approach is also used extensively in such areas as economics, sociology and political science, as well as in more specialist sub-disciplines such as administrative science. This wide flexibility, compatibility with various philosophical approaches and strong practicality makes an institutional approach an ideal framework with which to integrate and explore the elderly migration phenomenon. Before proceeding to do this however, it is essential to have a good grasp of the institutional approach if it is desired to integrate elderly migration research, yet remain relevant to any issues addressed.

2.2 What is an Institutional Approach?

An institutional approach consists of explaining events in terms of the institutional effects on them. It seeks to describe, analyse and construct theories concerning the formation of the policies that generate these effects. Consequently an emphasis is placed on the effects of rules, procedures and

¹ For an in-depth overview of the different philosophical approaches to human geography refer to Johnston (1983).

the internal structure of institutions upon organizations and individuals. There is no uniform 'institutional approach', rather there are a range of definitions. This is typical of a developing methodology. These approaches have arisen from two basic directions:

1. deductively, through theoretical development and extension of the concept of a 'social institution', and

2. inductively, from an increasing desire to explain the actions of various organizations by reference to the forces acting upon them.

This section will briefly cover the theoretical conceptions that have been developed and then will trace the inductive development of the institutional approach evident in geography. These understandings tend towards a common focus and should be viewed as complementary rather than mutually exclusive in their illustration of institutions and institutionalization.

THEORETICAL DEVELOPMENT

The bulk of the theoretical work done on the concept of 'institution' in society is found especially among disciplines for which this is a primary focus, namely sociology, political and administrative sciences, organizational studies and other related fields. The four predominant views that have been developed are outlined below:

Institutions as Social Values.

One of the earliest and most influential approaches to institutional theory arose with Phillip Selznick in the 1950s. Selznick argued that institutionalization was more than just the establishment of new organizations, rather it was essentially "to infuse [organizations] with value beyond the technical requirements of the task at hand" (Selznick 1957 : 17). Selznick distinguished between organizations set up for a set purpose and those which had become 'institutionalised' - valued and established for their own self-maintenance as ends in themselves. This institutionalization resulted in stability and the persistence of the structure through time. Selznick then, saw institutionalism as a "process" of instilling value and stability happening "to the organization over time" (Selznick 1957 : 16). Weaknesses in Selznick's approach lie mainly in the fact that it is primarily definitive, describing the fact that values are instilled into organizations as part of the institutionalization process, but not explaining how they are.

Institutions as Social Reality.

This view went further than Selznick and focused on the reasons for value agreement. Like Selznick, followers of this school of institutionalist thought argued for a historical and process understanding of institutionalization which saw institutions as based on a shared definition of social reality which had become to be accepted despite any individual's views or opinion. This in turn promoted a stable social order by which society could run by accepted social procedures (Berger and Luckmann 1967). An institution in this school of thought is something which is widely accepted as 'the way things are done'. (For example, the capitalist mode of production, agreed social laws or norms of morality and behaviour, the nuclear family in modern western societies, etc). Institutionalization is the process whereby such things become the accepted and guiding social norms within an organization (Zucker 1983 : 5). The major weakness of this approach is its highly generalised and process orientated analysis which makes direct application to the study of organizations provide only a relatively superficial analysis.

Institutions as Social Belief Systems.

In an attempt to overcome the limitations of the social reality approach, this body of theory was extended and contextualized so that the focus of institutionalization was no longer a process leading to a socially defined reality, but rather institutions were defined as "shared beliefs" or "rational myths" (Scott 1987 : 497) which offered distinct "social purposes" and specified "in a rule-like way the appropriate means" to achieve defined purposes (Meyer and Rowan 1977 : 343). This shift from a process to a static definition of institutions enabled a more thorough analysis of organizations to be made. It enabled stress to be laid on such things as the influence of symbols, normative beliefs and values and rational justifications (rather than the more traditional information flows, technical requirements of tasks, etc) on organizational behaviour (Scott 1987 : 498). Organizations were no longer seen to be conforming to some institutionalised beliefs because they "constitute reality", but rather because to do so worked to the benefit of the organization through legitimation, expanding resources or whatever (Meyer and Rowan 1977). This meant that the process that led to conformity could be acknowledged (eg. coercive, mimetic and normative - DiMaggio and Powell 1983). A change to a more static view also enables the study of the differing belief systems that influence different organizations. Wide ranging

work in this area has stressed the multiplicity of beliefs and therefore has introduced the concept of multiple institutional environments, as opposed to the individual institutional environment (DiMaggio and Powell 1983). Along with this is the recognition of the tendency for belief systems to themselves become institutionalised with time. For example, traditions give way to the nation-state, professions and rationalized systems of law. Consequently the emphasis in studying organizations is on the influence of the State and professional associations through regulation or indirectly by creating new rational myths advantageous to organizations (Scott 1987 : 498-499).

Institutions as Social Realms.

This view of institutions links the above work with its emphasis on diversity with the traditional sociological view of institutions as "enduring systems of social beliefs and socially organised practices associated with varying functional areas within social systems, eg., religion, work, family, politics" (Scott 1987 : 499). These institutions constitute both symbolic (cognitive and normative) and behavioural systems and are considered crucial for social stability and continuity. Differing institutional realms are seen to rely upon differing belief systems:

"The institutional logic of capitalism is accumulation and the commodification of human activity. That of the state is rationalisation and regulation of human activity by legal and bureaucratic hierarchies . . . That of the family is community and the motivation of human activity by unconditional loyalty to its members and their welfare . . ."

(Friedland and Alford 1987 : 36)

Institutional theorists of this school however, reject the traditional functionalist view wherein each institution worked toward the benefit of the whole society. Indeed it is argued that there may be conflicting ideas as to which beliefs are valid for which activities in any one society. (For example, should housing or health be regulated by the market or the state?; should family planning or education be controlled by the family, state or church?). Such differences can be seen as a major source of conflicts between groups in society (Friedland and Alford 1987 : 32-34). This view of institutions then, focuses on the differing 'institutional logics', 'spheres' or 'realms' that exist within societies as "repertoires that are available to individuals and organizations to employ in the pursuit of their own interests" (Scott 1987 : 500). Organizations become institutionalized as they conform to such

institutional realms. The focus of research is consequently on which logic an organization adopts and why, as well as how institutional social realms themselves are formed. A consequence of this is an analysis of the varying beliefs and values of individuals and organizations that work influence the realm they will adopt.

The above views all show a common base - the idea of institutions being ultimately derived and legitimated in a common values base within any society. Such an understanding has evolved as Selznick's original concept was applied to existent organizations forcing a move towards a less abstract view of institutions. Such 'theory down' work however, has not been the only source of development. There has been a substantive body of work which, working from individual organizations outward, has brought further insights into the concept of an 'institution' and how it functions. This can be clearly seen in the development of institutional approaches from within geography.

INSTITUTIONAL APPROACHES AND GEOGRAPHY

The use of institutional approaches within geography is a relatively recent development. Institutional work in geography has been dominated by an organizational focus stemming from its pragmatic and relevancy emphasis and the need for a link with theory. Prior to the 1960s much geographical work tended to be regional and descriptive in emphasis. It dealt primarily in aggregate terms such as trade flows, migration rates, etc for regions, but rarely looked at the political-administrative structures or the activities of individual companies or organizations contributing to these. What theoretical development that there was tended to be directed towards the development of macro-theory in the form of social Laws, such as the Demographic Transition Model, ecology models of urban development, the Gravity Model, etc. During this period a small number of works looked at various forms of institutional effects upon the social geography of an area (such as Whittlesey (1935) looking at the tendency of governments to impose uniformity within their territories, Nelson (1952) as to whether municipal boundaries influenced land-use distribution, Large (1957) on government activities in agriculture, Manners (1962) and government effects on industrial location decisions, etc). Such studies however were isolated and rare.

The Quantitative Revolution.

The 1960s brought the advent of the Quantitative Revolution in geography. The explosion in the ability to analyse large quantities of information with computers gave rise to the ability to statistically correlate predicted data from models with empirical data from reality. For the first time some forms of social theory were able to be 'verified'. As a result of these developments, economic and physical models were stressed at the expense of institutional or social models. This was because economic and physical models provided the easily obtainable mathematical 'hard data' needed for statistical correlations. Institutions were regarded as 'nuisance factors' which 'distorted' the data from that predicted by the models. The fact that institutions have this effect can be traced to the simplified and idealised assumptions behind these models, such as perfect competition, perfect information transfer, individual rationality, etc. These theories and models ignored the differential and varying constraining effect of institutions upon such assumptions. (The fact of this differential institutional effect in space can be illustrated by the success of the urban ecology models in the United States relative to other countries due to the free market policies and relatively limited government control held generally up until the early 1960s). By the late 1960s however, criticisms of positivistic approaches² centring on the lack of accuracy with many models, their oversimplified assumptions and lack of recognition of individual human perceptions were leading to new developments.

Behaviouralism.

Behaviouralism was the dominant methodology to arise at the time from such criticisms, primarily as a response to the lack of realism of the purely quantitative approaches. Once more however, institutional factors were overlooked as behaviouralist approaches focused primarily on individual perceptions of empirical, decision-making environments and on individual choice. Many behaviouralists linked their approach with the concept of 'satisficing behaviour' which recognised that individuals also take into account non-economic factors in many decisions. Ironically, even though the concept of 'satisficing behaviour' was first developed by Simon (1959) in an institutional context few continued this line of approach. A few exceptions can be found, such as Townroe (1971, 1972) and Watts (1974) on the contexts of individual decisions in industrial location.

² For a fuller review of criticisms of positivism see Johnston (1979) chapter 5.

Urban Managerialism.

The rise of 'politically relevant' studies was paralleled by a second major source of change coming from the theoretical level. Increasing criticism was being levelled against the behaviouralist stress on individual preferences and action in decision-making. An increasing number of authors began to question such assumptions. Form (1954) recognised that such assumptions in neo-classical economics did not take into account that "the land market is highly organised and dominated by a number of interacting organizations". Form saw the land market as the outcome of inter-organizational bargaining rather than a "free unorganised market in which individuals compete". The nature of this bargaining was in turn the result of the relative resources of the organizations, as well as their internal structures and the interests which they represented. Other authors were to develop this approach further. Rex and More (1967) for example, in their Weberian based analysis of the housing market laid stress on the importance of conflict and constraints on individual choices. Influence in the market was seen to be based on an individual's class background. Haddon (1970 : 132-133) followed this lead suggesting that people's access to the housing market was a function of their perceived situation, status or political influence and urged further study of institutional access mechanisms. Such work was to be drawn together by Pahl (1970) in his controversial 'urban managerialist' or 'gatekeeper' thesis. Pahl claimed that there were fundamental constraints on urban resources and that these constraints shaped the socio-spatial system. Co-ordinating access to these resources were managers or 'gatekeepers' of the various housing market institutions (finance, real estate agencies, local state, etc) who collectively acted as the regulators of access, guided by the policies, goals and procedures of the institutions they represented. Pahl viewed these managers as the 'independent variables' and access as the 'dependent variable'. Pahl saw the geography of the housing market being primarily shaped by managerial perceptions and decisions. For example banks, when providing loans, tended to discriminate against women, by race, etc, on the basis of a perceived high credit risk, therefore preventing the access of certain groups to the housing market. Similarly, real estate agents would steer people from different socio-economic backgrounds into 'appropriate' neighbourhoods with the aim of preserving stable housing market prices.

An Arising Institutional Approach in Geography.

Pahl's thesis was quickly applied by many authors in local studies, especially on aspects of the housing market (for example Dennis 1970, Lambert 1970, Niner 1975, Corina 1976, English 1976) and occasionally other issues, such as environmentalism (Mitchell 1971, Sewell 1971) and business environment selection (McDermott and Taylor 1976). Corresponding with the growing extensive use of the managerialist analysis came increased critiques leading to further developments towards an institutional approach. Most of the criticism focused on the treatment of managers as "independent variables" rather than more fully recognising that the relationship between managers and the managed is constrained by wider socio-economic forces and structures (Norman 1975, Harloe 1975, Williams 1978, Leonard 1979). This led to further work which used analytical models which took into account the forces acting upon managers. Some, such as Harloe et al. (1974) adopted a pluralist institutional model from American political science. This saw decision making as the outcome of competing group interests. Institutions were viewed as having their own internal interests and ideologies and hence contained internal as well as external constraints. The constraints on managers, it was argued, could be identified by looking at institutional constraints (Harloe et al. 1974 : 9). In his 1975 work, Pahl acknowledged this criticism of the 'independent managers' concept, although he argued that a continued managerial focus was needed within an institutional framework. This was because managers were seen as the key intermediaries between essentially capitalist institutions and the general public.

At the same time as the behavioural approach was dominating in the late 1960s to the mid 1970s, another major foundation was being formed which would ultimately result in the explosion of institutional related work we find today. The first growing influence came from increasing calls for the 'relevance' of geography to human issues, especially from the liberal and radical left. The understanding of 'relevance' ranged from the radical 'removal of injustice and inequality' through to providing 'a guide for policy formation'. From this came a growth in policy related studies ranging from strategies to meet goals through to the consequences of possible policy and/or structural changes on the population. (For examples see Johnston 1979 chapter 6). Even today much current institutional study results from this desire for relevancy. This desire coupled with the developments flowing from

urban managerialism and theoretical progress in other disciplines, has resulted in a rapidly growing literature which seeks to understand and guide organizational behaviour in an institutional context. Such studies can be loosely arranged according to their level of criticism of institutional policy and/or activity, from strategies for policy, through effects of changing policy, through to questioning the policies or institutions themselves. Also arising from the structural critiques have come significant attempts to link at a more theoretical level, the managerial and policy relevant approaches with the theoretical work done in the other disciplines. One of the most successful comes from an administrative scientist. Benson's (1977) work on a dialectic approach to organizations, (with similarities to the 'shared social belief systems' approach, - see section 2.2, but from a Marxian structuralist perspective) identified four principles of institutionalization - the social construction of institutions from competing social groups, totality of analysis (ie. the holistic perspective) of an institutional view, and the role of contradiction in legitimation and praxis in institutional change. These themes will now be examined.

2.3 Towards An Institutional Analysis

COMMON THEMES

In the above review we can see that among the various approaches to understanding and analysing institutions there exist some uniting themes and concepts. There is full agreement that organisations are not neutral, but part of a wider society and that they consequently tend to exist for more than their stated mission, gaining interests beyond their immediate purpose. The source of such interests may arise "from the beliefs or interests of the people manning the institutions, who use the institution to advance their own ideas, or they may stem from an 'institutional ideology', in which the institution acts to further its own interests." (Manion and Flowerdew 1982 : 32). Here Manion and Flowerdew detect some of the major emphases which arise from differing approaches to institutional theory and practice.

1 Values

Institutions generally have a stated mission, but it is rare that this is the only thing for which an institution works. As Pahl (1979) notes, institutions have a tendency towards self-perpetuation even apart from their mission. This can arise for a range of reasons, for example employee desire for the preservation of their jobs and status. More often than not however, it is an

institution's values which become believed in and which are sought to be replicated. These values can either be invested by individuals and/or recipients into the institution (re Selznick 1957) or be adopted as policy by the institution for its own legitimation (and/or other benefits) in light of its purpose. This may effect even the structural mechanisms of the institution towards its mission, such as competitive promotion versus co-operative management. The result is channelled back through the reinforcement of the institution's ideology in the form of the 'institution image' or 'ideology' (for example, efficient and centralised versus social and local) and on goes the cycle.

2 Group Interests

The theoretical development of institutional approaches has brought with it the recognition that there are forces working upon institutions from without as well as within. Although the values and influence of internal agents within an institution is a real phenomenon (as the urban managerialist thesis clearly shows), any attempt to understand an organization institutionally must also recognise the influences upon key agents in an organization. This then acknowledges that even within a single institution (such as the state) there can be conflicting interests (for example, treasury versus the education sector of any government). The competition of different interest groups, each bringing their own values and priorities means that there can be considerable changes in policy over time as different groups dominate. Hence any attempt to understand any institution must recognise the influence of various competing groups from both within and without.

3 Legitimation and Contradiction

Institutions have to legitimise their existence. Pahl (1970, 1975, 1979) demonstrated that this is done by appealing ultimately to values and the institution's effectiveness in meeting its objectives in light of this. However, because of the fact that there can be competing value influences from different groups there can be conflicting legitimacies, which may even lead to fundamental contradictions which may be maintained by certain groups for their own interests (Benson 1979 : 4-5, 13-15; Friedland and Alford 1987). To take a current example, a welfare organization may appeal to its service ideology to legitimate itself to the public while appealing to its economic viability to the government for financial assistance, even though an effective service may not be able to be given at a profit. There is also the possibility of external versus internal contradictions. Internally, institutional

managers tend to have two categories of legitimation in decision-making. Firstly they can appeal to personal values as distinct from the institution. The tendency here however, is that managers are often drawn from similar socio-economic and educational backgrounds and their selection and promotion based on these backgrounds. The result can be a bias by managers of similar background. For example, managers trained as engineers will tend to show a characteristic approach to problem solving based on this background. This can result in discrimination in the policies and approaches taken and therefore in resource distribution (Manion and Flowerdew 1982: 30). Secondly, managers may appeal to the values inherent in the membership of an institution. Managers can pick up values through working in an institution. Indeed promotion may be based on subscription to an institution's values, even a willingness to place one's own good under that of the institution (by being prepared to transfer residence at request for example - Manion and Flowerdew 1982: 30). This can result in loyalty to the institution overriding the manager's loyalty to clients, as in the negative case of business corruption. However, legitimation relies on an on-going balance between the institution's official ideology and legitimation (outlined in policy), its practice, and a willingness of the various groups to listen and compromise if a major unstable contradiction is to be avoided.

4 Policy and Praxis

Policy (written or unwritten) can be seen as the key expression of these competing forces within and upon any institution. Often it is the result of a compromise between these forces. Policy then provides the formal recognition of the competing values as well as the legitimation required for the direction and goals of how to achieve the 'institutional mission' in light of these values. Often these values are betrayed in the way policy perceives (discriminates) its mission and its method of approach to it. Policy can also be seen as dynamic rather than static, able to adapt in turn to changing practice, new situations and demands and thereby reinforcing institutional legitimation. In this respect an institution's policy controls and directs the practice of the institution, providing limits beyond which if practice departs, the legitimation of the institution may be threatened. It is through focusing on policy and its outcomes that an organization's behaviour can be understood 'institutionally' and the sum of the influences upon it assessed. Policy and its impact on institutional practices and individual actions, are the central aspects of any institutional approach in which the net sum of all other factors can be found.

A DEFINITION

From the above, an institutional analysis can be seen as offering a holistic analysis of a wide range of organizations within society. This thesis is concerned with the way that institutions discriminate on the basis of stated policy, explaining this in terms of institutional influences. Consequently, in this thesis an 'institution' is an organization (or a group of similar organizations) viewed, not only in terms of structure and function as traditionally understood, but also in terms of the values and conflicting interests acting upon it, and the impacts of this upon those whom it serves. From this, the focus of analysis is on those sets of beliefs, values and norms by which an organization is constrained if it is to gain legitimacy. Consequently an institution:

"... is not regarded as an indivisible entity acting as a unit to fulfil its mission. It is ... influenced by rules and procedures which are not directly and essentially related to its mission, but which have been developed internally and/or are imposed externally upon it. It will also be influenced by its own internal structure and by the special interests of its subdivisions or of people within it".

(Manion and Flowerdew 1982 : 4)

Because institutions are "not regarded as an indivisible entities", recognition is given to the fact that institutions contain within themselves competing forces and interests, as well as from without, that seek to influence policy. An institutional approach then, seeks not only to be aware of organizations as whole entities, but also to examine the forces acting upon them and from within to shape their policies. In sociological terms, an institution is seen as part of the society, not as an independent variable (Benson 1977 : 3, 6-9). This is illustrated in figure 2.1. The resulting organizational structures and policies are viewed as dynamic, the consequence of changing values as different interests dominate. All this does not deny that people (both within and outside of any institution) make choices or have their own interests, but rather that these choices and interests are constrained and regulated in institutional environments. Social processes, such as class struggle for example, are seen to be mediated through institutions and hence the need for the recognition of institutional influences if a realistic understanding of society is desired. In the case of this thesis, the outcomes of these competing values and social processes, mediated through institutions, will be assessed for their impact on post-retirement migration. The model in figure 2.1 also

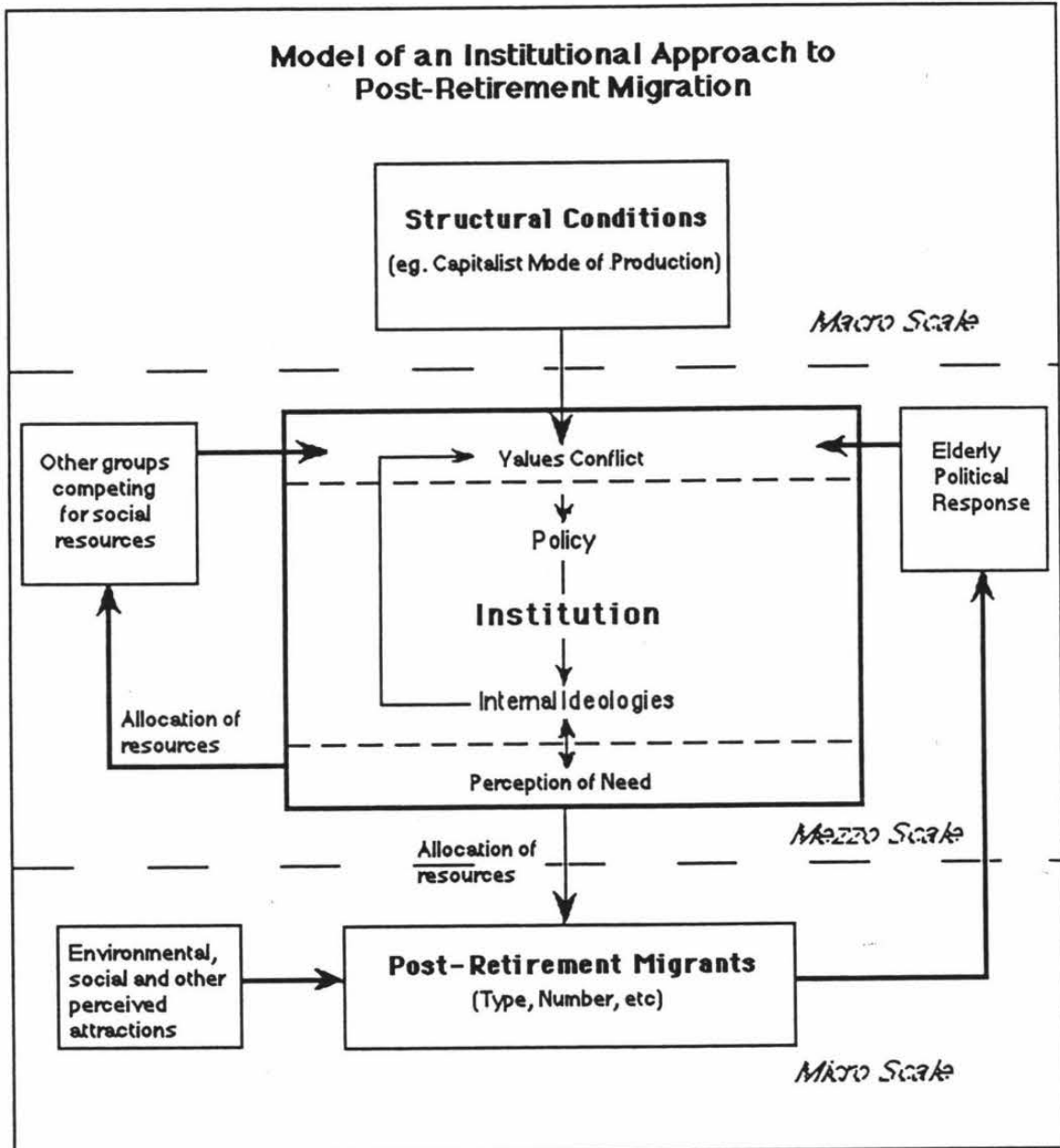


Figure 2.1

allows the integration of various scales, from the macro (general theory, structural conditions, etc) through mezzo (national, regional and local influences mediated by institutions) to the micro (local and/or individual) scales. This, coupled with the compatibility of the methodology with a range of philosophical perspectives mentioned earlier, means that an institutional approach offers a framework within which the range of work currently done on post-retirement migration can be more fully integrated. The above model will be the one adapted for this thesis.

2.5 Summary

The institutional approach in geography has arisen from an extension from a simple autonomous managerialism coupled with the recognition of higher order factors, primarily the political, economic and ideological structures within a society. This arose from an on-going refinement of theoretical approaches combined with the parallel development of a desire for relevant policy orientated research. The result has been the recognition of institutions from two different perspectives, 'formal' and 'informal'. 'Formal' institutions are concrete organisations which have formal stated policies, while 'informal' institutions can be viewed as unstated agreed patterns of social behaviour (such as the capitalist mode of production and other socio-structural arrangements, marriage, retirement, etc) which may act as legitimating bases for the formal institutions. The institutionalist methodologies are therefore in a unique situation within social sciences, having both a strong theoretical basis as well as a high utility for understanding and addressing social issues. This thesis seeks to use the institutional approach to trace the influence of competing values on institutional distribution of scarce social resources to elderly migrants. The importance of such a study can be seen in that values can influence the choice of one form of regulation, policy or structure over another and this can have a major impact on an institution's activities. Consequently, a strong understanding of how competing elderly interest groups seek to manipulate institutional policy to insert their desired or valued goals is needed. This is examined more fully in section 3.3. Before doing this however, the reasons for using an institutional analysis of elderly migration shall be more explicitly outlined.

Chapter 3 Case Study Methodology

3.1 Justification of Methodology

Before proceeding to outline the methodology, objections to using an institutional approach to elderly migration study, such as that illustrated in figure 2.1, must first be met. These objections are met below.

CONTEXT SPECIFICITY

One of the strongest criticisms that can be brought is that of the restrictive nature of the generalisations possible using this approach. This is mainly due to the fact that conclusions are dependent on the legal, historical and national context in which the institution(s) concerned operate. Even between regions there may be significant differences in institutional goals or perspectives. Such a criticism is often brought by those who seek to establish a general theory of elderly migration. The work of Wiseman and Roseman (1979), etc, outlining the highly heterogeneous nature of elderly populations makes the likelihood of a general theory questionable with regard to both its feasibility and realism. Certainly, those theories which have been offered (such as activity, disengagement and continuity theories) are widely criticised for that fact that they are so highly generalised that they are limited in terms of any effective utility except at the most aggregate level. Beside this, the fact that all three appear to be valid for different groups of elderly once again displays the difficulty of trying to find an all encompassing migration theory for a highly heterogeneous group. Consequently, an institutional approach can be justified because:

"Even though institutional factors make it harder to formulate general theory, it is important that they are taken into account, both because they are directly responsible for a large number of individual moves [eg. amenity migration, institutionalization, etc] and because they are necessary to account for 'failures' of more general models to fit a given data set"

Flowerdew (1982 : 223)

An institutional approach then, can be viewed as an accompaniment to highly generalised theory, accounting for variances and providing a link to the empirically observed situation.

HIDDEN AGENDAS

Another criticism of an institutional approach arises from its focus on values and reliance on policy statements. The difficulty with this is that there may be a 'hidden agenda' or informal policy over and above any stated policy. In many cases, members of the institution are often reluctant to reveal such a policy, especially where this apparently conflicts with or challenges the formal policy or institutional legitimation, authority, etc. Consequently our ability to fully understand institutional influences is limited. Although this is a valid problem with an institutional approach, it can be over-exaggerated. If an institution or its managers depart too far from stated policy, this threatens the legitimation of the institution, or the managerial actions. Also, institutional theory suggests that formal policy is dynamic rather than fixed, able to respond to changing values and influences from both without and within (though this may occur more slowly than some would like). Consequently, stated policy can be seen to reflect the influences upon an institution, though the difference that can occur with informal policy can arise from minority special interest subgroups or the time delay involved in changing policy. Consequently, in this thesis the stated policy will be assumed to be the one operating, unless clear information to the contrary arises.

In summary then, although an institutional approach lacks generality and this therefore limits its predictive ability, it:

". . . offers a convenient way of combining insights from different disciplinary strands of research on migration. It also focuses on variables that are amenable to organisational or governmental control, and may therefore have direct policy relevance. Finally, it is less abstract and far more intuitively reasonable than most attempts at creating a general theory of [especially elderly] migration"

Flowerdew (1982 : 223)

In this way an institutional methodology has been selected in response to the calls for policy relevance and yet a coherent framework for elderly migration research. An institutional approach therefore, meets the call of many elderly migration researchers, for example Wiseman and Roseman:

"Although several studies of elderly migration have been undertaken, the disparate nature of the emerging body of literature reflects the need for an integrative conceptual framework"

(1979 : 324)

and Rowles:

"Acknowledging linkage between societal values, social institutions and the geography of ageing and the aged, raises important issues . . . it behoves us [as geographers] to contribute to discussions of philosophy and practice in public policy insofar as decisions within this realm have geographical outcomes"

(1986 : 530)

3.2 Key Concepts Outlined

In the institutional analysis outlined in figure 2.1, policy is seen to be one of the key variables. Not only does an institution's policy provide guidance and legitimation for administrators, but it is also an expression of the underlying and influencing values on an institution. Consequently a conceptual approach to and a means of assessing policy impacts on migrants is needed. To do this in light of time and other constraints this thesis will focus on two key aspects of policy as it affects elderly migrants, namely how the 'needy' elderly are 'discriminated' by the institution and how that need is defined and measured.

DISCRIMINATION

A Definition

Discriminate: *v.t.* To constitute (or note) a difference between. *v.i.* To make a difference or distinction.

Chambers Dictionary (1975)

As a result of media reports of inequitable treatment of individuals on the basis of their age, sex, race, religion, etc, the word 'discrimination' has increasingly gained the connotation of unfair differential treatment. The concept of discrimination however, does not necessarily entail the negative suggestions it has gained.

Discrimination is an essentially philosophical activity involving the classification and refinement of categories to refine meanings (Barrow 1982 : 2)¹. This enables the development of knowledge, for example, through the formation of the categories such as 'God' versus 'ghost', 'justice' versus 'equality', 'cause' versus 'responsibility', 'need' versus 'want', etc. From this it can be seen that in the broadest understanding we all discriminate in the

¹ For a more in depth discussion of discrimination as a concept, refer to any general ethics and/or philosophy of knowledge text book.

world around us, categorizing and sorting information in order to understand and make sense of our environment and ourselves.

Discrimination by nature then, involves more than just observing differences. It often involves judgement and making distinctions. We choose what differences are important in constituting a basis for discrimination. This choice is often related to the purpose for which we are discriminating. For example, if searching for a table in a room full of furniture, an individual will search on the basis of physical dimensions rather than say, colour because this is the more relevant data in separating what is a table from other furniture. Similarly, one would select a potential champion athlete on the basis of physical prowess rather than hair colour, or skin colour. Implied in this choice is also the need for preconceived and well defined categories into which we wish to place any phenomenon (Barrow 1982 : 4). For example, before we can test for differences between student knowledge, intelligence and wisdom we first need a clear definition of each of these. This may not be easy due to such things as, in this case, overlapping or related concepts and categories.

The Role of 'Policy' and the Centrality of Values.

The fact that we use judgement in discriminating does not necessarily tell us whether such discrimination is morally acceptable. At best it can tell us whether a basis of discrimination is relevant for a given purpose (as in the athlete example above). The decision over when discrimination is 'bad' or 'unacceptable' rests ultimately upon one's values and world-view. This applies not only on the individual level, but also at the collective or group level. Personal and structural discrimination are therefore linked where a society invests its collective values into its institutions. As a society's values and/or world-view changes, these earlier held values remain embedded in society's institutions which are generally conservative towards value change due to the ideological and structural preservation in the form of 'policy', legislative restrictions, etc. The result is 'institutional discrimination'. This is usually viewed in negative terms as the discrimination between people on the basis of 'irrelevant' or 'immoral' factors, usually race, age, sex income, etc. Often this is associated with power conflict between groups within society. This issue however, involves more than a debate over what is acceptable discrimination, these debates are often the manifestation of a clash in values between these very groups. The result of the struggle of the

different groups to promote their values is often a compromise which is in turn invested back into institutions in the form of adjusted policy or goals, etc, and on goes the cycle. In this can be seen the central role of stated 'policy' (which can include legislative requirements as well as internally imposed constraints and guide-lines). It provides the basic criteria by which need is discriminated and resources allocated. Hence policy can be seen as a long-term reflection of the value influences that have occurred within the institution.

In this case study one major focus shall be on the changing basis of discriminating who are the 'needy' elderly for resource allocation by that institution. Impacts of the varying discriminatory bases on the migration of the elderly to Waikanae will be examined, and the consequent elderly migrant response through political and pressure groups such as Horowhenua Superannuitants Association, Age Concern, 60's Up, etc. The fact that discrimination changes with time reflects the changing strength of various group values upon and/or within the institution and the search for continuing legitimation from informal institutions. Before this can be done however, we must first outline definitions of 'need' so that the differing perceptions of elderly migrant need can be examined.

NEEDS

The concept of need has been a problematic one for planners, researchers and philosophers for many centuries. What is the difference between a 'need' and a 'greed' in practical terms, and how does one measure such need? This thesis will focus on how institutions identify those elderly who are in 'need', how this impacts on migrants and migration and the political response of the migrants as to whether their perceived needs are being met. For this purpose the method outlined by the International Social Security Association (in Rhee 1974 : 81-92 and footnote references : 85) has been adopted. It recognises the concept of need as a primarily socially defined phenomenon, and hence the variability of definitions between cultures and over time in response to different purposes. (For example, at one time electricity supply would have been considered a luxury, now it is generally regarded as a necessity for modern living). The recognition of the necessity of differing definitions of need according to various purposes leads to a multidimensional approach to analysing need. Rhee (1974 : Chapter 5) summarises one developing approach to understanding and measuring the

multi-dimensionality of need. Four definitions of need are recognised (see also figure 3.1):

1 Felt Need

This represents the need felt by the individual concerned. For the general purpose of this thesis felt need can be understood as any perception the elderly may have as to what they feel they need now and/or in the future in regard to standard of living, relationships, assistance, etc.

Measurement: Felt need can be ascertained by asking (via interviews, questionnaires, etc) the population concerned directly.

2 Normative Need

Normative need is that which is postulated and recommended by experts. May be presumed to be based on 'objective' norms, for example, nutritional norms by biochemists, housing norms by gerontologists, town and country planners. To some extent the level of normative need is culturally determined (for an example, minimum health standards change with increasing health knowledge). The assumptions of experts should be as explicit as possible.

Measurement: Interviews with experts, policy recommendations, minimum standards, etc.

3 Comparative Need

This refers to resources supplied to persons only with the required characteristics of need where in some situations, administrators consider it real, in others not. Comparative need then, is need as it is recognised by the institution.

Measurement: Primarily measured via content analysis of policy and/or guide-lines focusing on how the 'needy' elderly are distinguished from others. Interviews with managers should be aimed to get their interpretation of such policies so as to determine the actual institutional activities occurring.

4 Expressed Need

Expressed need reflects existing statistics of take up, vaguely corresponding to economic 'demand'. Where a corresponding 'supply' exists, it can be measured by utilisation. This is the easiest of the four indicators to detect, but the most likely to mislead due to other factors (such as advertising inflating demand, elderly desire for security above immediate need, etc).

Measurement: By consumption, political expression or, in some circumstances, waiting lists are a way of measuring it (ie. as unmet demand). Survey questionnaire may also be used to detect use of services.

The measurement of the scale of need is given in table 3.1 (see over page). Need is assumed to be strongest where there is universal recognition of need across all categories. This is illustrated below in figure 3.1:

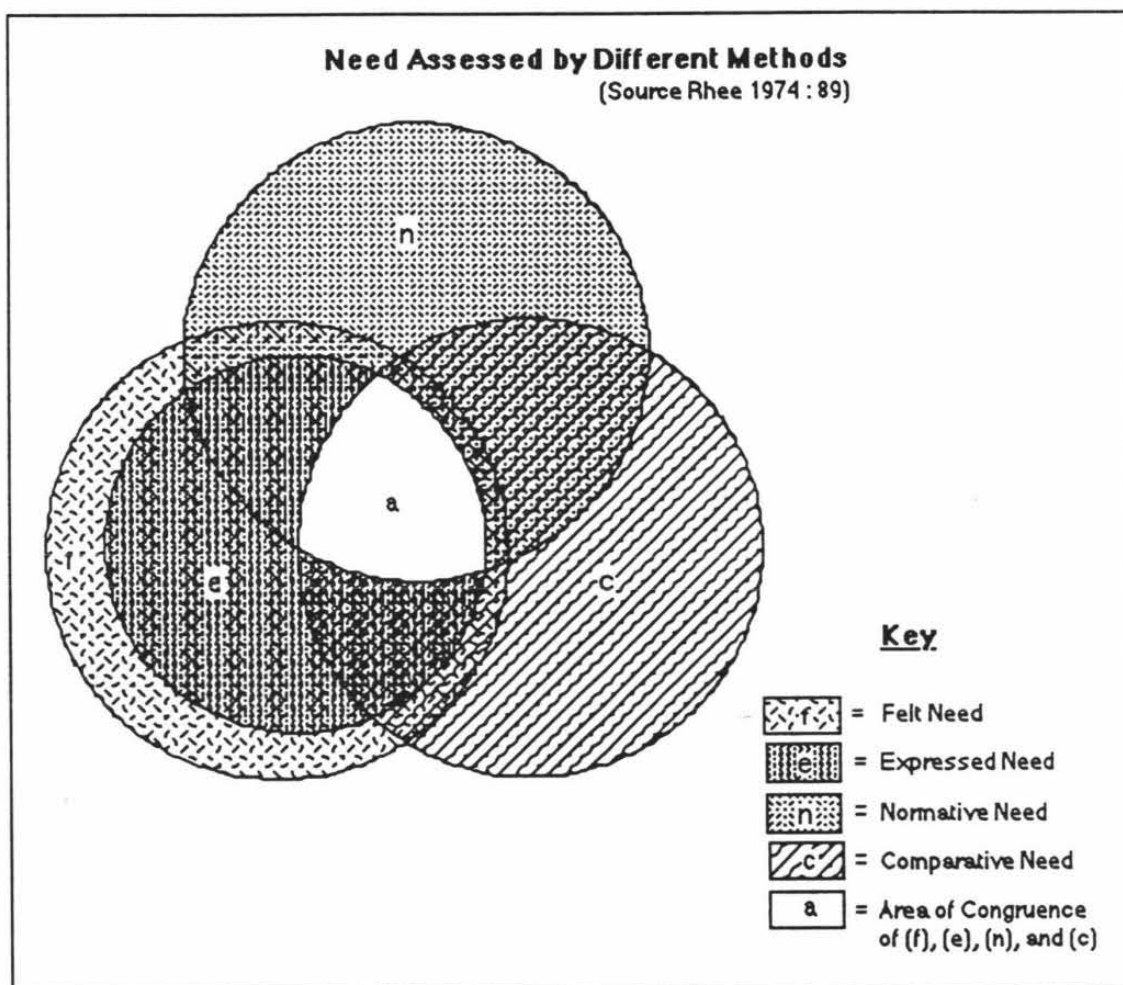


Figure 3.1

The area of congruence corresponds to the 'indisputable need' category found in table 3.1 (code number 1) below. Note also that all expressed need is assumed to reflect felt need. This is an attempt to distinguish between a need and a greed. If an expressed need exists where there is no felt need, then this suggests an attempt to secure resources beyond what is perceived important by those in the situation.

Table 3.1

Measuring Social Needs

<u>Code No.s</u>	<u>Need Felt by the individual concerned.</u>	<u>Normative Need: Need postulated or recommended by experts</u>	<u>Comparative Need: Need identified by institution.</u>	<u>Expressed Need: Need resembling demand in the economic sense.</u>	<u>Comments:</u>
1	1	1	1	1	Indisputable need
2	1	1	0	1	Clear indication that need ought to be met.
3	1	1	1	0	There may be deterrents requiring investigation
4	1	1	0	0	Absence of take-up possibly due to supply
5	1	0	1	1	Experts may need to re-examine their judgement
6	1	0	1	0	Need possibly better met in a different way
7	1	0	0	1	Experts and suppliers (institutions) may be out of touch with social reality
8	1	0	0	0	Perhaps impossible to supply the need. Examine reasons.
9	0	1	1	1	Improbable situation: Need not "felt" but "demanded". Possible sampling defect
10	0	1	1	0	Public may lack information or experts may be wrong
11	0	1	0	1	Improbable situation
12	0	1	0	0	Perhaps too new, too technical or too obscure (eg. medical needs). Perhaps public need to be better informed or experts wrong
13	0	0	1	1	Improbable situation
14	0	0	1	0	Need probably obsolete
16	0	0	0	1	Improbable situation
17	0	0	0	0	No problem of need

(Source: Rhee 1974 : 90)

An underlying assumption for this thesis is that elderly migration arises from a response to felt need (be it health reasons, 'need' for a new post-retirement lifestyle, family loyalties, etc). Hence this thesis seeks to see how changing institutional (ie comparative) definitions of need, and the assistance they supply as a result of this, affect patterns of elderly migrants. Part of this analysis involves looking at the elderly migrant view of whether institutions are indeed meeting their felt (individual surveyed) and expressed (especially politically expressed) needs, as this is seen as key in any migration decision.

3.3 Outline of Case Study

As outlined in the previous sections and chapters, elderly migration, despite the growing literature, remains a relatively diverse field of study with researchers from different disciplines taking different approaches (Flowerdew 1982 : 209). Consequently institutional approaches were reviewed as a possible solution to the disparate and ad hoc nature of much elderly migration research. This case study seeks to move towards an institutional analysis to see how effectively such an approach can meet the calls for a common research base and greater policy relevance. The following will outline the objectives, assumptions and goals of the study.

AIMS

The primary aims of this case study are:

1 Theoretical Aim

To test for an integrated methodological framework in which to co-ordinate studies of elderly migration from micro to macro scale, therefore providing a link between individual actions and macro theories, so as to increase planning awareness and effectiveness in meeting migrant needs efficiently and promote greater understanding of the processes affecting migration.

2 Case Study Aim

This thesis seeks to test the ability of the proposed institutional analysis in performing the above task in a practical case, namely:

(a) In determining how well individual elderly needs are met by service institutions in Waikanae and examining the interrelationships between these and on-going migration patterns to and from the region, and

(b) Pin-pointing areas of planning and resource provision where elderly migrant needs are not being met or being over-supplied with a view to improving efficiency in the targeting of resources.

UNDERLYING ASSUMPTIONS

Assumptions behind the methodology are as follows. These are drawn from the literature reviews (see Chapters 1 and 2):

1. Human migration occurs on the basis of individual perceived felt 'need(s)' via a cost-benefit analysis of their situation where the 'benefits' (in terms of economic and non-economic 'needs') of the move outweigh the 'costs' of moving and/or 'benefits' of the current location. (Source: elderly migration literature review, especially Lee 1966).
2. Migration occurs within institutional (formal and informal) contexts, hence institutional considerations influence the migration decision, especially in terms of who is able to migrate, and where. (Source: Institutional approach literature review, especially Flowerdew 1982).
3. Formal institutions compete for elderly migrants by appealing to an ideology which claims to meet the 'needs' of these elderly.
4. The underlying basis for service provision is the dominant informal institution, the Capitalist Mode of Production (need for profit to further services and 'need provision') which can create a contradiction or 'conflict of values' between this mode and official ideology as limited social resources are distributed between competing groups in society.
5. Policy is the long-term outcome of this values struggle. This affects the definition of need, therefore the services provided, therefore the migrants attracted to the region. (Source: Institutional approach literature review).

This institutional approach seeks to provide a cohesive framework into which various forms of elderly migration study can be integrated (see Aim 1 above). These assumptions underlie this by recognising structural, institutional and individual level influences in the migration process. From this a methodology has been developed that can incorporate findings (theoretical and/or empirical) from the macro to the micro scales in an integrative approach to

understanding elderly migration (see figure 2.1). In this thesis, emphasis will be on the institutional rather than environmental or macro structural influences on elderly migrants in line with the focus of the topic, though a more equal weighting is possible (see section 5.2).

HYPOTHESES

For the case study we wish to test a range of factors to see whether this institutional approach can adequately detect known factors (micro and macro) that influence elderly migration and recognise these in a workable, mezzo scale model relevant to planners. Before approaching this practical aspect, it remains that a significant link has to be shown to exist between institutional perception and migrant response. Consequently the primary hypothesis can be stated thus:

Primary Hypothesis

That elderly post-retirement migration is influenced by institutional perceptions of elderly migrant needs and the consequent provision and availability of services.

The following subsidiary hypotheses therefore, provide the testable statements by which it is intended to validate the primary hypothesis. The subsidiary hypotheses are based on underlying assumptions about elderly migration and are formulated in light of the specific aims of this study (as outlined previously this section). These assumptions act as a control to allow a comparison of results with findings from other researchers so as to verify the accuracy of the method in detecting and interpreting data. Operational definitions are outlined or referred to where appropriate and once stated apply to all following subsidiary hypotheses in which they occur.

Subsidiary Hypothesis 1

Elderly migrants have migrated in order to meet some 'felt need' which the new location is thought to provide for more fully than the past location.

Operational Definitions:

- Elderly = persons not in full-time paid employment aged 60 years or older.
- 'Felt need' = need felt by the individual(s) (see section 3.2).
- migration = a change in permanent residency from outside to within the Waikanae Community area (including Parklands-Woodlands Retirement Village).

Subsidiary Hypothesis 2

To move, migrants must have met the criteria given by whichever institution(s) they interact with. (This criteria is a reflection of the actual 'comparative need' of the individual as defined by that institution. Migrants must meet it to gain access to desired resources/location).

Operational Definitions:

- 'Comparative need' = need as perceived by the institution (see section 3.2).

Subsidiary Hypothesis 3

Informal institutional environments (ie structural factors, such as the Capitalist Mode of Production, the democratic process leading for political competition for scarce resources between different social groups, etc) provide constraints on institutional recognition of individual 'felt need' and the legitimation for this constraint. Hence we would expect to find some discrepancy between definitions of felt and comparative need concerning elderly migrants.

Operational Definitions:

- 'Informal' institutions = unwritten, socially agreed laws of collective behaviour (for example, the Capitalist mode of production, nuclear family - see section 2.5).

Subsidiary Hypothesis 4

Such discrepancies lead to dissatisfaction and consequently to political action as elderly seek recognition of 'expressed needs'.

Operational Definitions:

- Political action = any actions to aimed to express elderly concerns regarding service provision, spoken by groups or individuals claiming to represent elderly interests.

- 'Expressed needs' = need as collectively identified by the elderly or groups representing the elderly (see section 3.2).

Subsidiary Hypothesis 5

As more services for meeting elderly needs become available, this has a cumulative effect on migration due to the fact that comparative need is closer to felt need allowing more migrants of the type assumed (assumption 1) to migrate to the region.

If the subsidiary hypotheses are confirmed, this will strongly suggest that the primary hypothesis is valid and that the institutional approach can fulfil the stated aims. If the subsidiary hypotheses are generally found to be false, then the results from this institutional approach will be considered in conflict with the studies it is supposed to complement, showing the primary hypothesis to be largely false and the methodology inappropriate (see Aim 1). These hypotheses, if confirmed, will provide evidence that suggests a significant link between institutional discrimination of need and elderly migration, especially in terms of 'who', moving 'where' (local scale) and 'when'. This could provide the basis for allowing a more effective predictive model for elderly migration movements by accounting for institutional variables instead of seeing them as nuisance factors.

THE STUDY AREA

The area selected for this case study is the settlement of Waikanae (1986 resident population: 6 050). It covers the Waikanae District Community which includes Waikanae Township, Waikanae Beach and the developing suburb of Te Moana which lies on the beach side of the township (see map, appendix 1). Included also is the Parklands-Woodlands retirement village which is part of the town but falls just outside the Community District's boundaries). This location was selected because of its reputation as one of the major concentrations of elderly amenity migrant destinations in New Zealand (42-43% of population 1986 is aged 60+ years - Robb and Cody 1990 : 11). It is hoped that this would provide more accurate results because of a greater sample population and also that the high number of migrants would suggest that any attracting influences of the region may be more easily identified. Also Waikanae is one of New Zealand's fastest growing residential areas (at 5%+ per annum 1986 - Robb and Cody 1990 : 6). Consequently there is strong competition for social resources between the resident groups, (especially the young and elderly - Robb and Cody 1990) as people expect social resources to be as available as in other suburban areas, yet these are stretched to the limit to keep pace with the population increase. It is hoped that this high level of competition for the limited local social resources will be reflected in active political lobbying by elderly groups, thereby providing a clear reflection of local elderly concerns.

The location has been limited to the Waikanae District Community area due to resource constraints (in terms of labour, time and financial limitations).

THE SELECTED INSTITUTIONS

Primarily as a result of the constraints mentioned above, a full institutional analysis of Waikanae is not possible. A comprehensive survey of social services in the Kapiti Coast district by the Kapiti Community Social Services (Inc.) for the whole population has recently become available (Robb and Cody 1990). Rather than duplicate this work, its findings will be considered in this case study. Consequently, the field research in this thesis is limited to analysing a representative range of organisations and services which are considered influential in their possible effect on elderly migration. The list of organizations contacted is given in appendix 2.

The fact that Waikanae is a recognised amenity region for elderly migrants in New Zealand means that amenity providers will be a focus of this case study. This is appropriate when it is remembered that amenity migrants are easily identified (via utilization of services and waiting lists). Amenity migrants come to amenities because they feel that such services meet perceived need. Consequently, a change in institutional policy regarding service provision and those in 'need' of that service may have a significant impact on those accepted, and therefore on those who migrate. This thesis therefore will target those institutions which play a key role in providing amenities (such as housing, retail services, transport, health, etc). These service providing groups can be broken up into three basic categories:

Public Organizations

A key organization was the Wellington Area Health Board whose policies directly or indirectly affected the range of care and support facilities available. The Department of Social Welfare is important as a major income source and its policies on allowances can greatly influence the financial access of the elderly. Local government has also been given much greater responsibility under the 1989 legislation to ensure the provision of social services, hence the policies and actions of the Kapiti Coast District Council will be considered. Central government's role will be seen as mediated through its departments at the local level. Public organizations will be a major focus due to their easily accessible policy statements (eg. annual plans, etc).

Private Organizations

The largest private amenity provider in Waikanae is the Parklands-Woodlands Retirement Village. This will be examined as a key post-retirement amenity provider and therefore attractor of elderly migrants. Other private service providers will also be selected, though time and resource constraints force a selective analysis. The Kapiti Community Social Services report (Robb and Cody 1990) has indicated that areas such as accessibility to health, retail, transport and other social services are sources of some discontent among the resident elderly. Representatives of these will also be examined to see whether such factors attract or deter certain migrants. A key to this accessibility is financial income, hence issues such as the local real estate market steering and the possible effect of a cut in Guaranteed Retirement Income (GRI) on migration to the region, etc, will be assessed.

Voluntary Organizations

Voluntary groups are numerous in Waikanae and also supply many services. In light of current government emphasis on community involvement, a selection of these organizations will also be examined.

3.4 Methodology

The following methodology seeks to provide some practical steps to give data and direction for the case study in light of the institutional approach and aims outlined above.

(1) BACKGROUND INFORMATION

The aim of this step is to provide the basis statistical, geographical and historical contexts in which the study will be conducted. This was partly achieved by using the Supermap™ and other various Department of Statistics census publications to get basic population data for the Kapiti Coast district and also the proportion of elderly to the rest of the resident population. Other important sources were Robb and Cody (1990) and KCDC (1991a) which provided the latest estimations on demographic data for the Kapiti region as well as population growth projections until the year 2011.

A second approach to provide the context of the case study were found by a historical overview of growth of Waikanae as an amenity centre, noting especially any coincidence with key changes in government policies (eg,

superannuation, etc). Sources for historical review consisted mainly of books on local history (notably McLean 1988), local community newspapers (The Kapiti Observer), interviews, etc.

(2) INSTITUTIONAL PERCEPTION

This step seeks to outline the changing institutional guide-lines toward and perceptions of elderly migrants to/from Waikanae. This provided data which will be used to assess the effectiveness of these institutions in meeting migrant need and affecting migration patterns.

Firstly, an analysis of policy past and present will be carried out. Emphasis should be on criteria for detecting 'needy' migrants (such as age, class, race, etc) and the source of such criteria. Sources include organizational policy (written), legislation requirements (where appropriate), etc

Secondly, managerial interviews to gain perceptions and interpretation of elderly 'needs' (ie. local 'institutional ideology' - see figure 2.1) will be done. This will provide the major source of data as it is desired that the application of policy to the actual situation in the locality be understood rather than abstract policy as it applies at a purely national level. Managerial interpretation of such policy is a key to understanding its application in the local situation (refer Pahl 1970, 1975). A schedule was used to guide semi-structured interviews with managers to provide a measure of compatibility and comparison between interviews. The general schedule used is given in appendix 3. The topic areas were covered in each case, although the precise questions used varied (in some cases considerably) due to the nature of the organization to which the participant belonged. A list of key contacts was obtained from Robb and Cody (1990 appendix 2 : 45-50). Other interviewees were contacted via community directories, etc. The organizations represented are listed with appendix 2.

(3) ELDERLY POLITICAL RESPONSE

By examining corporate elderly response to services provided it is hoped that the influence of the elderly on the institutions can be approximately assessed. Also it is sought to determine what sector of the elderly population have the dominant voice in such political activity. Is it those who benefit in terms of being able to migrate? To achieve this, interviews with representatives from elderly political groups will be done to assess their perceptions concerning migrant needs. Contacts were obtained via Robb

and Cody (1990 appendix 2 : 45-50) and via direct enquires through elderly organizations. From this, an assessment will be made of elderly political group influence on the institutions concerned and their policies. This shall also be obtained through interviews with local representatives from the institutions and the groups. (As a result of these findings a comparison can be achieved between 'comparative' and 'normative' as against 'expressed' need - see step 5).

In addition to the interviews, an examination of the elderly political groups' membership base will be done to see whether the population that benefits is indeed those that are represented. This involves cross-correlating the relevant findings from the elderly survey (see step 4 below) with the political articulation from these groups (This will allow a comparison between 'felt' and 'expressed' needs - see step 5).

As a check on the above findings, an examination of informative material to members (if there is any) will be made to see how the organization may influence membership opinion, justify its actions, etc.

4) ELDERLY MIGRANT SURVEY

The aim of the survey is to provide a confirmation of elderly perceptions of their need for services as well as the extent of influence this may have on past or future migration decisions (re subsidiary hypotheses 1 and 2). An original survey was drawn up and a pilot survey done amongst 15 elderly migrants to Palmerston North known by the author. This was done to ensure that the questions elicited the information desired and whether any more questions should be included to gain further information. This resulted in a few minor changes in wording to the questions before the final copy of the survey was formulated. A copy of the questionnaire used is found in appendix 4. The questionnaire survey is designed to:

- assess the importance of institutional factors in migration decisions (past and/or future) for migrants. (Building on findings from steps 1 to 3) and;
- provide some data from individual elderly to aid in testing the similarity of elderly ('felt need') and elderly political perceptions ('expressed need') versus institutional perceptions ('comparative need').

Section A of the questionnaire seeks to provide the basic statistical background of those surveyed in an attempt to identify possible factors that may influence elderly perception of their service needs. This recognises that the elderly are a heterogeneous group reflecting a wide range of cohort, class, ethnic and other influences on their individual perceptions and that resources may need to be targeted to specific sub-groups of elderly.

Section B collects information concerning retirement related migration, perceived reasons for coming specifically to Waikanae and motives for any possible future moves. These answers will be examined to estimate the significance attributed to institutional factors (eg. housing costs/quality reflect retail market influence, willingness to leave the area with declining health may reflect poor intensive health care services, etc). Both in this and the next section 'services' represents the key institutional variable, covering recreational as well as social services.

Section C looks at the level of satisfaction with services and consequent political involvement. This will be compared to the migration data to see whether a strong dissatisfaction with local services results in a higher propensity to migrate and/or higher levels of political involvement (ie. attempt to move the services to the community to prevent the need to move later).

The data collected will primarily assessed as direct responses. Key variables in regard to hypotheses (notably the service and political involvement factors for subsidiary hypothesis 4) will be tested using chi-square tests. A level of significance of 10% was selected before the new hypothesis can be definitively accepted. This level has been chosen in common with much other social science research. Conclusions as to the likelihood of the relationship will be as follows. A significance of:

- | | |
|----------|--|
| 25-11% | - Possibility of some relationship between variables |
| 10%-6% | - A significant (probable) relationship |
| 5%-2.5% | - A moderate probability of a relationship |
| 2.4% -1% | - A high probability of a relationship. |
| <1% | - A very high probability of a relationship. |

5) NEEDS ASSESSMENT

The section will seek to provide a coherent framework with which to see how selected elderly needs (especially felt and expressed) are being met in light of stated institutional policy objectives. It will enable the comparisons in the above steps to be made and simplify the validation or rejection of the hypotheses. The planning aspects (Aim 2(b) and Hypothesis 3) will be assessed at this point.

An assessment (following table 3.2 below) will be drawn up for various definitions of needs to determine correlation of institutional versus elderly discrimination of needs.

Table 3.2

Need?	Code	Basic Definition	Felt Need	Normative Need	Comparative Need	Expressed Need
NO	0	No recognition of need	No recognition of need	No recognition of need	No recognition of need	No recognition of need
YES	1	Weak recognition	Generally satisfied. Only minor complaints	Recommendation only, no compulsion	Need recognised but out of policy or role	Need recognised but out of sphere of action
"	2	Moderately weak	Some definite dissatisfaction expressed	Criteria exists but never enforced	Need recognised but no action taken	Need recognised but no action taken
"	3	Moderate recognition	Recognises that a need is definitely not being met	Criteria enforced	Need recognised, some action occurring to meet need	Need recognised, some action occurring to inform
"	4	Moderately strong recognition	Complaint results in consideration of future migration	Some urgency to enforce criteria	Some priority given, resources specifically allocated	Need recognised, low level protest or lobbying
"	5	Strong recognition	Complaint strong enough to induce future migration	Strong, urgency to meet criteria under threat of punishment	Immediate priority given to meeting need over other issues	Strong dissatisfaction expressed threatening immediate action

Use of this table will be made for each area of social service examined (eg. public transport, hospital access, etc). The individual social service organisations will be loosely grouped into subgroups of institutions reflecting

a common values/perception base to ease interpretation. The yes/no (0/1) categorisation in table 3.1 will be modified into 0 to 5 scale as given above. The comments given offer some basic guiding category definitions which provide the initial criteria for assessing whether a need is perceived and if so, how strongly. This will then be qualified in relation to the effect of the need not being met on migration (for felt need²) or on priority of service provision to meet it (for other needs). These criteria are given under these headings in the table 3.2. This categorisation allows a more accurate, simplified and informative comparison. It allows not only a measure of the strength of perception, but also some measure of the link between mere perception of need (ranks 0 to 2) and degrees of action resulting from that perception (ranks 3 to 5). Where there is disagreement between different recognisable groups of elderly, these will be identified.

From the above, discrepancies in the perception of need for various groups can be detected. A 'discrepancy' can be said to have occurred if the need between any two categories differs by more than one rank. For example, if the difference between felt and expressed need was 3 and 2 or 4 respectively then there is no discrepancy; 3 and 1 or 5, some discrepancy; a divergence of more than 2 ranks, a strong discrepancy. From this a discussion of the implications for the subsidiary hypotheses and for local social resource distribution/access can begin to be made.

(6) RELATE CASE STUDY TO HYPOTHESES

This final step attempts to assess the interrelationship between institutional policy and elderly migration to/from Waikanae in order to assess how well elderly needs are being met and any areas of weakness in services (re aim 2). To achieve this, the role of policy in influencing migration decisions, the cumulative affect of those migration decisions on institutions, the role of competing values about elderly shaping policy and institutional actions will be assessed. This will be outlined in section 4.1. Following this case study conclusion, there will be an assessment of the implications of the case study for the wider use of institutional approaches in post-retirement migration research in fulfilment of aim 1 of this thesis.

² Because of the wide range in the strength of perceptions of need that may exist in the population, felt need will be assessed on the basis of the most vocal quarter of the population. Hence, if a full 1 in 4 would move if the need is not met, the score 5 would be given. If a majority would move or consider it - 4, and so on. The assumption behind this is that if a quarter of the elderly population in Waikanae recognise a need that is not being met, then this is a large enough minority to demand or justify a planning or service provision response.

Chapter 4

Summary of Findings

This chapter summarises and presents the findings of each of the methodological steps. Steps 1 and 2 are contained in Part A and examine the context into which migration occurs in Waikanae. Part B consists of steps 3 to 5 and examines the elderly response to the context and assess its impact on the decision to migrate. An overall conclusion to the case study can be found in chapter 4.

PART A

SOCIAL AND INSTITUTIONAL CONTEXT

Part A outlines both the historical/demographic and the institutional contexts and perceptions that post-retirement migrants move through on shifting to or from Waikanae.

4.1 Social Background

HISTORY

The history of Waikanae's growth is primarily related to developments in transport. Originally a Maori coastal settlement with access to estuarine resources, Waikanae was used briefly as a whaling stop. With the growth of horse coach transport, the settlement moved inland to a fordable part of the Waikanae River before locating to the current township site with the arrival of the railway (1886) and later the road (1901). During this time population growth was slow with the local industry derived from surrounding bush and servicing the coach and railway. A set-back was to occur during the depression years as some moved away to more favourable places, followed by a recovery with the beginning of World War 2 as the area was used for military training. The major growth in Waikanae however, has occurred since 1955 with the advent of the private car. Being a relatively short journey from Wellington, Waikanae became a popular weekend holiday spot. As a result, at the beach an extensive bach settlement developed. Rapidly the population grew as retirees moved to their baches and the area attracted young families to the quieter lifestyle, still close to the city. From 1960 on, Waikanae's population grew rapidly as this trend quickly developed into

what is now a full scale suburbanization of the region. Kapiti, as the only remaining undeveloped area near Wellington with large amounts of flat land, is expected to experience continued rapid growth into a region of commuter suburbs for the foreseeable future (see figure 4.1).

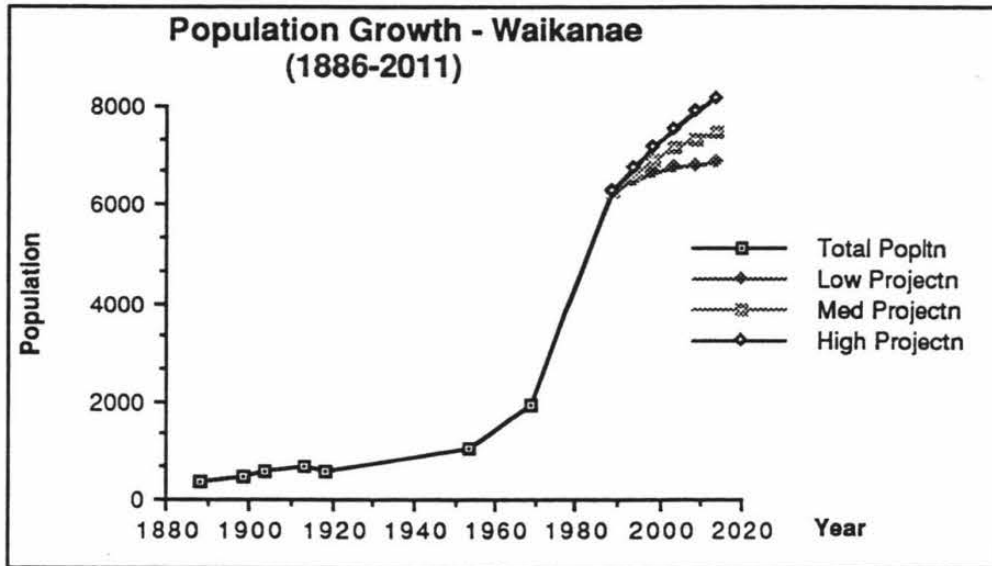


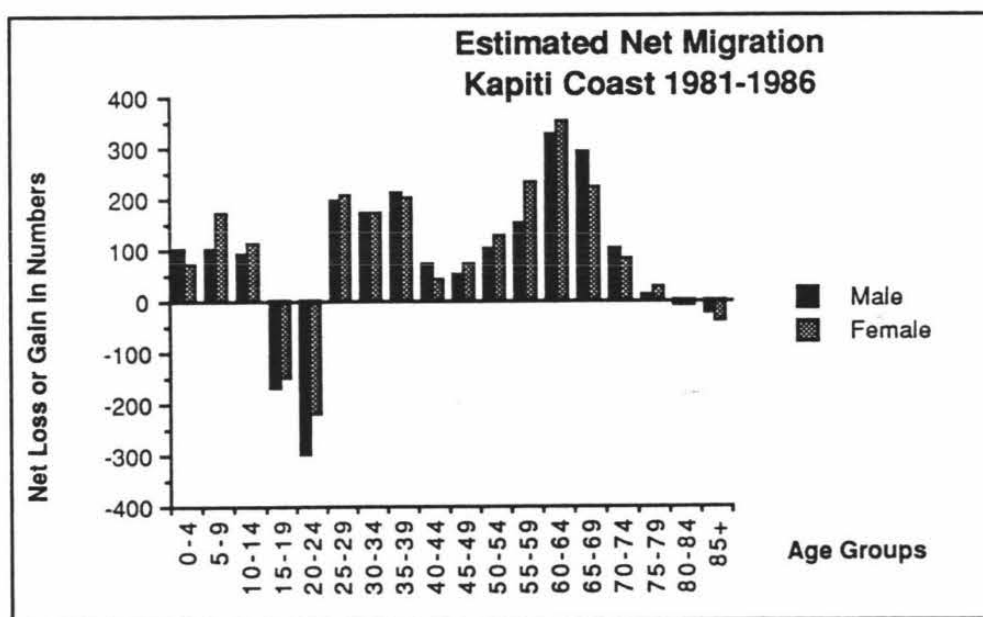
Figure 4.1

DEMOGRAPHICS

From figure 4.1 above it can be seen that Waikanae is experiencing rapid suburbanization in much the same way as many other commuter towns near major New Zealand cities (eg. Papakura and Howick near Auckland, Kaiapoi near Christchurch, etc). Waikanae's 5% p.a. growth (1986 Census) is the highest in the Kapiti Coast district, made up of mostly in-migration (93%), the great bulk of which originates in Wellington (91% of in-migrants 1981-1986). Projected estimations have suggested that this rate of growth should slow (Robb and Cody 1990 : 9; KCDC 1991a projections) as housing prices increase and the number of baches available decreases (though this could be altered if the present debate over a second bridge near the beach settlement goes forward). However, early releases of population figures for the 1991 census Kapiti statistical area do not seem to confirm this slowing growth rate, giving a total population of around 35800 which is significantly higher than expected even under the high growth scenario of the Kapiti Coast District Council report (KCDC 1991a). District growth has slightly increased to 18% for 1986-1991 (an average of 3.6%p.a., compared to 3.1%p.a. 1981-1986) for the whole Kapiti Coast statistical area, which is 80% of the entire Wellington Region's growth for the same period. If these

district figures apply to Waikanae where district growth was concentrated in 1986, and growth is higher than projected, then the strains upon social services may be greater in the near future than the local support groups have allowed for. Further complications are caused by a large holiday population which can swell the resident population by 4000 during peak holiday seasons placing even greater strains on local resources. (Though this holiday component is expected to decline rapidly over the next few years as the number of holiday homes decline).

The significant difference between Waikanae and other commuter towns is the extraordinarily high proportion of elderly people resident. 42-43% of Waikanae's 6 550 (high growth estimate for urban Waikanae 1991 - KCDC 1991 : 58) population is 60 years old or over, most of these having migrated to Waikanae since retirement (see figure 4.2).



Source: KCDC (1991a : 35)

Figure 4.2

The above graph suggests that Waikanae has a strongly dependent population, with a rapidly growing under 15 and over 60 population. This is confirmed in figure 4.3 below. As illustrated in figure 4.3 below, the number of those aged 60-69 is expected to remain fairly constant for the next ten years at around 2 500, but those over 70 years are expected to grow, from 21.7% (1986) to 24.5% of Waikanae's population by the year 2011 (see figure 4.3 below. This could be even higher if the 1991 provisional census results for Kapiti are confirmed at the smaller scale). This cohort effect of

SUMMARY

Waikanae is experiencing a period of rapid suburbanization, which begun in the late 1950s with the growing accessibility of Waikanae to Wellington as a result of the advent of the privately owned car. Waikanae attracts mainly younger families and retired persons due to the generally lower housing costs than Wellington. A large amount of out-migration occurs in the 15 to 25 year old age groups due to the lack of job opportunities in the immediate area. The result of this is a strongly 'dependent' population structure. From this it can be suspected that Waikanae would require a higher than average level of social service support to meet this demographically induced need. The next section takes a selective view of the institutional contexts operating in Waikanae and the range of services offered to meet this perceived need for those elderly migrating to Waikanae.

4.2 Institutional Perception¹

As mentioned in the discussion of the methodology, this analysis is an attempt to gain an idea of how the access to services for post-retirement migrants is affected by institutional perceptions and discrimination of need, and whether this perception is keeping pace with changing needs and/or influencing their migration. The results below are divided into public versus private and voluntary providers to enable a comparison of approaches.

KEY PUBLIC PROVIDERS

Department of Social Welfare

The Department of Social Welfare has traditionally been a key institutional player with regard to meeting elderly needs. As a primary income source for many retired people, its policies tend to have the most direct impacts on elderly ability to access services and overcome deficiencies in meeting need via financial means. (For example, the introduction of direct credited

¹ **Note:** It is desired to maintain the absolute confidentiality requested by most respondents. Consequently it has been sought to avoid direct connections between what was said in each interview and the individual who said it. Instead, those who have provided key information are listed in appendix 2 along with the organization for which they provided information. The other sources of verbal information include personal communications and informal discussions with others (eg. staff, members, residents, etc) involved in or effected by these organizations.

pensions greatly freed up the possible locations at which many elderly could choose to live). The current situation is one of a universal benefit scheme, though the 1991 Budget attempted to introduce an income tested system, an increase in the current surcharge now seems more imminent. The original plan was for a minimum of \$82 per week to be guaranteed to all, but those earning over the low income limit will lose from the full benefit 92¢ for every extra dollar. However, due to public pressure from the elderly concerning what would have to be revealed in a means test, the government has moved towards favouring a modified surcharge system whereby those with other income sources may pay a higher tax rate (see table 4.1). The impacts of this for Waikanae residents are hard to specifically predict, but with the great bulk of Waikanae's retired population in the middle and upper income brackets (above \$17,000 gross per annum income for a single person, approximately \$22,000 for a married couple) it is expected to be significant, especially upon the local economy which is quite dependent on servicing elderly needs. Which ever plan is finally adopted, the net effect is expected to be the same with middle income elderly paying more and losing net income.

Elderly reaction to this in Waikanae has ranged from shock, to dismay, through to anger. The constant uncertainty as to what the situation will actually be from April 1992 has brought much insecurity amongst the elderly as they try to decide what to do with their savings. Local ill feeling towards the government is strong, with a sense of betrayal. Many National Party members have removed their membership in disillusionment, joining elderly interest groups such as Friends of the Retired or the Horowhenua Superannuitants Association instead. Other Department of Social Welfare actions in recent times have also tended to reinforce the general opinion that the Department is unresponsive to elderly needs, though the anger is more often directed against the politicians. Kapiti Coast groups representing the elderly fought hard to get a Social Welfare office at Paraparaumu, but since its opening 6 years ago services have been cut back. Currently Guaranteed Retirement Income payments are administered from Porirua where Kapiti elderly make up 80% of the clientele. All this results in decreased access, which is often perceived by the elderly as a greater loss of independency and control over their own lives. Many elderly point out that, under the original means test scheme, the rich would have been relatively no worse off with an \$82 handout, and the very poor would have survived on the full

benefit, but those middle income receivers living from their savings for retirement would have been the ones to suffer. Many in Waikanae continue to worry about how they will cover on-going expenses on a reduced income (due to increased surtax) with electricity and rates also expected to rise. Many are likely to fix their investment into capital such as a house, but may find that they do not have the income to maintain it or other services they need.

The marked change in Social Welfare policy reflects the changing values and ideology current in government towards a more market and individual orientated view of elderly financial support, while arguing for increased support from the local community, especially the voluntary sector. This use of a "shadow [voluntary] state" (Wolch 1989) is an attempt to reduce government spending and involvement in social support in favour of greater local control of services and choice. So far at least the feeling is that local control has lessened and the quality of some services may be in danger of falling due to being overloaded, especially as extra income support for voluntary and private groups has not yet been forthcoming. This in turn, means that the current range of choice in local services is also threatened.

Wellington Area Health Board

This institution's activities has been one of the most difficult to assess in terms of the effects of its actions and policies on elderly migration to and from Waikanae. The main reason for this is the current government led restructuring which has been almost continuous over the last six years. This has resulted in much uncertainty and dissatisfaction, especially in the area of access to emergency services and specialist care. Waikanae was under the Palmerston North Hospital Board until the 1st April 1984 when it shifted into the new Wellington Area Health Board under the Area Health Boards Act 1983. With the 1991 Budget, the Wellington Area Health Board was replaced by the Wellington Regional Hospitals Commission covering the southern North Island, directed by a commissioner to oversee the development of competitive funding of many public health facilities with a view to selling off all but major hospital services.

The original shift of Waikanae's public health administration from Palmerston North to Wellington caused concern for some migrants. Some retirees had moved to Waikanae so that if hospitalised they would go to

Palmerston North, which for many was closer to family (for visits, support, etc) and for others was perceived to offer a better service than Wellington. The change in Boards meant a change in policy. Under budget constraints from central government, the Wellington Area Health Board adopted an increasingly centralised, hospital based service and a growing trend towards user pays approach for outlying areas. Consequently, the health centre property (now Waikanae Community Health Centre) was rented out to private general practitioners who would then provide the service with income coming from patients via insurance coverage. The district nurses continued to be based at the centre, offering free assistance on application to the Wellington Area Health Board or by doctor's recommendation. The criteria for access to the district nurse service is basically on a 'greatest nursing need gets greatest assistance' basis. However, signs of strains are evident, with the district nurses unable to keep up with growing demand and having to cut back on the level of individual service (refer Waikanae Community Health Centre later this section). With regard to the level and quality of basic health care, most residents are very satisfied with and are able to afford the insurance cover or receive government support.

Larger concerns appear when emergency and specialist services are looked at. The fact that Waikanae lies at the outer area of the Area Health Board means that it takes considerable time for an ambulance (based in Paraparaumu) to get the patient to Porirua or Wellington Hospital. According to Kapiti Carers, Park-Wood and other groups, some have died due to the delay. The recent policy of centralisation of services meant that Levin and even Porirua Hospitals were under threat of closure or cuts in service. When it is realised that both Levin and Paraparaumu Hospitals have as their major clientele, elderly from Waikanae, it is easy to understand the concern felt. No extra support has been forthcoming to make up for this retraction in services. The result is a considerable level of insecurity, especially amongst health workers themselves. This unease has been further increased with the Hospital Commission agenda regarding the possible sale of services and smaller hospitals.

With the 1991 Budget, a means tested system was proposed for GP and hospital fees. This has created much concern amongst many elderly in Waikanae. Those earning under around \$18 000 will qualify for free health care under the Kiwi Card system. However, those earning over this will face

a considerable increase in hospital and doctors fees, just at a time when surcharge increases mean a lowering of income. It is into this category that most Waikanae elderly fall.

Kapiti Coast District Council

As central government has withdrawn many social services due to Budget constraints over the last six years, there have been increasing calls for local government to take a greater role in social service activities. Indeed, this was one of the reasons behind Local Government restructuring in 1989 in which the Kapiti Coast District Council was formed. Prior to local government restructuring, the Kapiti Borough Council (this excluded Waikanae which was in Horowhenua County Council) had a position of Recreation Officer held by Jan Nisbet. Her primary role was to promote recreation groups and facilities in the region, though in practice this included service groups as well. However, this office was abandoned during restructuring. The loss was felt so strongly that intense lobbying of the new district council by various groups (notably the Kapiti Community Social Services group with their report - Robb and Cody 1990 - which predicted greater strain on social resources in the near future) coupled with support largely coming through the female councillors, has resulted in a new Community Development portfolio in the 1991 Draft Annual Plan (KCDC 1991b). (Most of the male councillors were more wary of the council taking on a social provision role rather than focusing on the traditional planning issues such as sewage, roading, business promotion, etc). Consequently the proposed portfolio is a compromise wherein the council will seek . . .

" . . . To facilitate the provision of services to meet social, cultural and recreational needs.

Council's role in these areas is not one of prime mover, but of helping community groups to help themselves. It is recognised that Council accepts some costs in undertaking this role. Council looks to Government and private providers to play their proper role in these areas also. Council sees its role as facilitator being exercised through provision of land, meeting places and facilities, subsidising community contributions where appropriate, providing advice and acting as a clearing house for the sharing of information."

(KCDC 1991b : 3)

This proposal includes the appointment of a Community Development Officer position whose main function will be to co-ordinate resources and

information to the various recreational, cultural, business and service groups in the district. Funding in the form of grants will be offered to voluntary groups via the Community Grants Scheme, as well as continued support for the Kapiti Coast Promotion Council and various other key funding groups. The Council is planning to allocate \$500 000 to the development of the portfolio (KCDC 1991b : 39 - 42). Which groups will qualify for funding or other support still has to be finalised.

The other area with which the council has a major role is in the provision of pensioner housing. Here the council aims

". . . to join with welfare agencies, both government and private, to provide adequate housing at reasonable rental for elderly persons of limited means in the district at no charge to rate-payers."

(KCDC 1991b : 69)

The council controls 127 units, but only a very small proportion of these are in Waikanae despite the fact that the highest concentration of pensioners are there. The reason for this under-servicing seems to be based on the perception that elderly in Waikanae are generally well off and do not need such units and the assumption that private sources will provide such accommodation. However, in light of the proposed 5.9% rate increase for Waikanae (KCDC 1991b : 11 -12), along with increases in electricity prices and cuts in Guaranteed Retirement Income, the need may be greater than currently assumed. Access to the housing is usually by recommendation from Social Welfare.

The main methods of elderly feedback to the council consist of direct submissions, submissions by lobby groups such as the Kapiti Coast Social Services and Age Concern, or through the Waikanae Community Board (see section 4.3). Elderly in Waikanae are probably less well serviced by the local council than elderly in the more urbanised areas, primarily because of the lower level of access to subsidised services, such as public transport, major libraries etc.

KEY PRIVATE PROVIDERS

Parkwood Trust

This trust was established through the efforts of Mr. Lloyd Parker in response to a local survey in 1965 which revealed a high level of loneliness amongst elderly residents. As a result the non-profit Parklands Trust was established, and by 1971 Parklands Retirement Village had opened.

The Trust aims to provide the level of support that retirees may need within a village atmosphere. This includes housing, hospice and home help care, security surveillance, meals-on-wheels, district nurse assistance and a wide range of recreational facilities (eg. gardens, bowling green, etc) as well as providing a financially secure investment. Based on similar villages in the United States and Europe, it aims to provide the elderly person with support so that they can have peace of mind for the future and yet maintain their independence for as long as possible. The institutional ideology promoted by the Trust is that of a caring community run for the elderly, by the elderly. This is reflected in the close feedback residents can have with staff via suggestion boxes, personal contact and regular community meetings. Although trying to promote 'independency' for the 'needy', the community is viewed by many outside as a rather elite and closed one, with residents having little wider community involvement (though this is disputed by the Parkwood residents themselves). However, the village does generate considerable economic support for Waikanae providing 98 jobs, 49 of which are full-time and 49 part-time, mainly in nursing, administrative, home help and kitchen areas. This makes Parkwood one of the largest Waikanae employers.

The basis for entry to the Parklands-Woodlands community is to be on the waiting list (currently of around several hundred). From this are selected those who have the highest need in terms of 'dependency' (ie. those who could obtain support from family or other sources are given lower priority than those who do not have such alternatives) for the villas. Access to the Parkwood Lodge hospice is prioritised for those already within the village and for those from other retirement villages around the country (many of which were unable to build their own close care units due to losses in the 1987 stock market crash). The minimum financial requirement for entry to the village is that the clients have enough available capital to purchase their own unit (at a 1991 average of NZ\$113,000 and \$169/week for a villa; \$100,000 to \$130,000 and \$388 to \$517/week for the Parkwood Lodge apartments - these on-going costs pay for the maintenance of on-going

services). This restriction tends to limit the potential clientele to current property freeholders. The Trust is non-profit, aiming rather for a continuing improvement in services. A distinct feature of Parkwood is that no direct funding support is received from or asked for from the Government in line with the Trust's policy of independency from the tax-payer. The major funding for development comes from a compulsory one off \$10,000 donation included in the unit prices, with continuing expenses met by regular payments from residents. Finances paid for the the units are treated as investments, held by the Trust and released when the occupants choose to leave or become deceased (in which case funds are given out according to the Will). Currently there are 290 residents (approx. 15% of estimated total Waikanae elderly population 1991) and this is expected to expand by 16 to 20 persons per year for the next five years. 60% of residents originate in from the Wellington region, 35% from other regions and 5% from overseas (compare this with figure 4.7). Of these 20% would have moved to Waikanae prior to residency in the village in the hope or expectancy of gaining entry. From this it can be seen that Parklands-Woodlands is a major generator of amenity migrants to the region, selecting primarily freeholders as migrants.

Although not directly funded by the Government, Parkwood Trust relies indirectly on the continuing weekly payments it receives for on-going expenses from residents. A large proportion of these payments are drawn from the government pensions. The cuts announced in the 1991 Budget will affect many of those whom Parkwood attracts. This may mean that the trust cannot supply the same level of service as the residents' ability to pay is decreased, or that Parkwood will have to increase the compulsory donation, both of which could affect its attractiveness to potential migrants. The Trust's policy of independency from direct funding may also have to be reviewed.

Real Estate

The Real Estate sector is undoubtedly one of the key players in influencing the specific direction and selectivity of elderly migration (Flowerdew 1982). In Waikanae, the Real Estate sector is in a state of rapid growth and fierce inter-agency competition. Consequently this puts pressure on agents to provide for the perceived needs of clients. The result of this is considerable steering of migrants to areas that are perceived to be desired by them. The original stages of retirement growth in Waikanae were based around the retirement of bach owners to the beach, which as numbers increased, led to the growth in recreational and other supporting activities. Consequently,

Waikanae's reputation as a retirement area providing many appropriate recreational and physical attractions is one of the primary causes of the cumulative growth in numbers of retirees in the region.

Those who are able to migrate to Waikanae are increasingly limited to the wealthier sector of society as a result of rapidly increasing property prices due to the high demand. Already as far as retirees are concerned, almost all migrants are freeholders or those with large capital reserves (refer to results from survey question 8 in appendix 5). This is due to the reluctance of lending institutions to give large sums of money to those who have lost their primary income source and who may have a limited 'repayment life-span'. Hence Pahl's 'gate-keeper thesis' (Pahl 1970, 1975 and 1979) is an important variable in the selectivity of elderly migrants.

There has been some discomfort amongst some agents at the possibility of an 'overbalanced community' with so many elderly as against other age cohorts. There is the prospect in the mind of some that Waikanae may become so dominated by the elderly, that migrants may begin to go elsewhere (and hence, property values fall) to find a more balanced community. Others, however, are less worried, pointing out that the low numbers of teenagers means that Waikanae suffers from less security problems, a far more important consideration for most elderly. Also the fact that recent statistics show a growth in the number of young families moving into the area in line with regional urban expansion seems to waylay this fear.

For the immediate future it does look as though Waikanae will continue to be promoted as a high value area and that it will attract wealthier elderly migrants who are seeking firm investments in light of current government uncertainty concerning its post-retirement income policies.

Retail Sector

The retail sector in Waikanae is a source of a significant amount of dissatisfaction amongst local residents. A common perception is that there are too many restaurants and real estate agents, and not enough competition amongst anything else. This complaint is loudest amongst those elderly without a car of their own who are therefore forced to shop in Waikanae. This means that those who can, go to Coastlands or Levin for most of their shopping. This greatly reduces the potential retail expansion

possible for Waikanae. However, in terms of physical access and quality of service, local retailers seem to rate fairly well (refer to 'satisfaction with services' in section 4.4).

This lack of competition is partly a result of the fact that many of the retail outlets are 'hobby shops' - shops run by recently retired persons as both an investment and a hobby. The Waikanae Business Association is designed to promote further coordination amongst businesses, especially in the retail sector. However, this has only had limited success. As yet there are still no agreed shopping hours. Some shops are shut Monday, others Tuesday. Opening and closing times also vary quite markedly. This is mainly because the hobby shop owners tend to be more flexible in their hours than the permanent retailers. (For example, if business is slow, some close up early and go and play golf). This has caused some tension between retailers and confusion for shoppers in the past. The advantage however, is that it does add to the relaxed village atmosphere and allow a more personal, less hurried service to customers. One of the Waikanae Business Association's successes however is the occasional organization of market days in which all shops run specials, stalls are set up, etc. This is quite popular with local residents.

Despite these activities, if local retailers desire to provide a better service to local elderly unable to get to other shops, as well as create some expansion, they need to consciously seek to compete with Coastlands by working to attract local shoppers to themselves rather than letting them travel to other areas. This would entail greater co-operation and coordination the part of local retailers than is current. Ultimately however, the community may have to choose between serving the needs of those unable to get to other shops or the hobby retailers and possible loss of the relaxed village atmosphere if they lose out.

Waikanae Community Health Centre

This centre is the main health care provider for Waikanae. It consists of a number of G.P.'s and acts also as a base for the District Nurses. The premises are rented from the Wellington Area Health Board (now replaced by the Wellington Regional Hospitals Commission) and the business is run as a private service to the health needs of the community. Its primary role is to provide basic health care; namely GP services, home help support and

nursing services support for the disabled, etc. Supplementing this the centre has come to also provide basic health teaching (eg. how to quit smoking, weight loss courses, etc) as well as providing an advisory service for physical and mental health needs. As the primary first stop in meeting health-care needs, the centre also indirectly acts in an advocative manner by recommending various specialists over others.

Access to GP services is open to all, but at the cost of the usual fees. Most of the elderly clients have some form of medical insurance which enables ready access to the doctors. The services of the District Nurses are available according to the need of patients and is primarily funded through the Area Health Board. Potential patients are assessed according to their need for various services (eg. meals-on-wheels, home help, home nursing support, etc). The centre employs 2 full-time and 3 part-time nurses. However the growing strain on the ability of these services to keep up with an ageing population along with on-going funding cuts is forcing a change in policy from a service supply (ie dependency) to a self-sufficient/co-operative model whereby elderly are encouraged to maintain their independency as much as possible (for example by washing and dressing themselves wherever practicable). Those wealthy enough are encouraged to get access to private home-help services.

VOLUNTARY PROVIDERS

The following are selected key examples in Waikanae:

Red Cross

The Waikanae branch of the Red Cross is primarily run by retired residents. The reason suggested for this, apart from the larger numbers of and greater free time for the retired, is that many younger families have to have both parents working, thereby preventing their involvement. The Red Cross group seeks to provide a range of services such as meals-on-wheels, basic first aid training, companionship, luncheons and speakers, etc. However, because of the limited financial and physical ability of most of its members, its main activity has tended to be fund-raising for the organization within the community. The main service provided by the Waikanae Red Cross in meeting needs has been meals-on-wheels and other food provision. Acceptance for meals-on-wheels is decided by the District Nurse on the basis of an individual's inability to cook or pay for their own meals. (Those

wealthy enough are expected to obtain their own unsubsidised 'dail-a-meal' services). However, once on the scheme it is difficult to get people off if their circumstances improve. Consequently there can be some exploitation of the service. This problem has become critical as the ability of the service is struggling to keep up with the growing demand. This situation is further complicated by the increasing requests for food assistance from young families that have recently begun. In line with the Red Cross' official policy, the group is entirely neutral in regard to political issues, concentrating on meeting their community's basic health and welfare needs.

Senior Citizens

This group is one of the largest recreational groups in Waikanae with a membership of around 400. It is a group for senior citizens run by senior citizens, providing such activities as entertainment days, coffee mornings, weekly indoor bowls, housie and cards, bus trips, weekend trips, amongst many others. On top of this it provides a range of halls and other facilities (valued at around \$500 000) which are also extensively used by many other groups in the community. Membership is offered to any over 60 years old on receipt of a \$5 fee.

The group's explicit aim is to provide a context in which local elderly need for companionship can be met. The belief is that maintaining an active social involvement leads to a healthier, more positive mental and physical state and provides a stronger sense of self-esteem. Although members of the group recognise that they have other needs, such as the need for financial and health security, this is seen to be outside the scope of the aims of the group, better left to other groups with the skills and resources.

Friends of the Retired

A similar group to Senior Citizens, Friends of the Retired aims at the more physically and mentally active elderly and seeks to avoid the 'aged group' stereotype. Membership is based on a minimal fee and was originally 140 and has been kept at this to enable the group to get to know one another. (There is a waiting list for future membership). Activities are wide ranging and include such things as bus outings, canoeing, darts, organised walks and social events, regular seminars, etc. Friends of the Retired aims to provide a monthly forum in which local retired residents can meet each other and form friendships. Companionship is seen as the greatest elderly need,

especially for those living alone such as widows (women make up 75%+ of members) and members are encouraged to get together more regularly and arrange their own activities amongst themselves. It is argued that if the elderly are not lonely they can survive the other stresses of life (such as financial insecurity, health problems, etc) more positively. As a result, the 'Friends' concept is very important. This is evidenced in the carers' subgroup within Friends of Retired, the members of which pledge to keep in touch with the ill, the bereaved, or lonely members (especially those without family nearby).

Disabled Persons Assembly

A lobby group that seeks to promote the interests of the disabled. Activities include educating the community and planners to the needs of the disabled, suggestions for improvements in access of facilities to the disabled, etc. In Waikanae, the Disabled Persons Assembly speaks for a large number of elderly suffering from a range of ageing related disabilities (eg, loss of sight/hearing, stroke patients, alzheimers sufferers, etc). Generally Waikanae is not seen to be too bad in the area of physical access to most buildings and shops (a result of the large consumer clout of elderly in Waikanae). However, this is predominantly only for those who have their own independent transport, notably car. Those deprived of this find it difficult to get to such services due to the limited public transport, being reliant on others. Also, the lack of transport access to Paraparaumu means that they pay more for the lower range of goods available in Waikanae. Such disabilities that effect transport also tend to restrict the social activities of the elderly disabled and can result in loneliness and/or poor self image.

Although Disabled Persons Assembly recognises the unseen 'disability' of financial constraints, lack of basic life skills when a spouse dies, etc, these are seen as outside the direct scope of the Assembly.

Kapiti Carers

Kapiti Carers (originally Good Samaritans) is a voluntary social support group that provides a range of on-call services within the community. The service consists of phoned-in requests, which the Kapiti Carer operators then allocate to those living nearby on their volunteer lists. These services, with regard to the elderly, include transport (local and to Wellington), short term home help (such as gardening, cooking, cleaning, etc) and other

practical assistance. The service is free, though a donation for services is encouraged. All other funding comes from general community donations and donations of time and service from volunteers. Unfortunately Kapiti Carers has seen a significant decline in the number of younger married volunteers in the last 6 years. This has been primarily due to the fact that many younger married women are having to take jobs to help maintain household living standards. Concern was also expressed over the impact of income cuts for the elderly from the 1991 Budget on the voluntary service. The great majority of volunteers are younger retirees who may not be able to continue to bear the costs of providing the service (eg. wear and tear on cars). Efforts are being made to overcome the dependence on retired volunteers by encouraging school groups to have 'volunteer days' and getting younger people involved.

Although strictly nonpolitical, Kapiti Carers is also concerned at the decline in physical access to health services for the elderly. Local and longer distance public transport is greatly lacking and the demand for this service is steadily rising as the population ages and more elderly feel less confident or are unable to drive themselves. This makes doctor's visits and specialist treatment very difficult to get to for many elderly. (Indeed most requests for assistance in health related matters come from the District Nurses and the Health Centre doctors themselves on behalf of patients unwilling to acknowledge this dependence).

From the above examples it can be seen that, while not actively or directly lobbying local or national government on social concerns (in line with its social service aims), Kapiti Carers is not afraid to express anxiety about the impacts of public policy where it effects the group's ability to effectively perform its services. Kapiti Carers is aware that it is a group responding to need as it arises, acting as a safety net, and it recognises that it will take some other group(s) to provide the necessary solutions to factors that create such need.

Lovelink

Run by the churches on the Kapiti Coast, Lovelink is a recently formed body which seeks to provide a range of social support services to the Kapiti Coast communities. Organised by the local churches and based on similar groups in Auckland, Christchurch and Dunedin (as well as the United States where

the concept originated), Lovelink is an interdenominational co-ordinating body for local churches' social care activities. Its aims are similar to the Kapiti Carers group, namely to provide any sort of practical assistance to those disadvantaged in the community. For the elderly this may mean providing transport, doing the gardens or shopping, and providing other basic support, though the organization also aims to be accessible to all other needy groups in the community. As with Kapiti Carers, those in need are detected via phone calls to the group or by referrals from the District Nurses, Social Welfare, ACC or others involved in local social work.

In Waikanae, Lovelink plans to work in co-operation with the well established Kapiti Carers group. However, Lovelink also hopes to be able to expand the current level of social support as a result of its more substantial resources (such as the foodbank in Paraparaumu). Although there is a danger of a duplication of service between these two groups, those involved in Lovelink feel that they can fill gaps in social support that may exist. With regard to the elderly, Lovelink expects a rapidly rising demand to occur for its services due to cutbacks many face. This means that many elderly may be less able to afford to run a car, save for emergencies, pay for gardeners, nursing care etc.

Recreational Clubs

Waikanae can be rightly said to have an over-abundance of recreational and interest clubs and societies, especially those that cater for retirees. Indeed in the questionnaire (see section 4.4) recreational services were stressed by many respondents as being a key attraction that Waikanae offers. Many retirees are still very active and are attracted to Waikanae by the wide range of recreational activities (notably bowls, crafts, Probus, as well as less stereotyped activities, such as canoeing, cycling, areobics). Also, these local groups deliberately encourage the promotion of Waikanae as a recreation haven for elderly through the information centre and by word of mouth. The reason for the original existence of these groups in such a concentration appears to stem from the early days of Waikanae as a beach settlement and holiday demand, coupled with a growing number of retirees moving to their holiday homes in the region. The current situation can be seen as the result of a cumulative effect as more recreational activities attracted more migrants and vice versa. This was initially aided by other

factors, such as proximity to Wellington, good soils for gardening, healthy climate, etc.

Almost all these organizations see themselves as providing a primarily social rather than competitive function. They tend to see the greatest elderly needs as companionship and a positive, active, interest based lifestyle. Those involved point out that many elderly can cope with financial or other stress if they have friends and a positive self-image, but someone who is lonely despite material well-being is in a worse situation. All these groups are apolitical (though much discussion and debate may occur among members at meetings!). Consequently most social, economic or other issues are seen as being outside the scope of such groups.

SUMMARY

From the above overview of the key institutional players, a range of distinctive characteristics can be noticed which impact on the institutional context in Waikanae. The public institutions have traditionally appealed to a welfarist ethic of providing a safety net for the needy citizen. However, this has come under criticism in light of current restructuring towards a more 'user pays' (in the case of the Area Health Boards) and/or targeted approach (as in the case of the proposed means test on National Superannuation). This move away from a universal approach to welfare may cause a crisis of legitimation for any government if those genuinely in need begin to be missed. At the local level however, the Kapiti Coast District Council has indicated a recognition of its greater role in the facilitation of service provision in the local community. This suggests that social support is a function that may be increasingly carried out through local government and local groups in co-operation.

Private groups display a service ethic tempered by a necessity for profit. This latter factor means that (especially in the case of the Parkwood Trust and general real estate sector) services tend to cater to those with the ability to pay. This suggests that those migrating to Waikanae will be filtered according to the amount of capital they have available. For those more dependent elderly already in Waikanae, the retail sector seems to lack in the area of effective local competition.

Finally, the voluntary groups display a range of perception depending on their function. Those that directly provide services tend to be less political than the co-ordinating groups. (This may be due to some extent to their dependence on community grants from governmental bodies). Recreational groups tend to seek to provide social support through companionship which is seen to provide psychological support.

From this we can see that Waikanae has a comprehensive range of institutional sources for social services. However, the situation is rapidly changing due to government policy of moving part of the social role to local government and groups. The next two sections will examine the response of the elderly to this changing institutional context, first in the form of their political response, and secondly in terms of perceived need.

PART B

ELDERLY PERCEPTIONS AND NEEDS ASSESSMENT

Part B focuses on the migrant perception of institutional services in Waikanae and examines how this impacts on the migration decision. Following this a comparative assessment is made between the various definitions of need in order to detect any discrepancies, especially between institutional service providers and the elderly. A overall summary assessment and conclusion to the findings of this chapter can be found in section 4.1.

4.3 Elderly Political Response

Elderly political response to their perceived needs occurs through two major avenues in Waikanae. There are the direct methods via individual or distinctly elderly interest group lobbying; and there are wider, more indirect approaches through more general channels that Waikanae elderly can express themselves, especially in light of their dominant numerical position in the general population.

According to McLean (1988 : 88) at the local level there seems to be a reasonably high level of political apathy, despite District Council attempts to encourage public participation with the elderly. However, recent moves towards direct political involvement seem to be growing on nationwide issues effecting elderly, accompanied by growing disillusionment with National Party on central government issues. The successful attempt of elderly at blocking government attempts to introduce a means tested national superannuation reflects the growing elderly realization of their distinctive political clout.

INDIRECTLY REPRESENTATIVE ORGANIZATIONS

Kapiti Community Social Services (Inc.)

This group is a key player in the co-ordination of local social services. It consists of various social service group representatives who meet on a monthly basis to discuss the issues surrounding the provision of services throughout the Kapiti region. The group is privately run and has been involved in lobbying local and central government over local social service

issues, publishing and providing information on the state of social services, preventing unnecessary duplication and aiding co-ordination of services by various groups, etc. In its 1990 report (Rob and Cody) the group identified several areas of likely growth in need of services for the elderly:

- Home help services are struggling to keep pace with the growing and ageing population

- Transport requirements are growing as more elderly become dependant on public transport as a result of ageing. Services were currently found to be relatively infrequent and expensive both around Waikanae and to other destinations

- There is recognition of the need for greater access to hospital, ambulance and other emergency services. Also Paraparaumu Hospital is overloaded with demand from elderly patients moving in from Waikanae, making facilities unavailable for the rest of the population.

- Competition for social resources between the young and elderly as the under 15 year old cohort also grows rapidly due to in-migration suggests that Waikanae will soon be experiencing some of the country's highest dependency rates. This may mean that some needy will miss out in the competition for resources, possibly those with the greatest need (who tend to be the least able to voice their need).

- Concern over the rapid increase in demand forecast over the next 30 years for services as ageing-in-place occurs and current retirees enter the at risk age groups en masse.

Despite the above concerns, it was generally recognised that the present service situation was quite good, especially for the younger, healthier, wealthier and more mobile retired who had the financial and physical resources with which to provide for their own needs. However, in the interviews with various committee members of the Kapiti Coast Social Services further concerns were expressed in light of the 1991 Budget:

- Waikanae elderly, by being generally better off financially, are expecting to be hard hit with any pension cuts. This is especially so when considered in light of income reduction due to the expected rate increases (KCDC 1991b), increases in electricity and petrol prices, etc. Such severe income reductions are expected to have a considerable impact on elderly financial and physical accessibility to services, especially in light of the fact that until now most services were directly accessed and paid for by the elderly themselves.

- It was also pointed out that the great bulk of social service and recreational groups in Waikanae were run by the retired themselves, some of whom were paid full or part-time. The new means test and cuts proposed may force many elderly to withdraw or cut back their physical and/or financial support to such groups, thereby worsening the situation at a time when services would be needed more than ever.

- Growth in the proportion of elderly may increase in Waikanae as elderly retirees migrate there to invest in property to fix their assets and thereby avoid cuts to their income, thereby extenuating the problem in the long-term (due to ageing-in-place).

- Finally, a major concern was expressed that despite government emphasis on communities supporting their own, little support in funding to assist the transition was forthcoming to replace those public services which had been progressively withdrawn over the last 6 to 7 years.

Waikanae Community Board

The Waikanae Community Board (known in its equivalent prior to the 1989 restructuring as the Waikanae District Community Council) is the representative body to the Kapiti Coast District Council for the Waikanae Ward. It has very little power of its own with no real ability to initiate its own activities. Consequently its main role is to keep the District Council informed of the concerns of Waikanae citizens, acting as a consultative mechanism in the planning process. In this it has been most fervent, even to the point of gaining the reputation as a lobby group for greater Waikanae independence. Most of the pressure for this desire for greater autonomy has come about because of the general perception that Waikanae has not benefited from local body reform. The area of strongest dissatisfaction has been a series of rate increases, with a current 5.9% rise in proposal (KCDC 1991b : 11-12). The Waikanae Ratepayer's Association (the majority of whose members are elderly) has voiced the strongest objections, claiming that Waikanae has received little in return for all the increased costs and that with so many elderly on fixed incomes the increases cannot be justified. The District Council however, maintains that Waikanae is the fastest growing part of the district with the highest average property values and the fact that Waikanae residents extensively utilise Paraparaumu services all work to justify the increases. Generally however there is an increasing resignation to the fact of Paraparaumu control of town planning in Waikanae with a growing realisation of the interdependence between the two towns.

DIRECTLY REPRESENTATIVE ORGANIZATIONS

Horowhenua Superannuitants Association Inc

The Horowhenua Superannuitants Association is a local break-away from the former New Zealand Superannuitants Association (which was abandoned by many regions due to its financial problems). It is a special interest group whose major goal is to oppose ageism against superannuitants. The association is opposed to both the means test proposed in the 1991 Budget and the current 25¢ surtax, which is seen as a continuation of the Labour introduced surtax which was the original issue against which the association was formed to oppose. This group sees its major role as protecting superannuitants from government claw-backs, through either means testing or taxation. If this goal is achieved, the association would disband. This distinguishes this group from others, such as Grey Power which seeks to be a political power block, or Friends of the Retired, Age Concern and others which are more focused on social issues as well.

On the positive side, the association seeks to lobby for a situation where the elderly are not penalised by an imposed means test or surtax (a proposed 25% tax on top of the current tax of 23% paid on extra income) above a certain income level beyond the pension (\$80/week gross for a single person, \$120/week for a married couple), but rather are treated as all other citizens. In this the associations around New Zealand have been successful in securing a limited victory by pressuring government to drop its original stringent plans based on a means test (for example, the income limit for married elderly was extended from \$80/week gross to \$120/week - see table 4.1 below for a more detailed comparison). This original scheme, it was argued, penalised the elderly for providing for their own retirement. Subsequent to the government announcement of a 25¢ surtax, the association is still unhappy. They see it as trading a greater evil for a lesser. It continues to oppose the 3 year freeze on pensions (which is expected to cause hardship with rate, electricity and telephone increases looming), wants a slower increase in the age of eligibility for the pension and claims that the penalty for those in the 'high' (which they see as set too low) income bracket is still too stringent. The association is arguing for a new marginal tax rate above the current 33%, claiming that this will greatly assist the

government in meeting its costs, as well as being the simplest way to make richer New Zealanders pay for services without an extensive bureaucracy to provide means testing for a 'user pays for the rich' system. The association views both National and Labour as having abandoned their promises which were the basis on which the elderly paid their taxes and planned their retirement with the expectation of being supported.

Table 4.1

Comparison of New Schemes With Current GRI

Private Annual Income		Budget Proposal <i>Worse off by:</i> [Net per Week]		New Regime <i>Worse off by:</i> [Net per Week]	
Single Person	<i>Married Couple</i>	Single Person	<i>Married Couple</i>	Single Person	<i>Married Couple</i>
\$4 000	\$6 000	\$Nil	\$23	\$Nil	\$Nil
\$5 000	\$7 000	\$10	\$48	\$4	\$8
\$7 000	\$10 000	\$35	\$78	\$14	\$18
\$10 000	\$12 000	\$62	\$98	\$17	\$28
\$15 000	\$16 000	\$105	\$132	\$22	\$32
\$20 000	\$20 000	\$113	\$167	\$27	\$35
\$25 000	\$24 000	\$89	\$198	\$32	\$39
\$30 000	\$30 000	\$65	\$175	\$37	\$45
\$35 000	\$40 000	\$45	\$136	\$41	\$55

Source: HSA Newsletter, No. 14 - November 1991

The main way the superannuitant associations lobby government is via direct pressure on local MPs and cabinet ministers, as well as publishing regular pamphlets to MPs outlining the views and arguments of the associations and telling of the impacts of policies on their members. The lobbying strength of the associations, along with other groups, has greatly increased recently with the abandonment of many elderly from the major political parties in favour of such special interest groups. Being a local organization, the association will also occasionally lobby local government over issues that affect local superannuitants, such as rate increases, GST on rates, etc. Although many in the associations would support proportional representation as a means to break the two party dominance of government, the associations desire to remain strictly apolitical and asocial, preferring a strictly lobbying role.

Age Concern

A co-ordinating group which is similar in function to the Kapiti Coast Social Services except that it aims to co-ordinate information and resources in support of specifically elderly groups. Age Concern has only been in the area for nearly 3 years, yet it has already lobbied extensively over issues affecting its members, both at the national level (through its national network and Wellington office, mainly in opposition to pension cuts) as well as local issues. Recently Age Concern has been calling for more government support for local social service organizations in the Kapiti area, and has succeeded in helping persuade the Kapiti Coast District Council that it has a responsibility in this area (see earlier this section).

Some group representatives have expressed annoyance that there is yet another coordinating group 'telling them what to do'. Generally however, there is recognition that Age Concern has an important function in voicing the concerns of elderly service groups and that its co-ordination and representative work gives it a much stronger voice than most other lobby groups.

Friends of the Retired

Although primarily a social group, Friends of the Retired originated as a break-off from the 60's Up movement. The main reasons for the split was because it was perceived that 60's Up was too dominated by national and Auckland issues to effectively meet local needs. Consequently, as a result of its original tradition, Friends of the Retired would and has lobbied government over issues of very strong concern to its members (such as proposed Guaranteed Retirement Income cuts pre-1991 Budget and other, more local issues such as funding for home help support). However this is seen as peripheral to its main function of providing a sphere for companionship.

SUMMARY

From the above, the important role of voluntary and co-ordinating groups in politically expressing elderly concerns can be seen. Recently the general political apathy of the elderly has been overcome as many elderly responded to threatened government cuts to their pensions by joining the various lobby groups. This has meant that a major past source of political

lobbying, though the political parties, has declined as many removed their membership. The consequence has been a much more distinctive and visible elderly lobbying voice, the success of which can be evidenced in the government back-down from means testing superannuation and in the Kapiti Coast District Council's recognition of its social role in the community. The growing elderly recognition of their distinctive political clout reflects an growth in underlying discontent and insecurity amongst Waikanae elderly. These perceived needs will now be examined in more detail.

4.4 Post-Retirement Migration Survey

After the 1991 Budget, in August of 1991, the author distributed 150 questionnaires around a sample of those listed as 'retired' or 'widowed' drawn from the General Electoral Role 1990 who were living within Waikanae township and beach. 94 responses were received giving a return rate of 62.7%. The following section contains an overview of responses to questions, as well as some relevant cross-tabulations (including chi-squared tests) to examine possible relationships between variables. These findings will be used to assist in the evaluation some of the subsidiary hypotheses. A summary of key findings in light of the relevant hypotheses and an assessment of the general consensus of elderly felt needs in Waikanae can be found in section 4.1.

A copy of the questionnaire and the data referred to can be found in appendices 4 and 5. All data was processed using the Minitab© statistical package.

AN OVERVIEW OF RESPONSES

The following refers to those responses where it is felt that further explanation is needed than that readily obtainable from the data found in appendix 5.

Sex (Question 1)

58.5% of respondents were male. This is a strong bias when it is considered that around two-thirds of the over 60's population in Waikanae is female. The source of this bias stems from two sources, namely the fact that males tended to answer the survey in married households and the fact that the original sample population was biased due to the criteria for selection being

the occupation of 'retired'. Many women however have not had paid jobs and continue to refer to themselves as 'housewife' or other category. Some attempt was made to overcome this by using 'widow', though evidently many do not choose to use this. Unfortunately there was little that could be done to overcome this bias in the sample population, and this factor has to be held in mind when examining the data. The result of the male bias is that males dominate the sample for all ages (see figure 4.4), although as expected from their longer average life-spans, women make up a higher proportion of the older elderly.

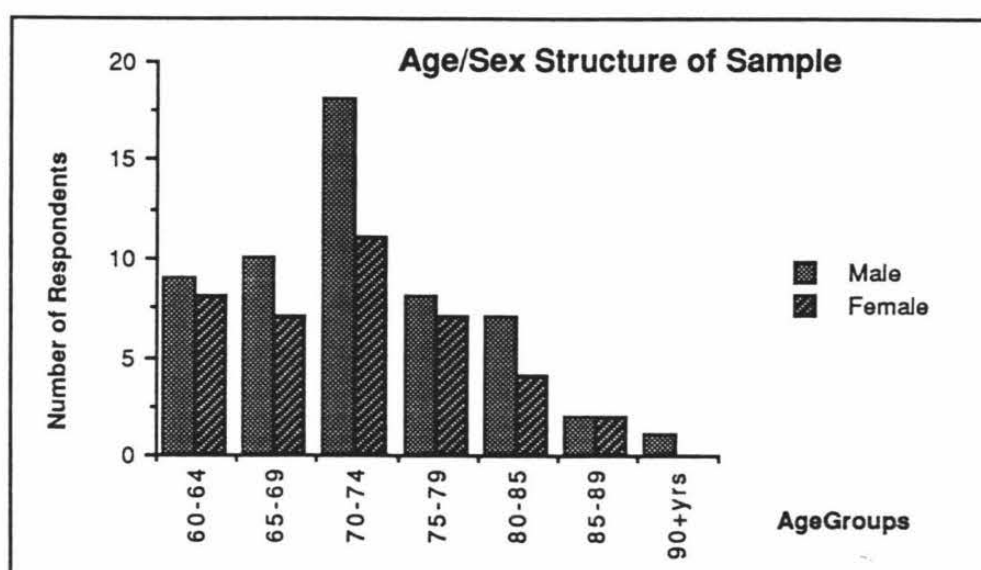


Figure 4.4

This female bias in the actual population is important for planners who need to be aware of the fact that women's issues are becoming an increasingly recognised aspect for social service provision to the older elderly.

Age (Question 3)

30.8% of respondents were in the 70-74 year age group. The reason for the high response rate for this age group is uncertain, possibly a combination of sample error and/or a greater willingness of 70+ year olds to return the survey than those younger. This bias towards the 70-79 year old bracket should also be held in consideration when interpreting results (see figures 4.3 , 4.4 and 4.5).

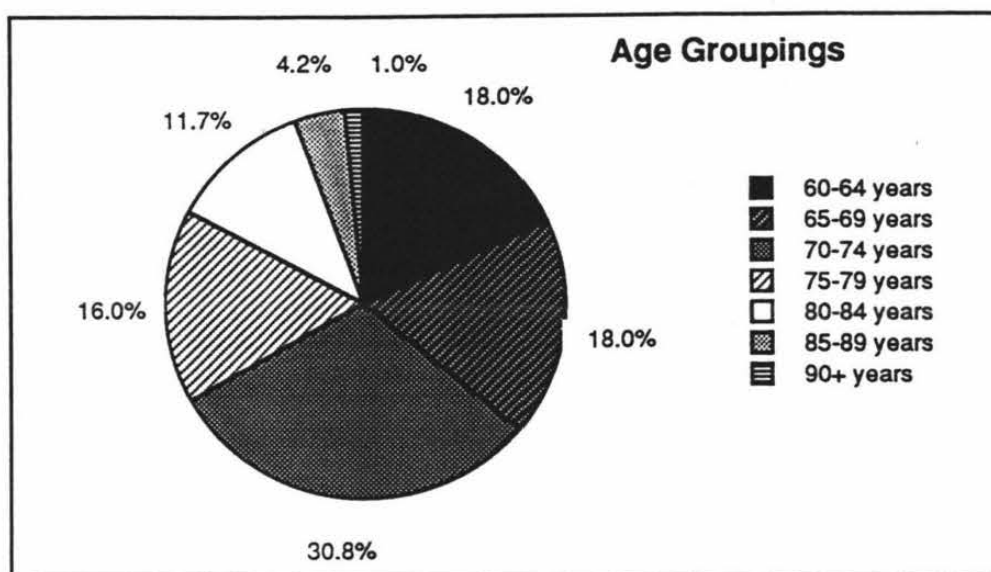


Figure 4.5

Ethnicity (Question 4)

The 100% European ethnicity of the sample reflects the dominance and homogeneity of the cultural background of Waikanae elderly. This is probably due to a common class and income background of many migrants (refer to Real Estate Sector - steering of clients - section 4.2).

Pre and Post-retirement Income (Question 5 and Question 6)

Results of the income questions are illustrated below in figure 4.6 (over page). Reflected here is the decline in income as a result of retirement, with about half of those in the \$30,000+ bracket declining to the \$20,000 to \$29,999 level. This suggests, as generally expected, that retirement results in a substantial loss of income.

Education and Housing Variables (Questions 7 to 9)

A high proportion of migrants are freeholders, reflecting a wealthier background. Otherwise results here are randomly spread and self-explanatory (refer to appendix 5).

Years Since Retirement (Question 10)

Generally there is a fairly even spread (between 3 to 8% per category) of years since retirement up until 15 years where the number drops off. However there is a large number (11% of the sample) who retired 3 years ago. There seems to be no reason for this excess and is probably a chance sampling result.

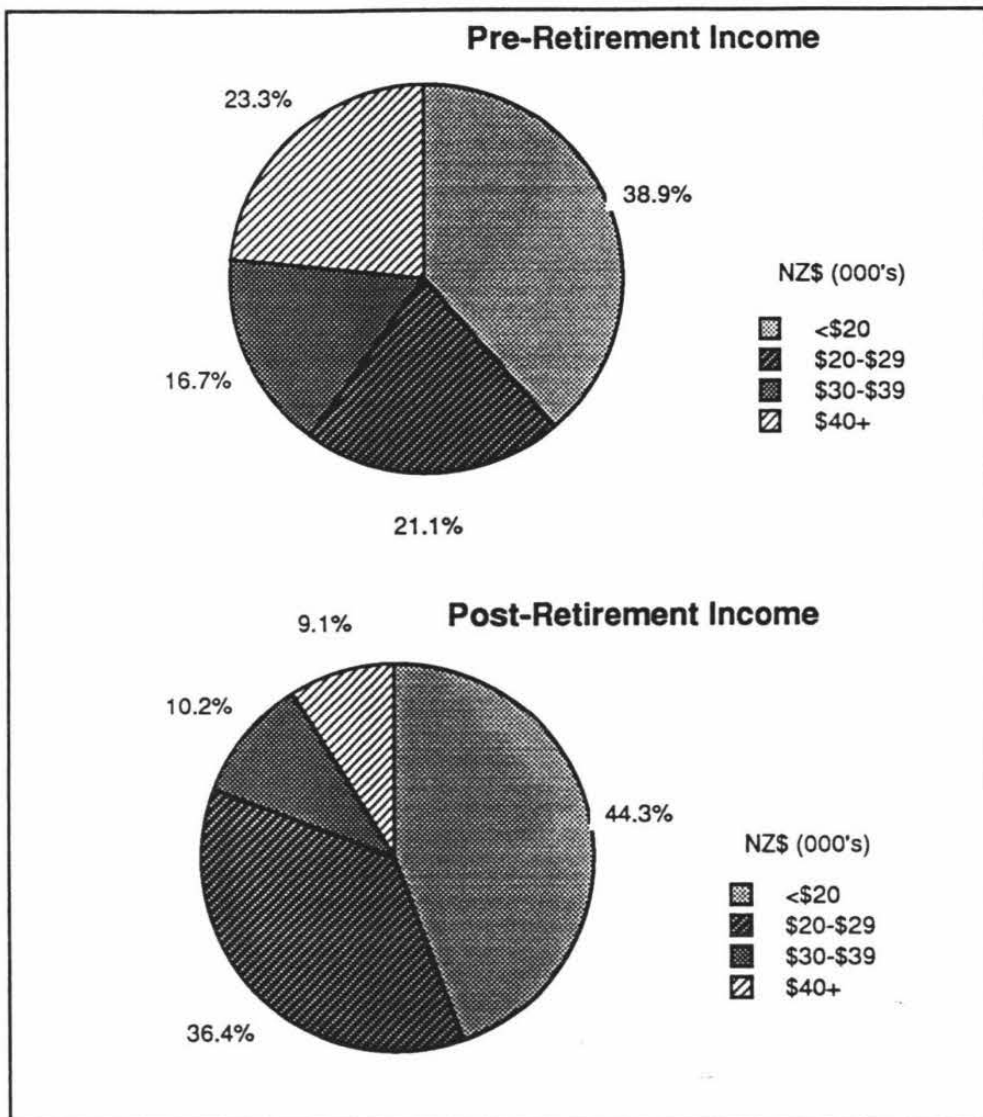


Figure 4.6

Years of Residency (Question 11)

The general trend here is a tendency for a longer residency for those with many years since retirement, which is to be expected in a high in-migration area.

Origin (Question 12)

17.4% of the sample were resident in Waikanae prior to five years before retirement, while a further 57.6% came from the Wellington Region (a total of 75%, considerably less than the general Kapiti population where 91% (1986 Census) of residents originated in or from the Wellington region. Another 8.7% come from other neighbouring regions such as Manawatu and Wairapa). Of the remaining 25%, 6.5% originated from overseas (mainly

Australia and England) and the remainder from throughout the rest of the country.

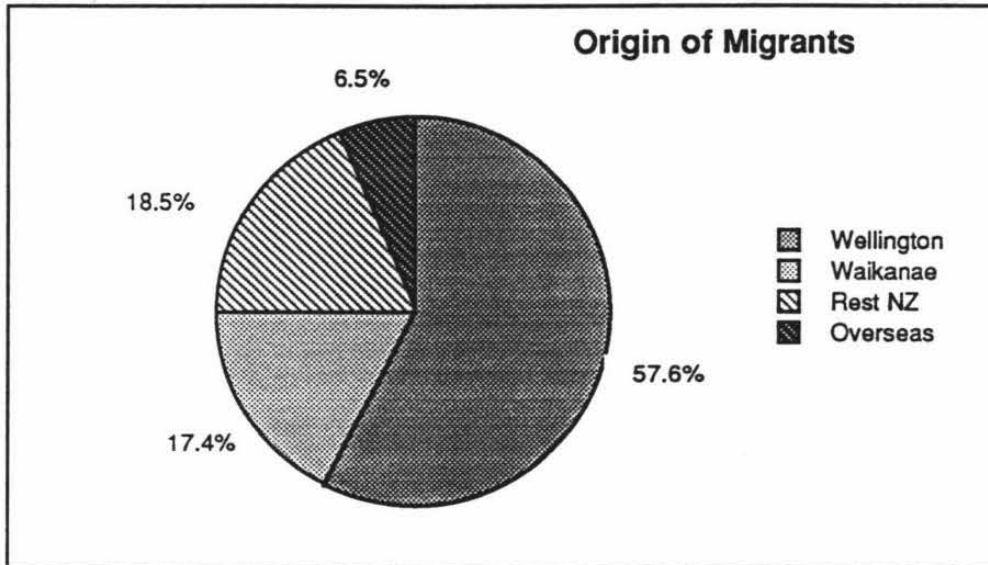


Figure 4.7

What the 25% of migrants from outside the Wellington region displays is that Waikanae is a much wider attractor of elderly migrants than the general population. This cannot be attributed to the physical environment alone (for there many alternative destinations on a national and global level in this respect), but rather suggests the possible attraction of other factors.

Motivations to Migrate (Question 13)

This question examined the reasons why the respondents moved to Waikanae. An attempt was made to overcome the usual more general answers like 'nice physical environment' by asking why they moved specifically to Waikanae rather than elsewhere in the local district. The aim here was to detect by implication the needs being met by moving to Waikanae. The results obtained can be seen illustrated in figure 4.8 below, where 1 in 2 post-retirees can be seen to have moved to Waikanae because of the physical environment; 1 in 3 due to the services available (most stated recreation or general social service support services for the elderly as major attractants to Waikanae); 1 in 4 due to the cost/quality of housing (ie. investment reasons), previous holiday experience at Waikanae, due to family or friends or for 'other' reasons. These results reflect the wide range of attracting factors that draw elderly to Waikanae which in turn displays the heterogeneity of the elderly population and its needs.

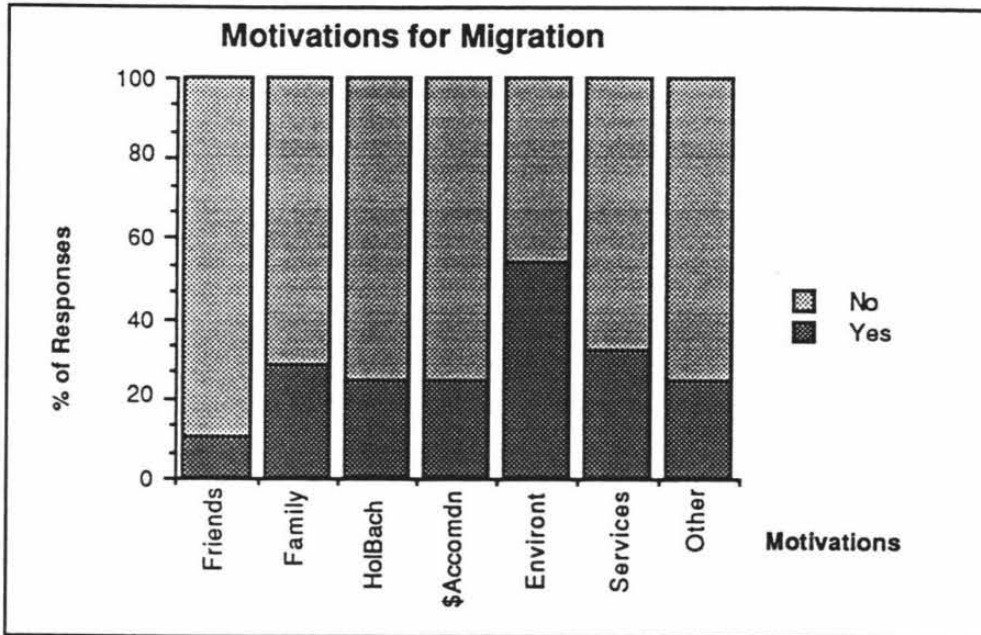


Figure 4.8

Most respondents indicated more than one attracting factor which indicates that it is a combination of factors that makes Waikanae attractive as a destination. A significant result however, is the prominent place the services (institutional indicator) had for 1 in every 3 migrants as a conscious factor in their migration decision. This reflects the fact of Waikanae being an amenity centre providing services for which many post-retirees migrate. With regard to the interactions occurring however, the attraction of services seems fairly constant over all class, age/sex, origin and accommodation categories. Family and friends, for example, become more important motivations for migration for those living further away from Waikanae ($\text{Chi}^2=22.636$ df 10 significant at 2.5% and 30.118 df 10 significant at 0.1% respectively), yet still 1 in 3 indicate services as an attracting factor. Those under 70 years old tend to have moved more due to holiday experience ($\text{Chi}^2=8.591$ df 2 significant at 2.5%), while those 70+ are more likely to have moved for friend or family reasons ($\text{Chi}^2=5.981$ df 2 significant at 10%). The cost of accommodation is important mainly for migrants from the rest of New Zealand excluding the immediately neighbouring regions.

Timing of Migration (Question 14)

This question aimed to infer the actual factors that influenced the migration decision by looking at what controlled the timing of the move. The question

options were left rather limited to try and allow freedom for the respondents to specify their own reasons in the 'other' category. Responses given are illustrated below:

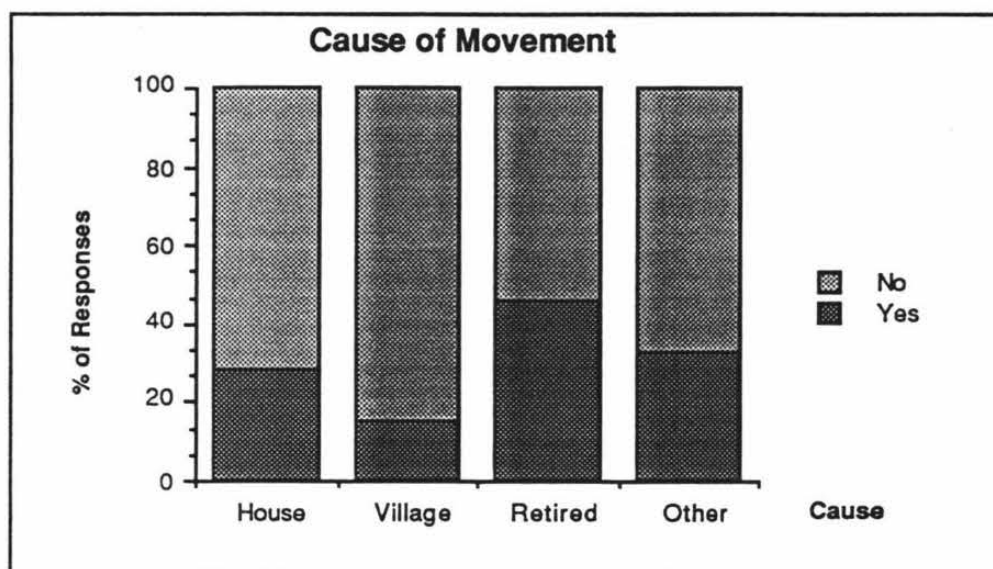


Figure 4.9

From the above graph it can be observed that nearly 1 in 2 migrants had come to Waikanae as a in response to their retirement, reflecting the importance of this life cycle event in promoting migration amongst elderly. This suggests that post-retirement needs differ enough to generate movement in nearly half of all elderly migrants to Waikanae. 1 in 4 moved on the sale/purchase of a house, suggesting that the real estate market is having some influence, while 1 in 6 move to Waikanae in expectation of or actual acceptance for a retirement village (most of these were associated with the Parkwood Trust retirement village). 1 in 3 moved for other reasons, the most common being to gain increased access to family. Institutional influences were largely unimportant in most 'other' responses.

Hindering Factors (Question 15)

This attempts to detect factors that may be hindering migration. Of those friends who wanted to move to Waikanae but had not yet, the primary hindering factors were the inability to sell/purchase a house, lack of finance or not having yet retired. All these are institutionally imposed factors and this suggests that institutions may be the key barriers to movement, generally overcome where substantial capital is available.

Future Migration Motivations (Question 16)

This question is a reflection of the possible impacts on movement of future need. 41% of all respondents would not move under any circumstances. Of those remaining, 1 in 2 would move due to a significant decline in income or health, 1 in 3 would shift if their spouse died or if access to emergency services declined, 1 in 4 if accommodation costs increased significantly, only 5% if their transport declined, while 1 in 5 gave other reasons:

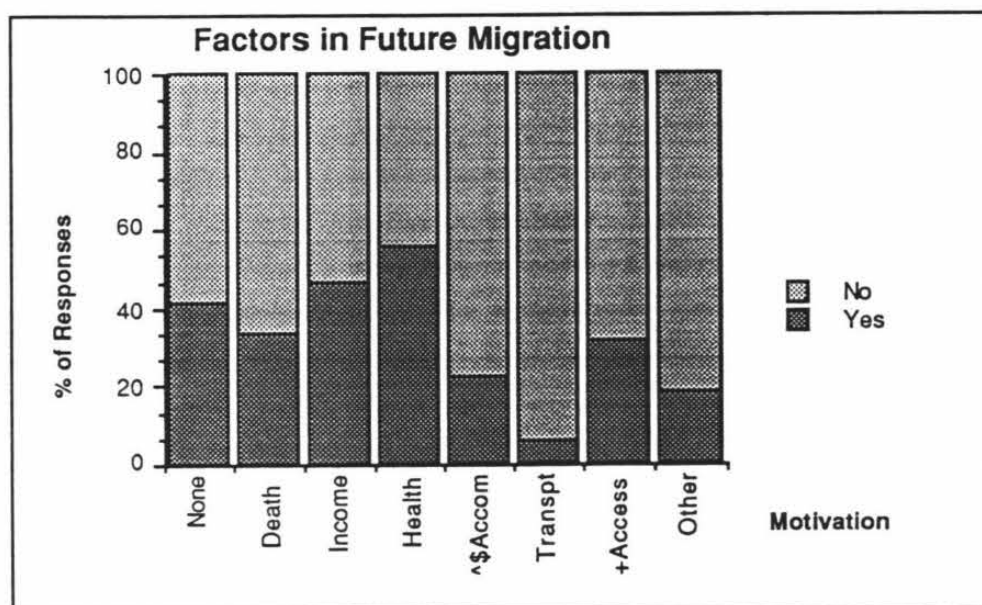


Figure 4.10²

These results suggests that factors related to an individual's direct ability to overcome physical or institutional obstacles (health and income) are the most closely felt incentives for future migration. This reflects the relative expense and poor accessibility of intensive health services and the current uncertainties regarding the long term state of elderly pensions.

Satisfaction with Services (Question 17)

70% of respondents were fully satisfied with the recreational and social services offered at Waikanae. This reflects the fact that many elderly have moved there to have their needs met. Of those who did express some dissatisfaction, most were unhappy about the lack of local or longer distance public transport, lack of competition or range in the Waikanae retail outlets

² Motivations from 'Death' to 'Other' have been adjusted so that those who said that they would move for no reason ('None') have been removed from the 'No' answers to these categories.

and distance from hospitals and emergency services. These complaints tended to come from those who could foresee limited mobility and consequently would be forced to use local shops and services. However, question 16 suggests that this mobility factor would generally not cause many to shift.

Political Involvement (Question 19)

Only 22% of respondents were members or somehow involved in a group that was involved in political activity on behalf of elderly. This reflects the high level of political apathy amongst Waikanae elderly observed by others (McLean 1988 : 88). Most of those who were involved with such groups supported groups such as the Superannuitants Association, Grey Power, and other national level lobby groups, although a number were involved in more local groups such as Friends of the Retired. Many respondents however, indicated that they were considering membership in such groups in response to the 1991 Budget announcement. Many also indicated their withdrawal of membership from the National Party as they perceived it as abandoning elderly interests. This indicates that political expression amongst Waikanae elderly had until recently been channelled through the general political party system.

KEY INTERACTIONS

Service x Politic

In order to confirm subsidiary hypothesis 4, a link had to be established between service dissatisfaction and political involvement. From table 4.2 below, there can be seen some indication that dissatisfaction with local services is related to increased political involvement.

Table 4.2

**Chi-square Table of Service Satisfaction
by Political Involvement**

Service\Politic	Yes	No	All
Yes	Observed: 12 Expected: 14.68	53 50.32	65 65
No	9 6.32	19 21.68	28 28
All	21 21	72 72	91 91

Chi-square=2.095 df=1
Nearly significant at 10%

However it is unclear whether service dissatisfaction leads to political involvement or whether political involvement reflects a greater willingness to express dissatisfaction. This is especially so when it is considered that political involvement is strongly related to class factors, namely higher educated (significant at 10%) and pre-retirement income (significant at 2.5%) groups.

Services by Future Migration

Of those who stated they would not move from Waikanae, those who were older were more likely to not move suggesting the influence of topophilia for a place growing with time. 84% of those unwilling to move are likely to feel fully satisfied with local services compared with 59% of those who would move. This suggests that satisfaction with institutional provision of services can significantly deter any future migration decision. Also, those who did not move for the physical environment reasons were more likely to express dissatisfaction with services, indicating that for those whom the pleasant physical environment is not important, the institutional environment is of greater importance, giving confirmation to subsidiary hypothesis 1.

Those who expressed willingness to move again due to a decline in access to emergency services, decline in income, increase in transport or accommodation costs or death of spouse were all more likely to express some level of dissatisfaction with social services. This indicates that willingness to move and perception of limits or deficiencies in service provision are connected (a limited confirmation of subsidiary hypothesis 5). Hence the importance of readily accessible information for individuals to make an informed decision regarding future migration necessity. The reason for the similar effect of these indicators is that they are related, especially the decreased income/increased accommodation costs and decreased income/emergency access variables showing the importance of finance in allowing access to services and consequently allowing greater permanence in residency (re subsidiary hypothesis 2).

Other Interactions

The following are other significant interactions which do not directly impinge on the subsidiary hypotheses but which may indicate biases in the sample data.

Age x Family: ($\text{Chi}^2=5.981$ df 2: significant at 10%): Younger are less likely to have moved for family reasons.

Age x Holbach: ($\text{Chi}^2=8.591$ df 2: significant at 2.5%): More likely to move due to holiday experience if younger.

Age x None: ($\text{Chi}^2=4.843$ df 2: significant at 10%): Older are less likely to move for any reason, probably due to influence of growing topophilia over time.

Origin x Friends: ($\text{Chi}^2=30.118$ df 10: significant at 0.1%): Very high probability that friends are a more important factor for those from other parts of NZ other than the neighbouring regions.

SUMMARY

The above results do lend support to the idea that institutional social service provision and post retirement migration are in some way linked. The relatively high acknowledgement of services as an important component in the original decision to migrate confirms this, as does the timing of migration (influenced primarily by institutionally controlled factors) and motivations indicated for future migration. However, dissatisfaction with service does not seem to necessarily result in increased political demands for change. This suggests that some elderly are prepared to put up with the inconveniences or move to another area if new services are required, rather than seeking an improvement in the local situation.

To more fully determine whether post-retirement migrant needs are being met, the questionnaire findings will now be assessed in light of the other perceptions of need.

4.5 Needs Assessment

The first step in assessing the above information as it relates to perception of post-retiree needs is to attempt to group the various individuals and organizations into similar subgroups. The criteria for doing this is necessarily subjective due to the qualitative nature of much of the data. The hypothetical basis for these subgroups is the assumption that similar perceptions of need

reflect a common values (and therefore informal institutional) base. Consequently the following subgroups are made up along common value lines in order to observe whether the differing institutional perspectives do indeed affect the perception of elderly migrant needs.

Felt Need Subgroups

There are at least two major types of post-retiree migrants evident in the survey undertaken: amenity migrants moving to services, and generally younger more independent migrants moving immediately post-retirement for a more relaxed lifestyle. The latter group are generally more concerned about their independence and less about the provision of services.

Political (Expressed) Perception Subgroups

Of those groups that claim to in some way politically represent elderly claims, two major distinctions are evident. There are those groups that directly represent elderly interests directly, and groups which push elderly claims as part of a wider representation. Those groups which solely speak for elderly concerns are generally more vocal and have a stronger perception of elderly concerns, the concerns of their membership.

Normative Definitions

Although not a major focus of this thesis, normative definitions outlining minimum standards that must be met to fulfil basic needs (ie. food, shelter clothing, etc) reflect past perceptions of need deficiency. Two major types of normative need can be recognised, those imposed through legal requirements (ie. minimum standards, etc) and those given informally by society through generally accepted standards of justice.

Institutional (Comparative) Perception Subgroups

The comparative need (institutional) perception can be identified as following the underlying informal institutional values. In section 4.2 above 3 types of perception can be seen reflecting the public, private and voluntary distinctions. Public organisations generally have a welfarist perception (ie. that individuals have a right to a basic level of support which, in the last instance, should be supplied by the state), private formal institutions have a service ethic modified by the need for profit, while the voluntary groups have a primary perception tainted by a strong community service ethic. Within the voluntary category, there is a further distinction between the more politically

Table 4.3

Needs Assessment Table

NEED	Felt Need		Expressed Need		Normative Criteria		Institutional Perception				
	Amenity	Independant	Direct	Indirect	Legal	Informal	Public	Private	Voluntary Co Rec Soc		
Accommodation	1	1	0	1	3	3	3	2	2	0	1
Health Services	1	1	3	3	2	2	2	4	3	1	3
Non-financial Support	1	2	4	4	3	3	3	4	3	1	3
Family Support	2	2	2	3	0	3	2	1	1	1	2
Social Contact	3	3	1	2	0	1	0	3	3	4	2
Independency	2	4	3	3	1	0	1	3	3	3	4
Transport (Private)	0	1	1	2	0	0	0	0	0	0	1
Transport (Public)	3	3	3	3	1	1	2	1	2	1	4
Retail Services	3	3	2	2	0	1	1	2	2	2	3
Environment Attractions	1	1	2	3	0	1	0	3	1	3	1
Income Stability	4	4	5	4	3	3	3	1	3	1	4
Financial Security	4	4	5	4	0	0	1	3	3	2	4
Emergency Health Care	3	4	4	4	1	0	1	1	3	1	4
Cost of Living	4	4	3	2	1	1	2	3	1	1	3

active co-ordinating groups, the recreational groups and the social service providing groups. The aim of this categorisation is to provide a simplified table of graded perceptions for a range of identified post-retiree migrant needs. The grading is an attempt to allow some measure of objectivity in comparing perceptions drawn from a mixture of quantitative and qualitative data (see section 3.4.5). Table 4.3 then, enables an overall analysis of the data and eases the assessment of the subsidiary hypotheses.

INTERPRETATION OF TABLE 4.3

Accommodation

Most retirees in Waikanae are able to provide their own accommodation. Indeed the survey indicated that 84% own their own homes outright. Consequently accommodation is not a strongly felt or expressed need. However, there is pensioner housing being provided for some elderly, mainly through the Kapiti Coast District Council for that minority of elderly who cannot afford their own accommodation in the area. This provision is in keeping with the legal requirements for the council to ensure a minimum standard of housing for everyone. There was some concern expressed by some voluntary welfare groups that needy elderly in this area may miss out due to the perception of Waikanae being a 'rich' area, especially in light of the current economic downturn. However, estimates from Rob and Cody (1990) and KCDC (1991b) indicate that sufficient housing should be available for the foreseeable future.

General Health Services

The health services in Waikanae have a very good reputation, especially the Community Health Centre. Consequently the felt need for services is low with the current situation being very much taken for granted. This is even more so for those in the retirement villages where intensive nursing care is available. However, recent government suggestions about increases in doctors' charges and possible reduction of some services (such as the District Nurses) has meant that agencies representing the elderly have spoken out on the importance of maintaining the current level of service. This reflects wider social expectations. In Waikanae the main responsibility and acknowledgement for health care has come from the private sector which run the Waikanae Community Health Centre, retirement homes, etc.

Non-Financial Support

Generally the level of nonfinancial, nonfamily support (such as home help, meals-on-wheels, transport assistance, adult education, etc) in Waikanae is perceived to be very good, hence felt need is low. However expressed need is high, especially at the local District level. The reason for this is the concern that many (especially voluntary) groups are being overwhelmed with demand for their services, partly due to the current economic downturn. This is especially the case in Waikanae which has many young families as well as elderly giving the potential for a high dependency burden. Many groups are lobbying government for some sort of increased support.

There is general acceptance that these needs have to be provided for. The local council has acknowledged some responsibility in its district plan, and private and voluntary groups have responded to meet these needs. The private support groups have been able to get involved due to the relatively high wealth of many elderly in the area who seek to pay for their own care.

Family Support

Most of those who retire to Waikanae are able to support themselves. As a result felt need of direct family is generally low. However for those migrants who move to be closer to family, informal and emotional support is important. Various groups representing the elderly try to encourage and inform family as to how they can support and encourage their elder members more. This is an expectation that many elderly feel they deserve. Some institutions take a similar approach while others see it as outside their responsibility. Family support is one need which is met entirely voluntarily and cannot be legislated or enforced, hence planners should seek to educate people in whanau values if they wish to reduce the phenomena of 'elderly dumping' in health care institutions.

Social Contact

Companionship is an important need identified by many retirees. Indeed many migrated to Waikanae to gain access to the recreational services who generally see their main role as fulfilling this need. Private and voluntary groups also seek to encourage elderly to maintain active social lifestyles for general psychological well-being.

Independency

Those younger migrants who move to Waikanae to retire stress their desire to remain as independent as possible. Many are concerned not to be a burden to their families. This desire for independence is seen to be a reward for years of work given to society by many. In Waikanae independence is reliant on finance and transport. Amenity migrants are less concerned about their independence, willing to live with the support that a retirement village provides. This support however, is on their terms because they pay for it. Also, for many such support allows a greater freedom and security in day to day living as one ages. The various representative groups also promote independency as a means to mental and emotional well-being, providing a more stable self image and a sense of having control over one's future.

Transport (private)

Although not a strongly felt need due to the fact that most Waikanae elderly do have their own cars, private transport is nevertheless expressed by many to be important in maintaining free access to shops, services, social activities, etc. For amenity migrants, this need is largely superfluous as the retirement village can often supply at least local transport on request. Other than this, the need is generally unrecognised or seen to be the responsibility of the individual.

Transport (public)

This need is recognised by most elderly, but strongly felt amongst those who do not have their own means of transport. There has been on-going lobbying for better, more regular and cheaper public transport, both locally and to Wellington. As yet this has been unsuccessful. The lack of service is made up to a certain extent by some voluntary drivers from service groups such as Kapiti Carers and Lovelink. However, with the ageing population and growing numbers of elderly in Waikanae without transport, demand for this service is expected to increase and is already showing in the case of the voluntary providers.

Retail Services

Retail services in Waikanae are a source of some dissatisfaction in Waikanae, mainly due to the lack of competition. This is especially the case for those without private transport who are 'trapped' in Waikanae and are forced to buy goods at a higher price than they could get at Coastlands or

Levin. This is expressed by various groups, notably the service providers who work with such dependent elderly. So far this has had little effect on the situation, and the wider Waikanae society (normative perception) is still largely ignorant of this need.

Environmental Attractions

This includes both the physical and the human environments. Waikanae is acknowledged for providing a popular and suitable climate for the retired. Its village atmosphere also helps one to feel away from the bustle of the city. Because these were some of the key reasons for moving to Waikanae, satisfaction is high and felt need low. However, rapid suburbanization is threatening to destroy the semi-rural atmosphere of Waikanae and this has resulted in considerable protest and lobbying to encourage the preservation of these characteristics, hence expressed need is higher. Recreational groups are also pushing for such protections to maintain many of their activities (such as local bush-walks, etc).

Income Stability

This issue has become strongly felt since the 1991 Budget announcement of the means testing of superannuation and subsequent confusion. Many elderly feel that a considerable cut to GRI would leave them with a lower standard of living and/or more dependant than currently. Many would consider moving, especially amenity migrants due to the high on-going costs of services, need for transport, etc in Waikanae. Elderly groups have successfully lobbied the government away from means testing and continue to strongly argue the social costs of allowing the surtax to increase to 25¢ and allowing the general long term uncertainty concerning GRI to continue. This was supported by the growing elderly demand towards social groups for foodbank and other support. Even under the new system the government had proposed, minimum income standards were to be maintained, but many argue that these were set too low.

Financial Security

This issue has been closely related to the above in the means test debate. Many elderly believed the means test would dissuade them being able to use their life savings freely, and would instead freeze them or exhaust their savings in living off them before becoming dependent on the government. Meanwhile, local private and voluntary organizations have generally

opposed the decline in savings which would mean less investment or donated support, further worsening local ability to provide the social support needed. As it stands, these issues are still continuing. Very strong and vocal opposition has come from direct political groups as elderly feel threatened and betrayed.

Cost of Living

As with the above, this is a concern that has become sharply felt as a result of the 1991 Budget. However, recent proposed rate, electricity and telephone increases have further raised concern. The current low mortgage rates are of small benefit due to the fact that most elderly are freeholders. However, because of low interest rates and the fact that the government has only indirect control of the cost of living, lobby groups have not been as vocal on this issues as others. Currently this is not a large issue in Waikanae, but if elderly income is cut severely, many may have trouble paying for on-going costs, such as car, village services, etc. The long-term consequence may be increased elderly dependence.

Emergency Health Care

This is a need that is felt acutely by the older elderly, but is a concern for all retired persons. Access to emergency and specialist health care is poor in Waikanae, and this is strongly expressed by many local groups. Some social services groups (such as Kapiti Carers) have prioritised hospital access as a primary service. However, the response from the Hospital Board has been to withdraw and centralise emergency and specialist services. This has not been widely compensated for by the private sector. Even the retirement villages provide only intensive nursing care rather than emergency or specialist. Generally it is felt that need is definitely not being met for those who most need it and yet are least able to obtain ready access to it.

SUMMARY

The above analysis has sought to assess the data gathered for this thesis in a concise form using key indicated needs. The aim of this is to help confirm whether or not the meeting of migrant needs by institutions affects migration significantly. To do this, the final analysis and conclusions drawn from the above chapter will now be assessed in light of the subsidiary hypotheses.

Chapter 5 Thesis Conclusions and Critique

5.1 Case Study Conclusions

CONCLUSIONS IN LIGHT OF HYPOTHESES

The following conclusions are made on the hypotheses stated in section 3.3.

Subsidiary Hypothesis 1

All the migrants who filled out the questionnaire indicated that they had moved in order to meet some perceived need. No one failed to indicate a reason. This illustrates that Waikanae is an area where such needs are met and this accounts for their migration to this destination. Therefore, this subsidiary hypothesis is strongly supported.

Subsidiary Hypothesis 2

The questionnaire hoped to identify the factors that generated migration indirectly by seeing what affected the timing of the move. In 43% of the cases, respondents moved in response to accommodation availability, reflecting the influence of real estate markets and access to capital. 46% indicated that they moved because of retirement, a life-cycle change reflecting the effects of institutional practice in employment. (Those who indicated 'other' reflected a range of non-institutional factors, such as access to family, to get away from the city, etc). The net effect of the institutional influences on the migrants is that Waikanae attracts generally younger, just retired and wealthier elderly. Those with less capital are unable to live there due to bank reluctance to give elderly citizens mortgages. This was given as the most common reason (along with not having yet retired) as why friends who wanted to move to Waikanae did not. This however, was complicated by the other services available. The large number of recreational services and low level of emergency and specialist health services tended to favour younger migrants and deter those over 75 years of age from coming to Waikanae. Despite this influence, the questionnaire revealed that institutional factors have a more indirect affect on migration which may not be consciously recognised by migrants during the decision-making process. Access to residency in Waikanae does require certain financial criteria for most migrants, and favours others, such as a younger more active age group.

Subsidiary Hypothesis 3

From the assessment section we can see that the political or service institutions are constrained by external or internal regulations from meeting elderly needs (indicated by codes 1 and 2). This is particularly notable for private and recreational interests. The former is restrained by the need for profit, the latter by an informal understanding that such groups should be apolitical. The result of this restraint means that in some cases, discrepancies arise between various institutions and the felt need of Waikanae elderly on some issues (eg. refer assessment table for public transport, emergency health care, costs of living, etc). However the converse can be seen in some cases (eg. accommodation, environmental attractions, non-financial support, etc) where need is recognised by institution but not strongly felt. This is due to the fact that these institutions provide services over a wider geographical area than Waikanae, and some cater for a wider population rather than just the elderly. Consequently they provide services for a wider population with different needs to Waikanae elderly. Generally though, services are meeting the felt need of the elderly with only minor discrepancies in the differing perceptions of need. This demonstrates that the restrictions on the institutions are not significant enough to hinder provision for need. However, the relatively independent and wealthy nature of Waikanae elderly must be taken into account. In light of the ageing population, current government withdrawals in health and income support and lack of intensive social support services, this service gap will widen in the future.

Subsidiary Hypothesis 4

The analysis of the survey indicated that the link between service dissatisfaction and political expression is relatively tentative. Political activity seems more related to class background prior to retirement. The increase over time in service provision for elderly need in Waikanae seems to have risen primarily as a result of institutional perception and logics (such as the need for profit) rather than any politically driven change. This is especially so in the service (notably voluntary) groups where most members and/or volunteers are from the retired section of the community. Catering for need in these groups is primarily driven internally from the membership rather than externally through the political process. Examples include (until recently) political persuasion through the National and/or Labour Parties, rate-payer

group lobbying of local councils, membership pressure from within voluntary groups, etc.

Subsidiary Hypothesis 5

The brief historical overview confirms the idea that the growth in services has had a cumulative effect on elderly migration to the area. Waikanae originally developed into a popular retirement area due to the fact that the original stages of retirement growth in Waikanae were based around the retirement of bach owners to the beach. Increased access to Wellington as a result of the advent of the private car is the key historical factor which initiated this growth. This enabled retirees to maintain contact with friends and relatives (especially from Wellington) while living in Waikanae. As numbers increased, this led to the growth in recreational and other supporting activities. Consequently, Waikanae's reputation as a retirement area providing many of the appropriate recreational and physical attractions is part of the cause of the cumulative growth in numbers of retirees in the region. This increase in elderly migrant numbers led to the improvement in social services available, notably in the private (with the Park-Wood Trust and Waikanae Community Health Centre) and voluntary sectors (many of which are mainly run and supported by retirees). These services have in turn attracted increasing numbers of migrants, including growing numbers from outside the neighbouring regions.

Overall Conclusions in Light of Primary Hypothesis

Elderly migration is significantly influenced by the institutions at the destination. Most of the needs expressed by post-retirement migrants are well serviced in Waikanae, especially for the younger elderly whose health (and independency) is generally good. This, along with the suitability of the physical environment seems to be the key reason why Waikanae rather than other similar areas attracts such a high proportion of post-retirement migrants. The real estate sector also has a considerable influence on the nature of the majority of the migrants able to settle in Waikanae by filtering out those who do not have access to large amounts of capital.

IMPLICATIONS FOR POST-RETIREMENT MIGRATION THEORY

The fact that the case study generally supports the hypothesis that institutional factors do influence the migration decision raises some important issues for post-retirement migration theory. Firstly it means that no

attempt at developing a theory of post-retirement migration can ignore the impact of institutional factors upon the migrants. Any theory must attempt to recognise that migration decisions are not just a reflection of individual tastes, but also a reflection of the constraints and opportunities created by the institutional contexts within which the migrant makes their decision. These institutional constraints and opportunities may not even be consciously acknowledged by the decision-maker. This means that typological approaches, like that suggested by Wiseman and Roseman (1979), are too simplistic. Institutional, as well as individual sociological and psychological characteristics, need to be taken into account in order to explain the likelihood of and direction of migration. Hence, a person may not move because the institutional support mechanisms to enable migration may not be available, or because of institutional barriers (such as the cost of the service) may prevent migration.

Secondly, the variable nature of institutional influences from region to region means that any theory of post-retirement migration would have to be seen as operating through the mediating institutions before any specific explanations for regional migration patterns can be made. As mentioned in section 3.1, an institutional analysis does sacrifice the universality of any theory in order to increase its utility. However, if institutions are viewed as mediative between individuals and underlying social structures, it is possible to have a theory reflecting the structural aspects of society, modified for any region by the characteristics of the institutions.

Finally, because institutions in any given region provide a common environmental influence on the migration decision, post-retirement migration could begin to be classified in terms of the dominant institutional variables acting upon a heterogeneous population, filtering through migrants on the basis of social and psychological characteristics. This means that there can be a new development in theory which is able overcome to a, certain extent, problem of the heterogeneity of the retired population. Viewing institutions as 'filterers' of migrants, allowing (even forcing) some to migrate while dissuading (or preventing) others who do not meet institutional criteria would enable new insights into the indirect social influences impacting upon post-retirement migrants. (The greatest remaining problem with this however remains that of identifying those who desire to migrate who yet cannot or do not move, in order to determine why they do not. Currently the only way to

find such people is through a large scale questionnaire which can be both time consuming and expensive. However, given rapidly improving methods of data collection, such as television response polls, this may soon be a less significant problem). Another consequence of a common institutional context for migration is the ability of planners and managers to influence the process. This will now be examined.

CONCLUSIONS IN LIGHT OF AIM 2

The following conclusions are drawn up in light of the thesis' Aim 2 outlined in section 3.3.

Institutions and Post-Retirement Migration in Waikanae

In summary, it can be said that elderly needs are generally well catered for in Waikanae, especially with regard to the younger, more independent retirees. This reflects the nature of Waikanae being an amenity centre for post-retirement migrants and accounts for Waikanae being a major retirement destination for financially secure retirees. The effect of institutional environments on elderly migration to Waikanae has been one of encouraging greater migration due to the recreational and other general services available, as well as selectivity towards younger, wealthier retirees through the real estate market and the lack of specialist and intensive support services for those with more severe health problems. The converse effect has been to prevent poorer and older elderly from being able to settle in Waikanae.

Planning Implications

This filtering process raises a number of issues for planners and other institutional service providers. With the numbers of elderly over 75 expected to rapidly increase over the next 20 years due to ageing-in-place, there is a growing urgency to provide greater access to emergency and specialist health services. In addition to this, greater assistance is needed for those voluntary groups which provide the bulk of the more intensive community support for the elderly, many of which are already struggling to keep up with the rising demand. The younger elderly are generally wealthy and independent enough to provide access for their own needs independently. This older group however, have often had their capital depleted, especially in the current economic downturn, a risk further aggravated under current uncertainties about government intentions regarding elderly income.

Consequently they may not be able to shift nearer to services, as housing is often dearer in the major cities where such services are located. Aside from this, the survey suggests that many of the older elderly would not wish to move due to topophilia built up through a lengthy residence. If the ideology of providing choice to the individual is desired to be maintained in light of the current central government retrenchment in social services, the local community will have to play a greater role in service support than in the past.

Although planners may feel they are familiar with the institutional environment for and in which they plan, the institutional approach enables a more rigorous and systematic analysis from a range of value based perspectives. This can be an important aid, especially where, as in the case of Waikanae, direct voluntary public participation in the planning process is low. Because this approach deals with values it offers not only a framework for understanding the processes occurring, but also provides a context in which planners can, with better information and understanding offer a more considered decision on issues where there is a conflict in values. As well as this, the method also encourages a higher level of consultation and public information, resulting in possibly greater community and involvement.

Some Suggestions

The need for increased community involvement has already been acknowledged by the Kapiti Coast District Council in its Community Affairs portfolio provisions (KCDC 1991) and is being lobbied for by the coordinating groups such as Age Concern and the Kapiti Coast Social Services group. This increased role will mean greater cost in finance and other support from the local community at a time when economic circumstances are difficult. However, Waikanae is rapidly developing and relatively prosperous and this may offer a unique opportunity to encourage a stronger community spirit through community care/support schemes. Identity is an important issue for a rapidly developing community, and such community co-operation would aid this. This could be done using existing organizations such as Kapiti Carers and Lovelink, and would give the Waikanae Community Board a more definite role in promoting Waikanae's vision of being a relatively self-supporting community within the Kapiti district.

In the private sector, Waikanae may be able to benefit from an ageing, relatively wealthy population. There is the possibility of a private hospital, especially as the central government plans to sell off many public health facilities (Levin Hospital could be expanded rather than closed for example). Alternatively, more attention could be given to encouraging greater access to emergency services by private sources moving specialists and/or services closer to Waikanae.

Whichever options are chosen, Waikanae looks likely to remain a major retirement centre into the future. (This is especially so if incomes are threatened with being cut or heavily taxed as elderly seek to invest savings in property). As Waikanae develops, retirement migration may drop off if some of the attractive aspects of Waikanae (such as the unhurried village atmosphere, bush walks, community spirit, etc) deteriorate. If Waikanae desires to retain its image as a 'good place to retire' it needs to continue to foster these distinctive features and continue to expand its range of services to meet the needs of its ageing retired population.

5.2 Critique of Methodology

CASE STUDY METHODOLOGY - PROBLEMS AND SOLUTIONS

As inevitably happens in research, the methodology often comes across various difficulties which need to be addressed. This is especially the case when applying a methodology to a new area of work. Consequently the problems encountered in this study provided a learning opportunity and a basis for assessing whether Aim 1 could be fulfilled. The range of major problems in the case study were mostly due to the scale of the project, while others were more related to the nature of the object of study, post-retirement migration.

Resource Constraints

Many of the problems encountered related to the time and other resource constraints connected with Masters research which prevented as comprehensive an analysis as initially anticipated. Consequently the macro (especially supra-national) scale received comparatively little investigation (though this is touched on below). These constraints also meant that formal interviews had to be limited to a number of key individuals (see appendix 2 - although this was supplemented by informal discussions amongst other

residents and members of organizations) and that assessment of policy was restricted to merely the primary objectives and criteria of the organisation. Most of these limitations could be overcome given greater resources.

Biases in the Population

Of those problems which arose that were not related to resource constraints, the most major was a result of the fact that most of the migrants to Waikanae were relatively wealthy at the time of retirement, well educated, etc. Hence, many of them were able to overcome any institutional barriers such as capital demands, ability to access income support, etc that would tend to prevent migration for those on lower incomes. This meant that institutional attractions rather than barriers had to be focused on in order to determine the extent of institutional influence on the migration decision. In the case of many of these migrants however, the institutional factor was not a conscious aspect of the decision of where to migrate, but rather a taken-for-granted (as part of the costs and benefits of moving) part of the context in which the decision was made. This meant that to detect the institutional influence, indirect questions (such as satisfaction with services, what affected the timing of movement, etc) had to be asked in order to ascertain how institutions impacted on the decision to migrate. Consequently the information collected had to a certain extent be interpreted, weakening the objectivity of the analysis.

An effective way to overcome this problem would be to have a comparison group of non-migrants who want to move but are unable to. Unfortunately, this would have meant great expense for it would require a large scale survey, first to detect 'trapped migrants' (those who want to move but cannot) and then ask as to why they cannot move. The questionnaire attempted to do this to a certain extent by asking why friends had not moved if they wished to. If, as the affirmative answers to this question suggested, many cannot move because of institutional barriers, this provides a much stronger basis of inferring that those who move can overcome these barriers and can to a certain extent choose between the advantageous services they desire. Indeed, the institutional approach may offer a much more useful explanation as to why post-retirees who want to move do not move than as to the current understanding of why some do.

Assessing the Data

This proved to be more difficult than anticipated due to the differing nature of the data. The major difficulty regarding need assessment was to distinguish between need that was perceived and need that was being recognised in actuality (ie. being acted on). This problem was reduced by using a graded scale for the assessment table where scores 1 and 2 reflect need merely perceived, and 3 to 5 various strengths of perception resulting in action. However, especially in the case of the elderly population, the perception of need could vary considerably due to personal circumstances. This reflected the heterogeneity of the elderly population and the general difficulty of trying to classify individuals into groups. In the end the most vocal quarter of the population was used as a standard basis on which to classify felt need. This was primarily chosen because on any individual need, less than half the population recorded a perceived need. (This can be seen in figures 4.7 to 4.9). However, if a full quarter of the population expressed need, this was seen to demand a planning response to the interests of around 15% of the total Waikanae population. This problem can be overcome to a certain extent by either modifying further the assessment table or finding an alternative assessment procedure.

Confidentiality Issues

This was especially a problem in public institutions undergoing restructuring (such as the Department of Social Welfare) or under threat of cuts to funding. Reluctance to be interviewed seemed to be due to an unwillingness of employees or clients to risk their current job situation by criticising the official line. Apart from the fact that this can be unhelpful in meeting need, this meant that to get the information either other sources had to be used, or the correlation between the informer and the information given had to be fudged. This was achieved using appendix 2, but remains a problem for future work by making it more difficult to trace sources of information and get to the actual perceptions operating.

INSTITUTIONAL APPROACHES AND POST-RETIREMENT MIGRATION

From the case study it is evident that the institutional approach provides a valid analysis of and extension in understanding to the phenomena of post-retirement migration. However, it does have a range of limitations. Both the advantages and disadvantages of the institutional method are outlined below.

Advantages and Extensions to the Method

In light of Aim 1 (see section 3.3) and the case study, the institutional approach has been demonstrated to adequately provide a comprehensive framework in which disparate knowledge of elderly migration at a variety of geographic scales can be co-ordinated and more fully understood. As well as this the method also enables a high level of utility for planners because it deals with the institutional values, structures and mechanisms with which they have to work, as well as allowing for the influence of macro processes and collective individual perceptions. However, not all aspects of this approach were exploited.

In the case of the macro scale aspects, little attention was paid to the interactions or long term historical developments at this scale due to the resource limits of the thesis. However, this could be easily achieved. For an example, the New Zealand government has been under pressure from international capital to repay its loans and open itself up to the globalization process. Consequently the government adopted a user pays philosophy which constrained an ever increasing number of its activities. This in turn impacted on the local level in Waikanae in the withdrawal of public health and wealth services, and the consequent growth of private and voluntary groups to fill the gap. In turn this affected the number and types of migrants who came to Waikanae. This example illustrates how institutions can be seen to mediate macro effects to the mezzo and micro scales and consequently allow a greater understanding of the interactions and impacts occurring between the various scales of analysis. As well as encompassing the macro scale, the methodology may also be extended to embrace 'trapped' elderly in order to help explain why they do not move and give clues to better ways to meet the needs of New Zealand's ageing population generally.

Problems With the Institutional Method

One of the greatest problems with this method is to know where to locate the limits of the study. Due to the comprehensive nature of the analysis involved, the cutoff points as to where one will not accept new information has to be decided. This has to be done in light of the objectives and goals in mind. However, this means that valuable information may be lost. Another disadvantage also due to the methodology's comprehensiveness is the time

intensive and cost elements involved which could also mean the loss of information if resources are limited.

A second major problem with the institutional model used was that it tends toward a socially deterministic viewpoint, seeing individuals and institutions as responding to the social environment created by previous outcomes of social struggle between various social groups. However, in the case of elderly migration, people from very similar or even identical social backgrounds may move for radically different reasons. This individuality (which may often be accompanied by a measure of spontaneity - for example, a desire to move purely from a wish for a change) undermines the assumption of a responsive view of migrant behaviour which is the basis of the institutional approach to migration. (This has also been recognised as a problem common to institutional theory generally, and is currently one area in which attempts to expand institutional theory are occurring - see Benson 1977). If migrants move for spontaneous reasons on a significant scale, then institutional affects would be unable to offer any explanation to migration. However, institutional variables do give limits to the amount of freedom available to the individual. For example, limited available capital, or limited information provided by an institution will severely restrict the range of choices available to the individual. In this respect then, the institutional approach takes more account of individuality than do any of the other proposed theoretical explanations, and should therefore continue to be used.

A final problem arising from the above is that the heterogeneity of the elderly population also limits the generalisations that can be made with regard to the impacts made on their movements by institutions. Some attempt was made to overcome this by having two classes of migrants, but even this was difficult to obtain from the data. A better possible approach is to work at a slightly more abstract level and deal with post-retiree migrants through the clarification of the idea of common institutional 'environments' or 'contexts' (a sphere of action in which several institutions interacting together impact on the phenomena) through which individuals are filtered into various 'at risk' groups. However, because of the dynamic nature of these environments, any consequent model will have to reasonably historically specific. This and the fact that institutions vary between regions and nations both mean that the methodology will only be able to provide limited theory

development at the mezzo or micro scale. The method is rather to be used to complement and contextualise (especially macro scale) theory.

5.3 Concluding Remarks - Future Directions

From the above it can be said the the institutional approaches do potentially offer a comprehensive and integrating framework for elderly migration study. This thesis primarily sought to assess the validity of the method for elderly migration study and has found it to be useful at the local level. Further studies at a range of scales need to be done confirm this and additionally test the flexibility of the approach. If this proves successful, institutional approaches may be used to aid social planning for elderly migrants due to the practical nature of the method, as well as furthering our understanding of institutions as mediators of social processes. Knowledge gained in this latter respect could be used to further refine the methodology. Several areas can be considered for the further development of an institutional approach to elderly migration.

Firstly, a further study should seek to focus more on the 'trapped' elderly and the role of institutional factors in preventing movement. Not only is this a very poorly researched or understood area which could potentially provide much information on how institutions influence the movement of individuals outside the labour market, but it also has important implications for planners and others who seek to cater for the needs of such persons.

Secondly, studies need to be carried out at a larger regional and/or national scales to assess whether the institutional approach can account for the direction of migration and individual selection of elderly migrants. This also, if successful, would provide a contextual basis into which local studies could be placed, saving both the amount of analysis and speculation of larger influences impacting on any local situation.

Finally, it can be said that given adequate resources, the institutional approach has much to offer, especially in a time of rapid social change in response to global economic processes impacting on New Zealand. Institutional approaches offer a framework by which the changes we make in society today can more fully understand in terms of how they will affect us tomorrow. If , as a society we can more fully understand the way we change,

we can then begin to make decisions as to the kind of society we want and how to work towards creating it. With our population ageing, we need to remember the next generations of elderly will also need support. We need to work today for the kind of society in which we would all like to retire, one that offers security, respect and choice. Often this conflicts with the values of our youth orientated society. The institutional methodology, by recognising values also offers a framework within which we can weigh up apparent conflicts and bring solutions. This is important as the elderly increasingly learn how to utilise political power as a group. Without a framework that recognises the integrity of values, we could be heading for a confrontation of generations that would ultimately work to the detriment of all. The zeal of youth and the wisdom of age will be needed if New Zealand desires to retain social harmony through economic difficulties.

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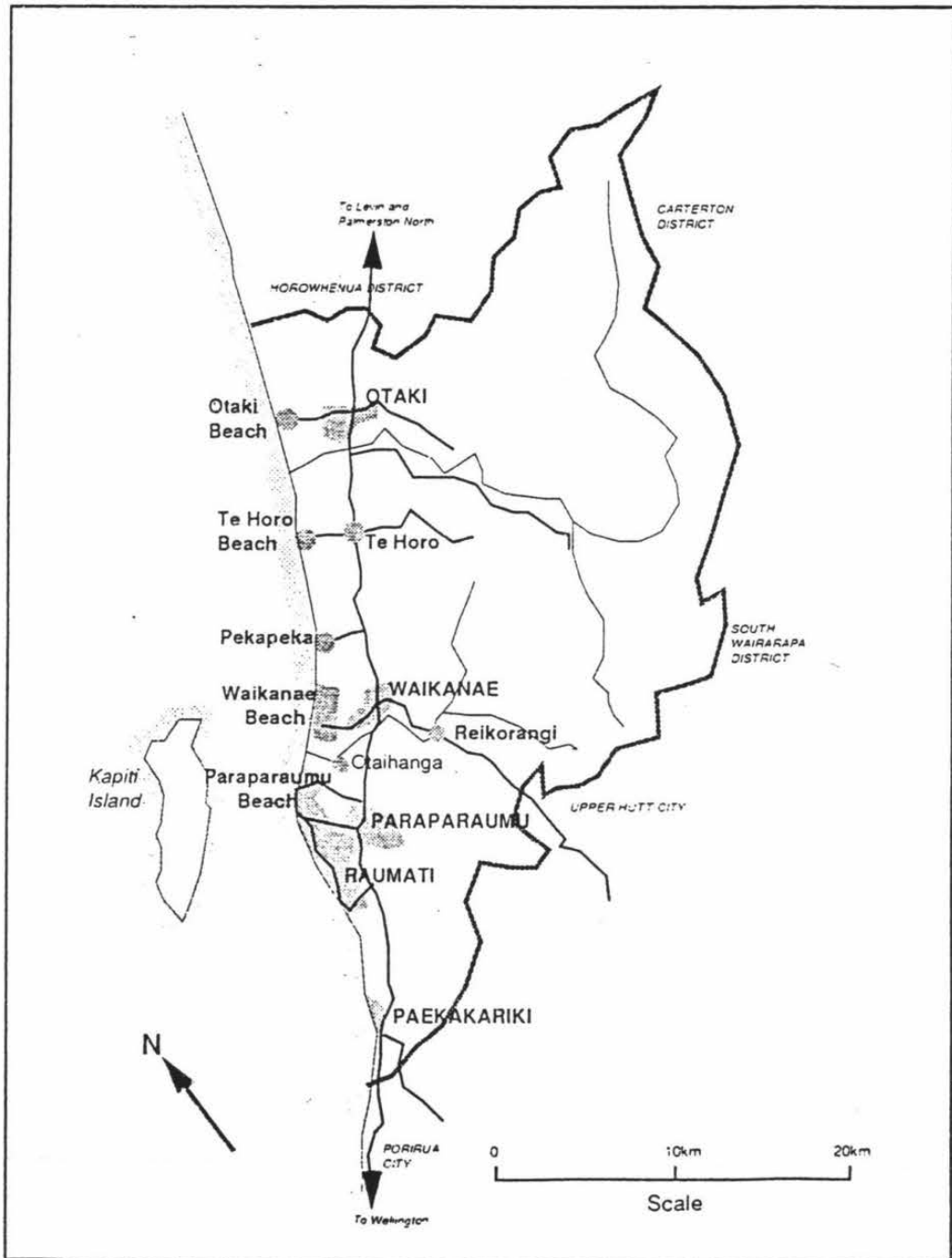
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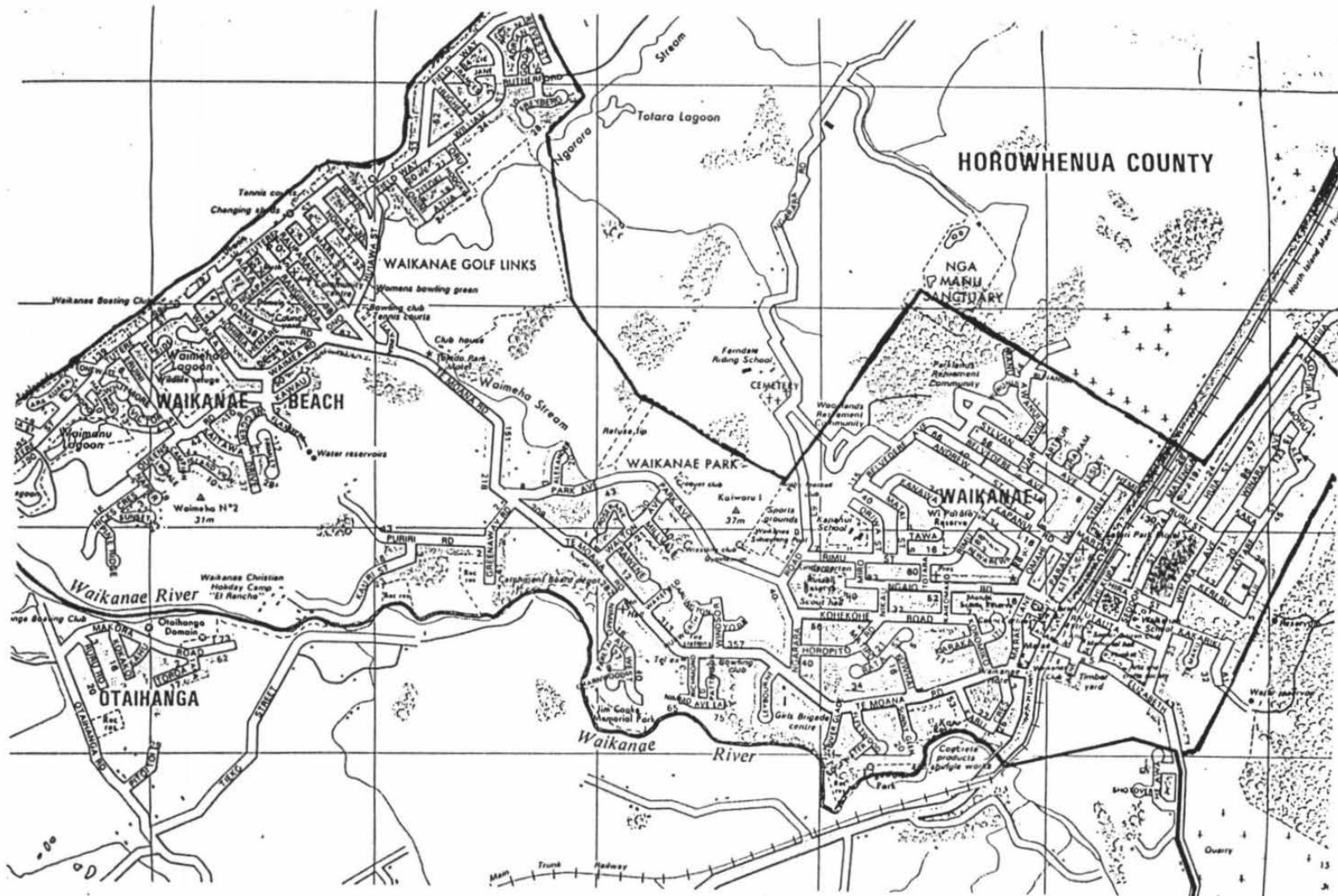
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Appendix 1

Location Map of Waikanae



Map of Waikanae Township and Beach Settlements



— = study area boundaries

Appendix 2

Key Individuals and Organizations Contacted for Interviews

Organization	Key Contact
<u>Park-Wood Trust</u> : Trust responsible for Parklands-Woodlands retirement village.	- P Ryan Costello General Manager
<u>Senior Citizens</u> : Aims to provide for elderly social needs. Organizes a variety of social activities.	- Mr Don Smith Committee Member
<u>Red Cross</u> : A voluntary group aiming to provide training in basic health care. Strong post-retirement membership.	- Mrs Don Smith Committee Member
<u>Kapiti Coast District Council</u> : Aims to provide a facilitatory/support role for social service groups. Allocates pensioner housing.	- Lesley Webb Councillor - Vye Hepburn Adviser
<u>Kapiti Community Social Services (Inc)</u> : Provides a structure in which different social service groups can join in discussing issues. Also lobbies Govt and provides information.	- Lesley Webb Chairperson - Vye Hepburn Committee Member - Peter Isaacs (informal discussions) Committee Member
<u>Age Concern</u> : A co-ordinating group for elderly service groups, also providing information and lobbying.	- Lesley Webb Committee Member
<u>Kapiti Citizens Advice Bureau</u> : Providing the community with a wide range of information and advice.	- Lesley Webb Committee Member - Discussions with staff
<u>Waikanae Information Centre</u> : Set up to promote Waikanae to tourists/ provide information and provide orientation for new residents. Unofficially acts as a co-ordination centre for a wide range of social, recreational and other groups.	- Ruth Wright Staff (Ruth has strong interests and knowledge of a wide range of community activities, concerns and issues in Waikanae)
<u>Waikanae Community Health Centre</u> : Privately run, rented from ex-Wellington Area Health Board premises. Aims to provide basic health care (GP, home help, home nursing, etc), basic health care training, information provision and advocacy/advice.	- Eleanor Carr Senior District Nurse
<u>Wellington Area Health Board (now Wellington Regional Hospitals Board)</u> : Prior to 1991 budget was responsible for providing and co-ordinating health care services in the Wellington area.	- Vye Hepburn Ex-Board Member (1988 - 1991)
<u>Disabled Persons Assembly</u> : A group that seeks to promote the interests of the mentally and physically disabled, especially in ensuring and lobbying for adequate social and physical access to the community.	- Vye Hepburn Committee Member
<u>Real Estate Agencies</u> : This group of organizations are concentrated on as they act (in conjunction with banks, etc) as the primary gatekeepers of residential location, therefore prime influencers of local residential social geographies.	- Elaine Lethbridge Ex-Paraparaumu Agent (This individual known to the author was used as a primary indirect source because of the reluctance of local agents for interviews due to their time constraints and/or concerns over confidentiality).

<u>Friends of the Retired:</u> This group is a local splinter group from the 60's Up movement. It broke ties mainly due to dissatisfaction with the Auckland dominated concerns of the organization. Its main role is providing social activities for more active elderly.	- Elizabeth Falla Ex-chairperson, current Deputy Chair and newsletter/publicity secretary.
<u>Kapiti Carers:</u> An on-call voluntary group which aims to meet basic practical community needs (eg. transport, home help, shopping and gardening assistance, etc).	- Anna Upton President
<u>Retail Sector (Waikanae Business Association):</u> The WBA is a forum for local businesses in which to co-ordinate business development strategies in Waikanae.	- Anna Upton Craft shop (part owner). - Ruth Wright (Has much involvement with local retailers through her work in the Waikanae Information Centre).
<u>Horowhenua Superannuitants Association Inc:</u> A special interest group which seeks to protect the status of superannuitants and prevent ageist discrimination towards retiree income in pensions and tax.	- Derek Presto Secretary
<u>Probus:</u> A social group for retired professional and business people. There are two groups, one for men and the other for women.	- Elizabeth Falla Member
<u>Department of Social Welfare:</u> Provides basic welfare support, mainly through basic financial provision.	- Due to the current restructuring, and the controversy over GRI, DSW staff were reluctant to accept an interview. Consequently information has been mainly derived from DSW publications, opinions of other respondents and discussions with elderly.

Note: All the above were complemented with more informal discussions with staff, residents, members and others involved with or affected by the above organizations. Due to the fact that these discussions provided complementary rather than essential information and the disparate nature of the discussions, those individuals are hereby acknowledged but not sourced.

Appendix 3

General Interview Schedule

Section A

Individual Perception of Elderly Need

1. What are your personal views considering the needs of the elderly with respect to:

(a) Future elderly needs in general (say till 2020AD)?

(eg. - Health - Financial -Social etc. Why?)

(b) Elderly in Waikanae (past, present and future)?

(eg. - Health - Financial -Social etc. Why?)

2. For what reasons do you think that Waikanae attracts such a high number of retirees?

Section B

Perception and Practice of Policy Requirements

3. Does your organization have a policy statement/outline of goals, objectives, requirements, criteria, etc regarding the allocation of resources to retirement migrants?

Locate and obtain copy plus any publicity material.

4. How are these applied in the Waikanae context?

Any exceptions?, Deviations/interpretations from official policy guide-lines?

5. Have you noticed an increase in the demand for your services over time? Why?

6. Do you feel these criteria/guide-lines are adequate in detecting and meeting needs of elderly migrants?

Criteria too lenient/confining to be effective in guiding allocation of resources? In a few words could you describe the most successful and least successful aspects of your organization in terms of its service to elderly migrants.

(personally, and in light of above objectives)

Section C

Political Responsiveness.

7. Is there a process whereby the elderly can offer suggestions for improvements to your services?

(If so at what level? ie. Political and/or individual, etc)

8. Does your organisation liaison with elderly groups (eg. Grey Power, 60's Up, Aged Concern, etc) in decision making?

and/or

Does your group have direct contact with decision makers/service providers, etc?

Section D

Perception of Interaction of Service Provision and Migration.

9. Do you foresee a problem with service provision (that relates to you organization) for retirees in Waikanae in the future? Why/Where from? What impact do you think this will have on migration (ie. increase out-migration due to health, etc; in-migration due to good services, etc)?

10. Any other comments/observations.

Appendix 4

MASSEY UNIVERSITY
GEOGRAPHY DEPARTMENT

1991 POST RETIREMENT MIGRATION QUESTIONNAIRE

- CONFIDENTIAL -

SECTION 1

Statistical Background

Official Use

1 = column
no.

- | | | | | | | |
|--|-----|---|------------------------------|-----|--------------------------|---------------|
| | 1 | 2 | | | | |
| 1. Sex: | M | F | (circle one) | 1 | <input type="checkbox"/> | |
| 2. Marital Status: | 1 (|) | Single (never married) | | | |
| (Tick appropriate) | 2 (|) | Widowed | 2 | <input type="checkbox"/> | |
| | 3 (|) | Currently married | | | |
| | 4 (|) | Divorced | | | |
| 3. Age: | 1 (|) | Under 60 years | 5 (|) | 75 - 79 years |
| (Tick appropriate) | 2 (|) | 60 - 64 years | 6 (|) | 80 - 85 years |
| | 3 (|) | 65 - 69 years | 7 (|) | 85 - 89 years |
| | 4 (|) | 70 - 74 years | 8 (|) | 90 + years |
| 4. Ethnic Origin: | 1 (|) | European | | | |
| (Tick appropriate) | 2 (|) | Maori | | | |
| | 3 (|) | Polynesian | | | |
| | 4 (|) | Asian | 4 | <input type="checkbox"/> | |
| | 5 (|) | African | | | |
| | 6 (|) | Other (please specify) | | | |
| | | | | | | |
| 5. Income Background: Please classify your <u>pre - retirement</u> gross annual income into one of the following categories (include spouse's income if applicable). | | | | | | |
| (Tick appropriate) | 1 (|) | Under \$19 999 | | | |
| | 2 (|) | \$20 000 - \$29 999 | | | |
| | 3 (|) | \$30 000 - \$39 999 | 5 | <input type="checkbox"/> | |
| | 4 (|) | \$40 000 + | | | |

6. Income Background: Please classify your current gross annual income into one of the following categories (include spouse's income if applicable).

- (Tick appropriate)
- 1 () Under \$19 999
 - 2 () \$20 000 - \$29 999
 - 3 () \$30 000 - \$39 999
 - 4 () \$40 000 +

6

7. State your highest level of formal education:

- (Tick appropriate)
- 1 () Primary School completed
 - 2 () High School level
 - 3 () University level qualification
 - 4 () Other (please specify)
-

7

8. Is your accommodation:

- (Tick appropriate)
- 1 () Mortgaged
 - 2 () Freehold
 - 3 () Rented
 - 4 () Board (with friend or relative)
 - 5 () Resident of a village and/or home

8

9. How many persons are resident in the household (include yourself)?:

- (Tick appropriate)
- 1 () 1
 - 2 () 2
 - 3 () 3
 - 4 () 4
 - 5 () 5 or more

9

10. How many years since your (or your spouse's) retirement?:

..... years

10 - 11

SECTION 2

Migration Information

11. How long have you been a permanent resident at your current address?:

..... years

12 - 13

12. Where did you live 5 years or more prior to your (or your spouse's) retirement?:
 (give rural area or town).....

14 - 15

(If your answer to Q12 is "Waikanae" go to Q15)

13. Why did you shift to Waikanae and not some where else (eg. Paraparumu or Otaki)?

(Tick reasons that were considered at time of shifting)

- () Close to friends
- () Close to family
- () Used to own a batch and/or holiday here
- () Cost and/or type of accommodation
- () Nice and/or familiar physical environment
- () Services available (eg. clubs, health, shopping, etc) (please specify service(s))
-
- () Other (please specify)
-

Yes 1 No 2

16

17

18

19

20

21

22

14. Why did you shift when you did?

(Tick as many as appropriate)

- () To move into a recently purchased house
- () Accepted for a retirement village or home
- () Retired from paid employment
- () Other (please specify)
-
-
-

Yes 1 No 2

23

24

25

26

15. Do you know of any other retired person(s) who would like to live in Waikanae but are unable to at the moment?

1 2
 Yes / No (circle one)

27

If your answer was "Yes", do you know why they have not yet moved to Waikanae?

.....

.....

.....

16. Under what circumstances would you consider moving from Waikanae in the future?

(Tick as many as appropriate)

- () None
- () Death of spouse
- () Decline in current income
- () Deterioration in health
- () Increase in costs of accommodation
- () Increase in transport costs
- () Deterioration in access to essential services
- () Other (please specify)
-

Yes 1	No 2
28	<input type="checkbox"/>
29	<input type="checkbox"/>
30	<input type="checkbox"/>
31	<input type="checkbox"/>
32	<input type="checkbox"/>
33	<input type="checkbox"/>
34	<input type="checkbox"/>
35	<input type="checkbox"/>

Why would or wouldn't you move because of this? Please elaborate:

.....

.....

.....

.....

SECTION 3

Quality of Services

17. Are you fully satisfied with the quality, access and/or level of services (eg. clubs/societies, health-care, transport, home help, shopping, accommodation, financial advice, etc) or information on them for senior citizens in Waikanae?

1 2

Yes / No (circle one)

36

If you are not satisfied with service, please outline which services dissatisfy and why you are dissatisfied:

.....

.....

.....

.....

18. What do you like the best about the services available in Waikanae?

.....

.....

.....

.....

19. Are you a member of Grey Power, Age Concern, 60's Up or some other group which speaks out on the concerns of the over 60's?

1 2
Yes / No (circle one)

37

If your answer was 'Yes', please indicate:

(a) the name of the Group(s):.....
.....
.....

and

(b) reasons for membership:.....
.....
.....
.....

20. Phone number for possible follow up (if desired):.....

Thank you for your co-operation

Appendix 5

Tally of Questionnaire Results

Sex	COUNT	Marital	COUNT	Age	COUNT	Ethnic	COUNT
1	55	1	6	2	17	1	94
2	39	2	23	3	17	N=	94
N=	94	3	62	4	29		
		4	3	5	15		
		N=	94	6	11		
				7	4		
				8	1		
				N=	94		
Income1	COUNT	Income2	COUNT	Educate	COUNT	Accomdn	COUNT
1	35	1	39	1	15	1	3
2	15	2	32	2	49	2	81
3	19	3	8	3	23	3	2
4	21	4	9	4	4	5	7
N=	90	N=	88	N=	91	N=	93
*=	4	*=	6	*=	3	*=	1
Resident	COUNT	RetYears	COUNT	RetYears	COUNT		
1	32	1	2	25	2		
2	56	2	3	28	1		
3	4	3	10	29	1		
5	1	4	5	31	1		
N=	93	5	3	N=	89		
*=	1	6	4	*=	5		
		7	6				
		8	6				
		9	3				
		10	5				
		11	7				
		12	5				
		13	3				
		14	2				
		15	3				
		16	4				
		17	2				
		18	2				
		20	3				
		21	3				
		22	2				
		24	1				

AddYears	COUNT	AddYears	COUNT	Origin	COUNT	Friends	COUNT
1	9	28	1	0	16	1	8
2	8	31	1	2	2	2	70
3	6	35	1	6	1	N=	78
4	8	52	1	11	1	*=	16
5	3	N=	92	13	3		
6	8	*=	2	14	53		
7	4			15	5		
8	7			16	1		
9	4			24	1		
10	6			25	3		
11	1			27	6		
12	1			N=	92		
13	3			*=	2		
14	3						
15	1						
16	5						
17	3						
18	1						
19	2						
20	3						
21	1						
23	1						
Family	COUNT	HolBatch	COUNT	\$Accomdn	COUNT	Environt	COUNT
1	22	1	19	1	19	1	42
2	56	2	59	2	59	2	36
N=	78	N=	78	N=	78	N=	78
*=	16	*=	16	*=	16	*=	16
Services	COUNT	13-Other	COUNT	House	COUNT	Village	COUNT
1	25	1	19	1	22	1	12
2	53	2	59	2	57	2	67
N=	78	N=	78	N=	79	N=	79
*=	16	*=	16	*=	15	*=	15
Retired	COUNT	14-Other	COUNT	Others	COUNT	None	COUNT
1	36	1	26	1	23	1	38
2	43	2	53	2	71	2	54
N=	79	N=	79	N=	94	N=	92
*=	15	*=	15			*=	2
Death	COUNT	Income	COUNT	Health	COUNT	^\$Accom	COUNT
1	18	1	25	1	30	1	12
2	74	2	67	2	62	2	80
N=	92	N=	92	N=	92	N=	92
*=	2	*=	2	*=	2	*=	2
Transpt	COUNT	+Access	COUNT	16-Other	COUNT	Service	COUNT
1	3	1	17	1	10	1	65
2	89	2	75	2	82	2	28
N=	92	N=	92	N=	92	N=	93
*=	2	*=	2	*=	2	*=	1
Politic	COUNT						
1	21						
2	73						