

# EWAS WORKING PAPER SERIES

## HOW SETTLED ARE THE RETIRED? OLDER MIGRANTS MOVING INTO AND OUT OF THE WESTERN BAY OF PLENTY

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Working Paper 5

June 2006



Family Centre  
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WELLINGTON NEW ZEALAND



Population Studies Centre  
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HAMILTON NEW ZEALAND

### **ENHANCING WELLBEING IN AN AGEING SOCIETY (EWAS)**

*A programme of research funded by the Foundation for Research Science and  
Technology; conducted by the Family Centre Social Policy Research Unit and the  
Population Studies Centre at the University of Waikato*

The research reported in this working paper is part of the research programme *Enhancing Wellbeing in an Ageing Society* (EWAS), funded by the Foundation for Research, Science and Technology and carried out in partnership by the Family Centre Social Policy Research Unit (FCSPRU) and the Population Studies Centre (PSC) at the University of Waikato.

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ISSN: 1177-4029

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ABSTRACT

The movement of older men and women has become a more complex and prevalent feature of life at the beginning of the twenty-first century. Retirement migration of senior citizens to “active adult communities” is being marketed with images of “successful ageing” in particular places and settings. Evidence from recent special purpose surveys on migration into and out of the Western Bay of Plenty sub-region suggests that the region is currently also experiencing a counter-flow of older people out to other regions in New Zealand. Reasons given by older people moving in and out of the Western Bay of Plenty help us to gain a better understanding of the motives underlying the movement of people aged 65 years and older.

**Keywords:** migration of older persons, community impact, migration motives, Tauranga, Western Bay of Plenty

ACKNOWLEDGEMENTS

The authors acknowledge the financial support to carry out the surveys and analysis reported in this paper that was received from the *Strangers In Town* Programme, funded by the Foundation for Research, Science and Technology. Karen Phillips, Rebecca Grantham and Muriaroha Muntz assisted with the coding and analysis of the survey data. Their support is gratefully acknowledged. This paper was originally presented at the FRST-funded Research Endusers Conference *On the frontiers: New public good research on population, migration and community dynamics*, March 30 - April 1, 2005, Wellington. This version was edited by Jacques Poot, Director PSC and Co-Programme Leader, EWAS.

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## 1. Introduction

The combination of high life expectancy and sub-replacement fertility mean that New Zealand, like other OECD countries, has an ageing population. The median age of New Zealand's population during the 1994-2004 decade has increased from 32.5 years in 1994 to 35.4 years in 2004 (Statistics New Zealand, 2005). At the same time the age composition of New Zealand's population has changed significantly. The population aged 65 years and over (65+) increased by 17.3 percent from 419,000 in December 1994 to 491,600 in December 2004. Statistics New Zealand predicts that the percentage of the New Zealand population aged 65 years and over will increase from 12 to 26 percent between 2001 and 2051 (Statistics New Zealand, 2004). Currently, one in eight New Zealanders is aged 65 years and over (Statistics New Zealand, 2005).

In the Western Bay of Plenty District the share of the 65+ age group in the population is projected to increase from 14 percent in 2001 to 25 percent in 2026. In Tauranga City, the population share of this group is projected to increase from 17 percent to 23 percent (Statistics NZ, 2005). Given that total net migration accounted for 80 percent of the overall population increase of Tauranga City between 1996 and 2001, it is likely that much of the increase in the 65+ age group in this local government area will be 'driven' by migration (Bedford, 2002). A similar, albeit not as significant, trend is evident in the adjacent Western Bay of Plenty District, where migration accounted for 63 percent of the total population increase between 1996 and 2001. Overall, Bedford (2002, 5) concludes that for the Western Bay of Plenty sub-region – comprising Tauranga City and Western Bay of Plenty District – "migration, especially internal migration, is the major driver of population growth."

The significance of migration to the Western Bay of Plenty's population growth may be explained by the status of the region as one of New Zealand's 'sunbelt' areas. In general, sunbelt areas are those locales that have a significant and attractive coastline and have relatively high sunshine hours. Along with the Western Bay of Plenty, New Zealand's other sunbelt regions include Tasman, Marlborough, Thames-Coromandel, and the Far North. According to Lee and McDermott (1998, 97) in their study of urban growth trends in New Zealand, migration to sunbelt regions is driven by "a growing cohort of retirees" who are pursuing "lifestyle options in attractive environments".

Migration estimates provided by Statistics New Zealand provide support to the perception that older migrants make a significant contribution to growth in sunbelt regions in New Zealand. For example, while Statistic New Zealand data indicate that between 1996 and 2001 migrants in the 65+ year age group comprised 19 percent of total migrants moving into the Western Bay of Plenty sub-region, this is projected to increase to 31 percent of total migrants for the period between 2046 and 2051, assuming 1996-2001 age-specific rates. This New Zealand trend is consistent with the internal migration of older persons observed overseas. Drysdale (1988), for example, reported on the movement of elderly people to coastal centres in eastern Australia, while McHugh and Mings (1991, 5) reported that the majority of movers to the popular sunbelt destination of Phoenix, Arizona, 'can be categorised as young-old'.

McHugh and Mings are just two among a number of overseas researchers who have explored differences in migration patterns of the elderly, and who have recognised that 'young-old' and 'old-old' have different motivations and experiences as migrants. In New Zealand, however, the different experiences of elderly migrants have been largely ignored to date. This paper seeks to begin to 'fill the gap' that exists in literature on elderly migration in New

Zealand. In particular, this research builds on the work of Heenan and Moffat (1986, 73) who, in their seminal research on the migration of the elderly in New Zealand, argue that analysis of data at a 'localised geographical scale offers a relevant approach for future research.' By focusing on results obtained from a special purpose survey on migrants to and from the Western Bay of Plenty sub-region this paper examines the range of motivations of both "young-old" and "old-old" migrants to establish how settled this group of current or former residents of the Western Bay of Plenty sub-region is in retirement.

The paper begins by reviewing some existing overseas literature on the migration of older persons. In particular, attention focuses on the variety of typologies of aging that have been employed in migration research, categorising elderly migrants in relation to both age and life-course variables. The concepts discussed in Section 2 of the paper are then employed in a discussion of results obtained from the special purpose survey of Western Bay of Plenty migrants. Section 3 provides a short review of literature on the community impacts of this migration. Section 4 describes the key characteristics of persons moving in and out of the Western Bay of Plenty who were included in a special purpose survey conducted by the University of Waikato's Migration Research Group. In outlining the experiences of elderly migrants to and from the Western Bay of Plenty, particular attention is paid to differences between the young-old and the old-old in terms of both reasons for movement and migration outcomes. The characteristics of older migrants are reported in Section 5, while Section 6 discusses migration plans and motives. Section 7 provides a short conclusion.

## **2. Categorising Elderly – Age and Life-Course Typologies**

Evidence from overseas research shows a long-standing awareness of differences in the experiences of elderly migrants. Thus, rather than positioning elderly migrants as a homogenous group with similar migration experiences, it is widely accepted that the migration behaviour of the elderly is a highly variegated phenomenon. Variation in elderly migrant behaviour relates to both the scale of movement and the reasons for migration. For example, in their analysis of elderly migration in the United States Rowles and Watkins (1993) identify a 'mosaic' of scales encompassed by elderly migration, including snowbelt-to-sunbelt migration, local movement to regional weekend and vacation destinations, migration from urban to nearby rural areas, provincial return migration, counterstream return migration out of the sunbelt, and migration for assistance from rural to urban areas.

The variety of scales evident in elderly migration is surpassed by the variety of reasons given for movement. Moreover, there is significant variation in migration motivations according to the age of migrants. Conway and Houtenville (2003, 310) point out, for example, that "the older elderly may migrate for very different reasons than the younger elderly." Having analysed data from the United States' Census, these authors find that there are differences in the importance younger and older elderly place on such things as climate (more important for younger elderly), cost of living (more important for older elderly), and income tax structure (more important to older elderly) (Conway and Houtenville, 2003, 324-326). In drawing a distinction between younger and older elderly, Conway and Houtenville (2003) rely on a widely-accepted typology that differentiates the 'young-old' (65-74 years) and the 'old-old' (over 75 years), a distinction necessitated by the increased length of 'productive' life (Covey, 1992).

Age-based typologies, however, are only one way in which the elderly may be categorised. Rowles and Watkins (1993), for example, distinguish between amenity migration, return migration, and migration for assistance. These authors report that amenity migrants are primarily the young-old and tend to be healthy, affluent and well-educated. Amenity migrants seek “a leisure-oriented lifestyle in pleasant surroundings that are well-endowed with both recreational and service resources” (Rowles and Watkins, 1993, 511). Return migrants are persons who return to a place of former residence, typically either mobile young-old returning to communities they departed in their youth or old-old in ill-health returning to be with family and/or to spend their last years in familiar surroundings. Migrants for assistance are generally old-old, motivated to “move closer to family or to service and long-term care resources that provide increasing levels of assistance as they become more frail” (Rowles and Watkins, 1993, 511). Migrants do not, however, remain fixed within a specific category. Thus, a single individual may be an amenity migrant at retirement, may become a return migrant as they move from being young-old to old-old, and may conclude their mobility history by making a final move as a migrant for assistance.

In order to avoid conceptual problems with ‘typology overlap’, several authors have developed dynamic life-course perspectives on elderly migration. Life-course models are based on the idea that the preferences of migrants vary according to their personal attributes and their stage in the life course (Walters, 2002). Litwak and Longino (1987), for example, offer a ‘developmental context’ model that outlines the sequencing and pressures leading to three basic moves the elderly make – retirement or amenity movers who are wealthier, married, and in better health; moderate disability movers who are poorer, widowed, and need informal caregiving; and, major disability movers with chronic disability who are moving to an institution. The distinctive life-course attributes of each of these three groups allows for the examination of ways in which socio-spatial factors influence migration at different stages in the life course.

### **3. Elderly Migration and Community Impacts**

Age-based and life-course typologies of elderly migrants are useful in framing policy approaches and planning agendas implemented in response to the demands and/or requirements of elderly migrants. For example, Stimson et al (1996, 1) explain, in relation to sunbelt migration in Australia, that understanding the basis of the decision of individuals and households to undertake residential relocation is “important in assisting in managing the development and planning of urban areas, coping with the impacts of growth, and providing infrastructure and services.” Research into the impacts of elderly migrants on local communities has developed a significant profile in the United States, where approaches to understanding elderly migrant behaviour has developed into a topic of increasing interest and concern to planners and public officials. In some regions in the United States, for example, officials have explored the feasibility of elderly migration as a ‘growth industry’ (Summers and Hirschl, 1985). Not only are retirees regarded as providing an alternative strategy for economic development, but the ‘business’ of retirement is believed by many to be the “ultimate ‘clean industry’” (Clark, Knapp and White, 1996, 328). For some communities an influx of elderly migrants has stimulated economic development, yet for other locales the impact of in-migrants has been more mixed.

In concluding their detailed study of ‘elderly migration and development in small communities’, Rowles and Watkins (1993, 534) caution against policy-makers and planners

ignoring “indirect costs to localities” as well as “non-economic factors that are often hidden from cursory inspection”. Central to the work of Rowles and Watkins (1993) is an understanding that both the characteristics of the in migrants and the nature of the receiving community will influence the degree to which a community benefits from, or is detrimentally affected by, increased elderly migration.

For example, communities attracting primarily return migrants who have both familiarity with the area and existing social ties can anticipate a set of demands and expectations from elderly immigrants that is different from that of communities that attract amenity migrants with more limited prior knowledge of the community and expectations based on experiences elsewhere. Moreover, communities that emerge as elderly migrant destinations through serendipity confront different problems (primarily problems of adapting to unanticipated changes) than those found in communities that set out to implement a deliberate strategy of retiree-migrant-based economic development (and hence can anticipate and plan for change) (Rowles and Watkins, 1993, 514).

Potential benefits of elderly-migration-based community development include increases in local retail and house sales, enhancement of the local ratings base, increase in the local capital pool (such as savings and investment), job creation, development of a pool of talented and committed service volunteers, and the stimulation of service development. Potential costs of elderly-migration-based development include increasing service demands that place a strain on existing community services, development of a ‘geriatric’ population with special needs, negative repercussions for other sectors of the local economy (such as discouragement of industrial investment), escalating house prices, environmental concerns (including traffic congestion, over-development, strains on infrastructure), and the transformation of the local social and political climate (Rowles and Watkins, 1993, 516).

Communities are not static entities. Individuals, families and communities become over time part of a culture of migration. For the elderly ‘the societal mantra of activity in aging has arisen to combat pervasive stereotypes of old age as a period of disengagement and decline’ (McHugh, 2000, 84). The migratory life-style of healthy and wealthy young-old to the sunbelt areas ensures a continual inflow of the young elderly pursuing the culture of retirement as the “active” third age. But life course will then ensure that there will be a movement of individuals from young-old migrants to old-old residents and this “aging” will impact on the nature of local benefits and costs. For example, a young-old migrant may be a valuable asset to a community, providing welcome investment income and acting as a volunteer worker in a variety of cultural settings. As this resident ages, and becomes ‘old-old’, they will place increasing pressure on community services, while simultaneously withdrawing savings from local banks to pay for medical care and reducing commitment to volunteer activities. “In the absence of a continuing stream of new migrants to constantly reinvigorate the community, the result may be evolution of a vulnerable and high-cost geriatric enclave generating a community image that may actually serve as a constraint on future economic development” (Rowles and Watkins, 1993, 515-516).

The potential of elderly migration to constrain economic development has been recognised as a problem of particular relevance to sunbelt centres. Newton and Bell (1996, 6) argue, for example, that population growth due to ‘retirement-driven’ migration “may occur with little evidence of ‘productive’ investment”. Thus, in sunbelt areas such as south-east Queensland,



Australia, industry growth will be confined primarily to ‘city building’ and ‘people-serving’ activities rather than ‘export-oriented manufacturing and producer-service industries’ (Newton and Bell, 1996, 6). A similar, albeit somewhat tentative, conclusion may be reached about industrial growth in the Western Bay of Plenty sub-region. Data from the 1996 New Zealand Census shows that the construction and health industries in the Western Bay of Plenty sub-region are above the national average in terms of employment (Smith and Briggs, 2001).

#### **4. Movement In and Out of Tauranga City and Western Bay District: a Context**

In 2001, for every two people who moved into the Western Bay of Plenty sub-region, one person moved out. In other words, twice as many people aged 15 years and over moved into the area as moved out (Table 1). This is not surprising as the Bay of Plenty region (net migration gain 8,595) was behind Canterbury (net migration gain 8,685) in experiencing the second-largest net gain from internal migration between 1996 and 2001 (Statistics New Zealand, 2002b). These figures are useful in providing a broad overview of migration patterns, yet they are of little use in understanding migration impacts on local communities. As Heenan and Moffat (1986, 73) explain, the lack of locational specificity in regional data “severely limits the utility of observations recorded because they apply to a coarse regional network in which boundaries bear little relationship to coherent local communities.”

The survey data employed in this analysis are derived from a special purpose survey implemented within a specific locality in New Zealand. This locality is the Western Bay of Plenty sub-region, comprising the areas managed by the Tauranga City and Western Bay of Plenty District Councils. The survey was designed to gather the reasons why people had moved into or out of the sub-region between 1 October 2002 and 30 September 2003. The 2003 survey was a replica of surveys carried out in the same area in 2000-2001 and 2001-2002. The methodology used in these surveys has been discussed in detail elsewhere; see for example Lidgard and McLeay (2002a, 2002b).

In Table 1 the age and gender of the 2003 survey group are compared with the 2001 census data to show how representative the survey sample is of the total migrant population. It should be noted from the outset that the census data refer to the five-year period 1996-2001, whereas the survey data capture movers over a single year (October 2002 to September 2003). In this paper we focus specifically on the older population. The census data for the Western Bay of Plenty sub-region show that the percentage of the in-migrants aged 65+ is similar to the corresponding percentage of the out-migrants. On a gender basis, there are more males than females moving both in and out of the sub-region in both the census and survey data. This is the case for both the total migrant population and the migrant population aged 65 years and over (Table 1). However, it is acknowledged that the survey respondents are under-represented in the youngest age group (15-24 years) and over-represented in the oldest age group (65 years and over).

**Table 1: IN and OUT migration from the Western Bay of Plenty sub-region, by age group and gender, Census 2001 and Survey 2003.**

Age Group	Census Number 1996-2001		Census Percent		Survey Number 2002-2003		Survey Percent	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT
15-24	3,093	2,502	15.5	25.7	16	7	3.3	2.6
25-39	8,346	3,621	41.9	37.1	102	70	21.0	26.4
40-64	8,127	3,462	40.8	35.5	227	113	46.7	42.6
65+	372	168	1.9	1.7	140	76	28.8	28.7
<b>Total</b>	<b>19,938</b>	<b>9,753</b>	<b>100.0</b>	<b>100.0</b>	<b>486</b>	<b>265</b>	<b>100.0</b>	<b>100.0</b>
Gender								
Male	10,782	5,094	54.1	52.2	281	132	57.8	49.8
Female	9,162	4,662	45.9	47.8	195	131	40.1	49.4
Gender 65+ yrs								
Male	243	123	65.3	73.2	94	39	67.1	51.3
Female	129	45	34.7	26.8	43	35	30.7	46.1
No response					3	2	2.1	2.6
<b>Total</b>	<b>372</b>	<b>168</b>	<b>100.0</b>	<b>100.0</b>	<b>140</b>	<b>76</b>	<b>100.0</b>	<b>100.0</b>

*Source:* Unpublished census data provided by Statistics New Zealand and special purpose survey.

The responses analysed for this paper are all those who completed the survey when aged 65 years and over. Of the 216 individuals in the survey aged 65 years or older, 140 were moving into the Western Bay sub-region and 76 individuals were moving out to other areas of New Zealand (Table 2). Thus, while the Western Bay sub-region is attracting many people to the 'sea and sun' it is also losing half as many people in this age group who are moving to other parts of New Zealand.

The most popular source locations of all migrants moving into the sub-region were Auckland, the Waikato and other North Island areas (Table 2). Indeed, the Western Bay of Plenty sub-region is receiving most new migrants in these older age groups from near-by regions. The most popular destinations of the older people moving out of the sub-region are the neighbouring Waikato region and other North Island regions. Auckland is not as popular a destination as other places in the Bay of Plenty.

These findings are consistent with the Census 2001 results which recorded the Auckland region as having the biggest net loss of people aged 65 years and over between 1996 and 2001. The majority of these out migrants from Auckland moved to either the Waikato or the Bay of Plenty.

The survey data also allowed examination of those making decisions at or soon after the age of commencing to receive New Zealand Super (65-69 years) and those who migrate later in life (75 years and older). The following section will examine some of the characteristics of the inward and outward migrants in the Tauranga and Western Bay of Plenty Districts in the following five older-age categories (Table 3).

**Table 2: Sources/destinations of all internal migrants and those aged 65+ years into and out of the Western Bay of Plenty sub-region (WBP) survey 2003**

(percentages)

Source/Destination	All age groups		65+ age group	
	Into WBoP	Out of WBoP	Into WBoP	Out of WBoP
Other Bay of Plenty	19.1	18.8	15.7	18.4
Waikato	22.8	25.2	20.0	30.3
Auckland	27.1	15.4	23.6	17.1
Other North Island	25.9	28.2	32.8	26.3
South Island	4.3	11.3	6.4	7.9
Not stated	0.8	1.2	1.4	0
<b>Total number</b>	<b>491</b>	<b>266</b>	<b>140</b>	<b>76</b>

**Table 3: Age distribution of respondents aged 65+ years, 2003 survey, by district**

a) numbers

Age group	Tauranga City		West Bay of Plenty District		Total	
	IN	OUT	IN	OUT	IN	OUT
65-69	38	6	13	8	51	14
70-74	30	16	10	7	40	23
75-79	15	13	8	2	23	15
80-84	12	13	4	7	16	20
85+	7	3	3	1	10	4
<b>Gender</b>						
Female	34	27	9	8	43	35
Male	66	23	28	16	94	39
No response	2	1	1	1	3	2
<b>Total</b>	<b>102</b>	<b>51</b>	<b>38</b>	<b>25</b>	<b>140</b>	<b>76</b>

b) percentages

Age group	Tauranga City		West Bay of Plenty District		Total	
	IN	OUT	IN	OUT	IN	OUT
65-69	37.3	11.8	34.2	32.0	36.4	18.4
70-74	29.4	31.4	26.3	28.0	28.6	30.3
75-79	14.7	25.5	21.1	8.0	16.4	19.7
80-84	11.8	25.5	10.5	28.0	11.4	26.3
85+	6.9	5.9	7.9	4.0	7.1	5.3
<b>Gender</b>						
Female	33.3	52.9	23.7	32.0	30.7	46.1
Male	64.7	45.1	73.7	64.0	67.1	51.3
No response	2.0	2.0	2.6	4.0	2.1	2.6
<b>Total no.</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Unpublished Western Bay of Plenty migration survey, 2003

Note: Subsequent tables are all from the same source

## 5. Characteristics of Older Migrants

### *Age and Gender*

There are several differences between the in-migrant and out-migrant respondents in terms of their basic demographic characteristics. Table 3 shows that there is a predominance of male migrants, except for out-migration from Tauranga City. In addition, among the 65+ group in-migrants have a younger age distribution than out-migrants.

### *Marital status*

More people were married amongst the group moving into the region than among those who had moved out (Table 4). The loss of a spouse appears to promote movement out of rather than into the region.

**Table 4: Marital status of respondents aged 65+ years, 2003 survey, by age group**

Marital status	(percentages)									
	65-69yr		70-74		75-79		80-84		85+	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Never married	3.9	0	0	0	0	0	6.3	0	10.0	0
Married	72.5	64.3	72.5	52.2	69.6	46.7	37.5	40.0	50.0	0
De facto	3.9	7.1	0	0	0	0	6.3	10.0	0	0
Separated	2.0	0	2.5	0	0	0	6.3	0	0	0
Divorced	3.9	0	7.5	8.7	8.7	6.7	6.3	5.0	0	0
Widowed	13.7	28.6	17.5	39.1	17.4	46.7	31.3	45.0	40.0	100
Not stated	0	0	0	0	4.3	0	6.3	0	0	0
<b>Total number</b>	<b>51</b>	<b>14</b>	<b>40</b>	<b>23</b>	<b>23</b>	<b>15</b>	<b>16</b>	<b>20</b>	<b>10</b>	<b>4</b>

### *Housing and household composition*

The majority of the people in the older age groups were living in a home they owned (Table 5). While higher percentages in the younger 65-69 year age group lived in their own home (86.3 percent moving in and 71.4 percent moving out) these figures drop for the older age groups, particularly for those aged 80 years and over. Around half of the people in this age group appear to have transferred their housing equity from individual title to group retirement village ownership (Table 5). These results are supported by 2001 Census findings where three-quarters of those aged 65 years of age and over said they owned or partly owned their usual residence. Rental accommodation was more frequent for the younger elderly and among these more likely among the out-migrants rather than the in-migrants.

Few people in the survey were living in households with children or other relatives (Table 6). Indeed, most older people in the survey were moving as independent migrants rather than moving as part of another household. Only in the oldest age groups did there appear to be a greater incidence of migrants living with family members.

**Table 5: Housing of respondents aged 65+ years, 2003 survey, by age group**

(percentages)

Housing	65-69yr		70-74		75-79		80-84		85+	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Own home	86.3	71.4	75.0	87.0	73.9	73.3	43.8	55.0	20.0	25.0
Relatives home	0	0	7.5	4.3	0	0	6.3	5.0	20.0	0
Rented	3.9	14.3	2.5	4.3	4.3	13.3	6.3	5.0	0	25.0
Retirement	0	0	15.0	4.3	8.7	0	31.3	35.0	40.0	25.0
Other	9.8	0	0	0	8.7	0	12.5	0	20.0	25.0
Not stated	0	0	0	0	4.3	0	0	0	0	0
<b>Total number</b>	<b>51</b>	<b>14</b>	<b>40</b>	<b>23</b>	<b>23</b>	<b>15</b>	<b>16</b>	<b>20</b>	<b>10</b>	<b>4</b>

**Table 6: Household composition of respondents aged 65+ years, 2003 survey, by age group**

(percentages)

Household	65-69yr		70-74		75-79		80-84		85+	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
One person	19.6	28.6	30.0	39.1	22.7	53.3	37.5	50.0	40.0	75.0
Couple only	79.4	71.4	70.0	52.2	72.7	40.0	50.1	50.0	40.0	0
Child(ren)	2.0	0	0	4.3	0	6.7	6.3	0	20.0	25.0
Multi-family	2.0	0	0	0	0	0	6.3	0	0	0
Not stated	0	0	0	0	0	0	0	0	0	0
<b>Total number</b>	<b>51</b>	<b>14</b>	<b>40</b>	<b>23</b>	<b>23</b>	<b>15</b>	<b>16</b>	<b>20</b>	<b>10</b>	<b>4</b>

**Source and level of income**

The findings from the 2001 Census show that between 1991 and 2001 the number of people aged 65 years in paid employment had more than doubled during the decade, from 22,230 to 49,935. Eleven percent in that age group was in paid employment in the week preceding the 2001 Census. Survey results in the Western Bay of Plenty found similar patterns. In the survey group between three to ten percent in the 65 to 79 year age group moving in were still working as either wage and salary earners or self-employed and in this age group for those moving out between seven to seventeen percent were still in paid employment (Table 7). Interestingly, employment is more common among those moving out than among those moving in. Government Super, however, was reported to be the main source of income, for migrants moving both in and out (Table 7). It should also be noted that the non-response rate for this question was high.

The non-response rate for the level of income, however, was even higher. It is common in surveys to find that people, particularly older people, are reluctant to state their income level. When analysing the income level it should be kept in mind that the income band is unknown for around a quarter of those in the 75+ year age group (Table 8).

Of those who answered the question, the majority stated that their income was between \$10,000 and \$20,000 (Table 8). This is consistent with national trends where “few older people appear in the upper levels of income” (Davey and Gee, 2002, 10). Given that a

significant percentage did not state an income band it can be argued that the type of accommodation listed by the respondents is a better indicator of relative wealth (Table 5).

**Table 7: Source of income of respondents aged 65+ years, 2003 survey, by age group**

Income source	(percentages)									
	65-69yr		70-74		75-79		80-84		85+	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Salary/Wages	2.0	7.1	0	8.7	4.3	6.7	0	5.0	0	0
Self-employment	7.8	0	2.5	8.7	0	0	0	5.0	0	0
Govt Super	51.0	71.4	67.5	52.2	52.2	60.0	25.0	70.0	90.0	100
Other	33.3	21.4	30.0	21.7	34.7	13.3	68.8	15.0	10.0	0
No source	0	0	0	0	0	6.7	0	0	0	0
Not stated	2.0	0	0	8.7	8.7	13.3	6.3	5.0	0	0
<b>Total number</b>	<b>51</b>	<b>14</b>	<b>40</b>	<b>23</b>	<b>23</b>	<b>15</b>	<b>16</b>	<b>20</b>	<b>10</b>	<b>4</b>

**Table 8: Income band of respondents aged 65+ years, 2003 survey, by age group**

Income level	(percentages)									
	65-69yr		70-74		75-79		80-84		85+	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Zero	0	0	0	0	0	0	0	0	0	0
0-5,000	0	0	0	4.3	4.2	0	0	0	0	0
5001-10,000	17.6	14.3	2.5	4.3	0	20.0	0	10.0	10.0	0
10,001-15,000	19.6	21.4	17.5	26.1	21.7	20.0	6.3	15.0	40.0	25.0
15,001-20,000	11.8	35.7	17.5	8.7	17.4	13.3	25.0	15.0	30.0	25.0
20,001-25,000	13.7	0	17.5	4.3	4.3	6.7	0	10.0	10.0	0
25,001-30,000	11.8	7.1	5.0	8.7	13.0	6.7	6.3	5.0	0	25.0
30,001-40,000	3.9	14.3	15.0	4.3	17.4	6.7	18.8	5.0	0	0
40,001-50,000	2.0	0	10.0	0	4.3	6.7	6.3	5.0	0	0
50,001-70,000	11.8	7.1	2.5	13.0	0	0	6.3	0	0	0
70,001-100,000	0	0	2.5	0	0	0	6.3	5.0	10.0	0
100,001+	3.9	0	0	0	0	0	0	0	0	0
Not stated	3.9	0	10.0	26.1	17.4	20.0	25.0	30.0	0	25.0
<b>Total number</b>	<b>51</b>	<b>14</b>	<b>40</b>	<b>23</b>	<b>23</b>	<b>15</b>	<b>16</b>	<b>20</b>	<b>10</b>	<b>4</b>

## 6. Migration Plans and Motives

### *Plans to move again*

One of the survey questions asked the respondents whether they had plans to move their place of residence again. The literature suggests that older people will make migration decisions on the basis of very thorough evaluation of alternatives. Moreover, as ageing progresses it seems likely that increased chances of health problems and reduced financial capacity may make it harder to relocate. Hence, it is not surprising to find that around three-quarters of individuals in the 65+ age group in the survey were not planning to move again

(Table 9). However, it does appear that the young-old, particularly those moving out of the sub-region, were not completely ruling out the possibility of another move. Twenty-nine percent of the young-old (65-69 years) moving out of the Western Bay of Plenty and 20 percent of the same age group moving into the area were either considering or had at least not ruled out another move. In fact, overall 20 percent of those aged 65+ were in those categories. The only age group that had completely ruled out a further move were the 14 individuals (six percent of the survey population) aged 85 years and over. Altogether, the survey suggests that around a fifth of older persons are not yet permanently settled in any given year.

**Table 9: Plans to move again of respondents aged 65+ years, 2003 survey, by age group**

Plans to move again	(percentages)									
	65-69yr		70-74		75-79		80-84		85+	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Yes	5.9	7.1	10.0	8.7	8.7	6.7	6.3	10.0	0	0
No	80.4	64.3	77.5	73.9	78.3	80.0	75.0	85.0	100	100
Undecided	13.7	21.4	12.5	13.0	13.0	13.3	12.5	0	0	0
Not stated	0	7.1	0	4.3	0	0	6.3	5.0	0	0
<b>Total number</b>	<b>51</b>	<b>14</b>	<b>40</b>	<b>23</b>	<b>23</b>	<b>15</b>	<b>16</b>	<b>20</b>	<b>10</b>	<b>4</b>

***Reasons for moving into or out of the Western Bay of Plenty***

The question asking the reasons for moving into the Western Bay of Plenty sub-region was divided into three sections (Table 10). The questions in the first section all had an economic focus, those in the second section focussed around lifestyle, while in the third section the questions centred on family and friends. The results are recorded in Table 10 for 51 individuals aged 65-69 years, 40 aged 70-74 years, 23 aged 75-79 years and 26 aged 80 years and over who moved into the Western Bay of Plenty sub-region.

As the results in Table 10 show, for the respondents moving into the Western Bay sub-region the climate and the coast were important to very important for all these older age groups although the percentage was highest for the youngest (65-69 years) age group. In the words of two 65-69 year old men: “Friendly people, good shopping centres, the beaches, sporting activities and the climate. New home close to the amenities, friendlier atmosphere and people” and “Fruit and vegetables cheaper and plentiful. I enjoy a warm climate, hot pools are beneficial to health and well-being”. These younger elderly individuals are clearly part of the group of retirees seeking a good lifestyle in an attractive environment.

For the older age groups (75+ years), being closer to family was a more important reason for moving into the region than either the good climate or coastal environment (Table 10). As a 75-79 year old man stated: “Being near my family”. While for another couple of men in the same age group it was the “fact our children are near, shops and hospitals are nearer”; “Good climate, nice home in good location and closer to some family members”.

**Table 10: Reasons cited as “important” or “very important” for selecting the Western Bay of Plenty as a destination, by 65+ age group, 2003 survey (percentages)**

Reason	Age group			
	65-69 years	70-74 years	75-79 years	80+ years
<b>Economic</b>				
Relocation of business	4.0	2.5	0	0
More job opportunities	6.0	2.5	0	0
Higher wages	0	2.5	0	0
Begin new business	4.0	7.5	4.3	0
Escape high living costs	13.7	7.5	4.3	10.0
<b>Lifestyle</b>				
Desire for change	54.9	52.5	30.4	15.4
Larger centre	11.8	17.5	0	7.7
Coastal environment	64.7	42.5	43.3	19.2
Income opportunities	4.0	10.0	0	0
Better climate	70.6	45.0	43.3	42.3
Better housing	23.5	27.5	8.6	15.4
<b>Family</b>				
Be closer to family	35.3	40.0	65.2	53.8
Be closer to friends	25.5	12.5	8.6	19.2
Children to grow up in WB	4.0	0	0	0
Partner/parents’ decision	9.8	15.0	4.3	3.8
<b>Number of respondents</b>	<b>51</b>	<b>40</b>	<b>23</b>	<b>26</b>

When the economic cluster of reasons is examined, escaping high living costs is the only reason cited across all age groups (Table 10). However, business opportunities were mentioned by some in the age groups up to 79 years. In the words of a 65 to 69 year old man his main reasons for moving into the region were “climate, lifestyle, potential business opportunities (in design), central location, and beach”.

The reasons given by the respondents aged 65 years and over for moving away from the Western Bay sub-region are summarised in Table 11. The results are analysed for 14 individuals aged 65-69 years, 23 aged 70-74 years, 15 aged 75-79 years and 24 aged 80 years or older under the same three major headings – economic, lifestyle and family – as used in the analysis of the individuals who had moved into the sub-region.

In addition to retirement, the most consistent reason given for the move away from the Bay across the four age groups was simply the desire to live in a new area. A significant percentage (22 to 37 percent) in the 65 to 79 year age groups appear to be moving out of the area because the housing was too expensive, while just over a quarter of those individuals in the 65-69 year age group indicated they had moved because of a partners’ decision.



**Table 11: Reasons cited as “important” or “very important” for leaving the Western Bay of Plenty, by 65+ age group, 2003 survey (percentages)**

Reason	Age group			
	65-69 years	70-74 years	75-79 years	80+ years
<b>Economic</b>				
Wages too low in WBP	0	4.3	0	0
Lost job in WBP	7.1	0	0	0
Poor job prospects in WBP	7.1	0	0	0
<b>Lifestyle</b>				
Desire to live in new area	28.5	13.0	33.4	23.1
Retirement	64.2	43.3	46.7	38.5
Limited income opportunities	7.1	8.7	0	3.8
Poor climate	0	0	0	3.8
Housing too expensive	36.7	21.7	26.7	3.8
<b>Family</b>				
To get away from family	14.2	13.0	20.0	3.8
Partner/parents’ decision	28.6	4.3	6.7	0
<b>Number of respondents</b>	<b>14</b>	<b>23</b>	<b>15</b>	<b>24</b>

Although some individuals indicated it was important to them to get further away from family, for others the move was made to take them closer to family members. As a 70-74 year old woman noted: “We really miss it [Tauranga] but we think family is more important and my children could not earn enough to settle in the BoP, even though they are highly qualified. ... I moved here [Christchurch] with my daughter & grandson & son. Now my daughter has her own home and we live near to all our family”.

Widowhood and illness also appear to be catalysts to move out of the Western Bay. As a woman in her seventies living in Raumati wrote: “My husband died so I moved back to be close to sons and grandchildren”. This point is also made by a 70-74 year old man who had moved to Whakatane: “Prefer to stay here [Tauranga] however, health. One of us is dying. Need to sell to obtain some cash & smaller property”. While a woman in her eighties who had moved to South Auckland wrote; “My main reason for moving from the Western Bay of Plenty is that I had a minor stroke. Friends moved me to be nearer to them”.

Finally return migration in older age can be an option for some. A woman in her seventies, living in Taranaki, wrote: “Due to an accident (me) and illness (husband) we were unable to continue earning. Medical costs were frightening. I was relieved to return to my beloved Taranaki. Can now manage finances, despite a recent stroke. Cost of living easier here and climate suits me”.

***Features most liked and feelings on living in the Western Bay of Plenty***

Both in- and out-migrant groups were asked what they liked most, currently or in the past, about living in the Western Bay of Plenty. The answers to this open-ended question were coded into the seven broad categories and summarised in Table 12. While the “physical environment” of the region scored highly across all the older age groups, in general it was

rated highest by the men and women who had moved out of the sub-region (55 to 85 percent). Proximity to family and other centres were mentioned more frequently by those who had moved into the area than those who had moved out. The exception is the youngest age group (65 to 69 year olds) moving out, who also valued the central location of the sub-region.

**Table 12: Valued attributes of the Western Bay of Plenty as a place to live, by 65+ age group, 2003 survey**

(percentages)				
Attribute	Age group			
	65-69 years	70-74 years	75-79 years	80+ years
<b>IN migrants</b>				
Physical environment	68.0	51.4	57.1	42.3
Quality of life	34.0	31.4	14.3	21.7
Recreation/leisure	6.0	8.6	0	8.7
Family proximity	14.0	14.3	19.0	17.4
Proximity of other centres	18.0	14.3	0	4.3
Economic opportunity	6.0	6.7	4.8	0
Education	2.0	0	0	4.3
<b>OUT migrants</b>				
Physical environment	84.6	63.2	54.5	61.1
Quality of life	15.4	15.8	18.2	11.1
Recreation/leisure	7.7	15.8	9.1	16.7
Family proximity	0	5.3	9.1	5.6
Proximity of other centres	15.4	0	0	5.6
Economic opportunity	7.7	5.3	9.1	0
Education	0	0	0	0

The importance of location is expressed by a 70-74 year old man who liked the “relaxed atmosphere with several other main centres within easy travel”. While a 65 to 69 year old man valued, together with coast and climate, the fact that Tauranga was a “City – [with] easy access to Auckland area”. A surprising finding was that recreation and leisure did not score as highly as a valued attribute amongst the in-migrant group as amongst the out-migrant group. This may suggest that a lot of recreational opportunities may be taken for granted while living in the Western Bay and not valued until they are no longer possible.

When asked to reflect on their overall feelings about living in the sub-region these feelings were overwhelmingly positive for both the in- and out-migrants. However, it was not surprising to find that the in-migrants had on average more positive feelings than the out group. Between 77 and 92 percent of the individuals who had recently moved into the Western Bay sub-region had positive feelings about their move (Table 13). Negative feelings about living in the sub-region were below five percent for all groups moving into the Western Bay and below nine percent for those moving out. However, within the group who had moved out, a relatively high proportion failed to state their feelings, which suggests they may still feel rather ambivalent about the Western Bay sub-region.

**Table 13: Feelings about living in the Western Bay of Plenty, by 65+ age group**

(percentages)

	Age group			
	65-69 years	70-74 years	75-79 years	80+ years
<b>IN migrants</b>				
Positive	92.1	85.0	87.0	76.9
Neutral	3.9	10.0	8.7	7.7
Negative	0	0	4.3	3.8
Not stated	3.9	5.0	0	11.5
<b>Total</b>	<b>51</b>	<b>40</b>	<b>23</b>	<b>26</b>
<b>OUT migrants</b>				
Positive	71.4	52.2	46.7	66.7
Neutral	14.3	17.4	20.0	12.5
Negative	7.1	8.6	6.7	4.2
Not stated	7.1	21.7	26.7	16.7
<b>Total</b>	<b>14</b>	<b>23</b>	<b>15</b>	<b>24</b>

## 7. Conclusion

This study has shown that the reasons for movement both into and out of the sub-region are many and varied. Planners need to remember that communities are not static entities. New Zealand has a relatively mobile population, even at older ages. The attributes of a place that matter to people will vary between groups of people. The attributes that attract the young-old (such as the chance to go swimming and fishing every day) may not be so appealing to the old-old, so as people reach the old-old stage not all will stay in a region like the Western Bay of Plenty and this must be taken into account in planning for geriatric support services.

Given that this age group is set to rise dramatically in the next two decades it is important to identify areas that experience the largest net migration gains and losses of older people, as well as the most popular destinations and origins of older migrants. This movement will change the communities in both the areas of origin of the migrants and the areas of destination. The challenge will be to factor in this migratory behaviour in policy designed to assist people to maintain independence as they 'age in place'.

Further work needs to be undertaken to separate the urban and rural segments of the over 65 year age group and to examine the likelihood of people 'staying on' in service depleted rural New Zealand as they age. As Joseph and Chalmers (1995) point out: "In the face of a prevailing government ideology of personal responsibility and well-established problems of providing rural services, rural communities will likely be left to cope as they may with the needs of growing numbers of elderly". In particular, older people in rural areas will, as Keeling (2001, 618) notes, "have to compensate for and manage the loss of family and friends that results from rural depopulation".

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