

**Living the Good Life? New Zealand  
expatriates, intentions to return, and  
the importance of lifestyle**

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# **Living the Good Life? New Zealand expatriates, intentions to return, and the importance of lifestyle**

## **Abstract**

This paper explores the role of lifestyle in migrant destination choice, using the example of expatriates' intentions to return home. Much of the previous research on migrants and destination choice has occurred within the fields of geography and demography, while research on lifestyle and factors that matter to families has tended to be within the work-life literature. Using the specific case of New Zealand expatriates returning to New Zealand, this paper represents an attempt to bring together these bodies of work to further explore the reasons migrants with families move to particular destinations. The analysis examines the degree to which expatriates report "lifestyle" as the reason for their return, then attempts an analysis of the concept of lifestyle with attention to the variables that matter to expatriates with families. As such, the paper explores the intersection between migration decisions and work-life variables. Finally, the paper concludes with a proposal for the development of a more nuanced set of indicators to measure the lifestyle factors that are relevant to the decisions of expatriates.

**Key words:** migration, expatriates, families, lifestyle, indices



## I. Introduction

There is a substantial body of research on the drivers for migration of those moving with their families from one country to another. However, little of this work has explored the importance of characteristics of migrants' destinations with regard to the factors that matter to families who are making such moves. Much of the research on migrants and destination choice has occurred within the fields of geography and demography, while research on lifestyle and factors that matter to families has tended to be within the work-life literature. Using the specific case of New Zealand expatriates returning to New Zealand, this paper represents an attempt to bring together these previously discrete bodies of work to further explore the reasons migrants with families move to particular destinations.

Within the disciplines of geography and demography, research examining the drivers of migration has drawn on a variety of theories, often economic, to explore why and where people move. Much of this work stems from the classic migration model by Sjaastad (1962), which argues that potential migrants evaluate the costs and benefits of migrating to another region and move when the benefits – usually job related – outweigh the costs of moving. While this neo-classical economic model considers the individual rather than the family, more recently there has been interest in examining family migration and “the broader social and economic implications of family migration processes” (Cooke, 2008:255). For example, Gubhaju and De Jong (2009:32) note that “one of the frontiers in micro-level migration theory is to...directly investigate the migration decision-making of men and women” and that “...the new household economic theory places migration decisions within the context of the household and contends that the family is at the centre of migration decision-making.” Increasingly other non-career and non-monetary factors, such as family ties and ‘lifestyle’ are being considered as motivators for moving, with Lidgard and Bedford (1994) finding that family ties, the attractions of the home environment, and a desire to bring children up with relatives close by were key reasons for New Zealanders to return home. Similarly, recent research by the New Zealand Department of Labour (2009) highlighted the non-monetary drivers attracting people to New Zealand.

While much of the research concerning expatriates' decision to return, and indeed the drivers for migration generally, has been within the fields of geography and demography, another body of research has relevance for the related questions of migrant destination choice and expatriate return, namely the growing body of work exploring issues related to work-life and work-family balance. However, much of the migration-related work in the work-life area has focused on issues such as the work-life experiences and problems of immigrants moving to new countries<sup>1</sup>, the implications for families when a member migrates<sup>2</sup>, or on gender differences in the employment of dual-career migrants<sup>3</sup>, rather than considering the degree to which potential migrants consider the various ‘lifestyle’ aspects of destination countries. In addition, research that has included lifestyle as a driver for migration has failed to

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<sup>1</sup> Such as Lan's 2002 research on immigrant Chinese families in California.

<sup>2</sup> Such as Bastia's 2009 research on grandmothers caring for children whose mothers have migrated or Semyonov and Gorodzeisky's 2008 analysis of the standard of living of families in the Philippines who receive remittances from family members working overseas.

<sup>3</sup> Such as Boyle et al, 2009; Cooke, 2007.

articulate exactly what the term ‘lifestyle’ encompasses. A number of studies have attempted international work-life comparisons (see further discussion below) using groups of indices to rank countries according to a range of facets that contributing to work-life balance or stress, but it does not appear that these indexes have been utilised in migration research.

This paper seeks to explore the intersection between the work-life and migration fields by examining the degree to which work-life considerations, broadly termed ‘lifestyle,’ contribute to expatriates’ decisions to return home. The paper conceptualises expatriates as a particular form of migrant, one who is able to draw upon prior knowledge to assess the work-life conditions of their destination, and who is likely to have family ties in their country of origin. Using data from a large survey of New Zealand expatriates, the paper explores intentions to return home and the importance of New Zealand’s ‘lifestyle’ in drawing them back. The paper also begins an unpicking of what exactly the concept of ‘lifestyle’ encompasses, with the aim of articulating, and thus enabling the measurement of, the factors that draw families to return or to move to particular destinations.

## **II. The context: migrants, expats and the Kiwi OE**

It is difficult to estimate exactly how many New Zealanders reside overseas<sup>4</sup>. Like many countries, New Zealand is unable to calculate the true size of its diaspora, with estimates ranging from around 450,000 (Bryant and Law, 2004) to over one million (quoted in Gamlen, 2007). However, given that Australian Bureau of Statistics estimates the New Zealand-born population living in Australia at 30 June 2008 at 494,579 (Australian Bureau of Statistics, 2009), it is likely that the upper estimate is closer to the actual size of the New Zealand diaspora, with some estimates indicating that as many as a quarter of New Zealand’s skilled workers could be overseas (Gamlen, 2007).

New Zealand is an international outlier in the high level of mobility of its population, particularly with regard to highly skilled workers. Bedford and Ho (2006:54) note that “New Zealand is the OECD country with the highest per capita rate of immigration, the highest per capita rate of emigration and the second largest diaspora per person (after Ireland) in the resident population. The country is unusual in having such a high level of emigration of citizens at the same time that it has such a very high per capita rate of immigration.” Larner (2007) also notes that not only is New Zealand’s high skill diaspora the highest in the OECD, it is also growing at a faster rate than most other countries. Few countries have such a high proportion of their native born highly skilled population overseas and *also* have foreign-born workers making up a significant proportion of their highly skilled workforce.

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<sup>4</sup> While counting the number of New Zealand citizens who are currently overseas and travelling on New Zealand passports appears relatively straightforward (despite the fact that there is currently no collated count of the number of New Zealanders overseas who are holding NZ passports), this number does not include people who are currently living overseas who have, or would have, rights to New Zealand citizenship but have not enacted those (for example, children born overseas to a New Zealand parent, who do not yet have passports). A full count of the New Zealand diaspora might include people born in New Zealand and those born overseas, the partners and children of expatriates who can apply for citizenship or permanent residence, and those who have an ongoing attachment to New Zealand despite no intention to return to New Zealand.

## **The role of the “OE”**

The migration and return of cohorts of New Zealanders has been part of New Zealand’s social fabric for many years, with a period of living and travelling overseas being a rite of passage for the young and middle-class for a number of generations. While other destinations are increasingly chosen, the “Kiwi OE” (overseas experience) historically involved young people who had recently completed tertiary education, and who may or may not have had one or two years of work experience, moving to the UK and living and working in London for a couple of years. The common anecdote reports that these young New Zealanders leave their home shores in their early 20s, earn British pounds and travel extensively in Europe, and then, when their two-year working holiday visas expire, return home to New Zealand’s “great lifestyle” to “settle down” and raise a family.

This anecdote assumes a number of things, including that the OE is a relatively short experience limited by a two year visa, that it is followed by a return to New Zealand and subsequent productive employment and family responsibilities, and that New Zealand’s lifestyle, coupled with family ties, is a key driver attracting expatriates back, despite the lesser opportunities for highly paid employment and career development. However, while a significant proportion of New Zealanders do come home after their OE, there are also a considerable number who don’t return. As noted, New Zealand has one of the highest proportions of skilled expatriate populations in the OECD, suggesting that the assumptions present in the OE anecdote may mask a somewhat different picture.

As such, not only is it difficult to estimate how many people overseas have rights to live in New Zealand if they chose to, it is also impossible to predict how many of those who leave New Zealand will return, how long they will be away for, and who might return with them. Stated intentions on departure may eventuate in entirely different outcomes as the circumstances of those overseas change. Furthermore, while many young New Zealanders on their OE are limited by the UK’s two-year working holiday visa, many others are entitled to long term residence in the United Kingdom by virtue of extended family ties (such as grandparents), while yet another unquantified number have dual or multiple citizenships and thus are not subject to the limits of various countries’ visa or migrant work policies. In addition, free movement to Australia and some Pacific Islands means that significant proportions of New Zealand citizens can remain in those countries indefinitely. Other expatriates leave New Zealand with family ties that provide a link to citizenship in another country, or with work permits that allow them to reside in countries such as the United States until their tenure with a particular company ends, something which may not happen for an extended period.

## **Why do we care about expatriates?**

This paper uses data from a survey of expatriates to explore the degree to which lifestyle acts as a pull factor in international moves. A key reason for focusing attention on New Zealand expatriates is evident in the ongoing debate around “brain drain.” This debate centres on whether the loss of skilled workers who leave New Zealand for labour markets that offer better career opportunities and financial rewards results in changes to the skill composition of the labour force and productivity, and

thus has negative impacts to New Zealand's living standards. This argument is supported by research which suggests that New Zealanders overseas are younger and better qualified relative to the usual resident population in New Zealand (KEA, 2006). The focus of extensive research and an ongoing topic in the popular media, brain drain theorists argue that the loss of New Zealand's "best and brightest" has the capacity to limit New Zealand's productivity growth, although alternative reports offer the reassurance that "brain exchange" is a truer description of the fluid dynamics of the movement of New Zealand's skilled labour force (Glass and Choy, 2001).

The debate around brain drain or exchange received significant media attention in the late 1990's and early 2000's, but this debate has recently re-emerged in the context of New Zealanders returning home (or not leaving) as a result of economic recession (Boland, 2009; TVNZ, 2009). For example, the New Zealand Prime Minister, John Key, recently noted that "New Zealand has long lamented that so many qualified and talented New Zealanders have left to live permanently overseas, and clearly if we can have them engaged in our economy, that will be a catalyst for higher growth and greater wealth in the country." (Boland, 2009)

Despite reports of brain exchange that show, in some years, net gains in the numbers of immigrating and emigrating skilled workers, there is limited research on the degree to which inflows and outflows of 'skilled migrants' constitute an equal substitution of skills and experience. In part, this is because the qualifications of migrants entering New Zealand do not necessarily equate to the occupations those migrants subsequently take up. The short tenure of some skilled migrants entering New Zealand also contributes to a potential skill loss. For example, the New Zealand Medical Council (2008) found that fewer than 10 percent of doctors from the US and Canada were still living in New Zealand four years after receiving their registration to practice medicine. While research indicates that New Zealand, at least on paper, has received more skilled medical personnel through migration than has lost through emigration, the short tenure of many of those entering New Zealand may represent an overall loss of local institutional and cultural knowledge despite being an equal or net gain in skills each year.

It is not only the overall loss of skilled workers that make consideration of expatriates and the drivers for their decisions worthy of attention. Research in New Zealand has suggested that expatriates remaining overseas tend to be those with greater achievements, with Hooks et al (2005:15) arguing that

...those who are likely to remain overseas place a higher value on achievement than those likely to return to New Zealand. It is possible that the socially or lifestyle-oriented migrants will return to New Zealand but that the country will be deprived of the high achievers with the skills, experience and motivation to contribute to a growing economy... This represents a considerable loss of talent for New Zealand particularly as many of these are in the highly skilled CEO/General Manager/Company Director group and the entrepreneurial Self-employed. These people identify working hard, problem solving and leadership as important motivators for being overseas.

Similarly, Gibson and McKenzie's 2009 study of the educational elite found that of those who had left New Zealand, only 18 percent of those holding a doctoral degree had returned, compared with 50 percent of those with other qualifications. This

suggests that not only are expatriates as a group more highly qualified than the general population, it may be the highest achievers who choose to remain away from New Zealand permanently.

A further factor relevant to the current New Zealand economy concerns the impact of the return of significant numbers of expatriates. Lidgard and Gilson (2002) note that “the development of a large pool of people with residence rights living outside of New Zealand means that even a small percentage returning at any given time would create a relatively large inflow of people.” This factor is perhaps of particular importance to policy makers during times of recession, as the impact of significant numbers of New Zealanders returning home would have substantial budget implications for revenue, social services and unemployment, as well as housing and other infrastructure. For example, Kennedy (2009) shows that a one percent population increase from returning New Zealanders is associated with a 9 percent increase in house prices. In addition, the return of different groups of expatriates has different impacts for the economy and the labour market (for example, if expatriates are largely older New Zealanders returning to retire, or whether they are younger workers returning during the years of family formation and career solidification.)

Another reason for attention to New Zealand’s expatriate population concerns the range of policy levers aimed at encouraging expatriates to return ‘home.’ Knowledge and information about the intentions and perceptions of expatriates, and differences between those who stay abroad and those who return, is essential for campaigns aimed at retaining or regaining the labour force participation of the most highly skilled workers.

### **Is it ‘lifestyle’ that brings people back to New Zealand, and if so, what is it?**

For those New Zealanders who return to New Zealand, it is unclear the degree to which the anecdote regarding lifestyle is true; that is, how much of the decision to return to New Zealand is driven by lifestyle and New Zealand being “a great place to raise a family”? Other drivers for return may include other extended family ties, including the need to provide care for older relatives, or a lack of alternative permanent residence options due to ineligibility for visas.

Lidgard and Bedford (1994) found that returning New Zealanders cited family ties were the most commonly cited reason for expatriates to return, but that men, in particular, often linked their attachment to New Zealand with statements about the environment and opportunities for an outdoor lifestyle. Similarly, Lidgard (2001) found that the majority of New Zealanders returned because they had family and/or friends in New Zealand, but that many also mentioned returning because they liked NZ’s physical environment.

In contrast, the Longitudinal Immigration Survey in New Zealand found that New Zealand’s ‘relaxed pace of life or lifestyle’ was the most common reason given by migrants for choosing New Zealand (44 percent), along with the climate or clean green environment (40 percent), and to provide a better future for their children (39 percent). However, it was notable that around two thirds of migrants in the study also had existing contacts in New Zealand, with many (40 percent) having family members already living there (Department of Labour, 2009).

As such, it appears that lifestyle plays an important role in attracting expatriates and other migrants to New Zealand. However, this raises a second question: assuming it *is* a major driver for skilled expatriates and their families choosing to return to New Zealand, what exactly does ‘lifestyle’ mean? The significant numbers of New Zealanders living in Australia indicate that there are a range of alternative destinations that may offer similar lifestyle choices, and as such, one could ask why any New Zealander would return here after two years in London, rather than move to, say, Melbourne? For example, those returning to be closer to elderly relatives may find that travel to visit a parent living in Queenstown may in many cases be cheaper and quicker from Melbourne than from Auckland, and the salaries and career opportunities are arguably better in the Australian city.

### **Why do we care about lifestyle, per se?**

The data from research by Lidgard (2001), Lidgard and Bedford (1994) and the Department of Labour (2009) indicate that lifestyle plays at least some role in the desirability of New Zealand for returning expatriates, but it is difficult to assess how lifestyle, as a driver for return, compares to other factors. Literature on the most common drivers for migration finds that the two key reasons for moving are to increase career opportunities and income, neither factors on which New Zealand can compete. As a result, lifestyle becomes vital as the leading attraction that New Zealand has with which to compete on the international stage.

Research by Ortega and Peri (2009) also highlights the importance of lifestyle if New Zealand is to compete for skilled migrants, as well as attracting back and retaining expatriates. Ortega and Peri show that migrants typically move from poorer to richer countries, and demonstrate that increases in wage differentials between the country of origin and the country of destination increases the flow of migrants. However, this is not the case for New Zealand expatriates, most of which are returning to New Zealand from wealthier countries such as the UK, the US and Australia.

In the sections that follow, I first examine the intentions to return a large group of New Zealanders living overseas. Drawing on data gathered in a survey carried out in 2006 by KEA, the Kiwi Expatriate Association, the paper explores differences between those who plan to return to New Zealand and those who don’t, and the degree to which New Zealand’s lifestyle is attracting them back. I also explore existing measures of “lifestyle” and argue for the need for a more nuanced set of indicators that are relevant to New Zealanders expatriates returning home.

### **III. The KEA dataset<sup>5</sup>**

This paper draws on analysis of a large data set collected in a global survey of New Zealand expatriates by the Kiwi Expatriate Association (KEA), a “global talent network connecting New Zealanders around the world.” The data provides insight

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<sup>5</sup> Permission was sought and gained from KEA to use this data set, which is not publicly available. A version of the original dataset that had been ‘cleaned’ by Robert Didham was used in this analysis.

into the intentions and behaviours of a large group of New Zealand expatriates, including the reasons they would return to New Zealand.

KEA conducted the online survey entitled “Everyone Counts” in 2006 at the time of the Census, and received responses from 18,002 New Zealanders living overseas. The survey asked respondents about their intentions to return to New Zealand, and the timing and drivers of such a decision. It also asked about current ties to New Zealand, the respondent’s current employment situation including work hours, and perceptions of New Zealand’s progress over the past years, as well as gathering demographic data such as citizenship status, marital status, income and education. KEA published a brief summary of the findings in 2006 (KEA, 2006).

By virtue of being gathered through a self-selected online survey, the data gathered in the survey has obvious limitations. The survey did not utilise a random sample and thus its results can not be generalised to all New Zealand expatriates. In addition, it is likely to represent the views of New Zealanders overseas who have relatively stronger ties to their New Zealand identity, as those whose identity as New Zealanders has perished more significantly would be unlikely to be connected into a Kiwi-focused organisation such as KEA. The survey was completed by a relatively small proportion of respondents living in Australia, meaning that the sample is not representative with regard to the geographic spread of New Zealand’s overall diaspora. A further limitation of the data is that it asks people about their *intentions*, rather than measuring their actual behaviour. Research has shown that people leaving their home country almost always *intend* to return, but that many stay away significantly longer than planned (Glaser, 1978, cited in Lidgard and Gilson, 2002) or do not return at all. However, Gubhaju and De Jong (2009:33-34), in their study of intentions to migrate, make a convincing argument for the validity of studying intentions, arguing that a significant body of research in social psychology has demonstrated a strong link between intentions and behaviour, with migration research also supporting the validity of this relationship. They argue that in earlier migration research,

...intentions to migrate were strong predictors of more permanent actual migration behaviour two years later, controlling for numerous microeconomic theory factors, such as human capital, household economy, local labour market, and demographic variables (De Jong, 2000). Other migration intentions-behaviour studies support the validity of migration intentions as an appropriate concept for migration decision-making research...

The KEA dataset also has a number of strengths. While the data is not representative of all New Zealand expatriates, it is the largest collection of data on the views of expatriate New Zealanders, and has a sufficient sample size to allow sub-group analysis. In addition, the level of detail in the information collected, and the large sample size, allows analysis of the link between intentions to return to New Zealand and a variety of personal and employment factors that are relevant to the concept of lifestyle in New Zealand, such as working hours and parental status. Knowing the intentions of expatriates allows analysis of differences between those who are planning to return and those who are not.

At the time of data collection, in 2006, the labour market was particularly strong with very low unemployment in New Zealand and in the most common expatriate destinations. Because of this, respondents would have had a degree of confidence with

regard to job security overseas and finding employment in New Zealand when they returned, so it is likely that this may have influenced ratings of the importance of economic factors.

The KEA survey gathered information about 18,002 respondents. However, because some respondents also filled in questionnaires for other family members, there were 58 responses from children aged 14 and under, and 147 responses for or from individuals aged between 15 and 19. Because much of the analysis of the data for this paper concerns intentions to stay overseas or return to New Zealand, and because in most cases, this decision would rest with the parents or guardians of these age groups, information for these youngest respondents has been excluded, leaving a sample of 17,797.

### Location of respondents

Survey respondents were based in 61 countries, but the sample was comprised mostly of New Zealanders who were living in England (n=7,070), Australia (n=4,674) and the United States (n=2,064). Table 1 below shows the geographic distribution of survey respondents, detailing the countries where there were 50 or more respondents.

**Table 1: Geographic spread of the KEA survey respondents**

Country	Number of respondents	% of total sample
England	7070	39.7
Australia	4674	26.3
USA	2064	11.6
Canada	416	2.3
Scotland	313	1.8
Japan	256	1.4
Singapore	230	1.3
Rep. of Ireland	230	1.3
China	196	1.1
Netherlands	189	1.1
Hong Kong	183	1.0
France	178	1.0
United Arab Emirates	168	0.9
Germany	106	0.6
Switzerland	102	0.6
Thailand	102	0.6
South Korea	72	0.4
Spain	66	0.4
Wales	52	0.3
Denmark	50	0.3
Italy	50	0.3
South Africa	50	0.3
Sweden	50	0.3
Other countries	830	4.7
Non-response	100	0.6
<b>TOTAL</b>	<b>17797</b>	<b>100.0%</b>

## **Excluding expatriates living in Australia**

Bryant and Law (2004) estimate that 77 percent of New Zealand's expatriate population is based in Australia, and Hugo et al (2008) note that there were more than 500,000 New Zealanders living in Australia in mid-2007. However, in the KEA sample, just over a quarter of respondents were based in Australia, meaning that the sample is not representative with regard to the geographic spread of New Zealand's diaspora.

Moving from New Zealand to Australia represents an expatriate experience considerably different to the experience of moving from New Zealand to most other countries. Barriers to moving across the Tasman (or, for some New Zealand-born Pacific populations, to another location in the Pacific Islands) are significantly less than those to many other countries. For example, airfares are considerably lower, the vast majority New Zealanders are legally entitled to work in Australia<sup>6</sup>, there is no time limit for how long New Zealanders can stay in Australia, and there are few visa requirements. In addition, relative similarities in the cost of living in Australia mean that many expatriates can move without firm employment options in place. In contrast, for example, New Zealanders can only remain in the United States for 90 days, with longer term stays only possible if the migrant is successful in obtaining an employment-related visa. Employment without such a visa is illegal, and the cost of living is very high in many of the major centres where finding employment is most likely, such as New York or Los Angeles, making moves without definite employment in place a costly exercise.

Green et al (2008) argue that cheap air fares and improved communication technology mean that migration does not necessarily result in separation from physical and communication ties with one's country of origin, with this being particularly the case for trans-Tasman moves due to New Zealand's geographical proximity to Australia.<sup>7</sup> As a result, moves to Australia are perceived as more similar to internal migration within New Zealand (Lidgard and Gilson, 2002), with those who move tending to be older and citing economic reasons for their decision (Green et al, 2008).

A number of authors have noted that the New Zealand population in Australia has a similar profile to the total New Zealand population. For example, Hugo (2004) found that New Zealanders in Australia are representative of the entire NZ population, and, unlike New Zealand's diaspora in other countries, the highly educated and skilled are not over-represented. In addition, Hugo et al (2008: 25-26) note that "there is little difference between the New Zealand citizen population in Australia and the Australia-born," and that "international migration between Australia and New Zealand has more similarities with internal migration patterns within Australia than it does with other international migration flows. This reflects the fact that despite Australia and New Zealand being separate nation states, they largely form a single labour market." Green et al (2008) note that New Zealand and Australia's close physical, historical

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<sup>6</sup> Although New Zealanders cannot obtain Australian social security unless they have Australian permanent residence. New Zealanders who moved to Australia after February 2001 have to formally apply to obtain permanent residence and pass a points-based test.

<sup>7</sup> Flight timetables and connections mean that in some cases, it may be quicker, and perhaps cheaper, to fly from Sydney to Queenstown than to fly to Queenstown from a town in the far north of New Zealand.

and cultural connections add to a feeling of trans-nationalism amongst migrants to and from both countries.

Relative to the proportion of New Zealand’s diaspora living in Australia, a relatively small proportion of Australian- based expatriates responded to the KEA survey. As a result, respondents in the United Kingdom and the US were over-represented in the KEA sample, a pattern which has been evident in other research. Lidgard and Gilson (2002) suggest that this in part because trans-tasman travel is viewed as similar to travel within New Zealand, but the geographical spread of this sample may also be due to the greater focus and profile KEA has in countries other than Australia.

There is a risk that the views and experiences of New Zealanders living in Australia may skew the results of any analysis of the total New Zealand diaspora if people moving to Australia have qualitatively different characteristics from those New Zealanders living elsewhere. Table 2 and Figure 1 show that the two groups of expatriates are significantly different. Table 2 shows that respondents living in countries other than Australia tending to be younger: 62 percent of the expatriate sample living in countries other than Australia were under the age of 35, compared with 47 percent of those in Australia.

**Table 2: Age structure of New Zealand expatriates in Australia and other countries, KEA survey<sup>8</sup>**

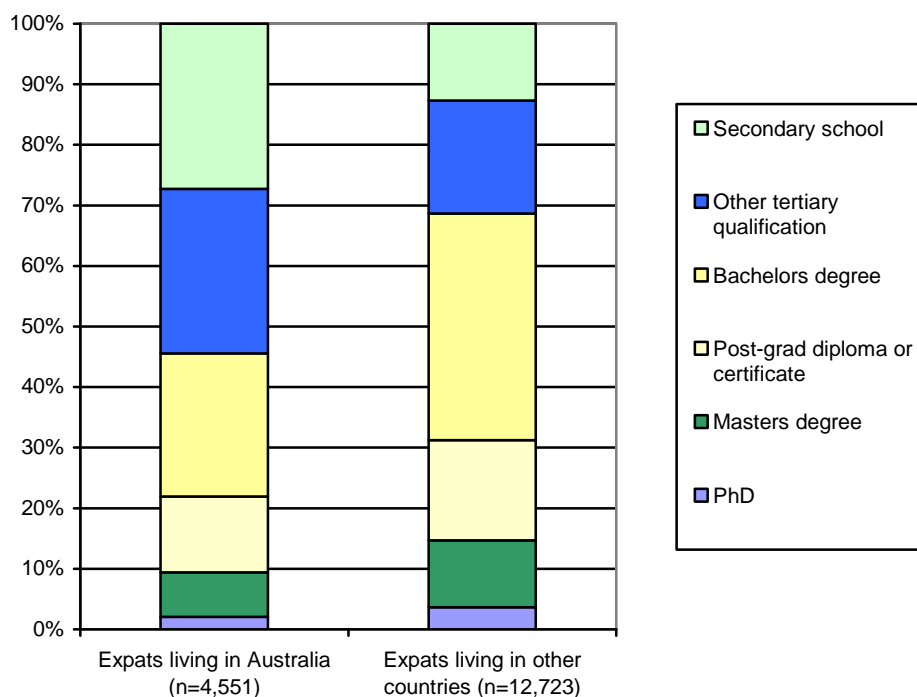
Age	Expats living in Australia % (n=4,674) <sup>9</sup>	Expats living in other countries % (n=13,123)
20-24	7.3	5.7
25-29	19.4	30.4
30-34	20.6	25.8
35-39	14.3	14.3
40-44	11.0	7.9
45-49	9.1	5.0
50-54	7.3	4.2
55-59	6.2	3.8
60-64	2.8	2.0
65+	2.2	1.0

Figure 1 also shows differences in qualifications between KEA respondents living in Australia and those living elsewhere. Those living in Australia were more similar to the New Zealand population as a whole, while those living elsewhere were significantly more highly qualified.

<sup>8</sup> Totals in this and other tables may not add to 100 percent due to rounding. In addition, the numbers of respondents in each group varies across tables due to the exclusion of non-responses.

<sup>9</sup> The numbers of respondents in this and other groups in tables in this paper vary due to some respondents not providing the information for particular questions (ie. Non responses are excluded from the totals.)

**Figure 1: Highest qualifications of NZ expatriates, KEA survey<sup>10</sup>**



Because New Zealand expatriates living in Australia tend to be more like the total New Zealand population, and because the experiences of these expatriates are significantly different from those moving further afield, the analyses that follow exclude those expatriates living in Australia. With those living in Australia excluded, the total sample is reduced to n=13,123. It is for this group that results of analysis are presented.

### **A brief description of expatriates outside Australia**

The KEA survey provides a wealth of information about the characteristics of a large group of New Zealand expatriates. However, it is important to note that while it is likely that the group of respondents is typical of New Zealand's expatriates, the following discussion is limited to those who responded to the survey, and is not necessarily representative of New Zealand's expatriate population as a whole.

Analysis of the sample shows that respondents were disproportionately younger and more highly qualified than the general resident population. Almost two thirds (62 percent) the sample were between the ages of 20 and 34, relative to 28 percent of the 20 and over population resident in New Zealand. Just under a third (31 percent) of respondents held a post-graduate qualification, compared with 5 percent of the resident population aged 20 and over<sup>11</sup>. Virtually all of the respondents (98 percent) were New Zealand citizens, but significant numbers had partners who were not, with

<sup>10</sup> Interestingly, the KEA survey did not offer a "no qualifications" response to the question "What is your highest educational qualification?" It is likely that some of the 400 respondents who did not answer this question were those with no formal qualifications, but it is impossible to estimate the proportions of non-responses and those without qualifications.

<sup>11</sup> Census 2006. To ensure alignment of the samples, census figures include only the usual resident population aged 20 and over, as respondents younger than 20 were excluded from the KEA analysis.

56 percent of men with partners and 49 percent of women with partners stating that their partners did not hold NZ citizenship. After salaries were converted into New Zealand dollars, respondents reported much higher incomes, with more than a third reporting incomes above \$100,000, compared with 4 percent of the resident population<sup>12</sup>.

More than half of the expatriates who participated in the KEA survey had been away from New Zealand longer than 2 years, with 55 percent indicating they had been away for 3-5 years or longer. This suggests that the anecdote of expatriates returning to New Zealand following a 2-year working holiday is only a one portion of New Zealand's diaspora<sup>13</sup>. However, only 16 percent of the sample had been living overseas for more than 10 years. Analysis by gender showed that there were some differences between men and women, with women somewhat more likely to have been away from New Zealand for a shorter period<sup>14</sup>.

#### **IV. Intentions to return to New Zealand: who plans to come back?**

More than half (57 percent) of the expatriates participating in the KEA survey listed a return to New Zealand as part of their future plans, while 12 percent were planning to remain overseas permanently. Almost one third (30 percent) did not know or had not yet decided whether they would return.

As shown in Figure 2, the most highly qualified expatriates were more likely to be planning to remain overseas with only 36 percent planning a return to New Zealand (compared with 58 percent of those without PhDs), and one quarter (27 percent) planning to remain overseas, compared with 12 percent of expatriates without this qualification.

When the sample of expatriates was further broken down by education, there was a clear correlation between higher educational qualifications and intentions to remain overseas. Figure 3 shows that those with higher qualifications were less likely to report intending to return to New Zealand, and more likely to say they would be remaining abroad permanently. Those with the highest qualifications were also somewhat more likely to report that they had not yet decided or didn't know what they would do in the future with regards to returning to New Zealand.

Intentions to return to New Zealand decreased by age, with older respondents significantly less likely to be planning to return to New Zealand. As shown in Figure 4, half (50 percent) of those over 65 were planning to stay overseas permanently, compared with only 6 percent of those aged between 20-24, while one quarter (26 percent) of the oldest age group planned to return to New Zealand, compared with two thirds (70 percent) of the youngest group.

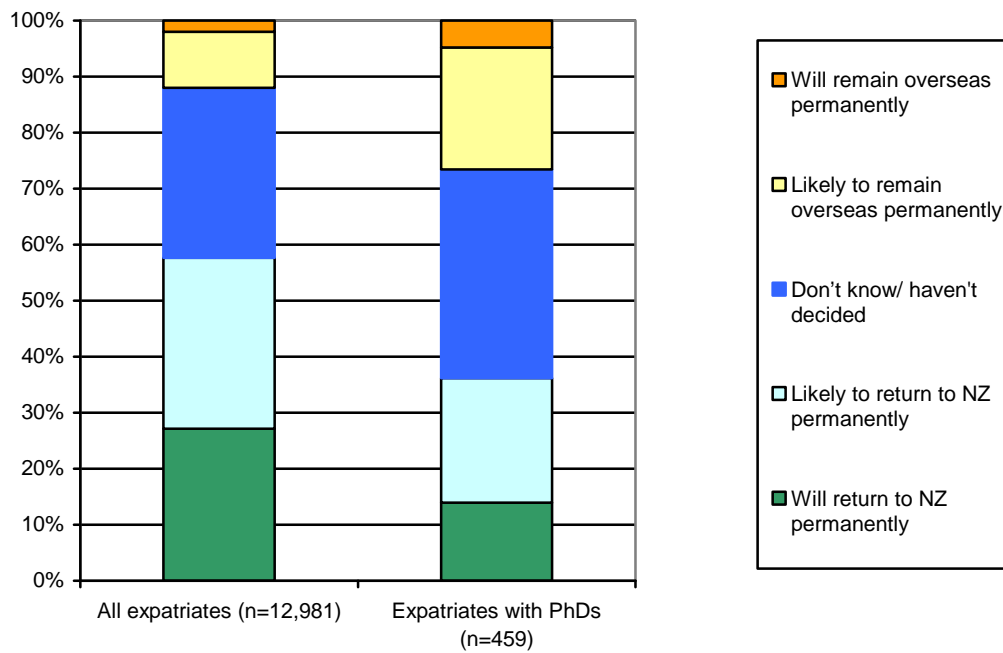
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<sup>12</sup> However, respondents did not report cost-of-living figures. It is likely that higher incomes are balanced by high costs.

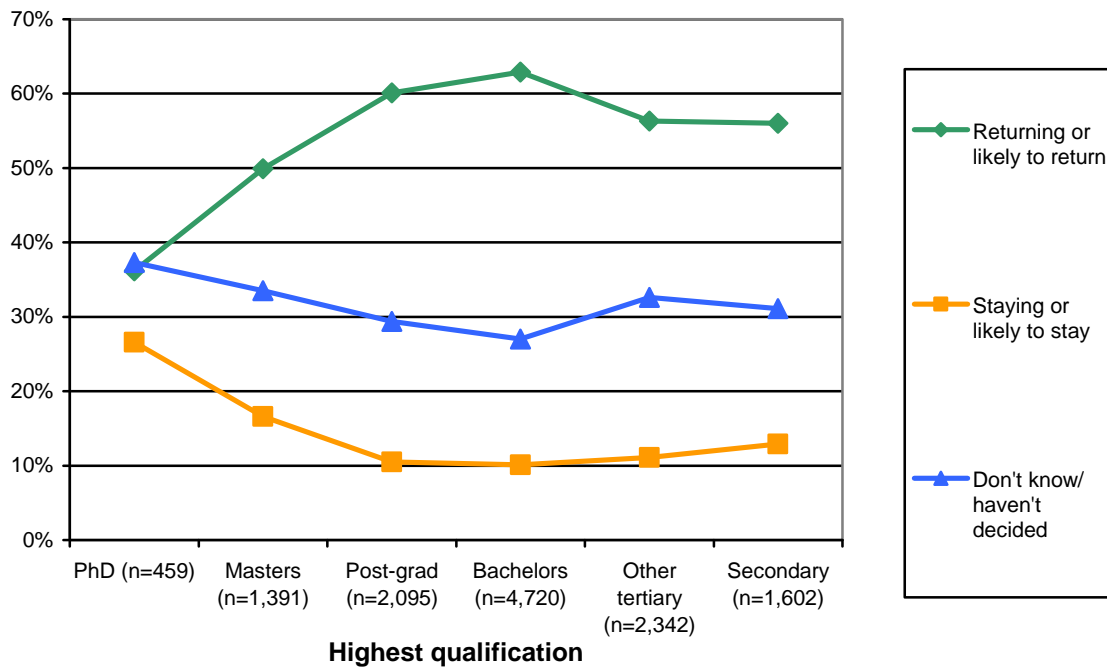
<sup>13</sup> Unfortunately, due to the overlap of categories (ie 1-2 years, 2-3 years and 3-5 years), it is not possible to calculate the exact proportions of those who had been away 2 years, as respondents with an absence of two years could have selected one of two possible categories. This means that it is likely that an even greater proportion of respondents were not part of the "2-years OE" group.

<sup>14</sup> Further analysis of the sample is available in Appendix A.

**Figure 2: Expatriate's intentions to return to New Zealand**



**Figure 3: Expatriates intentions to return by highest qualification**



**Figure 4: Plans to return to New Zealand, by age (n=12,981)**

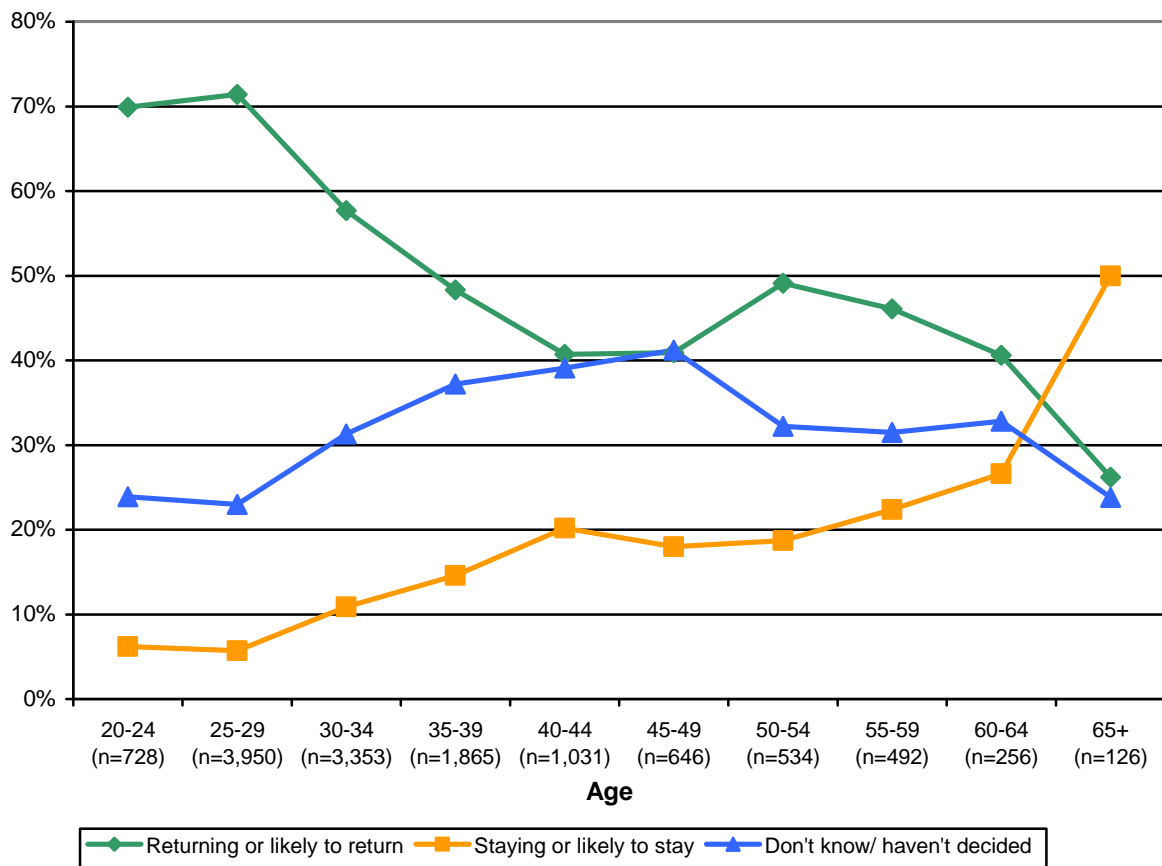
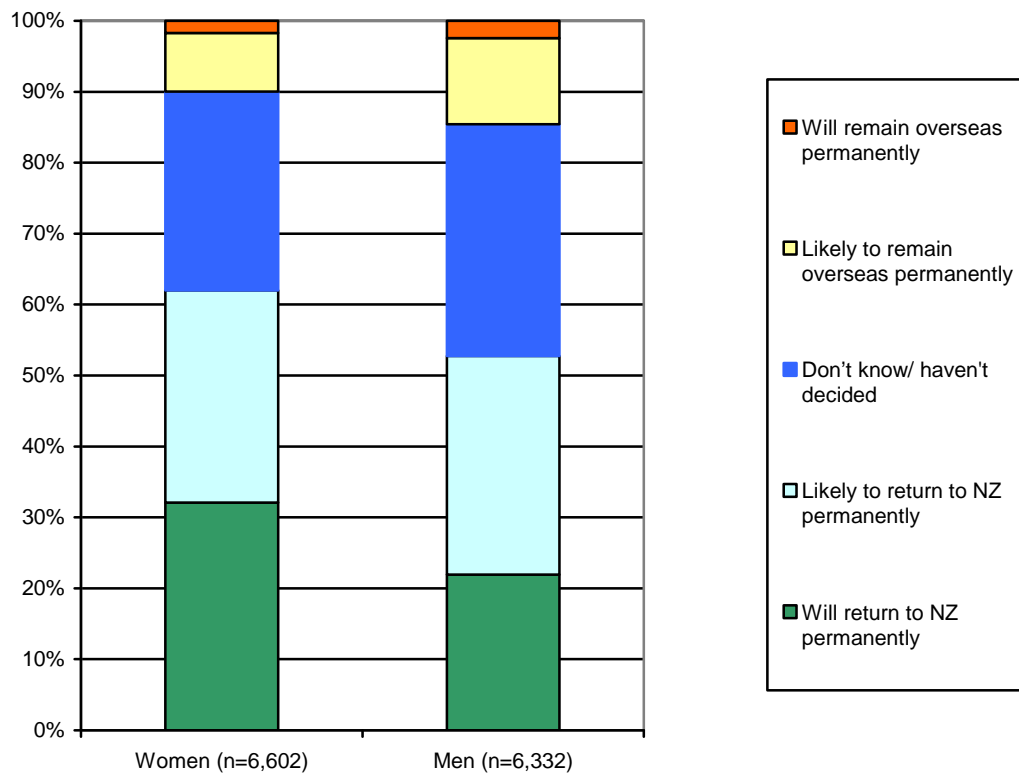


Figure 5 shows that women were more likely to report that they were returning to New Zealand than men, with 32 percent of women reporting they would definitely return, compared with 22 percent of men. Overall, 62 percent of female expatriates reported they were returning or were likely to return, compared with 53 percent of men.

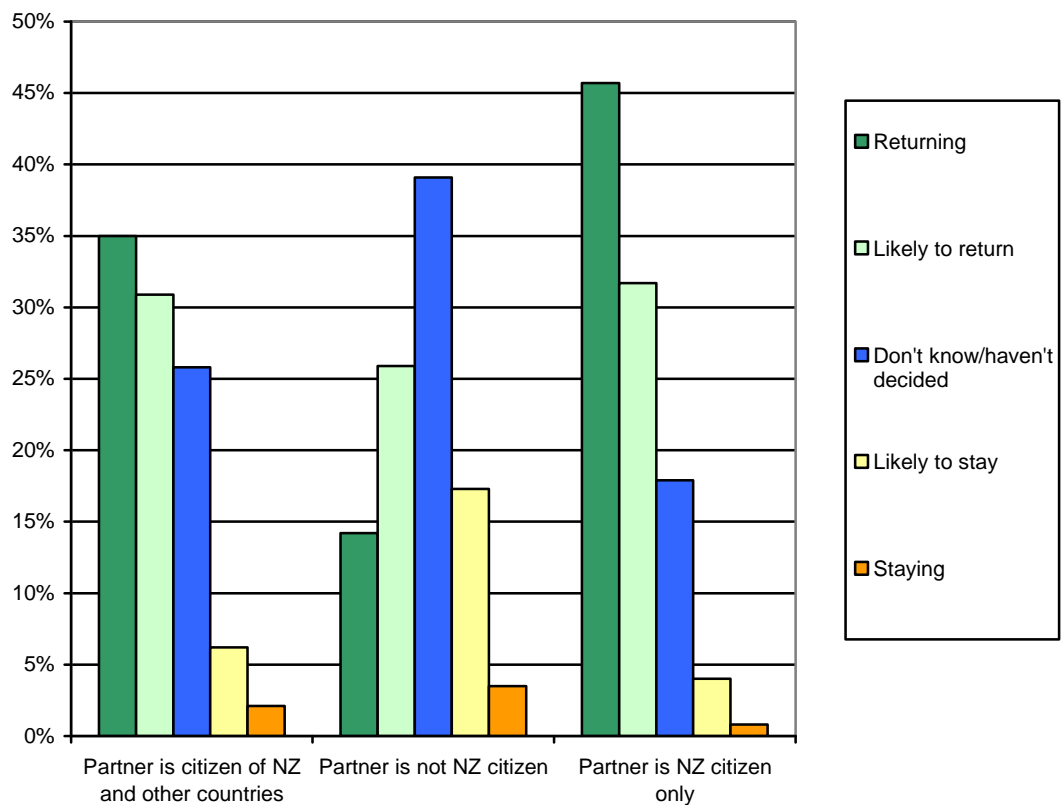
As shown in Figure 6, respondents whose partner (if they had one) was solely a New Zealand citizen were more likely to report they were definitely returning to New Zealand to live, with almost half of this group (46 percent) indicating they were returning, and a further 32 percent indicating they were likely to return. In contrast, only 14 percent of those whose partner was not a New Zealand citizen reported definitely that they would return to New Zealand, with a further 26 percent reporting a likely return, while almost 40 percent of this group were as yet undecided as to their intentions.

However, as Figure 7 shows, there were some gender differences in the intentions to return of those with foreign partners, with men who had a partner with foreign citizenship somewhat less likely to be planning to return to New Zealand than women with a partner who held foreign citizenship.

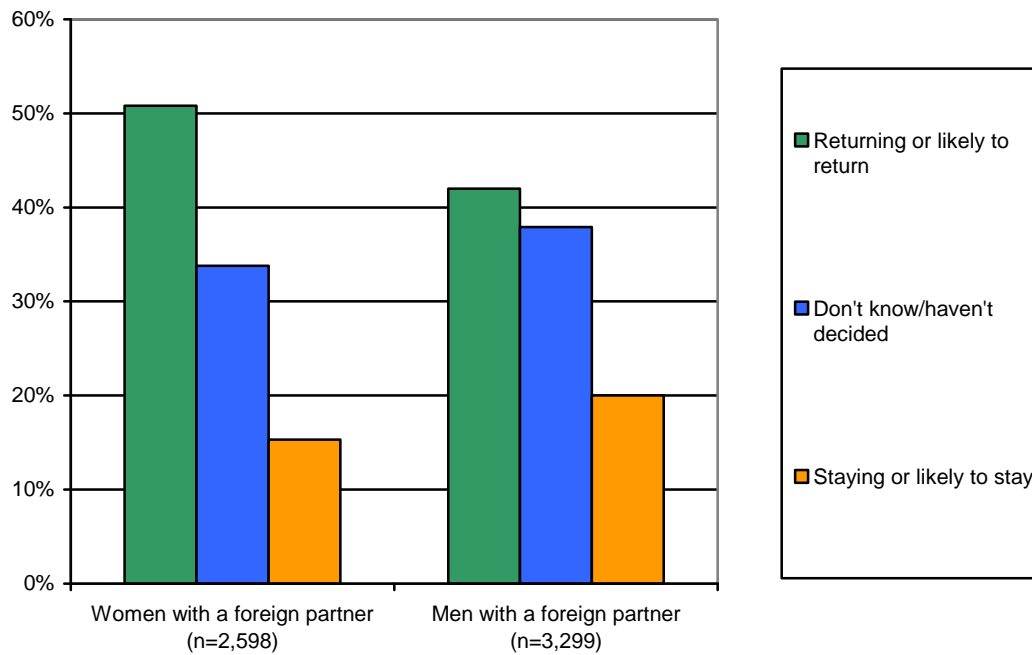
**Figure 5: Plans to return to New Zealand by gender**



**Figure 6: Plans to return, by citizenship of partner (n=8,698)**

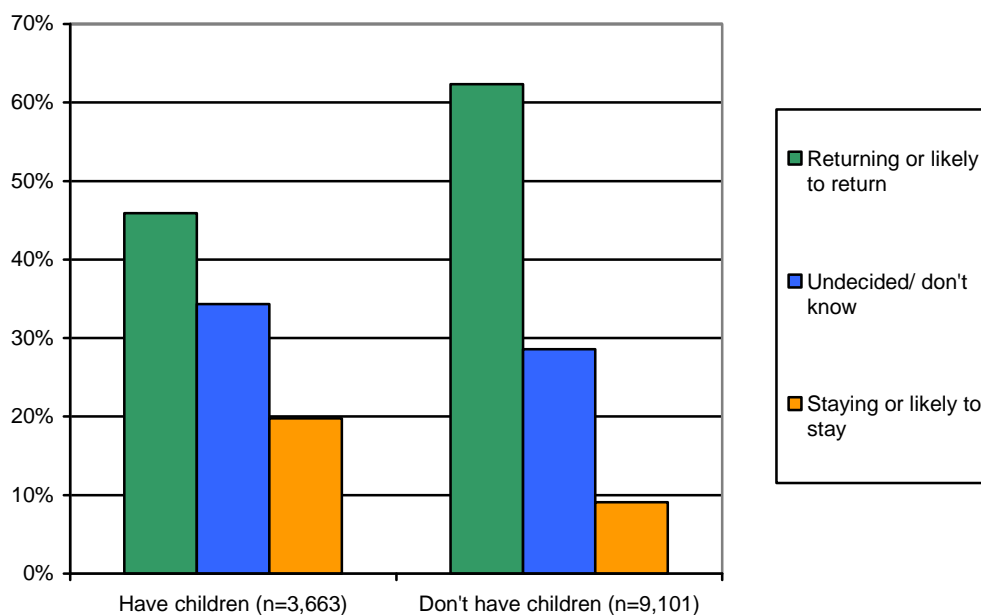


**Figure 7: Plans to return, by gender and citizenship status of partner**



Respondents with children were also less likely to be planning to return to New Zealand. Figure 8 shows that less than half of those with children were definitely or likely to return home, while almost two thirds (62 percent) of those without children were planning to return to New Zealand. Only 9 percent of those without children were planning on staying overseas permanently, while the proportions of those with children who planned to stay overseas were more than twice that amount.

**Figure 8: Plans to return, by children**



## Timing of return to New Zealand

The majority of expatriates who planned to come back to New Zealand planned to do so in one to five years time. Table 3 shows the timing of those who intended to return, with less than a fifth planning to be away for more than 5 years from the time of the survey.

**Table 3: Timing of planned return to New Zealand**

	<b>Respondents planning to return to New Zealand % (n=7,297)</b>
Within 1 year	15.4
1-5 years	66.8
5+ years	17.9

## V. To return or not? Differences between expatriates who plan to return to New Zealand and those who don't

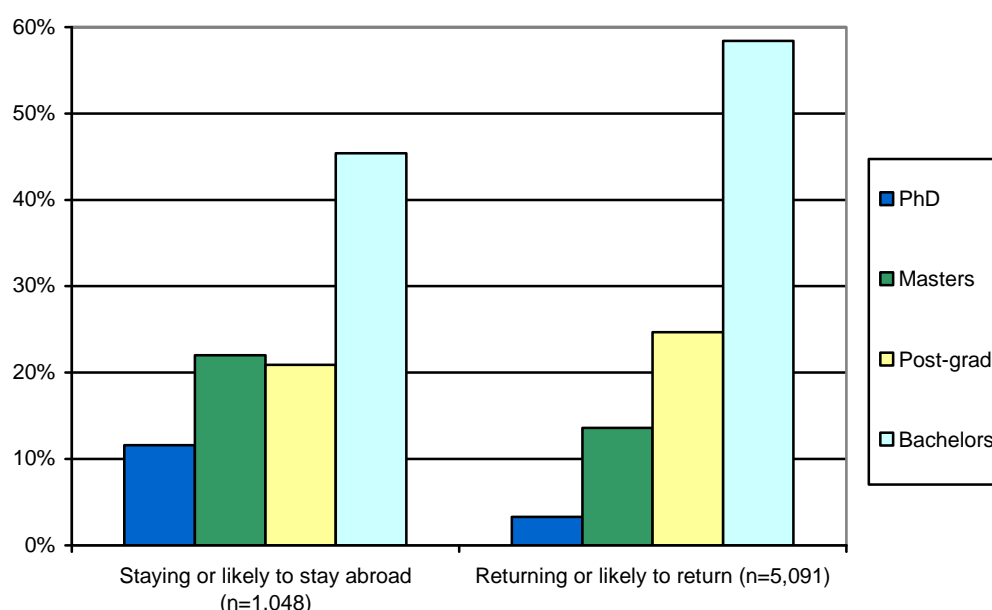
One of the advantages of the KEA survey is that it asked respondents about their intentions to return, and received responses from sufficient numbers to allow comparison between those who did and did not intend to stay overseas. This section of the paper explores the differences between the two groups of expatriates.

### Education

Expatriates who planned to stay overseas were disproportionately more highly qualified and more likely to hold post-graduate qualifications than those who planned to return to New Zealand. Almost a quarter (23 percent) of those who planned to stay overseas held masters or doctoral degrees, compared with 12 percent of those who were returning or likely to return to New Zealand, and 14 percent of the total sample.

When only those who held standard tertiary qualifications were considered, there was an even more marked difference between the qualifications of those staying abroad and returning to New Zealand. As shown in Figure 9, a third (33 percent) of those staying abroad held masters or doctorate degrees, compared with 17 percent of those returning to New Zealand. It is likely that this may in part be because it was the most highly qualified expatriates who were the most able to secure employment (and the related visas) that allowed them to reside in another country for an extended period.

**Figure 9: Tertiary qualifications of those returning to New Zealand or staying abroad**



### Age and time spent away from New Zealand

Those who were planning to return to New Zealand were disproportionately younger than those who planned to stay abroad. More than 70 percent of those planning to return were under 35 (compared with 61 percent of the total sample), while this age group made up only 40 percent of those staying or likely to stay abroad. Those in the older age groups were more disproportionately more likely to be planning to stay overseas, with those aged 40 and over making up 42 percent of those intending to stay away and only 17 percent of those planning to return, but comprising 28 percent of the total sample.

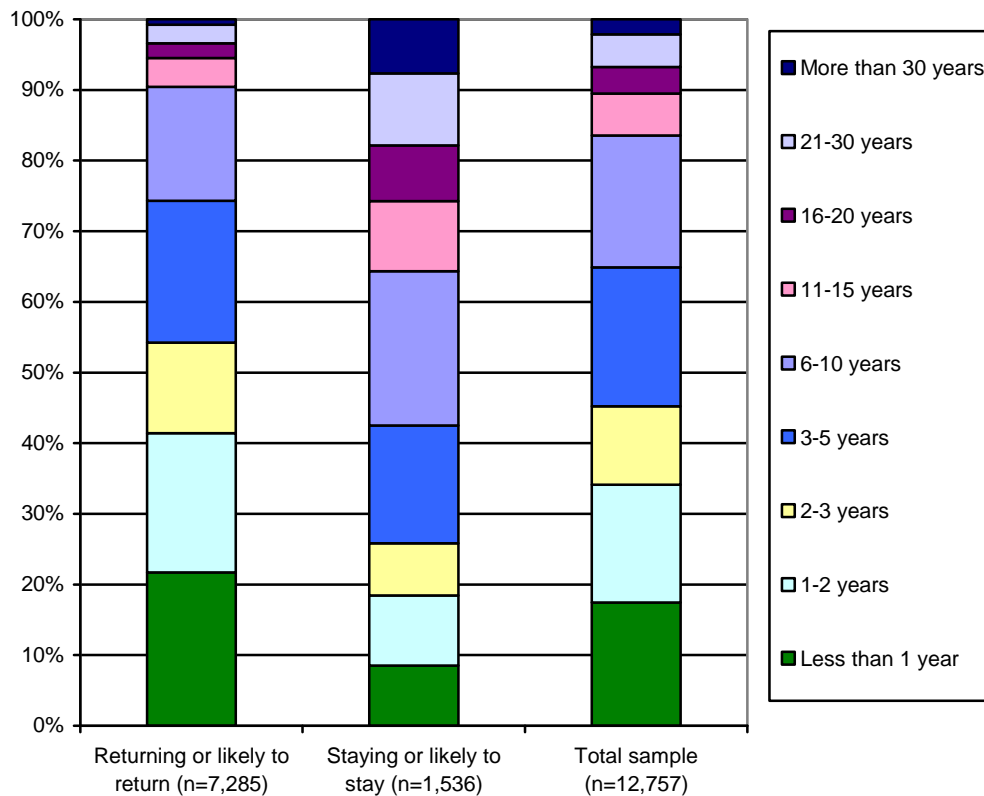
**Table 4: Age and intentions to return to New Zealand**

	Returning or likely to return % (n=7,474)	Staying or likely to stay % (n=1,572)	Total sample % (n=13,123)
20-24	6.8	2.9	5.7
25-29	37.7	14.2	30.4
30-34	25.9	23.3	25.8
35-39	12.0	17.3	14.3
40-44	5.6	13.2	7.9
45-49	3.5	7.4	5.0
50-54	3.5	6.4	4.2
55-59	3.0	7.0	3.8
60+	1.8	8.3	3.0
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

The relationship between age and intentions to return is likely to be associated with the length of time spent away from New Zealand. Younger people are less likely to have lived overseas for extended periods, and the length of tenure abroad is limited by years alive, with 25 year olds unable to report being overseas for more than 30 years!

Figure 10 shows that those who were away for shorter periods were disproportionately more likely to return or be likely to return to New Zealand, while those who had been overseas for longer periods were more likely to be planning to remain overseas. For example, those who had been away for less than 2 years made up 40 percent of those planning to return to New Zealand and only 18 percent of those intending to stay abroad (but 33 percent of the total sample) while those who had been away for more than 5 years made up 56 percent of those planning to stay overseas, but only 25 percent of those planning to return and 34 percent of the total sample.

**Figure 10: Intentions to return and tenure away from New Zealand**

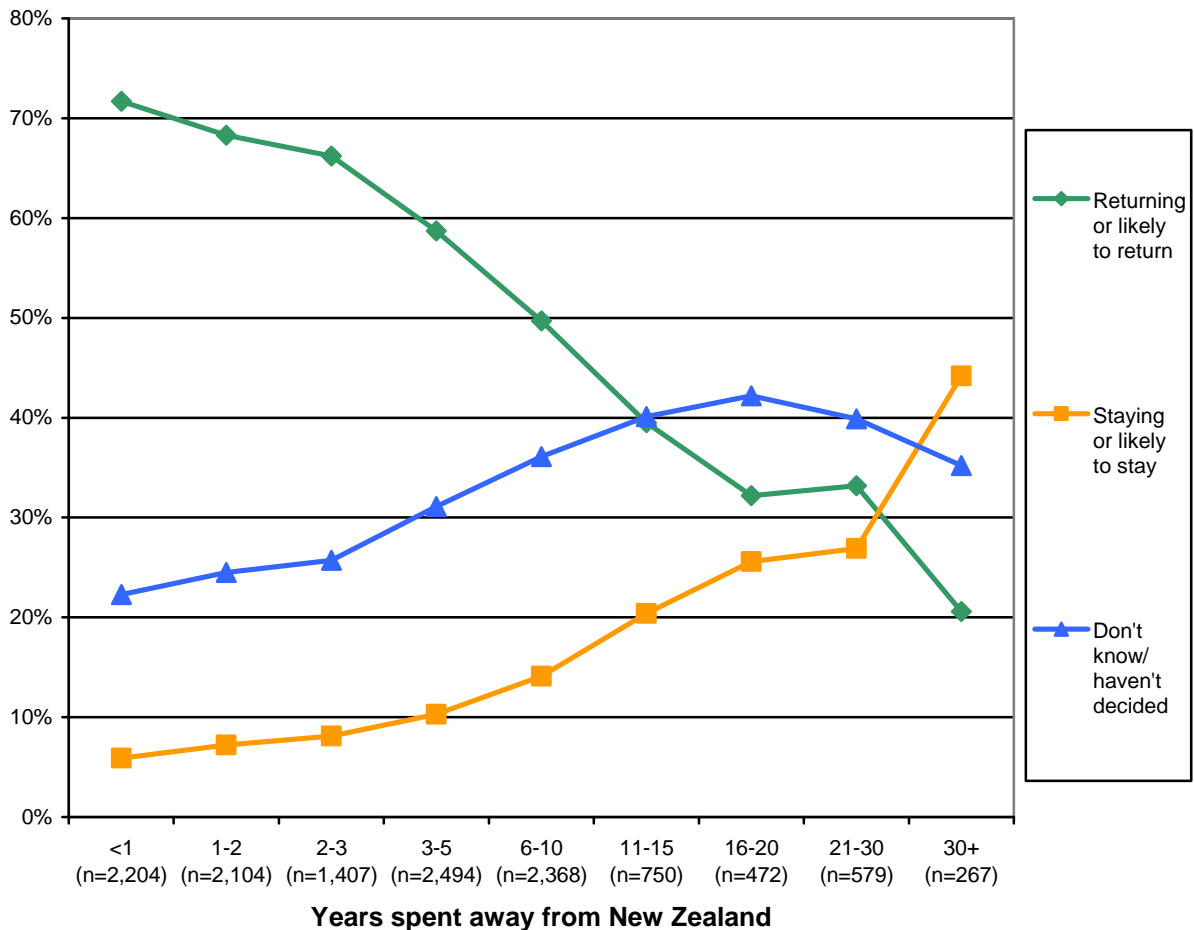


Similarly, Figure 11 shows that as the length of time a respondent has been away from New Zealand rises, the likelihood of their planning to return decreases while uncertainty over future moves increases. Almost three quarters of those who had been away less than a year planned to return, while less than a third of those who had been away for more than 15 years planned to do so. Less than a quarter of those with the shortest absence from New Zealand indicated uncertainty about their future, while this rose to more than 40 percent amongst those who has been away from New Zealand for 16-20 years. Amongst those who had been away from New Zealand for the

longest period (more than 30 years), only 20 percent planned to return to New Zealand, while 44 percent were intending to stay abroad. More than a third (35 percent) expressed uncertainty about their future place of residence.

Figure 11 also shows no significant drop off at the 2 year, 3 year or 5 year mark, again showing that the anecdote of the short-term OE fails to represent the experiences of many expatriates.

**Figure 11: Tenure away from New Zealand and intentions to return**



### Gender and partner citizenship status

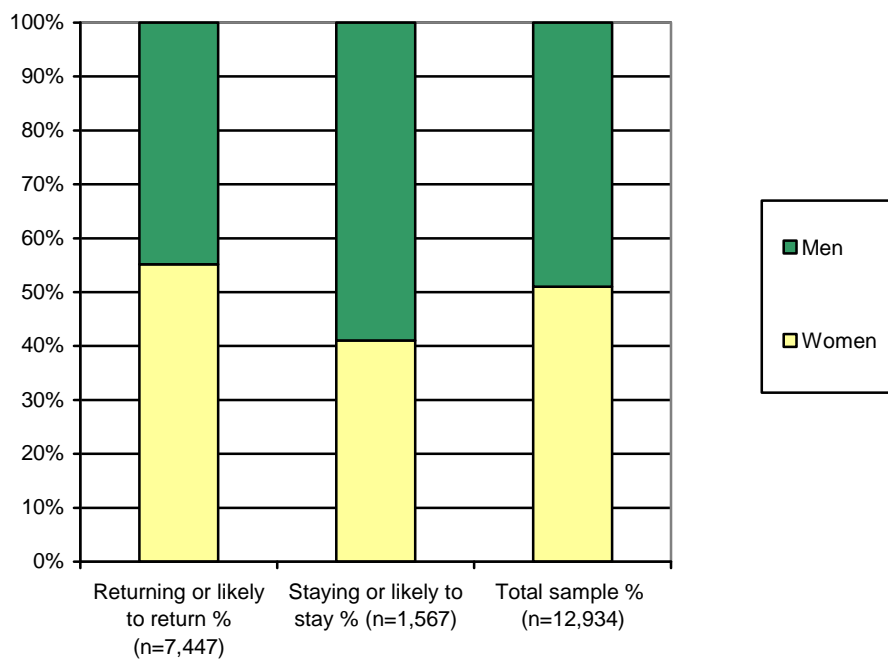
Those who were planning to return to New Zealand were disproportionately more likely to be women. Men were disproportionately more likely to be residing permanently overseas, making up around 45 percent of those returning, but 59 percent of those who planned or were staying away permanently, compared with 49 percent of the total sample.

The partner citizenship status of respondents with partners showed a relationship to intentions to return, with those who had partners with foreign citizenship being much more likely to be planning to stay overseas permanently. It is likely that this is due in

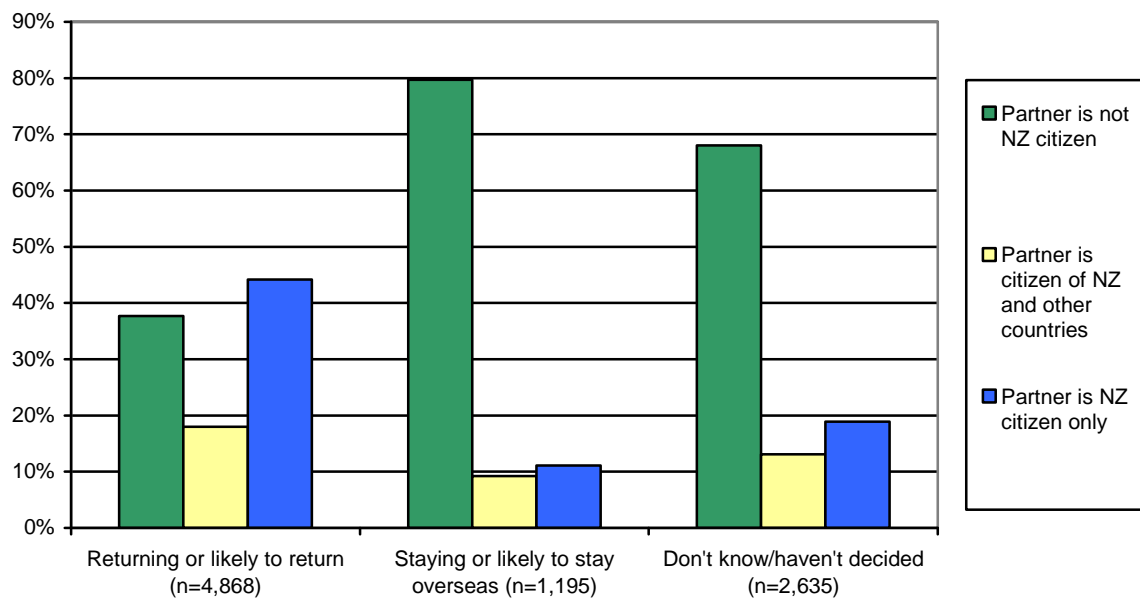
part to the ability to remain in a foreign country, as marriage to a foreign citizen may afford residency rights not available to those without such a tie.

Figures 12 and 13 show the relationship between intentions to return to New Zealand and gender (Figure 12), and intentions to return to New Zealand and partner citizenship status (Figure 13). Figure 14 combines gender and citizenship status, and illustrates that there were some gender differences in the relationship between partner citizenship status and intentions to return to New Zealand, with women with non-New Zealander partners more likely to be returning to New Zealand than men.

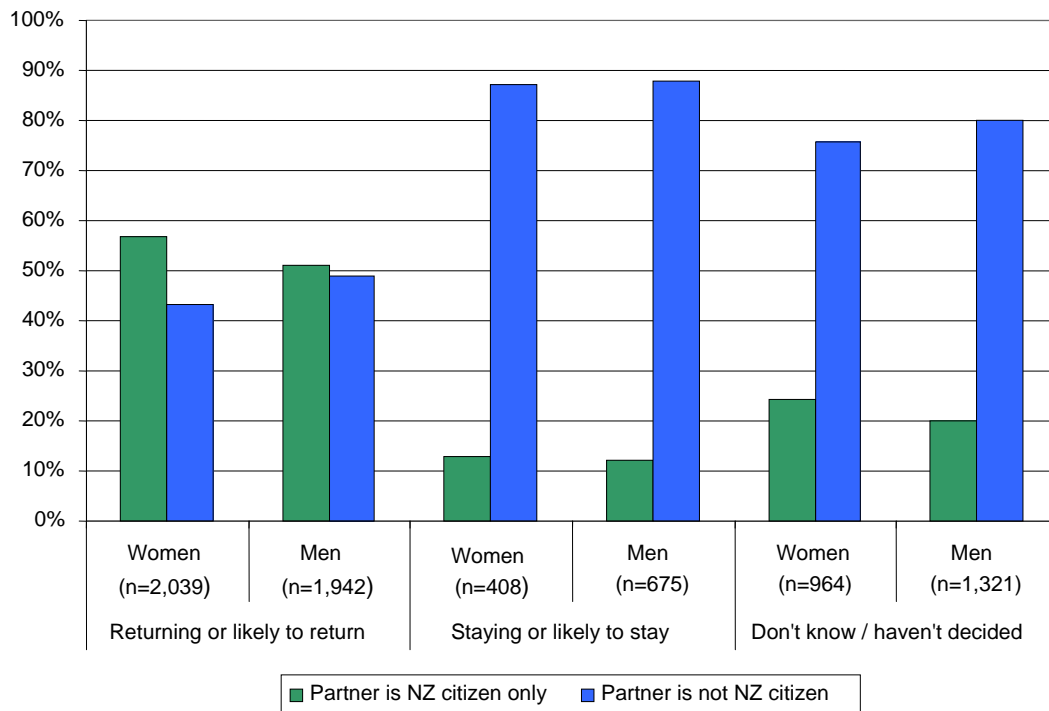
**Figure 12: Gender and intentions to return to New Zealand**



**Figure 13: Partner citizenship and intentions to return to New Zealand**



**Figure 14: Partner citizenship, gender and intentions to return to New Zealand**



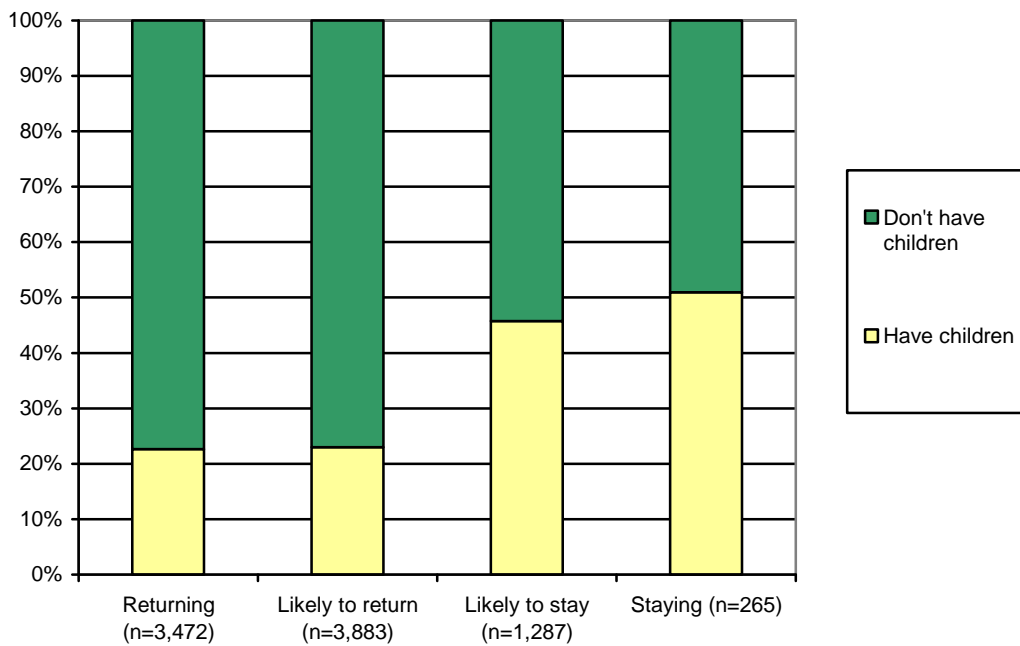
**Family status**

Figure 15 shows that those who were returning to New Zealand were less likely to have children. Less than a quarter (23 percent) of those who were returning or likely to return to New Zealand had children, compared with 46 percent of those who were likely to stay overseas and 51 percent of those who reported they would definitely be living permanently outside New Zealand.

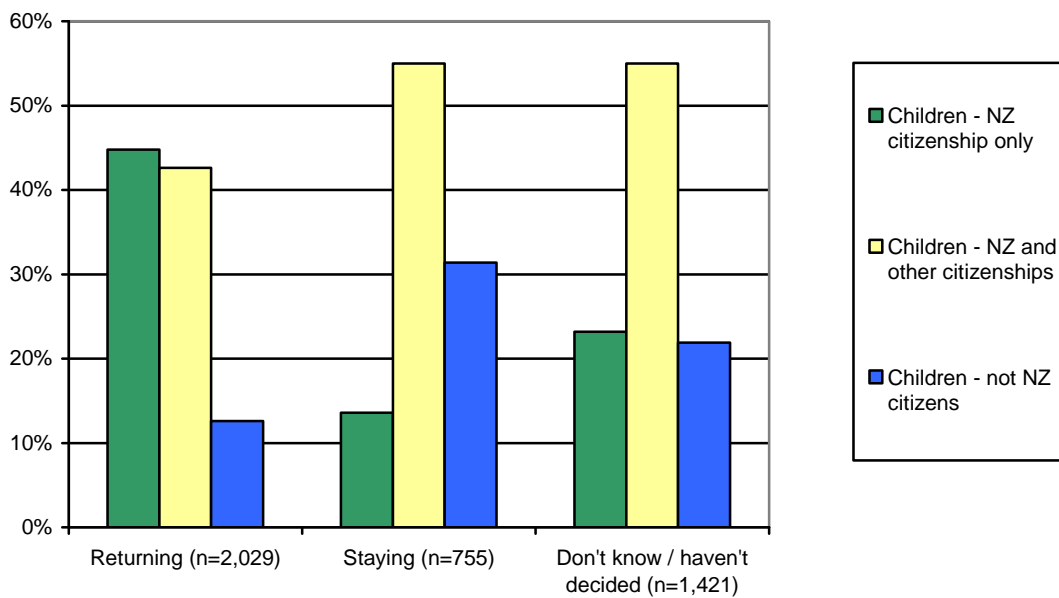
The data does not provide the reasons that those with children would be returning to New Zealand at lesser rates than those with children; however, it is likely that this is a result of a number of factors, including: having a foreign partner, respondents having a more established life (as opposed to those who intend to be away from New Zealand on a temporary basis), and age. It is also possible that those who have children overseas have a chance to ‘test the anecdote’ about New Zealand being the best place to raise a family, and, having experienced family life overseas, have decided that the lifestyle afforded by their country of residence is to their liking.

Figure 16 also sheds some light on the relationship between children and intentions to return to New Zealand. When looking only at respondents with children, those who reported intentions to stay away from New Zealand or who were undecided were more likely to have children who were either dual citizens of New Zealand and another country, or who were not New Zealand citizens. In contrast, those who reported intentions to return to New Zealand were the most likely to have children who held New Zealand citizenship only.

**Figure 15: Parental status and intentions to return to New Zealand**



**Figure 16: Citizenship status of children and intentions to return**



## VI. Reasons to return to New Zealand: The importance of lifestyle

The OE anecdote suggests that Kiwis return from their OE to New Zealand for the lifestyle, and because it's a great place to raise a family. But to what degree do

expatriates who are moving around the world consider lifestyle as a driver for their return? The KEA data suggests that lifestyle is the key reason expatriates return to New Zealand, but other research has found that other drivers are more significant. This section of the paper considers other research in this area, and explores the importance of lifestyle relative to other factors.

### **Lifestyle as a motivator for returning to New Zealand**

Earlier research utilising human capital theory suggested that the two primary drivers for migration movements are financial gains and career opportunities (see Cooke 2008 for a good description of earlier research on this topic). These factors have also been identified as key drivers in the decisions of expatriates to return to their home country. For example, Harvey (2009) found that job or business prospects were the most important factor encouraging expatriates to return home, and that highly skilled expatriates would not return to their home countries if good professional and job opportunities weren't available. Similarly, while it wasn't the primary reason for return, Lidgard and Bedford (1994) found that around half of male respondents and 40 percent of female respondents mentioned economic factors, such as unsatisfactory employment prospects overseas and perceived work and business opportunities in NZ, as major factors in their return.

However, a number of researchers (including Gibson and McKenzie, 2009; Chaban et al, 2009; Carr et al, 2005; Pio, 2005; Khoo et al, 2007; Hugo et al, 2003) have argued that research on migration has typically under-estimated the importance of lifestyle factors in migration decisions, with this work arguing that migrants cite lifestyle as an important factor in their decision to move. Research by Inkson et al (2004) and Carr et al (2005) found that the migration of New Zealanders was driven by five factors, namely economic factors, career factors, family factors, political factors, and cultural and lifestyle factors, while Khoo et al (2007:499), in a study of the drivers of migration of skilled workers to Australia, argues that "...the largest percentage of migrants indicated that they had come because of a liking for Australia's lifestyle and climate, a reason which is unrelated to employment or economic factors, which are usually important in labour migration." Similarly, as noted, the New Zealand Department of Labour's longitudinal study of immigrants found that lifestyle and pace of life was the primary reason given by migrants for their move.

Examining expatriates in particular, Hazan and Albert (2006) found that culture in the home country was the second most important reason driving expatriates to return, while Harvey (2009) also found that lifestyle was an important factor in expatriates decisions to return home. As well as lifestyle, a number of researchers found that family reasons were a key drivers, with 83 percent reporting the main reason they had returned home was because they had family in New Zealand in Lidgard's (2001) study of returning migrants.

The KEA questionnaire asked respondents to select the main reason they were planning to return from a list which included New Zealand's enhanced lifestyle and culture, family or marital connections, job and income prospects and opportunities for other family members. However, notably absent from this list was the expiry of visa documents as the reason for a (forced) return. It is likely that the lack of viable

residence options is a driver for the return of many expatriates, and as such, this should be kept in mind when considering the findings reported below.

An additional problem is that the questionnaire asked respondents to select *one* response that best described their main reason for returning. As the literature shows, decisions to move internationally rarely occur as a result of a single driver, and as such, the data below may represent an overly simplistic view of a complex decision. In addition, Morrison et al (2009) found that peoples responses differ depending on whether they are being asked their reasons for moving *from* their place of origin or *to* their place of destination.

Evidence from the KEA data, shown in Table 5, suggests that of those who plan to return to New Zealand, lifestyle is the key driver for coming back. Of those who were returning or likely to return to New Zealand and provided reasons for doing so, 53 percent indicated that the “enhanced lifestyle/culture in New Zealand” was the main reason for their return, while 34 percent indicated that their reason for return was “Family/marital connections in New Zealand.”

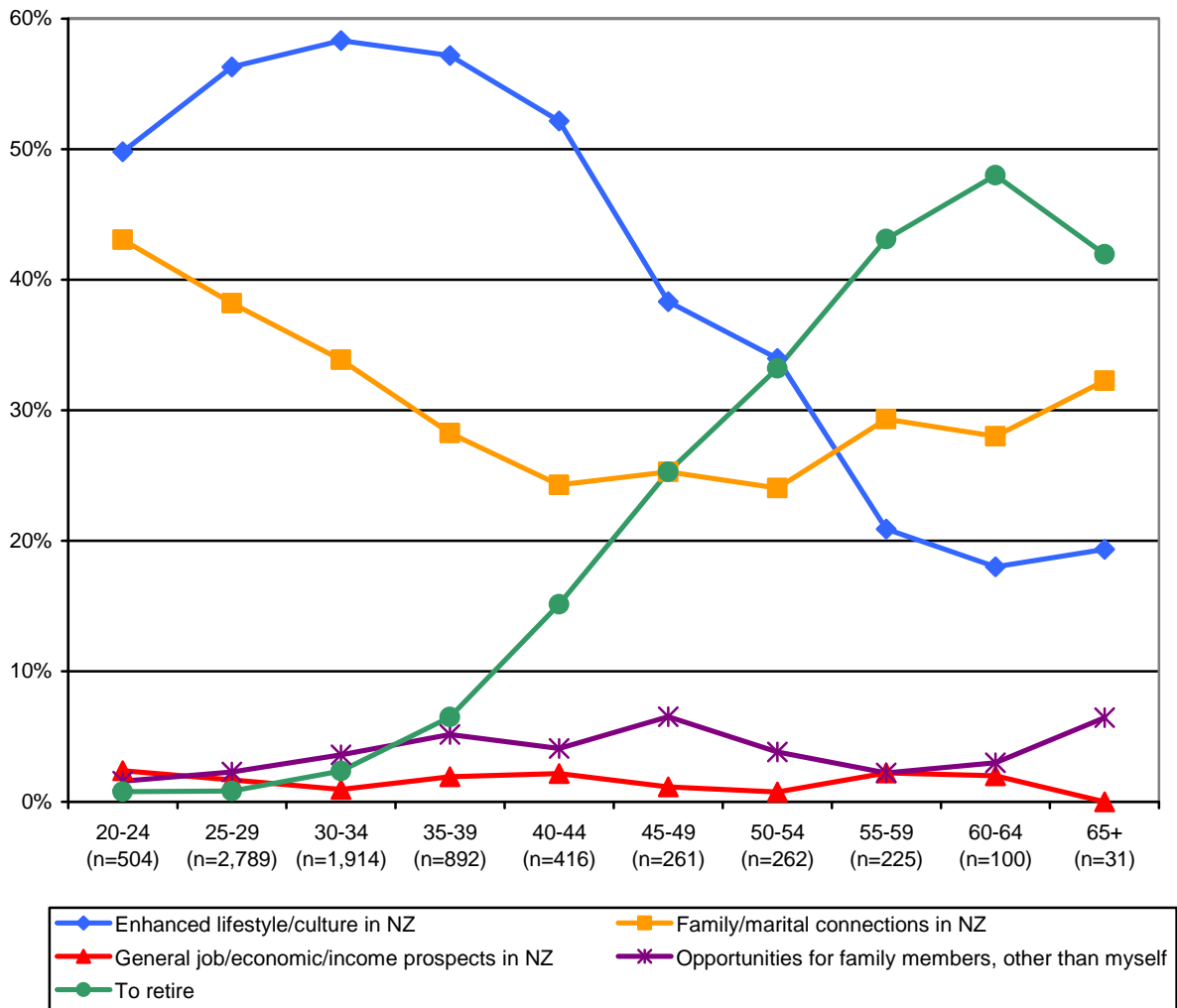
A key finding in this table, and in the discussion and figures that follow, is that very few respondents cited job, economic or income prospects as the reason or driver for their return to New Zealand. While not unexpected given New Zealand’s lack of competitiveness internationally in terms of salaries, employment and career opportunities for highly skilled workers, the number of respondents reporting this as a reason for their return was very low in all the analyses. It is possible that the timing of data collection for the KEA survey may have influenced this. Data was collected in 2006 when unemployment both in New Zealand and the most common expatriate destinations was very low, so respondents may have been reflecting the conditions of the time, and taking job security as a given. Re-administering the survey in times of economic recession, when jobs overseas may be in short supply, may change the importance of this factor in expatriates decisions to return.

**Table 5: Reasons for returning to New Zealand, respondents planning to return**

Reason for returning	Returning or likely to return	
	Will return to NZ permanently (n=3,481)	Likely to return to NZ permanently (n=3,953)
Enhanced lifestyle/culture in NZ	51.5	54.5
Family/marital connections in NZ	37.5	30.9
General job/economic/income prospects in NZ	1.6	1.5
My employer will want me to return to NZ	1.4	0.5
Opportunities for family members, other than myself	2.7	3.8
To study	0.4	0.3
To retire	4.9	8.5
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

Reasons for returning to New Zealand different by age, with younger respondents indicating that it was New Zealand’s lifestyle and culture that was attracting them back, while older respondents indicated that they were returning to retire; however, it is likely lifestyle was part of the decision to retire in New Zealand, along with proximity to family and eligibility for superannuation payments. Interestingly, and somewhat contrary to earlier research with returning New Zealanders (Lidgard and Bedford, 1994; Lidgard 2001), family ties surpassed ‘lifestyle’ as the key driver for return only for those aged 55 and above.

**Figure 17: Reasons for returning to New Zealand, by age**



Reasons for returning to New Zealand differed by gender, as shown in Table 6. Men were more likely to cite New Zealand’s lifestyle and culture, with almost two thirds citing this as the main reason for their return. Women were more evenly spread between lifestyle and family reasons for returning, with more than 40 percent indicating that family and/or marital connections were the main reason for coming back to New Zealand. In addition, men were almost twice as likely than women to

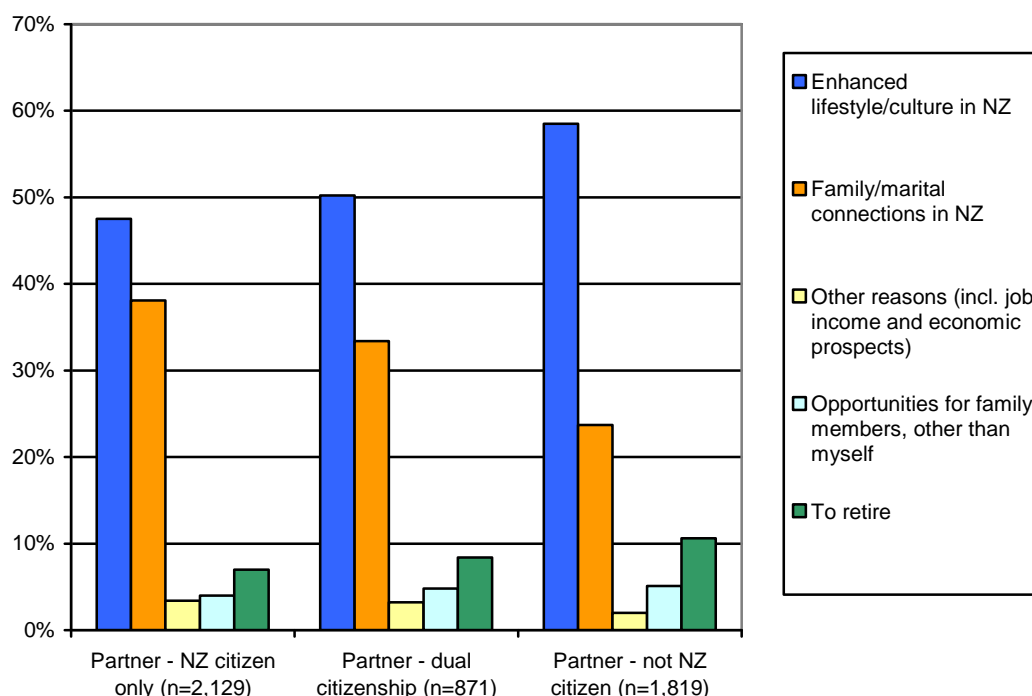
cite opportunities for other family members and retirement as the reasons for their return.

**Table 6: Reasons for returning to New Zealand, by gender**

	Male % (n=3,305)	Female % (n=4,062)
Enhanced lifestyle/culture in NZ	58.8	48.5
Family/marital connections in NZ	24.3	41.9
General job/economic/income prospects in NZ	1.9	1.3
My employer will want me to return to NZ	1.1	0.7
Opportunities for family members, other than myself	4.3	2.4
To study	0.4	0.3
To retire	9.2	4.9
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

Reasons for returning to New Zealand also differed by the citizenship status of the respondent's partner. Those respondents who had partners who were not New Zealand citizens were more likely to cite New Zealand's lifestyle as the primary reason for their return, as shown in Figure 18. They were less likely to cite family and marital connections, and more likely to return to New Zealand to retire, compared with those whose partners held New Zealand citizenship.

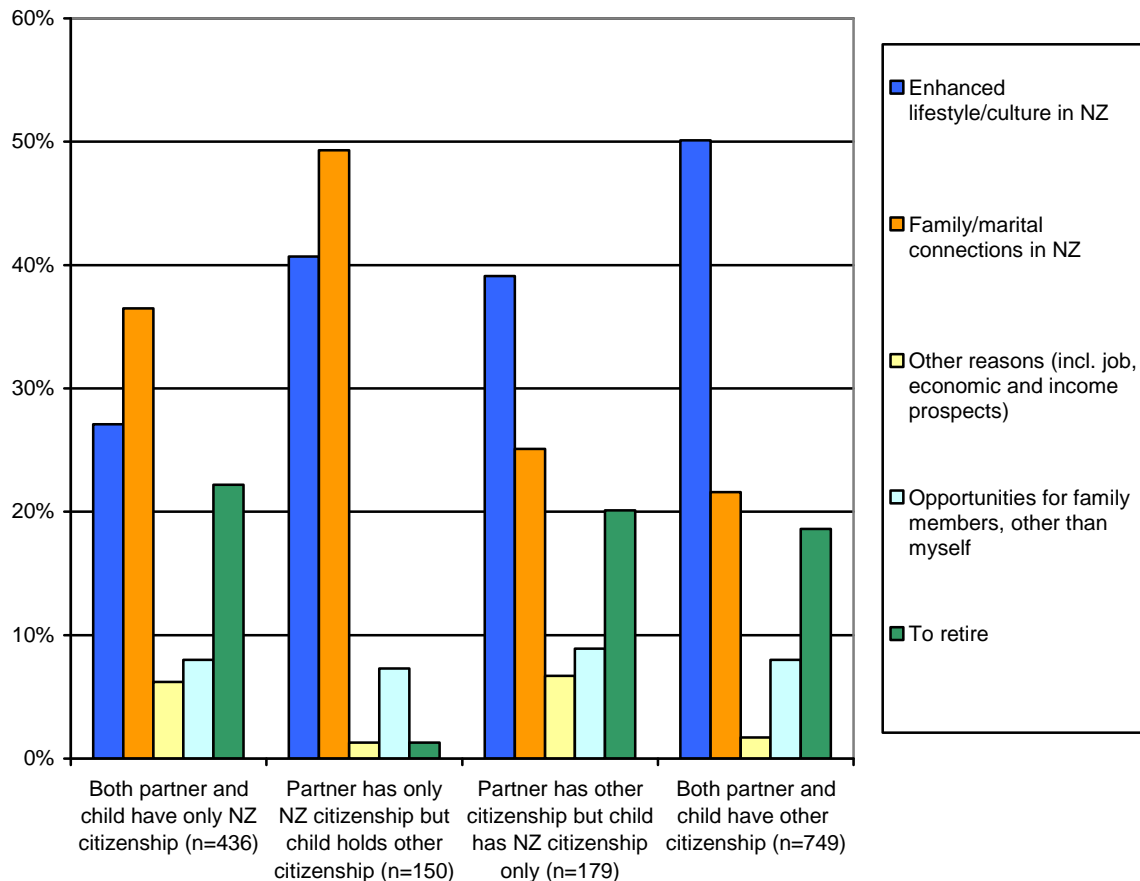
**Figure 18: Reasons for return by partner's citizenship status**



When both partner and child citizenship are examined, the relationship between having a partner who is not a New Zealand citizen, and returning for lifestyle reasons, continues. Figure 19 shows the citizenship status of both the respondent's partner and

the respondent's children, highlighting that New Zealand's lifestyle is more commonly a reason for return to New Zealand for those with foreign partners, while those whose partners are solely New Zealand citizens are more likely to cite family reasons as the driver for their return.

**Figure 19: Reasons for return to New Zealand, by partner and child citizenship**

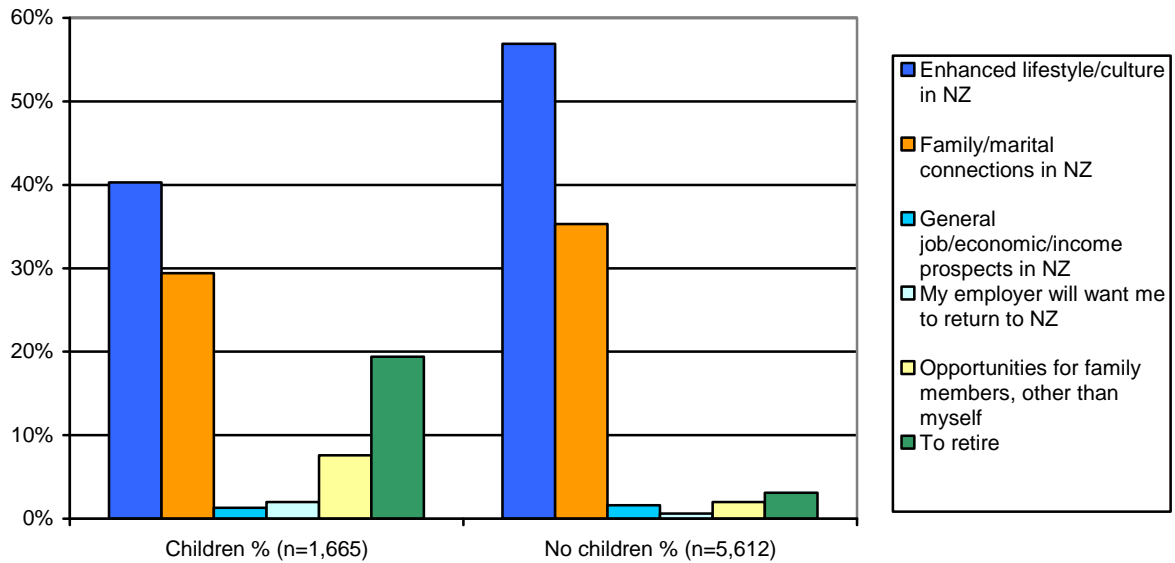


Reasons for returning to New Zealand also differed by whether the respondent had children, as shown in Figure 20. Interestingly, those with children were *less* likely than those without children to indicate that family and/or marital connections were the main reason driving their return, and were also less likely those without children to cite New Zealand's lifestyle and culture. While the anecdote suggests that expatriates return for the great lifestyle New Zealand provides for bringing up children, it was those who didn't have children who cited lifestyle as their reason for return. However, respondents with children were more likely than those without children to be returning to New Zealand in order to provide opportunities for other family members. Again, it was notable how few respondents reported income or job prospects as a driver for their return, something that could perhaps change during times of recession when international job markets are squeezed.

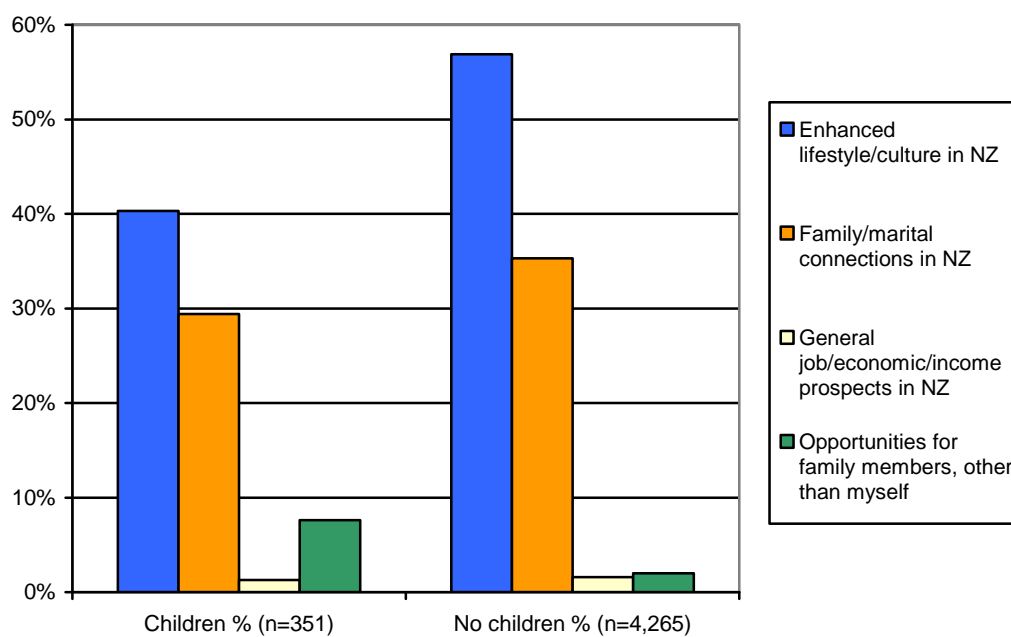
Because it is likely that respondents with children were also older and thus more likely to be considering retirement, the analysis shown in Figure 20 was re-run using only respondents aged 25 to 34 years old. Figure 21 shows that when focusing only on

this age group, respondents with children were still less likely to report New Zealand's lifestyle was the driver for their return; however, the draw of family and marital connections increased so there was a smaller difference between the proportions of those with and without children who cited this as the main reason for coming back to New Zealand. The proportions reporting opportunities for other family members as the driver for their return increased amongst those in this age group with children, with 12 percent of respondents with children reporting this as the main reason for their return compared with only 2 percent of those with no children.

**Figure 20: Reasons for returning to New Zealand, by presence of children**



**Figure 21: Reasons for returning to New Zealand given by respondents aged 25-34 planning to return, by presence of children**



## **Lifestyle is the key driver for return to New Zealand**

The tables and figures above highlight the importance of lifestyle in decisions to return to New Zealand. More than half of those returning or likely to return to New Zealand cited lifestyle as the key reason behind their choice to return, with this being a more popular reason to return than family or marital connections. As shown in this analysis, neither career or income factors were cited as a significant reason by any group planning to return to New Zealand.

## **VII. “Lifestyle”: What is it? And how do we measure it?**

The anecdote that sees young New Zealanders head off on their OE, then return back home two years later and eventually enter a new stage of family formation relies heavily on New Zealand’s lifestyle as a major draw-card, as well as it being “a great place to raise kids.” Lifestyle is New Zealand’s “comparative advantage” over other destinations in attracting skilled expatriates – and new migrants – as New Zealand is unable to offer the economic and career rewards available in many other countries. However, what exactly lifestyle is, and how we measure it, is less clear. Few discussions centre on what it is exactly that makes New Zealand’s lifestyle so good for families and raising children, with even fewer articulating exactly what it is that makes New Zealand’s lifestyle something that expatriates would leave Europe for.

In addition to a lack of clarity around the concept of lifestyle, existing measures of lifestyle are problematic, both in the indicators they use as well as their tendency to use a single measure to assess and rank the lifestyles of different areas.

A clearer articulation of what the concept of lifestyle may mean to migrants and expatriates, and a collection of measures that can capture it, is important for a number of reasons, including the need for New Zealand to be able to assess how it ranks compared with other expatriate and migrant destinations, to allow the identification of areas where New Zealand does not score as well, and to provide information to assist with policy development and investment decisions. This section of the paper offers an early attempt at dissecting the concept of lifestyle and highlights some problems with the use of existing indexes that endeavour to measure it.

### **What does New Zealand’s “enhanced lifestyle/culture” mean to KEA respondents?**

Significant numbers of respondents in the KEA survey attributed their return home to New Zealand’s lifestyle. However, the response “Enhanced lifestyle/culture in New Zealand” sheds little light on what exactly was drawing respondents back home, or on the different components that make up lifestyle. Unfortunately, the KEA survey did not systematically collect any additional information about what respondents were referring to when they selected this option<sup>15</sup>. However, many respondents included qualitative responses later in the survey which provide a sense of the wide range of factors that come under the umbrella term of lifestyle.

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<sup>15</sup> It would be valuable to include questions about this should the KEA survey be re-run.

When comparing lifestyles, one of the biggest influences for me is that I get 5 weeks holiday here and that is quite standard for (where I am). Knowing I would lose at least one of those if working in NZ makes my decision to live overseas a lot easier (at the moment). *(Respondent 6453418)*

Most Kiwis in NZ definitely take the lifestyle for-granted. NZ is the most beautiful country in the world...*(Respondent 6142115)*

New Zealand (is) a unique country with very innovative people, highly professional businesses and a love for music and culture. *(Respondent 6148119)*

I love NZ's growing sense of identity. I think Maori culture is an integral part of this. I love the haka. I love our creativity - along with identity, this must be our future. *(Respondent 6202959)*

It is clean and mostly tidy... We need to protect our amazing environment... so that we can maintain this current lifestyle...the liveability of New Zealand... As NZ globalizes we need also need to protect what makes Aotearoa unique from say America or the UK. Promotion of New Zealand values, Maori language and culture is important. I don't want my children to grow up in a carbon copy of America. *(Respondent 6219519)*

Talking to friends who live here in London / the UK, it's always the same story...we think a lot about returning "home" to NZ particularly for lifestyle reasons and to start a family...it's too scary a prospect to raise a family in the UK - too expensive and too much pressure on education and not enough emphasis on enjoying childhood. The food and service is better in NZ too. Daunting that we cannot just hop over to Europe when we want though! *(Respondent 6435606)*

I love that NZ is small and less populated. *(Respondent 6219023)*

My sons are aged 4 and 1 year old, and I'd like us to be back in New Zealand for their schooling, as I think education is better structured there, and there is a better atmosphere about NZ schools and their playgrounds. NZ schools place more emphasis on physical education than UK schools too. *(Respondent 6375381)*

I earn significantly more, have less hours, more holidays, and more time for research and more support for admin than I ever had in my 8 years of working within NZ ... It makes coming home hard! *(Respondent 6294235)*

It has been a good experience living, working and travelling in the UK but NZ is where I want to bring my children up because it offers a better lifestyle for families. *(Respondent 6204206)*

The range of responses shown here are by no means representative of all the factors that make up "lifestyle" nor of the range of qualitative responses provided by KEA respondents. Rather, they are included here only to indicate how the concept of

“lifestyle” can mean vastly different things to different people. Existing measures of lifestyle attempt to capture some of these diverse variables.

### Existing measures of lifestyle

A number of authors and institutions have attempted to articulate the factors that make up the ideal lifestyle for families, with some of these developing indexes<sup>16</sup> to measure these factors. These include, in New Zealand, the New Zealand Quality of Life report, the Social Report (MSD, various) and the ASB’s Top Spots: New Zealand’s Best Places for Families report, and internationally, Mercer’s Quality of Living index and the International Living Quality of Life Index.

Table 7 summarises the measures used in these indexes.

**Table 7: Indexes measuring “lifestyle”**

Index	What it measures	Key indicators
ASB Top Spots: Best Places for families (Hart, 2009)	Uses “diverse factors” to assess the best places in New Zealand for children and their parents to live.	<ul style="list-style-type: none"> <li>• Average annual household income</li> <li>• Preponderance of under-15 year olds</li> <li>• Unemployment rates</li> <li>• Housing affordability in relation to income levels</li> <li>• Deprivation levels</li> <li>• Neonatal health records and GPs per capita</li> <li>• Crime rates and youth apprehension levels</li> <li>• Education (incl. the rates of school leavers with NCEA level one or above; those that qualified to attend university and those with little or no formal attainment; truancy statistics)</li> <li>• Educational achievements of residents</li> <li>• Demographics (inc. proportions of couples with children etc)</li> </ul>
Social report (MSD, 2009)	Well-being and quality of life in New Zealand (ie compares national changes across years, not within areas. However, regional data available for some indicators)	<ul style="list-style-type: none"> <li>• People (incl. distribution of household types, housing tenure etc)</li> <li>• Health (incl. health and life expectancy, suicide, smoking and obesity etc)</li> <li>• Knowledge and skills (incl. participation in CE, school leavers with qualifications, participation in tertiary study etc)</li> <li>• Paid work (incl. unemployment, hourly earnings, satisfaction with work-life balance etc)</li> <li>• Economic standard of living (incl. household affordability and crowding, market income etc)</li> <li>• Civil and political rights (incl. voter turnout, perceived corruption and discrimination, etc)</li> <li>• Cultural identity (incl. local content on television, Maori language speakers, language retention)</li> <li>• Leisure and recreation (incl. satisfaction with leisure time, participation in physical activity and cultural and arts activities)</li> </ul>

<sup>16</sup> In this context, I use the term “index” to describe a tool that combines a variety of factors into a single variable or score which can then be used to rank countries or cities. I am not referring to the variable or score itself.

		<ul style="list-style-type: none"> <li>• Physical environment (incl. air and drinking water quality)</li> <li>• Safety (incl. assault mortality, fear of crime, criminal victimisation, road casualties)</li> <li>• Social connectedness (incl. telephone and internet access in the home, contact with family and friends, contact between young people and their parents etc)</li> </ul>
NZ Quality of Life report (2007)	Aims to describe and quantify the quality of life of those living in New Zealand's major urban areas.	<ul style="list-style-type: none"> <li>• People (incl. age, ethnicity etc)</li> <li>• Knowledge and skills (incl. participation in ECE, school participation, qualifications, etc)</li> <li>• Health (incl. life expectancy, infant mortality, low birth-weight babies etc)</li> <li>• Safety (incl. perceptions of safety, crime levels, child safety)</li> <li>• Housing (incl. housing costs and affordability, housing accessibility and tenure etc)</li> <li>• Social connectedness (incl. overall quality of life, community strength and spirit etc)</li> <li>• Civil and political rights (incl. community involvement in council decision making, voter turnout etc)</li> <li>• Economic standard of living (incl. income, work-life balance, cost of living, social deprivation etc)</li> <li>• Economic development (incl. economic growth, employment, local businesses)</li> <li>• Natural environment (incl. air quality, drinking water quality, ecological footprint etc)</li> <li>• Built environment (incl. look and feel of city, public transport, traffic and transport, etc)</li> </ul>
International Living Quality of Life Index (2009)		<ul style="list-style-type: none"> <li>• Cost of Living</li> <li>• Culture and Leisure (incl. literacy rates., school enrolments, museum attendance, recreational and cultural attractions etc)</li> <li>• Economy (incl. interest rates, GDP, GDP growth rate, GDP per capita, the inflation rate etc)</li> <li>• Environment (incl. population density per square kilometer, population growth rate, greenhouse emissions per capita, and the percentage of total land that is protected)</li> <li>• Freedom (incl. political rights and civil liberties)</li> <li>• Health (incl. calorie consumption, the number of people per doctor, the number of hospital beds per 1,000 people, the percentage of the population with access to safe water, the infant mortality rate, life expectancy, and public health expenditure as a percentage of a country's GDP)</li> <li>• Infrastructure (incl. railways, paved highways, and navigable relative to country population and size, number of airports, motor vehicles , telephones, Internet service providers, and cell phones per capita)</li> <li>• Safety and Risk (incl. hardship Differentials and danger allowances, which are based on extraordinarily difficult, notably unhealthy, or dangerous living conditions)</li> <li>• Climate (incl. average annual rainfall and average temperature, risk for natural disasters)</li> <li>• <a href="http://www.internationalliving.com/Internal-Components/Further-Resources/qofl2009">http://www.internationalliving.com/Internal-Components/Further-Resources/qofl2009</a></li> </ul>

Mercer Quality of Living (2009)	Assesses the potential standard of living in the host location.	<ul style="list-style-type: none"> <li>• Political and social environment (incl. political stability, crime, law enforcement, etc)</li> <li>• Economic environment (incl. currency exchange regulations, banking services)</li> <li>• Socio-cultural environment (incl. censorship, limitations on personal freedom)</li> <li>• Health and sanitation (incl. medical supplies and services, infectious diseases, air pollution, etc)</li> <li>• Schools and education (incl. standard and availability of international schools, etc)</li> <li>• Public services and transportation (electricity, water, public transport, traffic congestion, etc)</li> <li>• Recreation (restaurants, theatres, cinemas, sports and leisure, etc)</li> <li>• Consumer goods (availability of fresh food/daily consumption items, cars, etc)</li> <li>• Housing (housing, household appliances and furniture, maintenance services, etc)</li> <li>• Natural environment (incl. climate, record of natural disasters)</li> </ul>
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### Problems with existing indexes

There are two key problems with existing indexes that examine lifestyle, especially as they pertain to reasons for expatriate return to New Zealand. The first is the lack of a definition of what lifestyle means and encompasses, while the second concerns the distillation of a considerable range of factors into a single measure or variable.

Most of the indexes rely on gross measures, such as general measures of social deprivation and economic growth. These measures are important to families at a macro level, but do not necessarily impact at an individual or family level, especially for highly skilled workers and their families who appear disproportionately in New Zealand's expatriate population. In part, the gaps in these indexes are because a number of them were created with quite different purposes in mind. For example, the Mercer Quality of Living index was created to provide assistance to human resources professionals calculating the allowances paid to employees who are moving countries for work purposes.

While the inclusion of gross measures allows comparisons to be made at the country level, most indexes exclude factors that are regionally specific, despite regional differences having a significant impact on the lifestyle of those in different geographic areas. Further, even where factors that account for regional differences are included, the indexes omit a number of (often country-level) variables that have a significant impact on daily family life.

Furthermore, most existing indexes of lifestyle fail to include working hours and other workplace variables, which have a significant impact on quality of life, in their measures. Similarly, few lifestyle indexes contain measures of policy support for families, such as paid parental leave and statutory rights to family leave and flexible work. In addition, a further variable that does not commonly appear in a meaningful

or useful way in the indexes, but it extremely important to families with young children, is access to quality early childhood education and care services. Some of these missing variables are briefly considered in turn in this section, specifically in the context of their relevance to expatriates.

Secondly, and perhaps most significantly, is the major problem of what the indexes then do with the data that is included. Most distil the various indicators down to a single 'score' that can then be used to rank countries, cities or regions. This most commonly occurs by averaging the results for each indicator. Even if particular variables are weighted as more or less important, the collation of variables into a single measure means that extreme scores across different variables may average out to a middle ranking, making the gross measure far from ideal in terms of providing a deeper understanding of lifestyle.

As such, there are two overall problems with existing indexes of lifestyle. The first concerns the indicators themselves, such as the inclusion or exclusion of particular variables, and the macro or micro-level of measures used. The second problem concerns the collapsing of the variables into a single measure, which may compound the problems of variable selection as well as reducing or obscuring the diverse scores a particular country or area may receive across a variety of very different factors.

### **What is missing from existing indexes?**

Working hours rarely appear in lifestyle indexes, yet they are a key variable impacting on lifestyle. This importance stems from the role work hours play in shaping the daily lives of workers, especially those who work long and extended hours. Average and normative working hours, and working hours cultures, have a considerable bearing on the quality of life for families with children, not only through their direct impact (such as requiring the worker to be away from their family for long hours), but also through their mediating influence on other lifestyle factors. For example, easy access to regional and national parks and beaches and other outdoor recreation areas is a commonly cited variable attracting people (back) to life in New Zealand; however, long working hours may impact on families' ability to enjoy these resources by making it difficult for them to find time to engage in these activities. Similarly, it is difficult to celebrate New Zealand's 'relaxed pace of life' (Department of Labour, 2009) when one is working 70 hours each week.

Working hours are a particular issue when considering expatriates and their likelihood of returning to New Zealand, especially as New Zealand's working hours are amongst the highest in the OECD (Messenger, 2004). Census data indicate that significant proportions of New Zealand workers work more than 50 hours each week, and in 2006, almost one in three dual earner couples with dependent children worked a combined 80 or more hours each week (Fursman, 2008). Workers with post-graduate qualifications and those in management positions are amongst those most likely to work very long hours in New Zealand (Ibid), meaning that expatriates returning home to New Zealand are likely to be amongst those spending the most time in the office.

While workers with workers with higher household incomes, where expatriates are likely to be over-represented, are more likely to report working long hours, they also appear to have access to greater degrees of workplace flexibility (Zodgekar and

Fursman, 2008), a factor which may ameliorate some of the negative impacts of long work hours.

Another factor relevant to lifestyle for families, related to total working hours and noted in the comments from the KEA survey is the amount of paid time off work employees are entitled to. Gornick et al (2007) note that workers in EU countries are typically entitled to five to six weeks of paid vacation time, with a resulting full-year of work equating to 46 – 47 weeks. Gornick further notes that “The number of days that workers are permitted—and expected—to be away from work is also shaped by the establishment of public holidays. Public holiday laws vary widely across countries and, in some cases, employers can limit workers’ rights to take off holidays and/or to be paid for them. For example, EU citizens generally have a statutory right to public holidays.” (Gornick et al, 2007:4)

Paid parental leave is related to both total working hours and paid time off, as it assists families to reduce their total combined working hours during the first year of a new child’s life. The treatment of paid parental leave (PPL) in New Zealand provides a key example of how policies around leave and working hours can impact on family life for expatriates. Expatriates returning to New Zealand for the birth of a child would be ineligible for PPL unless the mother of the baby had been back in New Zealand and employed by a single employer for a minimum of six months. Because eligibility for paid parental leave is dependent on the mother’s employment status and tenure, even if the family had returned and the father of the child had taken up a position immediately and worked for six months, the family would be ineligible. In contrast, expatriate families returning to Australia would be eligible for a similar level of financial compensation to that provided through New Zealand’s PPL under the “baby bonus” scheme, regardless of their employment status or tenure (Callister and Galtry, 2009). While it is unlikely that expatriates would place much weight on their eligibility for PPL in their decision of where to reside, PPL does provide an example of a factor necessary to include in an index measuring the family-friendliness of any country’s lifestyle, particularly when that index is targeted at expatriates.

### **Indexes of family friendliness**

There are a number of indexes that consider lifestyle variables that impact families, such as working hours, flexible working arrangements, and leave from work entitlements, plus access to early childhood education. These include reports by the OECD (various) and the cross-country index created by Gornick and Meyer (1997) to assess policies that facilitate the equal division of paid and unpaid work. The factors considered in these indexes are shown below in Table 8.

**Table 8: Indexes with variables important to family life**

OECD: Babies and Bosses (2007)	Examines key work and family outcomes across OECD countries	<ul style="list-style-type: none"> <li>• Birth rates, maternal employment and child poverty</li> <li>• Public spending on families, including public spending on childcare as well as average net childcare fees</li> <li>• Tax/benefit systems to support families</li> <li>• Parental leave (income support and leave entitlements)</li> </ul>
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		<p>including leave for fathers</p> <ul style="list-style-type: none"> <li>• Childcare and out-of-school hours care</li> <li>• Working hours and annual vacation time</li> <li>• Other workplace factors, including family-friendly arrangements and share of part-time employment relative to full-time employment</li> </ul>
Gornick et al (1997)	Examines fourteen OECD countries' provision of policies that support mothers' employment	<ul style="list-style-type: none"> <li>• Legislated Job Protection</li> <li>• Paid Maternity Leave (incl. wage replacement rate, coverage and extended leave provisions)</li> <li>• Paternity Benefits</li> <li>• Child Care Expenditures</li> <li>• Tax Relief for Child Care</li> <li>• Guaranteed Child Care Coverage (0-2)</li> <li>• Guaranteed Child Care Coverage (3-5)</li> <li>• Percent Children (0-2) in Publicly Funded Child Care</li> <li>• Percent (3-School-Age) Children in 100%</li> <li>• Publicly Funded Child Care</li> <li>• Percent (Age 5) Children in Preprimary or School</li> <li>• Percent Children in Publicly Funded After-School Care</li> <li>• Age of Compulsory School</li> <li>• School Day 40 Hours</li> <li>• School Year 260 Days</li> <li>• Continuous School Day</li> </ul>

### VIII. A “family lifestyle” index

Desired lifestyles are likely to be different for people at different life stages and in different situations. However, given the age profile of most of New Zealand’s expatriates, and that many expatriates consider returning to New Zealand fall into the key family-formation age groups, a strong case can be made for the development of a “family lifestyle” index that addresses the lifestyle needs and desires of individuals and families in the 25-44 age group; that is, in the early stages of family-formation, when people are most likely to be parents with young children, or individuals and couples thinking about having children. There are a number of reasons for focusing on this group: this group is likely to be post-tertiary education and in a peak career development stage, meaning they add considerable value to the economy where they reside and work; ‘capturing’ this group makes it more likely that their skills and abilities will be retained longer term through the peak career and earning periods; and finally, this age is when it is most likely that decisions around the place of ‘settling down’ are likely to occur.

No single existing index contains the variables necessary to assess how New Zealand rates in terms of lifestyle for families, let alone how it compares with other countries. Such an index needs to contain *both* A) traditional lifestyle variables (such as access to outdoor recreation areas) *and* B) family-work variables, which are essential in mediating whether families are able to fully take advantage of the lifestyle factors. In order to assess how New Zealand’s lifestyle compares to that offered by other countries, a new index is needed, one that combines both lifestyle and family

variables into a single tool, and provides both an overall gross measure of lifestyle, but also some lower level composite ratings.

### **What needs to be included in a family lifestyle index?**

Analysis of existing indexes highlights that there are currently a number of indexes that include lifestyle variables, as well as (fewer) indexes that contain variables important to daily family life. However, these variables need to be considered together to provide an accurate assessment of lifestyle for families. This is not, however, as simple as combining the variables from each index into a single tool.

In order to create an index that could measure lifestyle for families, three major areas would need consideration. These are 1) the range of variables for inclusion in the index; 2) the relative weightings and scores of the included variables, as well as the interactions between them; and 3) the various levels of “scoring” that would be produced (ie a multi-level measure).

Two key areas that are currently missing from existing lifestyle indexes are, as noted, workplace factors such as working hours and access to flexible work, and the quality, accessibility and cost of early childhood care. Working hours are a factor that would be relatively easy to include in a lifestyle index. The New Zealand Census provides data for cross-national comparisons, and also breaks down the data to allow analysis by regional council/territorial authority. Average working hours by profession, education, income, gender and/or family status would all be variables relatively easy to include in an index of lifestyle for families.

Access to flexible work is somewhat more difficult to include when assessing lifestyle across countries. However, a number of countries collect data about access to flexible work, and the examination of the policy settings of some countries also provides information useful to this area. For example, a number of population destinations for New Zealand expatriates such as the UK give workers statutory rights to request flexible work, if not to secure such arrangements.

Other factors such as rights to paid time off work and access to paid leave for families (including leave following the birth of a child and statutory rights to leave to care for sick family members) would also be relevant.

The index would also need to pay close attention to the diversity of families, such as broadly accounting for differing lifestyle needs and desires of families of different ethnicities and cultures. For example, a key need for Maori families may be access to Kohanga Reo services, with the alignment of opening hours of such services and transport options to the service relative to the location of residence and employment also being important. New Zealand research by Witten et al (2006) on neighbourhood resources and their impact on families highlights that such factors can be operationalised into variables suitable for inclusion in an index. The index would also need to consider the issue of gender. Many indexes with relevance to families are focused on mothers, considering fathers almost as an afterthought.

Such an index would need to consider not only the macro and micro factors which impact of families’ daily living conditions, but would also need to consider the

weighting of various factors in the index. For example, would average working hours or access to flexible work be more or less important than access/proximity to beaches and other outdoor areas? And how would the effect of the first on the second be assessed? Similarly, would access to affordable and high quality early childhood education be more or less important than family support packages that allow families to choose to have a parent at home most of the time?

### **Moving away from single level measures**

Because of the different weightings of these diverse factors, an index of lifestyle would need to contain at least two, and possibly more, levels. The first level would produce an overall 'score' made up of all the variables within the index, similar to the existing lifestyle indexes. However, the index would also contain a second level, namely a score for each subset of lifestyle variables. The use of a single measure in any index, but especially when measuring a concept as multi-faceted as lifestyle, risks obscuring the different components and averaging disparate results into a less-than-meaningful average. Undertaking a second tier of measures would allow composite scores for some of the key components of lifestyle, such as work, outdoor living, and education, all factors which vary in importance for members of a diverse population. It would also allow the identification of the areas where a country or region did not rank highly.

As detailed discussion of these considerations are beyond the scope of this paper, further work on these factors are needed. However, the data presented here regarding the importance of lifestyle to New Zealand expatriates suggests that the creation of such an index is needed to allow a truer measurement of the degree to which New Zealand's (and other countries') lifestyle is truly a "great place to raise children." This is especially the case given the importance expatriates may have for New Zealand's economy, and our need to compete on the international stage as a desirable destination for skilled migrants looking to move. It is also vital if New Zealand wants to assess its performance in an area which has traditionally been the source of its comparative advantage.

### **Uses for a family lifestyle index: beyond expatriates**

An index to measure lifestyle for families would allow an international ranking of countries by the degree to which they offer a family-friendly lifestyle as well as enabling country-to-country comparisons. It would thus be useful to a variety of audiences, including policy makers in the areas of family policy, immigration, and work-life balance, as well as in labour policy more generally.

This information is important not only in the analysis of the environments which support New Zealand families with children, but also for considering how attractive New Zealand is both for its current and future citizens. An index would allow the identification of specific areas where New Zealand was not competitive, thus allowing the targeting of resources to areas where need was greatest.

In addition, such a tool could be utilised to explore how attractive New Zealand was to migrants of different destinations. While factors such as entry requirements and the ability to bring extended family members may impact on migrants from all

destinations, migrants from different countries may prioritise varying aspects of New Zealand life. For example, immigrants from countries where violence and political repression are normative may place more value on particular measures of family lifestyle than migrants from safer destinations.

Such an analysis is vital for future im/migration planning. Hugo (2007) argues that family-friendliness is fundamental in shaping decisions about where highly skilled and internationally mobile people raise their families, noting that the degree to which an environment is conducive to family life is key in the “increasingly competitive quest for global talent.” He argues that “The availability of an attractive, well remunerated appropriate job is a necessary but not sufficient condition for much skilled migration. Increasingly it is non economic factors which are the decisive elements in skilled workers migration decisions (including) lifestyle, future for children, family life, education of children (and personal) security.”

## **IX. Conclusions**

This paper has used the results of a large survey of New Zealand expatriates to explore the intersection between migration and work-life variables, by examining the degree to which lifestyle is shaping expatriates’ decisions to return.

The KEA data shows that expatriates, at least the ones who responded to the survey, are more highly educated than the general resident population in New Zealand, and that while many reported intentions to return to New Zealand, a significant proportion were planning to stay overseas, with this particularly the case for those with post-graduate qualifications. Male respondents were more likely to hold such qualifications than women respondents, and were also more likely to report plans to stay overseas, to have been away from New Zealand for longer, and to report having foreign partners.

Whether planning to return or not, expatriates represent a particular subset of migrant who disproportionately hold tertiary qualifications and have high earning potential. It is unlikely that most return to New Zealand to take advantage of opportunities for higher earnings or income, or to take advantage of opportunities for career development. As such, and as illustrated by the KEA data, lifestyle is one of the major drivers for expatriate return to New Zealand. Male respondents were more likely than female respondents to report New Zealand’s lifestyle as the driver for their return, and significantly less likely to report returning for family reasons.

The role of lifestyle is particularly important for New Zealand. New Zealand has extremely high numbers of citizens living overseas, and also suffers from a lack of competitiveness internationally in terms of salaries and employment opportunities for highly skilled workers. New Zealand relies on the perception that it is a clean, green and safe environment ideally suited to raising a family, with this seen as a major attraction for both new migrants and expatriates returning to NZ.

Previous cross-national assessments of lifestyle contain elements of assessment relevant to lifestyle, but do not look at the factors that impact on the family as a

whole, nor do they consider the more nuanced factors that impact on how easy daily life is for the families. Similarly, other international indexes measuring concepts relevant to family have tended to measure particular elements of work-family-friendliness, focusing on public benefits and provisions and/or, to a lesser degree, the workplace. However, these studies tend not to consider factors outside the government or workplace spheres, and the majority are based on high level macro measures.

As such, this paper suggests that a valuable next step in this area would be the creation of an index that combines both lifestyle and work-family variables to produce a tool for international use. Such a tool would provide insight into the degree to which New Zealand can compete with regard to lifestyle and whether the anecdotes regarding expatriates have some basis in reality. An index of this kind would also be a useful tool for more broadly focused migration research.

This paper contributes to research in this area by exploring the intersection between the work-family and migration literatures. Previous work in this area, including the creation of various indexes, has tended to be based firmly within either one body of literature or the other, with little research exploring the overlaps between them. However, future research that explores this intersection is necessary, particularly in the context of New Zealand's highly mobile population.

## Appendix A: What the KEA survey tells us about New Zealand’s expatriates<sup>17</sup>

The KEA survey provides a wealth of information about the characteristics of a large group of New Zealand expatriates. However, it is important to note that while it is likely that the group of respondents is typical of New Zealand’s expatriates, the following discussion is limited to those who responded to the survey, and is not necessarily representative of New Zealand’s expatriate population as a whole.

### Citizenship status

More than 98 percent of the respondents to the KEA survey were New Zealand citizens. The vast majority of respondents (88 percent) were born in New Zealand, while 5 percent were born outside New Zealand to New Zealand parents, and a further 5 percent indicated that they had come to New Zealand as immigrants but were now naturalised New Zealand citizens. A small number (1.2 percent) indicated that they were permanent residents but not citizens of New Zealand, and less than half a percent fell into each of the categories “I was formerly a citizen of NZ, but I no longer hold this status,” “I was formerly a permanent resident of NZ, but I no longer hold this status,” and “Other.”

### Citizenship status of partners

As shown in Table A, of those expatriates who provided information on their partners (n=8,755)<sup>18</sup>, a significant majority stated that their partners were either citizens of more than one country, or did not have New Zealand citizenship. There were some gender differences, with men more likely to have partners with foreign citizenship, and women more likely to have partners who held only New Zealand citizenship.

**Table A: Partner citizenship status, KEA respondents**

<b>Citizenship status of the respondent’s partner</b>	<b>Women % (n=4,073)</b>	<b>Men % (n=4,682)</b>
Partner is a citizen of NZ and other countries	15.7	15.0
Partner is not a NZ citizen	48.7	56.2
Partner is a NZ citizen only	35.6	28.9
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

<sup>17</sup> No multivariate analysis was conducted for this paper. However, as it is likely that there are some interactions between the variables discussed here, further analysis of this kind would be worthwhile.

<sup>18</sup> The question asked the respondent “If you are in a long-term domestic partnership, whether or not legally married, what is the citizenship status of your partner or spouse?” As such, it is not possible to ascertain whether those who left this question blank were those without long-term partners or whether they were non-responses.

## Education

Analysis of the KEA database indicates that concerns over the loss of New Zealand's most highly skilled and educated may be justified, even if these workers are replaced by skilled migrants from other countries. New Zealand expatriates completing the KEA questionnaire were significantly more highly skilled and educated than the total New Zealand population, with more than four-fifths (87 percent) having tertiary qualifications of some kind, compared with one quarter of the New Zealand population over 20 in the 2006 Census.

In order to ensure alignment with the samples, Census analysis in this table, and in the remainder of the paper, considers only the usual resident population aged 20 and over, as respondents younger than 20 were excluded from the KEA analysis. Table B shows the breakdown of educational qualifications in the KEA sample, and compares them to the total resident New Zealand population aged 20 and over, as captured in the 2006 census.

**Table B: Highest qualifications of the KEA sample and resident New Zealanders**

Highest qualification <sup>19</sup>	Expatriates % (n=12,723)	Resident New Zealanders % (n =2,860,179)
PhD	3.7	0.6
Masters	11.1	2.1
Post-grad dipl/cert	16.6	1.9
Bachelors	37.4	11.0
Other tertiary qual	18.6	9.3
<b>Total with tertiary qualifications</b>	<b>87.3%</b>	<b>24.9%</b>

As shown in Table C below, male respondents held higher qualifications than female respondents.

**Table C: Highest qualifications of the KEA sample, by gender**

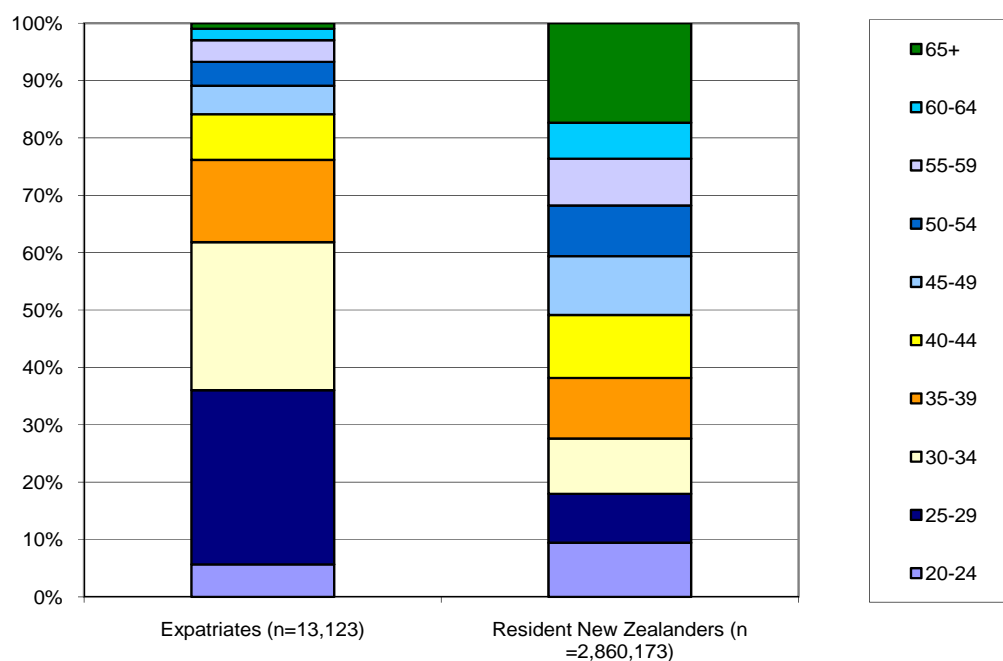
Highest qualification	Men % (n=6,204)	Women % (n =6,479)
PhD	5.0	2.3
Masters	12.5	9.6
Post-graduate diploma/certificate	14.8	18.3
Bachelors	36.0	38.9
Other tertiary qualification	18.2	19.0
Secondary school	13.4	12.0
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

<sup>19</sup> Note this table only includes those who achieved NCEA Level 5 and above ie doesn't count levels 3 and 4, even when these are achieved after leaving school

## Age

Analysis of the age structure of the KEA sample indicates that New Zealand expatriates are disproportionately younger than the resident population. Almost two thirds (62 percent) the sample are between the ages of 20 and 34, relative to 28 percent of the 20 and over population resident in New Zealand.

**Figure A: Age profile of expatriates and resident New Zealanders<sup>20</sup>**



Women respondents were even more disproportionately younger than the general population of New Zealand. As shown in Table D, 70 percent of women respondents were younger than 35, compared with 53 percent of male respondents.

**Table D: Age of KEA respondents, by gender**

Age	Men % (n=6,396)	Women % (n=6,661)
20-24	3.7	7.5
25-29	24.7	35.8
30-34	25.3	26.3
35-39	16.9	11.9
40-44	10.2	5.7
45-49	5.9	4.1
50-54	4.9	3.4
55-59	4.5	3.1
60+	3.9	2.1
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

<sup>20</sup> Because respondents under the age of 20 have been excluded from the KEA sample, this graph excludes the same age groups from the Census, so that the table compares the same age profiles.

## Income

Table E below indicates that relative to the usual resident New Zealand population as a whole, the expatriate population have considerably higher incomes. More than a third of expatriates (36 percent) completing the survey had incomes of greater than NZ\$100,000, compared with only 4 percent of the New Zealand resident population<sup>21</sup>. Of those who reported income, only 27 percent of expatriates earned \$50,000 or less, compared with four fifths (80 percent) of resident New Zealanders.

**Table E: Income profile of expatriates and resident New Zealanders**

Income (NZ\$)	Expatriates % (n=12,005)	Resident New Zealanders % (n=2,589,903)
Loss	0.2	0.6
Zero income	1.8	3.2
\$1–\$10,000	2.6	12.2
\$10,001–\$20,000	3.1	22.7
\$20,001–\$30,000	4.5	16.0
\$30,001–\$40,000	7.1	15.4
\$40,001–\$50,000	7.2	10.1
\$50,001–\$70,000	16.8	10.8
\$70,001–\$100,000	20.1	4.8
\$100,001 or more	36.5	4.1
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

## Length of time away from New Zealand

More than half of the expatriates who participated in the KEA survey had been away from New Zealand longer than 2 years, with 54.8 percent indicating they had been away for 3-5 years or longer. This suggests that the anecdote of expatriates returning to New Zealand following a 2-year working holiday is only a one portion of New Zealand's diaspora<sup>22</sup>. However, only 16 percent of expatriates had been living overseas for more than 10 years. Analysis by gender showed that there were some differences between men and women, with women somewhat more likely to have been away from New Zealand for a shorter period.

<sup>21</sup> A small number of the qualitative responses in the KEA survey indicated that some respondents were confused about the currency in which they should report income, or questioned the exchange rate used.

<sup>22</sup> Unfortunately, due to the overlap of categories (ie 1-2 years, 2-3 years and 3-5 years), it is not possible to calculate the exact proportions of those who had been away 2 years, as respondents with an absence of two years could have selected one of two possible categories. This means that it is likely that an even greater proportion of respondents were not part of the "2-years OE" group.

**Table F: Length of time away from New Zealand**

<b>Length of time away from New Zealand</b>	<b>All expatriates % (n=12,757)</b>	<b>Men % (n=6,226)</b>	<b>Women % (n=6,493)</b>
Less than 1 year	17.4	15.9	18.9
1-2 years	16.7	15.1	18.2
2-3 years	11.1	10.1	12.1
3-5 years	19.7	19.9	19.5
6-10 years	18.7	20.1	17.4
11-15 years	5.9	7.5	4.4
16-20 years	3.7	4.4	3.1
21-30 years	4.6	4.7	4.5
More than 30 years	2.1	2.3	1.9
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

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