

# *SESSION 7 :*

## *Care*

# The Political Economy of Female employment in Taiwan: The Employers' Perspective

Ying-Fang Chen<sup>1</sup>

Chung-Yang Yeh<sup>2</sup>

Jen-Der Lue<sup>3</sup>

Recently, the Varieties of Capitalism approach (VoC) regards firm as the core actors in welfare state development by emphasizing that employers' social policy preferences varied along production regimes. Although the VoC explains how capitalist institutional arrangements shape employers' social policy preference, it is gender-blind due to it focuses on male's life course and male-related social protection institutions. Thus, pension and unemployment insurance become the major analytical categories which are designed to deal with old social risks. Thus, the VoC ignores that post-industrialization and the significant increase in female labour force fundamentally change the nature of social risks. However, traditional social protections cannot cope with new social risks effectively to help female workers to balance work and family. In Taiwan, the prevalence of general skills and the SMEs-dominated economic structure has been greatly shaping labour market, and led employers to rely on flexibility in order to minimize labour cost. In turn, employers are reluctant to enact enterprise social policies and bear high labour cost. However, there are some firms introduced family policies for their female workers. Why? In this article, departing from the VoC approach, we endeavour to gender employers' preference on female employment in Taiwan.

**Key words:** female employment, production regimes, labor skills, welfare regimes, post-industrialization

---

<sup>1</sup> PhD student, Department of Social Welfare, National Chung Cheng University, Taiwan

E-mail: [yingfang0902@hotmail.com](mailto:yingfang0902@hotmail.com)

Address: 7F., No.388, Guanzhong S. Rd., Qianzhen Dist., Kaohsiung City 806, Taiwan (R.O.C.)

Telephone Number: 886-0953197088

<sup>2</sup> PhD student, Division of Sociology and Social Policy, University of Southampton, the United Kingdom. E-mail: [chungyang.yeh@gmail.com](mailto:chungyang.yeh@gmail.com)

<sup>3</sup> Associate Prof., Department of Social Welfare, National Chung Cheng University, Taiwan

E-mail: [jenderlue@gmail.com](mailto:jenderlue@gmail.com)

## 1. Introduction

The institutional underpinnings of welfare capitalism, from its full employment commitment to collective bargaining, labour market regulation, and social protection, aimed to safeguard the standard male production worker and breadwinner. It was he who constituted the nexus between economy and family, between production and consumption. His security, it was assumed, implied universal security. In the 1950s and 1960s, women's economic dependence on men was near absolute (Esping-Andersen, 2002; 68). However, both family structure and behavior are now undergoing massive change. The stable one-earner family is no longer standard but atypical. Cohabitation and single-person households are growing. Childhood today more likely means growing up with parents who both work, or with a single parent. Being a child today also means having few siblings and a fair risk of seeing one's parents separate or divorce (Esping-Andersen, 1999).

Both men and women have been affected by changes in the social and economic organization of the family. Especially, with the coming of post-industry society, the service sector is increasing quickly, namely that the female labour force participation rate will raise more fast (Bell, 1976). It is obviously not a source of social risk per se. If anything, couples with two incomes are better protected against the risk of poverty. Indeed, the move of women into paid employment implies a double job multiplier, visible on both the consumption and production side of the national accounts ledger. Their earnings add to households' purchasing power; their employment reduces households' available time to service their own needs (Bonoli, 2007 ; Esping-Andersen, 2002). Furthermore, a woman's economic status increases with her fertility, suggesting that the more ambitious a woman is to be a financial success, the more she has to forgo having children (Sawako, 2007).

Compared to the advanced countries, the employment rate of married women in Taiwan (41.2%) equals that of Italy (42.4%) and U.K. (47.3%), and surpassed that of Germany (38.4%) and Japan (17.6%). Another interesting finding of Sawako (2007) shows married women's income contribute much to Taiwan's household income about 20-45%. On the other hand, according to the Council of Labor Affairs of Taiwan (2007), the Taiwan's dual-earned family rate in 2006 is 37%. It increases 2.7% than in 2003. Obviously, the female employment contributes therefore much for the family's income maintenance (see table 1 and table 2).

<Table 1、Mother's work by age of youngest child(%)>

age of youngest child	Germany	Italy	Sweden	Taiwan	UK	U.S.
<3	38.4	42.4	83.4	41.2	47.3	54.0
3 to 5	48.3	44.1	73.9	42.3	56.0	60.0
6 to 9	63.8	39.1	77.0	45.8	66.6	65.2
10 to 14	72.3	43.4	70.1	36.9	75.4	65.8
15 to 17	67.6	31.8	57.6	29.6	67.2	59.1

(resource : Sawako, 2007: 46)

<Table 2、Working mothers' contribution to household income by nation(%)>

mothers' income contribution	Germany	Italy	Sweden	Taiwan	UK	U.S.	Japan
0-20%	18.5	8.4	20.3	10.0	43.4	28.8	51.1
20-45%	23.1	47.0	36.6	76.7	39.5	42.4	35.2
45-55%	37.2	26.0	17.9	9.2	7.4	15.3	8.9
55-75%	11.8	11.5	22.1	2.6	5.5	9.6	3.4
75-100%	7.5	4.8	2.9	1.5	4.0	3.3	0.9
100%	1.8	2.2	0.2	0.0	0.1	0.6	0.4

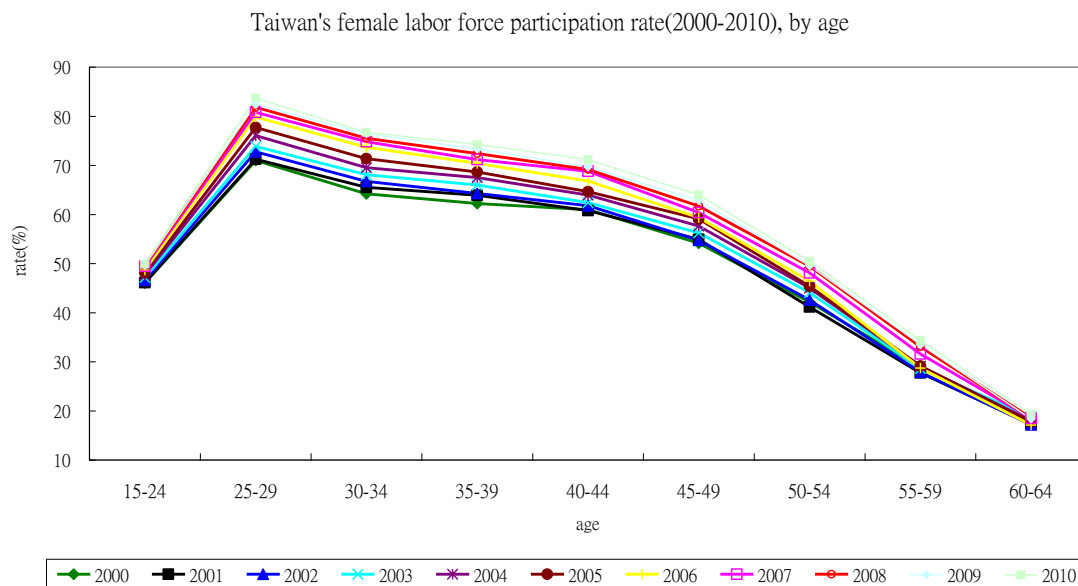
(resource : Sawako, 2007: 45)

However, Taiwan's female labor force participation rate decreases enormously while their children are aged below 3 years old<sup>4</sup>. In 2010, Taiwan's female leaves labor market due to the fact that she is married, the rate is 31.2%. And due to the element of pregnancy, especially for first birth, female quitting jobs rate is about 22.4%. Even though some of them will back to labor market, the average gap is about 7 years. Most important is that female, with work ability and her children below 6 years old, could not enter to labor market due to the caring responsibility, and the rate is very high(91.3%)(Directorate General of Budget, Accounting and Statistics of Taiwan, 2011). Another interesting finding shows that the responsibility of caring children aged below 3 years old mainly belongs to mothers<sup>5</sup> (Directorate General of Budget, Accounting and Statistics of Taiwan, 2011).In addition, the drop in the total fertility rate 2 in 1985 to 1.05 in 2008 attracts public attention.

<sup>4</sup> In 2010, Taiwan's female labor force participation rate is 56.09% while their children are aged below 3 years old. However, female employment rate increases to 62.27% while their children are aged above 6 years old.

<sup>5</sup> In 2010,the rate of mothers who are the mainly caretakers of children aged below 3 years old is 54.9%.

On the other hand, the peak of Taiwan's female labor force participation rate is between 25 and 29 years old. Then, it drops gradually. Ironically, after 30 years old and children growing, Taiwan's mothers could not return to labor market sufficiently (see below). In 2002, Taiwan's government enacted "Gender Equality in Employment Act", and allowed employee to apply for parental leave without payment before any of their children reach the age of three years old. After the 2009 reform, workers could apply for 60% replacement rate of earnings during the parental leave period. However, people of application for parental leave are mainly female. In table 3, we can find the first choice of female workers is returning home when someone's babies need to care. Even though female workers have the burden of caring responsibility, they seem fear of applying for parental leave. There are below 1 % female employment people to use the institution. According to the 2009 gender survey, there are just 40.3% firms to offer parental leave, and most of them are medium and large scale enterprises (68% and 94.8%, respectively)(Council Of Labor Affairs Executive Yuan, 2009). Thus, neither Taiwan's firms nor female workers are absent of incentives to use parental leave. In addition, once working mothers leave labor market, they will hardly return to original jobs. And someone will replace their position easily. The fact will result in women hard to balance work and family.



(Resource: Directorate General of Budget, Accounting and Statistics of Taiwan ,2011)

Table 3、People of Application for Parental Leave

Unit : Person

Year	Total	Male	Female	%female employment person
2002	3150	148	3002	0.08%
2003	2607	99	2508	0.06%
2004	2942	151	2791	0.07%
2005	3481	133	3348	0.08%
2006	4299	172	4127	0.10%
2007	5024	204	4820	0.11%
2008	5508	255	5253	0.12%
2009	17723	2847	14876	0.33%

(Resource: Council Of Labor Affairs Executive Yuan, 2011)

Above all, we can find that working mothers' contribution to household is definitely important in Taiwan. However, it is very interesting why married women can't return to labor market efficiently as their children growing. On the other hand, either Taiwan or other countries, female workers' occupations mainly congregate on service and general affairs sectors<sup>6</sup>. Thus, if house care and duties could affect female's employment rate, we should detect how social policies, especially family policies, influence female's rational choice between labor market and house care. And how will labor market, especially production regimes, shape the incentives of employers and female and make gender occupational segregation.

Past researches neither explain the special gender occupational segregation in Taiwan, nor regard the institutional arrangement which affects it. Recently, the Varieties of Capitalism (VOC) approach starts to regard the production regimes as serious(Estévez-Abe et al., 2001; Mares, 2003; Thelen, 2004). Hall and Soskice(2001) classify production regimes to two capitalism models, Coordinated Market Economies (CMEs) and Liberal Market Economies (LMEs)<sup>7</sup>. And they

---

<sup>6</sup> In 2010, Taiwan's women working in service sectors rate are 52.56%(Directorate General of Budget, Accounting and Statistics of Taiwan, 2011).

<sup>7</sup> States belonging to CMEs, their comparative advantages are long-term relationship, powerful trade unions, centralization wage bargaining system, and collective bargaining between employers and employee. These countries are such as Japan and Germany. Contrary to CMEs, states belonging to LMEs, their comparative advantages are short-term and untrustful relationship, moderate union density,

emphasize on the institutional complementarities in different production regimes.

Although VOC approach divides capitalism into two types successfully, and it explains the institutional complementarities between welfare state and production regime. It still ignores the prospect of gender, and these assumptions are likely to have different implications for women than for men. Like feminist scholars have identified previously neglected gendered consequences of welfare states by their effort to gender the welfare state, this paper genders the varieties of capitalism. Gendering of the VOC perspective provides an institutional explanation that enriches our understanding of sex segregation. A gendered perspective on the varieties of capitalism generates a new research agenda that is useful for the disciplines of comparative political economy and women's studies. Thus, this paper tries to draw a female employment pattern, namely, women in CMEs and LMEs will face different risk of employment due to different skill types. And female's comparative advantage in labour market will also affect their incentives to invest in specific-skill(Estévez-Abe, 2005; Estévez-Abe, 1999; Charles, 2005).

Above all, this article will follow VOC approach to discovery how the element of institutions, including family policies and skill type, influence female's preference to participate in the labour market. Furthermore, we will set Taiwan as our study case, which is affected deeply by so-called "Confucious culture" in East-Asia welfare regime, and to analyze how the production regime shape Female employment and gender occupational segregation in Taiwan. Then, Taiwan female employment pattern will be the reference of Taiwan's family policy. The rest of this paper is organized in four sections. Section one reviews relevant gender theories and their limitation. Then, presents an alternative theory of sex segregation which is so-called the skill-based theory of occupational segregation. Section two is our research method .Section three provide Taiwan's empirical evidence whether it will support of the skill-based theory or not. Section four, the concluding section, summarizes the findings of this paper and discusses normative implication.

## **2. Relevant theories**

### **2.1 theories of sex segregation**

Past researches discussing the female employment and sex segregation<sup>8</sup> mainly focus on

---

decentralization wage bargaining system, high level female employment rate, and low density of state intervening market(Huber and Stephens, 2001; Thelen, 2001; Ebbinghaus, 2002).

<sup>8</sup> The reality of sex segregation is a complicated multi-faceted phenomenon impossible to express in one single aggregated index. Thus, it is more useful to conceptualize sex segregation both as vertical

three approaches: (1) economic theories; (2) sociological theories; (3) institutional theories. And researchers in Taiwan, they always use human capital theories, sex discrimination, and gender mainstreaming perspective.

In the first place, labor economists have developed two types of explanations for occupational segregation: human capital and statistical discrimination theory. Human capital theory assumes a single family utility function, this analysis suggests the investigation how labor markets and public policies shape gender stereotypes and for how child support rules may affect women's decisions about labor market participation. Thus, women invest little in education, and their families invest less in their daughters' education than their sons' (Becker 1985). Statistical discrimination theory suggests that administered efficiency is in significant respects a system of bureaucratic politics. It appears that workers in predominantly female jobs have been relatively powerless in the system. Their interests have not been as effectively represented by employee organizations or department heads as have the interests of male counterparts. The system's commitment to the preservation of historical patterns of pay differences among jobs also has locked predominantly female jobs into a relatively disadvantaged position (Bridges and Nelson, 1988).

Secondly, sociological theories, such as cultural theories, favored by sociologist and some feminist economists. They emphasize the role of non-rational factors such as employers' tastes and cultural norms. Their findings are consistent with the theory of statistical discrimination as applied to gender segregation, but they are difficult to reconcile with explanations emphasizing optimal employer decision making under uncertainty. Instead, they suggest some features of organizations and their environments that foster and sustain the sexual division of labor (Bielby and Baron, 1986). On the other hand, these articles try to understand how cultural beliefs about gender differentially influence the early career-relevant decisions of men and women. To the extent that individuals then act on gender-differentiated perceptions when making career decisions, cultural beliefs about gender channel men and women in substantially different career directions (Correll, 2001). By the way, researchers in Taiwan, who attribute to gender segregation, favor this approach (see Huang, 1994).

A third approach focuses on institutional context. They emphasize on law or institutional arrangement which will protect female's working condition and opportunities. As Kelly and Dobbin (1999) use neoinstitutional theory to explores how the separation of powers shapes

---

segregation and horizontal segregation or concentration of men and women into single-sex-dominated occupations (Estévez-Abe, 2005).



employer response to law, especially for the Family and Medical Leave Act of 1993 in American. Another researcher, Chang (2000), addresses issues of cross-national convergence in patterns of occupational sex segregation in the context of a new typology. Each of these systems can be characterized by distinct underlying gender “logics” and by the context of state response to issues of gender equality in the labor market. Recently, the gender mainstreaming perspective in Taiwan is similar to the approach. Although the gender mainstreaming perspective does not have a clear definition, it also emphasizes on gender equality when making policies, and expects to respect the sex difference and equality.

In Taiwan case, many studies have demonstrated that a high proportion of married women leave their jobs because of marriage, pregnancy, or childbirth. However, there are also a high proportion of married women remain stay in the labor market. In addition, married women’s income contributes much to Taiwan’s household income. Namely, the female employment contributes therefore much for the family’s income maintenance. But it is very strange that the proportion of Taiwan’s married women returning to labor market is lower than OCED countries. The most importantly, the female occupations mainly congregate on service and general. By the way, the phenomenon is impossible to express by a single element, such as cultural theories, human capital theories and so on. If Taiwan married women’s income and the responsibility of house care contribute much to Taiwan’s household, whether there are some solutions to solve the married women’s dilemma between working and house care. Before we can solve the problem, we also need to find out how Taiwan’s institutional complementarities, especial for the production regime and social policy, shape the rational choices of employers and female labors and create the unusual sex segregation.

## **2.2 Skill and gender bias**

VoC approach has distinguished three types of skills associated with different product market strategies<sup>9</sup>. These skills differ significantly in terms of their asset specificity. Different types of social protection are complementary to different skill equilibria. Employers who rely on specific skills to compete effectively in international markets therefore need to institutionalize some sort of guarantee to insure workers against potential risks. Without implicit agreements for long-term employment and real wage stability, their specific skills will be under-supplied. Employers’ promises are not, however, sufficiently credible by themselves. This is why social protection as governmental policy becomes critical (Estévez-Abe et al., 2001). In the context, it not

---

<sup>9</sup> (1) firm-specific skills; (2) industry-specific skills; (3) general skills.

only focuses on manufacturing male workers, but also argues CMEs as investing in firm-specific skills and LMEs in general skills. However, in a service economy, there is a clear need to expand to cover both manufacturing and services. And consider female worker's employment pattern. On the other hand, there still exists different level of skill formation within CMEs or LMEs. For example, German women tend to invest in those jobs requiring either no training or general educational skills at a low level. As such the skills they invest in retain their characteristics as generally transferable. This contrasts with the position in LMEs where labor market quits may lead to a loss of skills as these are based on informal firm-specific training([Rubery, 2009](#)).

In addition, the system of skill accreditation has also been seen to have gender impacts in comparative analysis of pay structures and systems. Thus, the VoC focuses on the exclusion of women from firm-specific training but not on the potential protection for women's skill levels provided by an occupational training system. Nevertheless, in many occupations the greater significance attached to training and qualifications have advantages in protecting skill status and pay grade over the more informal systems that prevail in LMEs such as the UK (Ibid). Thus, within one type of skills still has different skill formation level, and they will also shape different wage hierarchy. Especially, female labor force participation rate increases substantially in post industry, they acquiring skills may differentiate. And it will influence women's wage and what kind of occupations they will chose.

Especially, post-industry brings its functional underpinnings in accelerating deindustrialization with a declining proportion of the male workforce with specific skills as well as in service sector growth and rising female labor market participation characterized by an increase in general skills. Fleckenstein et al. (2011) observed British and Germany's skill level transformation in postindustrial society. They found that British and Germany's national composition of human capital have become more pronounced with postindustrial trends. Thus, Fleckenstein et al. argue that we need to draw a more nuanced picture of postindustrial employment patterns by transcending the binary distinction between general and specific skills. By making a distinction between high- and low-general skills, they proposed a distinction among three skill sets, namely high-general, low-general and specific, to account for the potential of skill polarization in postindustrial economies.

VoC approach has argued that different institutional arrangement will provide different incentives to workers' willing to invest in specific-skill. And more specific skill will shape higher employment protection to prevent employment risk([Estévez-Abe, et al., 2001](#)). Contrary to male workers, women usually leave their jobs because of marriage, pregnancy, or childbirth. Due to the

fact that female will always be expected to care family, it will shape different incentive to female from male to invest in skill formation. Since firm-specific skills are extremely limited in portability, women as well as men are not likely to invest in those skills unless they are assured that their future employment is secure. While regular employment protection against economic fluctuations might be sufficient to protect men, women are not likely to invest in firm-specific skill unless they are also protected from potential dismissal arising from pregnancy and other family responsibilities that generally fall upon women. In addition, a production regime which regard firm-specific skill as important will more likely shape horizontal segregation. Since firm-specific skill is extremely limited in portability, and regular employment protection against economic fluctuations might be sufficient to protect men. Women are not likely to invest in firm-specific skill unless they are also protected from potential dismissal arising from pregnancy and other family responsibilities that generally fall upon women([Estévez-Abe, 2005, 2007](#)).

Thus, product market strategies that rely on firm-specific and industry-specific skill are more likely to be gender segregating than product market strategies based on general skills. Because general skills are portable, employees are likely to make the investments on their own. General skills that come with authoritative certification are most suited to women's needs. Such skills require that women enroll in school programs or take certification exams. Most certified general education-including high school diploma, BA and MBA-fall into this category. Women can pursue such qualifications independently of employers' calculations. When job qualifications are based on general skills acquired at school rather than firm-specific accumulated through on-the-job training, women will have a better chance in moving up the occupational hierarchy ([Estévez-Abe, 2005, 2007](#); Estévez-Abe et al., 2001).

What's interesting is that the more important the job is, the greater the cost of losing an employee with firm-specific skills, and the greater the male domination. The contrast between management jobs in CMEs and LMEs is striking in this respect: women are much more likely to work in management in LMEs than CMEs. It might be thought that CME women would be less likely to train. This is not necessarily true, as recognized skills are a passport to jobs paid at a collectively bargained rate. The implication is that women in CMEs will be more likely to train in areas that are occupation-specific but not firm-specific and preferably where the occupation is wide enough for employment to be available after breaks and/or on a part-time basis. Thus women work in clerical occupations, retail, and caring occupations. This enables them to work until they have children and then subsequently return to work (Soskice, 2005: 174).

As Hall and Soskice (2001) argument entails that the institutional advantages of LMEs

are wage flexibility and general skills. In CMEs, its institutional advantages are collective bargaining and specific skills. Following the perspectives, in LMEs, with wage flexibility, earnings reflect individual traits: High-productivity workers are well rewarded, low-productivity workers the reverse. With general skill, there is no economic reason why companies should discriminate; it should be sought elsewhere. Therefore there can be high inequality across classes but no reason for gender inequality. Namely, general skills provide more flexibility without penalizing career interruptions, precisely because they do not require any external guarantee and reinforcement. In CMEs, coordinated wage bargaining across industries leads to a more overall egalitarian distribution of earnings. But the specific skills argument reduces access to higher-paid jobs in the private sector and thus worsens the gender inequality of income. At the same time, in LMEs, less educated women are disadvantaged because of class. But they are also disadvantaged relative to better educated women because of childcare. Because the absolute cost of childcare is the same for both groups of women, the relative cost for less-educated women is much greater. In CMEs, well-educated women lose because of income equality. But they lose disproportionately more compared to comparably educated men than do less educated women, because vertical segregation is greater for the former (Soskice, 2005: 175).

### **2.3 Welfare state , female employment and gender segregation: the limitation of social policy**

Now, we will take welfare state into consideration. Welfare state strategies or policies will make employers and workers decide whether they will invest in specific-skills or not. Although welfare state could provide workers some incentives, such as social protection, to make the investments on specific-skills, social protection also will deepen gender bias. Because of time off due to childbirth and rearing will make women interrupt their investment on specific-skills (Estévez-Abe et al., 2001). Thus, it will reduce employers' incentives to hire female workers if they regard specific-skills as important. Then, women face greater discrimination in labor market. Unless government regulation or subsidies can equalize to employers the costs of hiring a man and a woman, women are penalized in welfare economies in which human capital tends to be more firm-specific. The same is not true in the case of general skills: If skills are truly general, there is no problem of moving in and out of employment, and employers will not make costly investment in their employees (Iversen et al., 2005: 220).

Now, we will take welfare state into consideration. Estévez-Abe(2005) argue that different women friendly policies will affect women into labor market, and invest in human capital. The most important women-friendly policies include generous paid maternity and parental

leaves and extensive public child care provision. Statutory maternity leave serves as extra employment protection targeted at women to protect them from dismissal risks. Paid (as opposed to unpaid) maternity and parental leaves protect women against loss of income during pregnancy and childrearing. Public child care similarly protects women from loss of income due to childrearing by enabling mothers to return to work. Child care, however, also protects women from risks of skill depreciation and missed skill acquisition opportunities in ways that even the most generous of paid leaves cannot hope to match.

Statutory leaves and public childcare provision are both intended to promote women's employment. They nonetheless differ on a dimension that is critical for women's human capital development: paid leaves increase women's time off work, while childcare provision reduces it. This means that paid leaves potentially widen the female-male gaps in the number of years worked. In other words, a long generous paid leave per se not help women's skill acquisition of specific skills. On the contrary, time-off-work during the early years of a woman's career interrupts and delays her skill acquisition. Provision of childcare thus is indispensable for women's specific skill investment, because it enables the continuous work necessary for specific skill acquisition. Employers can also use voluntary time-off as a signal of workers' commitment to work. Employers are likely to consider women who take long leaves as uncommitted to their work. The potential signaling effect of long leaves thus can affect all employers regardless of skill regimes([Estévez-Abe, 2005, 2007](#)).

In addition, Hook(2010) observed the sex segregation of household tasks in 19 countries with 36 time. She found that parental leave shows a clear pattern of a trade-off between men and women. Long parental leaves increase sex specialization by decreasing men's and increasing women's cooking time. Parental leave makes women available for time-inflexible housework during a critical time of household renegotiation, and it sends a clear message about who should provide family labor. This adds to research showing that long parental leaves depress women's labor force participation. However, the public provision of child care for young children is associated with less cooking time for women. It means that policies associated with greater father or state care of children appear to relieve women from time-inflexible domestic work. It will reduce women to interrupt jobs, and participate in labor market.

As Esping-Adersen (1999) have mentioned, social policies, such as public services, could support women independent outside the household, and avoid female workers from low-working condition jobs in private sectors. Women always are regarded as the main family care persons, however, high-quality and low-cost family care service will reduce women's family burden to

entry labor market. Then, a woman is better able to invest in her marketable skills. By raising her level of economic independence closer to her husband's, a wife reduces her stake in keeping the relationship going closer to his level. By the way, men may prefer to spare the public purse and hence their tax bill if their wives are default childcare givers. In addition, the welfare state is an important source of employment for women precisely because so many of the jobs replace caring functions that are otherwise provided "for free" in the family. The importance of public employment is particularly important in specific skills countries where it powerfully shapes the labor opportunities of women (Iversen and Rosenbluth, 2005: 38-39). As we have mentioned, collectively wage bargaining system is one of the CMEs states' institutional advantage. Accompanying with the system, compression of wage differentials is one way to protect investment in specific skills. Some specific skills systems are characterized by high minimum wages that tend to push up the cost of daycare and other family-oriented services. These effects, the state supports the ability to form an independent household, especially through publicly provided services such as daycare, and through employment for women in these services, it can compensate for the exclusion of women from good jobs in the private labor market (Iversen and Rosenbluth, 2006: 4-5). However, this should come with a bifurcation of male-dominated private sector and female-dominated public sector.

Contrary to CMEs states, deregulation wage bargaining system is one of characters in LMEs systems. A LMEs system, such as U.S., that offers little specific training in the field, minimal labor market regulations that would create barriers to entry into the profession, and the lack of unionization that could push wages higher. It may be essential to the growth of a private market of child care. This booming private child care market has allowed policy makers to sidestep the controversial question of child care and mothers' employment. With the supply of child care determined not by government officials but by markets, child care is shifted outside of the realm of formal, political debate (Morgan, 2005: 246-252). On the other hand, the flexible and general-skill private child care market makes mothers entry the labor market easily. Most importantly, they could take care their families without quitting jobs.

### **3. Method**

According to the VoC theory, production regimes was divided into CMEs and LMEs. We suppose that the production regime in Taiwan could classify into LMEs. The characters of Taiwan's production regime are exposed highly to the comparative global market. Furthermore, its comparative advantages are short-term and untrustful relationship, moderate union density, general

skill, flexible wage system, and low density of state intervening market. Relevant discussion about Taiwan's production regime<sup>10</sup> can refer to Chen (2005). In the precondition, we will explore the institutional complementarities in Taiwan whether it will affect female employment and gender bias suggested by VoC theory.

### 3.1 Data set

For our analysis we used data from the 'The labor force survey in Taiwan'. This survey was conducted by Directorate General of Budget, Accounting and Statistics of Taiwan in 2009. We will catch the time series from 1980 to 2008. After 1980s, Taiwan's society and politics face the pressure of democratization and globalization significantly. Then, social movement and revolution after 1990s developed quickly. In the condition, Taiwan welfare state also get some advancement in economic and democracy. Besides, our data set samples are the population of aged 15 years and over working people. And the data set includes some important information, such as the general condition of the full-time workers employed (gender, age, occupation, educational degree, content of work etc.).

### 3.2 Variables

The variables capturing individual characteristics of workers include sex, age and educational level, occupation, marriage status. We will observe some dimensions : (1)female workers in industry sector ratio; (2)female labor force in private sector ratio; (3)women in the female-oriented sector<sup>11</sup> ratio; (4)women with high stratification in per occupation ratio. And our definition of some variables are as follow:

- Industry and service sector: Industry branch distinguishes between industry and service sector. According to the "Occupation Classification of R.O.C." adopted by this survey, the industry sector includes mining & quarrying, manufacturing, electricity, gas & water, construction. The service sector includes trade, accommodation & eating-drinking places, transport, storage & communication, finance & insurance, real estate & rental & leasing, professional, scientific & technical services, educational services, health care & social

---

<sup>10</sup> Whether Taiwan's production regime could classify into LMEs or not, it is still uncrystallized.

However, it does not the article try to explore. Thus, our assumption is that Taiwan belongs to LMEs suggested by Chen (2005).

<sup>11</sup> Occupations with 60% and above female workers

welfare services, cultural, sporting & recreational services, other services, public administration.

- Women with management jobs: Women's occupations are legislators, government administrators, business executives & managers.
- Women with high education: women educational attainment above junior college, university & graduate school.
- Human resource of gender distance: female workers invest in high education minus male workers' condition. If the value is close to zero, it means that female and male have similar incentives to invest in human resource.
- Employment protection legislation: we will use the indicators of EPL. strictness which was defined by OECD<sup>12</sup> to calculate the employment protection value. Employment protection legislation (EPL.) is described along 18 basic items, which can be gathered in three main areas: (1) employment protection of regular workers against individual dismissal; (2) specific requirements for collective dismissals; and (3) regulation of temporary forms of employment. Starting from these 18 basic pieces of information, a four-step procedure has been developed for constructing cardinal summary indicators of EPL strictness that allow meaningful comparisons to be made.
- The generosity of family-related leaves: In the category, we will take maternity leave (or pregnancy leave), paternity leave, parental leave and the purpose of taking personal care leave. Then, we will divide the category into two dimension, couples' FTE paid leave and maximum length of leaves for women. We will use the "Full-time equivalent (FTE)", which was defined by OECD, to count the value ( $FTE = \text{Duration of leave in weeks} * \text{payment (as per cent of AW earnings)}$ ) received by the claimant ). According to the article 50 of Labor Standards Act in Taiwan, a female worker shall be granted maternity leave before and after childbirth for a combined period of eight weeks. And it starts in 1984. Other relevant act is "Gender Equality in Employment Act (2001)", the article 15 regulate while employees' spouses are in labor, their employers shall grant them three days off as a fraternity leave. In addition, the article 16 and 20 regulate that employees could apply for parental leave and the purpose of taking personal care without payment for 2 years and seven days in one year.

## **4. Results and Findings**

### **4.1 education and gender segregation**

---

<sup>12</sup> see OECD (2004). OECD employment outlook, chapter 2.



As Hall and Soskice (2001) argument entails that the institutional advantages of LMEs are wage flexibility and general skills. With wage flexibility, earnings reflect individual traits: High-productivity workers are well rewarded, low-productivity workers the reverse. With general skill, there is no economic reason why companies should discrimination should be sought elsewhere. Therefore there can be high inequality across classes but no reason for gender inequality. Namely, general skills provide more flexibility without penalizing career interruptions, precisely because they do not require any external guarantee and reinforcement. In addition, general skills that come with authoritative certification. Such skills require that people to enroll in school programs or take certification exams. Thus, we will suppose that Taiwan as the LMEs system, female workers would have the same incentive to invest in high education as male. If women are with high education as male, they would have the same opportunity to flow up to management jobs.

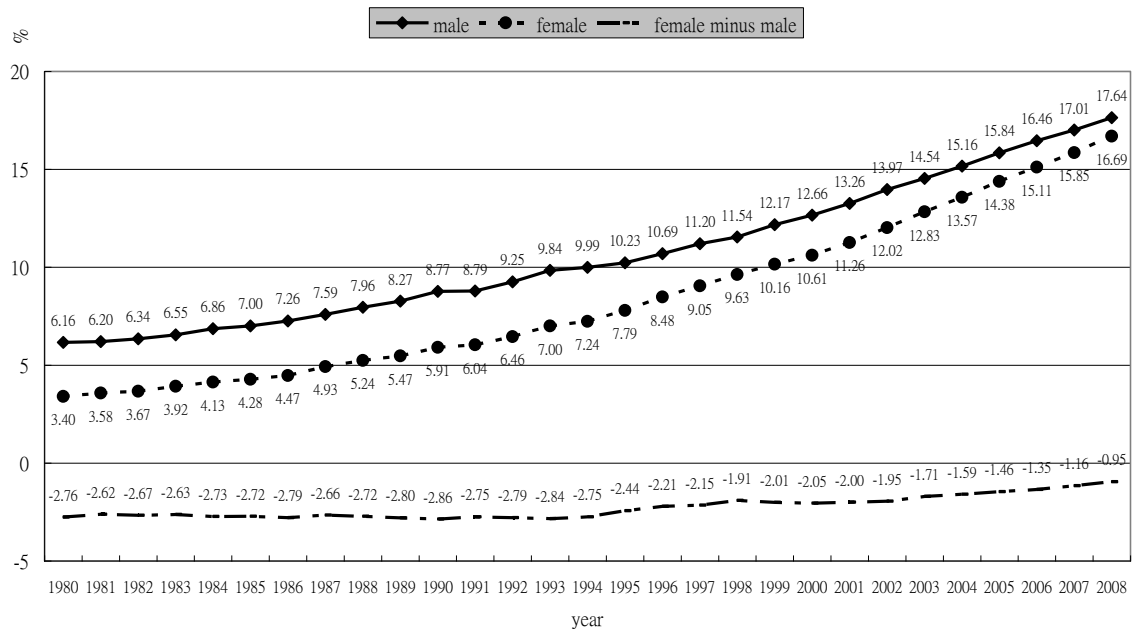
We can see the figure 1, Taiwan's female workers investing in high education increase from 3.4% in 1980 to 16.69% in 2008, it rises significantly. On the other hand, the human resource of gender distance value is -2.76 in 1980, and decreases to 0.95 in 2008. According to the phenomenon, we can find that Taiwan's female worker favor to invest in high education, and the distance value between female and male is below 3%. In addition, the distance value is close to zero (0.95%) in 2008. Obviously, female workers prefer to attain in high education as male's preference. As the Voc theory suggest us that one of the institutional advantage of LMEs systems is general skills, it will attract female to invest in high education due to the portable skill.

Secondly, Taiwan's female with management jobs are still low. It is below 1%(see the figure 2). However, the distance between female and male decrease from 1994 to 2008. And the ration in 2008 reduces below 3%. The gender distance trend lower gradually, and more and more women could flow up to management jobs. Nevertheless, we still need to say that Taiwan's labor market may exist statistic discrimination, and result in female with management jobs are behind male's condition. Although female with management jobs are lower than men in Taiwan's labor market, we can discover that women with high education as men are possible to get promoted. We can see the figure 3, female with high education and management jobs, the  $R^2$  value is significantly high (0.6646). Besides, the trend increases when female invest more in high education, and the correlation between these two variables is also significantly high (0.815).

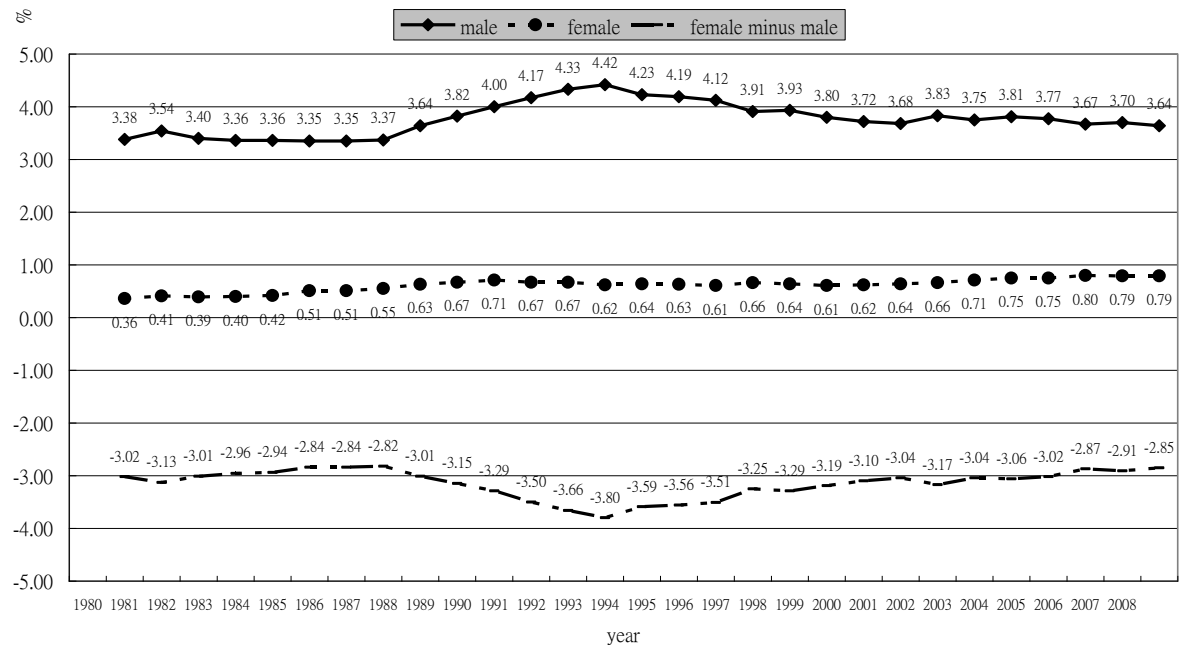
Above all, we can observe the gender educational segregation is limited in Taiwan. When job qualifications are based on general skills acquired at school rather than firm-specific accumulated through on-the-job training, women will have a better chance in moving up the

occupational hierarchy. And women can pursue such qualifications independently of employers' calculations. However, it still exist statistic discrimination in Taiwan's labor market.

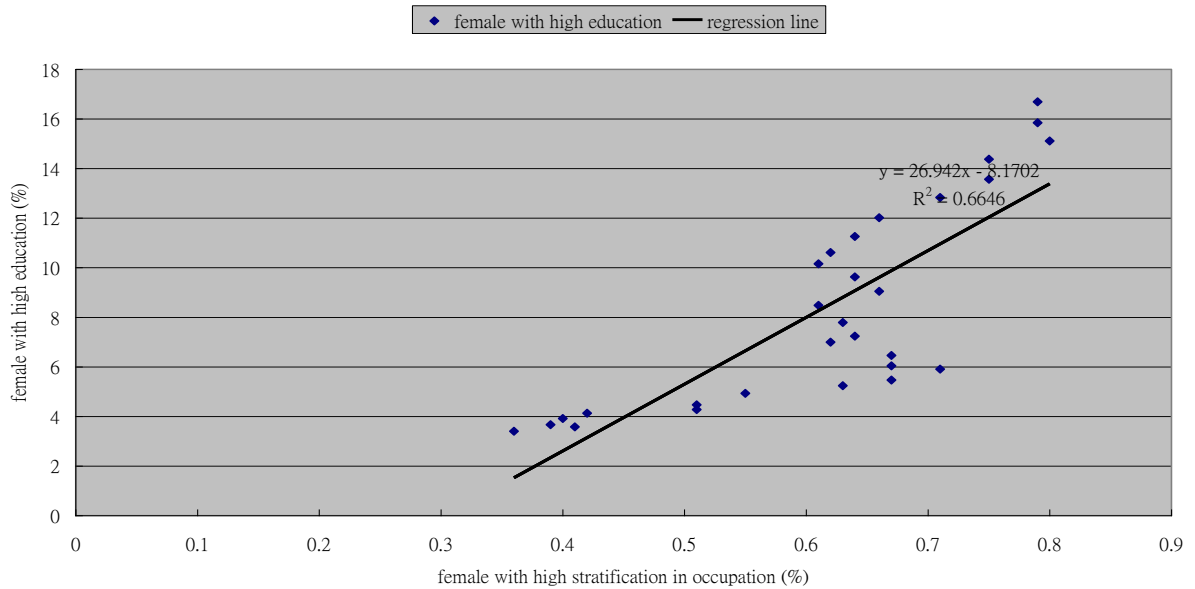
< figure1:Educational attainment above junior college of civilian population aged 15 years and over, by gender >



< Figure2: Occupations belong legislators, government administrators, business executives & managers, by gender>



< Figure3: female with high education and stratification in occupation >



#### 4.2 horizontal segregation

According by Estévez-Abe (1999b; 2005; 2007) researches, she clarify that a production regime which regard firm-specific skill as important will more likely shape horizontal segregation. Since firm-specific skill are extremely limited in portability, women as well as men are not likely to invest in those skills unless they are assured that their future employment is secure. While regular employment protection against economic fluctuations might be sufficient to protect men, women are not likely to invest in firm-specific skill unless they are also protected from potential dismissal arising from pregnancy and other family responsibilities that generally fall upon women. Namely, the more important the job is, the greater the cost of losing an employee with firm-specific skills, and the greater the male domination.

In the hypotheses, we will expect Taiwan LME system to be more gender equality. And the general skill is one of its institutional advantages, it will not attract employers to increase employment protection due to the low valuable skill. In the condition, employment protection will not shape dual-labor market widely. Let's see the table 1, the correlation coefficient between EPL.(1)<sup>13</sup> and gender employment ration is low whether it is in industry or service sector.

It means that EPL.(1) will not affect female and male workers to enter in industry or

<sup>13</sup> EPL.(1) can be gathered in two main areas: (1) employment protection of regular workers against individual dismissal and (2) regulation of temporary forms of employment.

service sector, if they have the same condition and opportunity. Then, we take EPL.(2)<sup>14</sup> into consideration, the correlation coefficients are significantly high whether gender they will be. And EPL.(2) will influence negatively both sex workers into industry sector, especially for men. Because Taiwan depends on export-oriented trade and flexible produce process, high wage and employment protection will increase employers' cost. Thus, the harder the collective dismissals is, the lower willing of employers hire male workers in the industry sector due to the higher wage than female workers. However, EPL.(2) will protect both sex workers into service sector, especially for women. It may be the more cost of collective dismissals than keeping these workers due to the low and flexible wage in service sector.

Compared to Table1, we further divide occupations into male-domination and female-domination occupations (see the Table 2). We can find that male-domination occupations distribute in both sectors. Nevertheless, female-domination occupations are major in service sector. The trends of correlation coefficients between gender employment ration and both EPL variables are similar with Table 1. Obviously, Taiwan's employment protection will not protect significantly female and male workers to entry industry sector, especially while the collective dismissals are taking into consideration. However, it is not as the assumption of VoC theory, which there will be more gender equality in horizontal occupations due to the lower employment protection and general skill. In Taiwan case, we can discovery that there still exist occupation horizontal segregation for women, they employ mainly in service sector. And there is more gender occupational equality for men, they can employ mainly in both sector.

---

<sup>14</sup> Besides the two main area of EPL.(1), EPL.(2) includes the third main area: specific requirements for collective dismissals.

< Table 1: correlation coefficient of gender employment ratio and EPL., by sector >

sector	Total industry sector	Total service sector
correlation coefficient of male employment ratio and EPL.		
EPL.(1)	0.175	-0.18
EPL.(2)	-0.738	0.54
correlation coefficient of female employment ratio and EPL.		
EPL.(1)	0.206	-0.31
EPL.(2)	-0.468	0.61

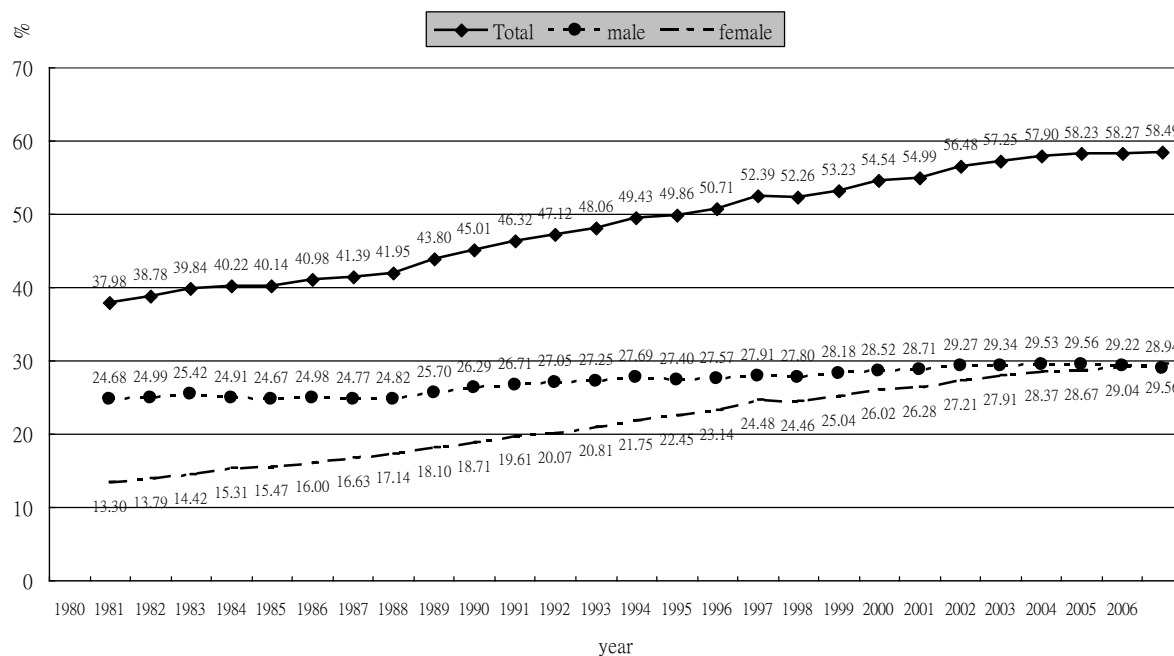
< Table 2: correlation coefficient of gender employment ratio and EPL., by occupation >

gender-domination	male-domination occupations							female-domination occupations	
occupation	Mining & Quarrying	Manufacturing	lectricity, Gas & Water	Construction	Transport, Storage & Communication	Real Estate & Rental & Leasing	Public Administration	Educational Services	Health Care & Social Welfare Services
sector	industry sector				service sector			service sector	
correlation coefficient of male employment ratio and EPL.									
EPL.(1)	0.58	-0.47	0.786	-0.133	0.829	-0.884	0.543	-0.607	-0.155
	-0.016							-0.37	
EPL.(2)	-0.82	-0.391	-0.697	-0.657	-0.639	0.469	0.527	0.766	0.834
	-0.672							0.88	
correlation coefficient of female employment ratio and EPL.									
EPL.(1)	0.042	0.47	0.682	-0.556	-0.256	-0.625	0.09	-0.652	-0.645
	0.116							-0.66	
EPL.(2)	-0.829	-0.69	-0.693	-0.358	0.443	0.685	0.91	0.893	0.743
	-0.014							0.82	

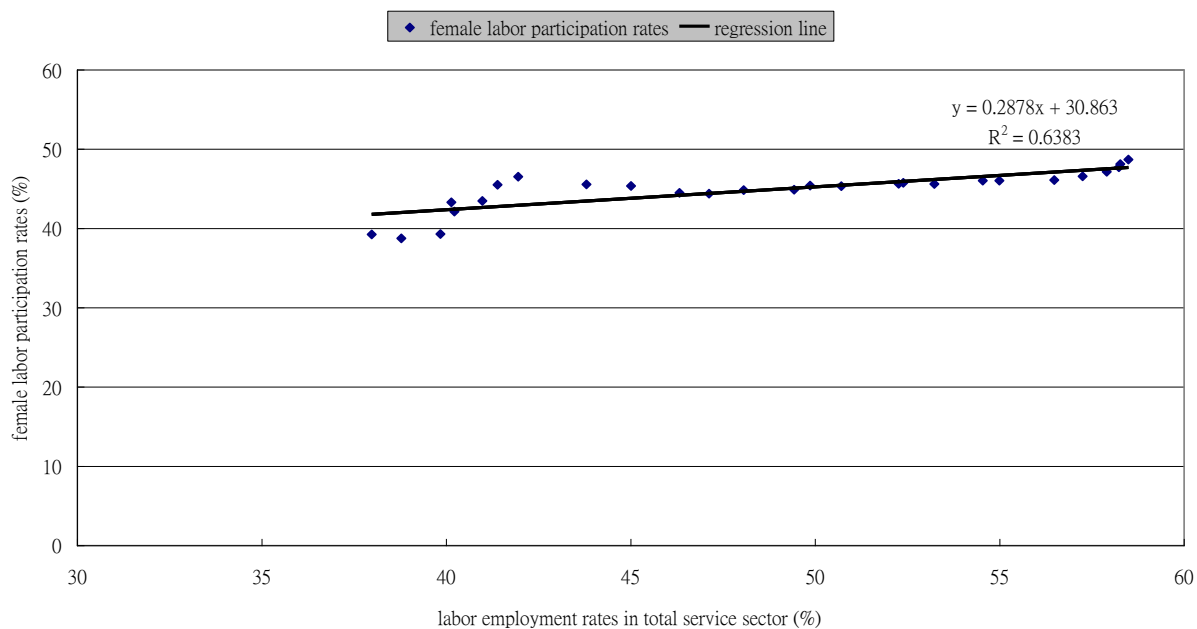
What elements do influence female workers to entry service sector? There may be many causes. However, it can not be ignored that male breadwinner hegemony fades, women gradually emerge as the lynchpin of any new equilibrium between households and the economy. All across the advanced world, families increasingly require women's work income in order to uphold living standards. The service economy is certainly the result of new technologies and changing business practice, and these are what fuel financial, marketing, design, and consultancy services. But its vitality is equally ignited by the changes in household behavior that stem from the disappearing homemaker and the emerging reality of regularly employed mothers and wives. Like modern firms, families also outsource their servicing needs and this is what promotes jobs in social and consumer services. The service sector, it is often believed that women are hugely over-represented in precarious jobs. The lion's share of part-time jobs are of course female, and these have often been the catapult of female employment growth (Esping-Andersen, 1999). Thus, we can assume that the service sector expanding, it will attract more women to employ in the sector. Due to the fact that women could combine jobs with housework in the flexible service sector.

In Taiwan case, we can see the figure 4, the trend of women employing in service sector is similar with the trend of total service sector employment rate. However, male workers employment rate in service sector does not accelerate. Furthermore, let's see the figure 5, labors in total service sector and female labor participation rate, the  $R^2$  value is significantly high (0.6383). Namely, the more the service sector is promoted, the more fast female workers accelerate to participate in labor market. And it will shape Taiwan's female-domination occupations mainly in service sector. Although female in service sector, such as distributive and personal services, are part-time biased, exhibit very high levels of job instability and low pay, wages in typical female sectors such as social, educational, and health services are above average, and levels of job tenure are high.

< Figure 4: workers in service sector, by gender >



< Figure 5 : workers in total service sector and female labor participation rate >



#### 4.3. vertical segregation and female employment

LME systems with general skill, there is no economic reason why companies should discrimination should be sought elsewhere. Therefore there can be high inequality across classes but no reason for gender inequality. Namely, general skills provide more flexibility without penalizing career interruptions, precisely because they do not require any external guarantee and reinforcement. At the same time, in LMEs, less educated women are disadvantaged because of class. But they are also disadvantaged relative to better educated women because of childcare. Because the absolute cost of childcare is the same for both groups of women, the relative cost for less-educated women is much greater. In the condition, we will argue, if the institutional arrangement will protect specific-skill formation, employers will guarantee the employment protection of core workers to force the skill formation. And these core workers always are male labors, due to the fact that they will not interrupt skill formation because of marry and pregnancy. Contrary to specific-skill, general-skill is more portable, and it does not catch on-the-job training. Thus, employers will not be like to bear the cost of employment protection. Namely, LME employment protection will not discriminate women to high hierarchy occupations absolutely. The possible element is women's education, it will affect LMEs female workers to flow to high hierarchy occupations or not.

In Taiwan, we can see the Table 3, the correlation coefficient between men with management jobs and EPL. is low (0.17 and -0.17). It means that EPL. will not protect men to high hierarchy occupations, and the male-oriented dual labor market is not clear-cut. On the other hand, the correlation coefficient (Table 3) on women is high. Although EPL.(1) will have negative effect on women to be management men, when we take collective dismissals into consideration, it will guarantee women to move up. In addition, we can clarify again that Taiwan female workers with high education will be more likely to flow up (see the figure 3). Here, we could conclude the section that the employment protection in Taiwan will not promise male workers to high hierarchy occupations, and it will not influence the gender vertical segregation definitely. Because employment protection effect on women is more than on men. However, gender and class vertical segregation exist definitely in Taiwan. Female with high education will be more likely to flow up than those with low education. And male workers will have more opportunities than women, who have the same condition, to be management men.



< Table3 : correlation coefficient of labor with management jobs rate and EPL., by gender >

	correlation coefficient of female with management jobs rate and EPL.	correlation coefficient of male with management jobs rate and EPL.
EPL.(1)	-0.58	0.17
EPL.(2)	0.69	-0.17

Besides gender occupational segregation debates, nowadays, scholars also pay more attention on female employment, because female workers could be important reserve labor force in the post-industry. There is no doubt that women may interrupt their careers due to marry, pregnancy and child birth. Thus, the welfare state is an important source of employment for women precisely because so many of the jobs replace caring functions that are otherwise provided “for free” in the family. The supportive welfare policies, such as paid maternity and family leave, child care service, will reduce mothers’ caring responsibility, and it will help them to enter in labor market. However, the difference effect between paid family leave and child care service is whether it is good for accumulating specific-skill or not, which the VoC theory inspires us.

From what we have mentioned above, Taiwan also has faced female employment debate. In 1984, Taiwan started the first paid maternity, government regulate employers to pay 8 weeks full wage for female workers when they give a birth. In 2001, “Gender Equality in Employment Act” has started. In the Act, it develops a lot of family leave programs, including paid and unpaid schemes. However, it is still lack of public child care service in Taiwan, and the private child care service is not cheap enough to afford. Whether could the so-called “Taiwan family policies” support women to participate in labor market or not? We can see the Table 4, the couples’ FTE paid<sup>15</sup> and maximum length of leaves for women, they have the highly positive correlation with female labor participation rates, especially for married, cohabited, and divorced women. According to the phenomenon, we may assume that the portable general-skill, which is one of Taiwan’s institutional advantages, let female workers could be back labor market easily, even though they ever interrupt careers. Here, we must clarify that it does not mean paid family leave affect female participate rate directly, it still need to further check. In addition, Taiwan is without public child service, so we can’t compare with it whether it will be more positive than paid family leave to support female employment or not.

---

<sup>15</sup> It includes paid maternity and father’s leave.

< Table 4 : correlation coefficient of marital-status labor participation rates and couples' FTE paid, maximum length of leaves for women in Taiwan >

	total	never married	married, spouse present or cohabited	divorced, separated or widowed
couples' FTE paid	0.82	0.307	0.694	0.73
maximum length of leaves for women	0.82	0.307	0.694	0.73

## 5. Preliminary Conclusion

Compared to the advanced countries, the employment rate of married women in Taiwan (41.2%) equals that of Italy (42.4%) and U.K. (47.3%), and surpassed that of Germany (38.4%) and Japan (17.6%). However, Taiwan's female employment rate decreases enormously while their children are aged above 3 years old. Another interesting finding of Sawako (2007) shows married women's income contribute much to Taiwan's household income about 20-45%. The female employment contributes therefore much for the family's income maintenance. This article aims to approach the problematic of occupational segregation and low female employment rate in Taiwan from the angle of Varieties of Capitalism (VoC) approach.

Existing social science on the family and gender relations tends to divide into two broad methodological traditions. One is rooted in a macrosociological approach that looks at how the organization of political, economic, and social institutions shapes ideologies and affects men and women differently in terms of income, careers, and political power. The other approach is a microeconomic analysis of how the division of household labor, fertility choices, and consumption patterns arise from consideration of household efficiency or as the result of bargaining within the family. Both approaches are limited by the focus on either macro- or microlevel processes, and by their relative neglect of each other. In this article we seek to explore the macroimplications of microdecisions, even as we try to understand how the microchoices are shaped by macroconditions.

As Iversen and [Rosenbluth](#) (2010), we try to share a strong focus on modes of production and material interests, but we pay more attention to institution design and conditions outside the market. Household bargaining and decisions interact with market conditions as well as political and

economic institutions. Today, outside options influence bargaining within the family. If women with better outside options, they will do relatively less housework and caring responsibility. In addition, government policy can influence how easily women straddle their household and market roles, both by subsidizing childcare and by employing women in the public sector. However, men and women will have different preferences over these policies since they will place some value on cultivating their respective outside options apart from maximizing family income.

So far, we find the pattern of Taiwan's female employment as follow. In educational segregation dimension, we find that Taiwan female workers prefer to attain in high education as male's preference. Although female with management jobs are lower than men, we can discover that women with high education as men are possible to get promoted. As the Voc theory suggest us that one of the institutional advantage of LMEs systems is general skills, it will attract female to invest in high education due to the portable skill. And women will have a better chance in moving up the occupational hierarchy. However, it still exist statistic discrimination in Taiwan's labor market.

In horizontal and vertical segregation dimension, Taiwan's employment protection will not protect significantly female and male workers to entry industry sector, especially while the collective dismissals are taking into consideration. We also can discovery that there still exist occupation horizontal segregation for women, they employ mainly in service sector. And the more the service sector is promoted, the more fast female workers accelerate to participate in labor market. However, there is more gender occupational equality for men, they can employ mainly in both sector. Besides, gender and class vertical segregation exist definitely in Taiwan. Female with high education will be more likely to flow up than those with low education. And male workers will have more opportunities than women, who have the same condition, to be management men.

In addition, Taiwan also has faced female employment debate. We can find that Taiwan paid family leave and maximum length of leaves for women, they have the highly positive correlation with female labor participation rates, especially for married, cohabited, and divorced women. According to the phenomenon, we may assume that the portable general-skill, which is one of Taiwan's institutional advantages, let female workers could be back labor market easily, even though they ever interrupt careers. However, Taiwan is without public child service, so we can't compare with it whether it will be more positive than paid family leave to support female employment or not.

So far, could VoC theory explain Taiwan's gender occupational segregation and female

employment? We are still skeptical. As Rubery (2009) argues that VoC theory does not explain variations in female participation. He thought that VoC theory is lack of female perspective, it ensuring that male employees are able to focus on their skilled work and firm-specific training without being distracted by domestic commitments. The second problem is that VoC's narrow lens focus mainly on manufacturing. Service sector now account for the vast majority of both employment and output, it needs to be expanded and updated to include the services business community. Thirdly, VoC theory inspires us that differences in segregation are to be explained through different systems of skill formation. The argument is not that employers do not in practice discriminate against women because they are more likely to take family leave but that there should be skepticism as to whether this persistent employer discrimination, particularly in a context where the costs are largely socialized and employment effectively continuous, should be considered to be fully explained by economic rationality. On the other hand, VoC approach needs to be more consistent with much of the literature on labor markets and forms of training, to provide a more differentiated analysis of the types of training. As LMEs tend to recruit on the basis of general educational skills but nevertheless have to provide some investment in firm-specific training although the investment may be limited and spread out due to the risk of loss of the investment though job quits. Furthermore, LMEs where labor market quits may also lead to a loss of skills as these are based on informal firm-specific training. In many occupations the greater significance attached to training and qualifications has advantages in protecting skill status and pay grade over the more informal systems that prevail in LMEs.

Another skepticism scholar is Folbre. In her recent work, she argues that the welfare state does not simply regulate or mediate capitalist relations of production; it regulates and mediates family policy-the process of production. It socializes some forms of family support and privatizes others; it promote health and encourages fertility and defines citizenship and restricts immigration. Its taxes and transfers have implications for gender roles that reach well beyond differences in female labor force participation. Her theoretical perspective also suggests that human behavior is shaped by gender interests as well as class interests. Current forms of gender inequality are not simply a byproduct of different class arrangements, but the outcome of more complex strategic interactions. In addition, she mention that in LMEs, such as U.S.A, affluent women have little incentive to push for greater state provision. They always manage their care responsibilities by hiring low-wage women to provide them in relatively inexpensive child and elder-care facilities. On

the other hand, poor women also suffer both from low wages and a low level of public support for care provision. In general, more extreme class inequality seemed to mute gender inequality, because it intensifies differences among women. In more class egalitarian societies, women perform more sex-stereotypical work, but are more generously paid for it (Folbre, 2009).

Finally, Rubery (2009) also suggests us that women are often very loyal and stable workers, and there is a real danger that the focus on the costs of women's interruptions may legitimate widespread and nonrational discrimination against women. Where this discrimination is reinforced by social norms, then there are limited costs to the employer. In addition, we also can't ignore the different female employment pattern between different classes. The central VoC-inspired argument, that women enjoy comparatively favorable access to high-level jobs in LMEs while facing higher barriers in CMEs, is therefore plausible for "higher-class" women whose human capital destines them for managerial or professional jobs. However, the favorability of LMEs to women is called into question when we consider the fate of "lower-class" women with limited human capital and low earnings capacities. It is a truism that the unregulated labor markets and porous social safety-nets characteristic of the LMEs offer flexibility at the cost of employment insecurity. The situation of lower-class women is very different. Maternity leave policies and childcare facilities are much more important for their ability to combine family care with paid work. Lacking the necessary human capital to compete for attractive jobs, skill specificity and the consequences of protective family policies are less relevant to their occupational opportunities. Thus, minimal levels of social protection and undeveloped family policies in LMEs often leave lower class women with no external support for reconciling paid and unpaid work, and no protection of their wages and conditions once they are in employment (Mandel and Shalev, 2009).

Above all, Taiwan as LMEs exists high variation of earnings distribution among working mothers. We will need to explore the differences of family policies between high and low class female workers in the future. Then, it will give us more fully pictures of Taiwan's female employment condition. And we also expect that different class women will suffer motherhood penalty by different factors. As Budig and Hodges (2010) suggest us that family resources, work effort, and compensating differentials account for a greater portion of the penalty among low earners. Among highly paid women, by contrast, the motherhood penalty is significantly smaller and largely explained by lost human capital due to childbearing.

## Reference

- Becker, G.. (1985). "Human Capital, Effort, and the Sexual Division of Labor", *Journal of Labor Economics*, 3(1): S33-58.
- Bell, D. (1976). *The Coming of Post-Industrial Society: A Venture in Social Forecasting*. New York: Basic Books .
- Bielby, W., and Baron, J. (1986). "Men and Women at Work: Sex Segregation and Statistical Discrimination", *American Journal of Sociology*, 95: 616-658.
- Bonoli, G.. (2007). "Time matters: Post-industrialization, new social risks and welfare state adaptation in advanced industrial democracies", *Comparative Political Studies* , 40(5) : 495-520.
- Bridges, W. P., and Nelson, R.L. (1988). "Markets in Hierarchies: Organizational and Market Influences on Gender Inequality in a State Pay System", *American Journal of Sociology*, 95(3): 616-658.
- Budig, M. J., and Hodges M. J. (2010). "Differences in Disadvantage: Variation in the Motherhood Penalty across White Women's Earnings Distribution." *American Sociological Review* 75(5):705-28.
- Chang, M. (2000). "The Evolution of Sex Segregation Regimes", *American Journal of Sociology*, 105: 1658-1701.
- Charles, M. (2005). "National Skill Regimes, Postindustrialism, and Sex Segregation", *Social Politics*, 12(2): 289-316.
- Chen, Y.F. (2005). *The Institutional Embedded of Production Regime and Social Policy in East Asia : Japan and Taiwan in Comparison*. Chia-i : National Chung Cheng University Press.
- Correll, S. (2001). "Gender and career Choice Process: The Role of Biased Self-Assessments", *American Journal of Sociology*, 106: 1671-1730.
- Directorate General of Budget, Accounting and Statistics of Taiwan (2011). *The survey of human resource paper*.
- Directorate General of Budget, Accounting and Statistics of Taiwan (2011): <http://www.dgbas.gov.tw>
- Ebbinghaus, B. (2002). *Exit from Labor : Reforming Early Retirement and Social Partnership in Europe, Japan, and the USA*. Habilitationsschrift Press.

- Esping-Andersen, G. (1999). *Social Foundations of Postindustrial Economies*. New York: Oxford University Press.
- Esping-Andersen, G. (2002). 'A New Gender Contract', in Esping-Andersen, G., Gallie, D., Hemerijck, A. and Myles, J. (2002), *Why We Need a New Welfare state*, pp. 68-95. New York/Oxford: Oxford University Press.
- Estévez-Abe, M. (1999). Multiple logics of the welfare state : skill, protection, and female labor in Japan and selected OECD countries. USJP Occasional Paper 99 – 02..
- Estévez-Abe, M. (2005). "Gendering Bias in Skill and Social Policies: The Varieties of Capitalism Perspective on Sex Segregation", *Social Politics*, 12(2): 180-215.
- Estévez-Abe, M. (2007). "Gendering the Varieties of Capitalism: Gender Bias in Skill and Social Policies" , in Rosenbluth, F. M. (2007)(ed.), *The Political Economy of Japan's Low Fertility*, pp. 63-86. Stanford: Stanford University Press.
- Estévez-Abe, M., Iversen, T. and Soskice, D. (2001). 'Social Production and Formation of Skills: A Reinterpretation of the Welfare State' in Hall, P. and Soskice, D. (2001)(ed.), *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage*, pp.145-183. New York/Oxford: Oxford University Press.
- Fleckenstein, T., Saunders, A. M., & Seeleib-Kaiser, M. (2011). The Dual Transformation of Social Protection and Human Capital: Comparing Britain and Germany. *Comparative Political Studies*, 44(12), 1622-1650.
- Folbre, N. (2009). "Varieties of patriarchal Capitalism ", *social politics*, 16(2): 204-209.
- Hall, P. and Soskice, D. (2001). 'Introduction to Varieties of Capitalism', in Hall, P. and Soskice, D. (2001)(ed.), *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage*, pp.1-68. New York/Oxford: Oxford University Press.
- Hook, J. L. (2010). Gender Inequality in the Welfare State: Sex Segregation in Housework, 1965-2003. *American Journal of Sociology*, 15(5), 1480–1523.
- Huang, H. M. (1994). "Development, Present Situation, and Problems of Women's Education and Labour Force Participation", *Journal Of Women And Gender Studies*, 5: 133-163.
- Huber, E. and Stephens, J. D. (2001). *Development and Crisis of the welfare State: parties and Policies in Global Markets*. London : The University of Chicago Press.
- Iversen, T. and Rosenbluth, F. (2005). "Gender Socialization: How Bargaining Power Shapes Social Norms and Political Attitudes", *Working Paper*.

- Iversen, T. and Rosenbluth, F. (2006). "The Political Economy of Gender: Explaining Cross-National Variation in the Gender Division of Labor and the Gender Voting Gap", *American Journal of Political Science*, 50(1): 1-19.
- Iversen, T. Rosenbluth, F. and Soskice, D. (2005). "Divorce and the Gender Division of Labor in Comparative Perspective", *Social Politics*, 12(2): 216-242.
- Iversen, T. and [Rosenbluth](#), F. (2010). "Women, Work, and Politics: The Political Economy of Gender Inequality". New Haven: Yale University Press.
- Kelly, E., and Dobbin, F. (1999). "Civil Rights Law at Work: Sex Discrimination and the Rise of Maternity Leave Politics", *American Journal of Sociology*, 105(2): 455-492.
- Mandel, H. and Shalev, M. (2009). "Gender, Class, and Varieties of Capitalism", *social politics*, 16(2): 161-161.
- Mares, I. (2003). "The Politics of Social Risk—Business and Welfare State Development". Cambridge : Cambridge University Press.
- Ministry of the interior of Taiwan (2008): <http://www.moi.gov.tw>
- Morgan, K. J. (2005). "The 'Production' of Child Care: How Labor Markets Shape Social Policy and Vice Versa", *Social Politics*, 12(2): 243-263. OECD (2004). OECD employment outlook.
- Rubery, J. (2009). "How gendering the Varieties of Capitalism requires a wider lens", *social politics*, 16(2): 192-203.
- Sawako, S. (2007). 'Women's economic status and fertility: Japan in cross-national perspective', in Rosenbluth, F. M.. (2007), *The political economy of Japan's low fertility*, pp. 37-62. California/ Stanford: Stanford University Press.
- Soskice, D. (2005). "Varieties of Capitalism and Cross-National Gender Differences", *Social Politics*, 12(2): 170-179.
- The Council of Labor Affairs of Taiwan (2007). *2007 Statistic of Female Labor Trends*.
- Thelen, K. (2001). 'Varieties of Labor Politics in the Developed Democracies.' in Hall, P. and Soskice, D. (2001) (ed.), *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage*, pp. 71-103. New York/Oxford: Oxford University Press.
- Thelen, K. (2004). *How Institutions Evolve : The Political Economy of Skill in Germany, Britain, The United States, and Japan*. Cambridge : Cambridge University Press.



# **The Transformation of the Private Sphere: Disentangling Online Friendships in Teenage Social Life**

Chin-Siang ANG (austin\_ang119@hotmail.com)

Department of Human Development and Family Studies,  
Faculty of Human Ecology, Universiti Putra Malaysia

## **1. Introduction**

Psychological need satisfaction refers to one's essential autonomous condition in pursuit of competence and relatedness within a social context which could affect his or her growth and well-being (Deci & Ryan, 2000, 2008). For example, there are robust associations between certain aspects of autonomy support and psychological need satisfaction (Koh, Wang, Erickson & Cote, 2012; Gagné 2003), and between psychological need satisfaction and personal well-being (e.g. life satisfaction and psychological health; Patrick, Knee, Canevello, & Lonsbary, 2007). These findings suggest that psychological need satisfaction can potentially enhance life satisfaction and psychological health. Such findings can be found from extant literature using samples from individualistic countries (e.g., United States; Şimşek & Koydemir, 2013, and Belgium; Luyckx, Vansteenkiste, Goossens, & Duriez, 2009), and from collectivistic countries (e.g., South Korea; Jang, Reeve, Ryan, & Kim, 2009, and China; Vansteenkiste, Lens, Soenens, & Luyckx, 2006). Identifications of psychological need satisfaction precursors and its correlates can provide vital cues to enhance individual well-being.

The extensive use of computer-mediated communication (CMC) in all spheres of social life has shifted the society towards increasingly interconnected. This phenomenon allegedly spurred by globalization, a process of individualization and an outcome of social movements (Baym, 2010). Following these changes, non-traditional relationships are widely accepted in both developed and developing countries (Chou & Peng, 2007; Sheldon, Abad, & Hinsch, 2011). For example, CMC provides a rich sphere for socialization and continues to grow as a result of rapid changes in economic and social circumstances (Walther, 2010). Apparently online socialization becomes a mainstream among teenagers. As pointed by Sheldon *et al.* (2011), individuals are unlikely to be motivated if they are in an environment or a context that does not meet their psychological needs. Despite psychological need satisfaction is often quoted as necessary nutrients in every social

context at all times for people to thrive and grow to the maximal extent, research to date has only studied psychological need satisfaction in multiple physical social contexts, also in online gaming research. Questions remain about its applicability to online friendships (Baym, 2010). As a wealth of empirical evidence shows that adolescence is a time which needs intense person-to-person communication with a friend (Mendelson & Aboud, 1999), this has led to an interest in studying psychological need satisfaction in online friendships.

Based on theories of uses and gratification and of self-determination, we proposed a structural model examining the association psychological need satisfaction between online friendships among teenagers from Malaysia, a collectivist society. In this study, primary factors include attitude towards online relationship formation, internet habit strength, online communication, and online self-disclosure. In addition, this study also examined the mediating roles of online communication and online self-disclosure in the relationship between attitude towards online relationship formation and internet habit strength, and psychological need satisfaction. The following section focuses on the theoretical and empirical research that models the study variables. We then describe the methods that we adopted. The findings are presented in the next section. Finally, we provide a general discussion, limitation, and recommendation for future studies.

## **2. Literature Review**

### **2-1. Theoretical Framework**

Uses and Gratification Theory (UGT; Katz, Blumler, & Gurevitch, 1974) and Self-Determination Theory (SDT; Deci & Ryan, 2000; 2008) serve an impetus to research on the nature and correlates of psychological need satisfaction. These theories are primarily developed in Western countries; however, some scholars suggested that UGT and SDT could be culturally unbounded. UGT could be applied to understand why media is use and what they are use for (Katz *et al.*, 1974). In Katz's theory, media choices are consciously made and one can gain satisfaction from mass media. To this end, users are viewed as active rather than passive consumers (Rubin, 2002). Nevertheless, recent calls have been made to include habit strength as a major part of UGT (LaRose & Eastin, 2004) in view of many individuals execute online internet activities on a daily, repetitive basis. This is consistent with the Rubin's (2002) notion that there are two types of orientation in media use that the author calls instrumental and ritualized. Instrumental orientation manifests of more purposive motivation, greater activity, and affinity for the content, while ritualized orientation manifests of the

passive use or habit, and greater affinity for the medium.

While UGT does shed light on the processes by which people could obtain gratification via media using, it does not address what gratification obtained of that use (Ryan, Rigby, & Przybylski, 2006). Deci and Ryan's (2000) SDT suggests how individuals seek psychological through *three* psychological needs: *autonomy*, an individual sense of volition and to be agents in accordance with his or her integrated sense of self; *competence*, an individual sense of mastery and self-proficiency through effective interaction with his or her social world; and *relatedness*, an individual sense of being cared for, likened, and valued by other individuals. Deci and Ryan's (2000, 2008) also added that these psychological needs are essential for one's optimal functioning and well-being taking into account the influential role of social environment. Indeed, one's social interactions within a particular context can affect his or her psychological need satisfaction positively or negatively. Therefore, humans are 'naturally' inclined toward integration of themselves in the social matrix. Collectively, both theories suggest that people are active seekers in social contexts and are aware of what they want at all time in order to fulfill their need satisfaction in an active way.

## **2-2. Psychological Need Satisfaction and Online Friendships**

In reality, "I want", "I like", and "I need" are probably among teenagers' most used phrases. It sounds that the pursuit of need satisfaction takes a central place in the lives of many teenagers regardless of culture and context variability. As pointed by Sheldon, Elliot, Kim, and Kasser (2001), psychological needs such as autonomy, competence, and relatedness are three top highly valued pursuits in comparison to other seven candidate needs (i.e., meaning/self-actualization, safety/security, pleasure/stimulation, money/luxury, popularity/status, physical health, and self-esteem) in a sample of American and South Korean youths. Though all three psychological needs are important, SDT scholars noted that there are by no means considered to be automatic (Patrick *et al.*, 2007). Instead, many arguments have been made for the influential role of social contexts as nurturing need-satisfaction.

Friendship becomes more significant than other developmental trajectories during adolescence. The literature has fairly consistently indicated that the role of friendship could promote adolescent well-being through companionship, emotional support, and instrumental rewards. Indeed, principal functions of friendship include provision of aid, emotional security, and intimacy (Mendelson & Aboud, 1999). It is necessary to encourage teens to form friendships with that they

can gain better social engagement and cooperation (Benson, McWey, & Ross, 2006). In particular, good friendships can better help teenagers to cope the adversities (Adams, Santo, & Bukowski, 2011). According to Allan (2008), friendship is an intimate relationship occurring in private sphere. However, our society is experiencing an unprecedented rise of cyber-technologies, friendship has evolved over time—cyberspace is a sphere where a realm of social life could be formed (Park & Floyd, 1996).

Cyberspace is promoted as a “new private sphere” and holds as a great platform of new communication (Pornsakulvanich, 2005). For example, social network sites (SNSs) like Facebook could afford flexibility and connectivity. Such sites can support the mobility of private sphere and can synchronize the contemporary modalities of friendships (Sheldon *et al.*, 2011). In other words, it is easy to meet people and make friends who are not a part of one’s physical life. Although physical friendship continues to serve as an important milestone in teenagers’ daily life, SNSs seem to guide this form of social relationship is gradually changing.

### **2-3. The Present Study**

In the current study, a conceptual model linking attitude towards online relationship formation, internet habit strength, online communication, online self-disclosure, and psychological need satisfaction in an online context was proposed.

#### *Online self-disclosure, online communication and psychological need satisfaction*

Online communication and online self-disclosure could pave the way for psychological need satisfaction (Barak & Suler, 2008; Schouten, Valkenburg, & Peter, 2007). Frequency of communication and sharing of personal information with others are necessary for relationship building (Collins & Miller, 1994). Following Bonetti, Campbell, and Gilmore’s (2010) recommendations, in the present study, online communication was based on self-reported frequency and intensity of online communication. Online communication is essential in fostering a relationship (i.e., from strangers to relational partners). If that is the case, increases frequency of interaction leads to increase psychological need satisfaction.

On the other hand, sharing the most personal aspects of the self may help to know one another and build trust (Jourard, 1971). What is more, as Cantor and Malley (1991) pointed out: disclosure provided opportunities for self-clarification and self-expression. By doing so, individual is

able to understand himself/ herself and his/ her world. Within a relationship context, intimacy often equates to self-disclosure (Derlega, Metts, Petronio, & Margulis, 1993). In the private realm, people tend to feel less threatened here than in the public sphere, thereby more comfortable to reveal themselves (Garzón, 2003). No doubt some studies showed that people tend to disclose to the people they known only in the virtual world. Baym (2010) adds to this recognition by asserting that teenagers felt that public display of the ‘inner self’ is a validation, not a violation, of their privacy. Hence, increasing online self-disclosure may offer great possibilities for psychological need satisfaction.

#### *Online self-disclosure and online communication as mediators*

According to Anastasi (1988), attitude is a psychological tendency to react favorably or unfavorably towards a particular entity. It has been commonly agreed that attitude is domain-specific; that is, attitude is specific to certain task and activities in certain situations and contexts. This study specifically focused on attitude towards online relationship formation, which defined as to the extent of favorable to form relationship with someone that never physically meeting before (Attrill & Jahil, 2011). On one hand, attitude towards online relationship formation has been showed as a predictor of need fulfillment among teenagers. For example, attitude toward the web was the most salient and significant predictor for user satisfaction in e-commerce (Luo, 2002). Teenagers who held positive attitudes were found to be more likely to report greater need satisfaction and relational closeness (Ledbetter *et al.*, 2011). On the other hand, direct association between attitude and behavior has been reported. For example, individuals who perceived favorable attitude towards online relationship formation tend to more likely to spend more time communicating (McKenna, Green, & Gleason, 2002) and more self-disclosure to their online friends (Attrill & Jahil, 2011).

Habit, a psychological construct rather than behavioral recurrence (Verplanken & Orbell, 1999), have been suggested as a form of repetition or behavioral script stored in memory. Now with its popularity and use among teens is increasing, it seems that Internet is getting integrated into people daily life. Correspondingly, some scholars argue that internet uses often have a strongly repetitive character (habit, convenience, or inertia) (LaRose & Easter. 2004). On one hand, LaRose and Eastin (2004) found a direct effect of internet habit strength on users’ satisfaction in a large sample of middle school students. The link between habitual media exposure and need fulfillment has also been reported elsewhere (Kraut et al., 2002). On the other hand, numerous

studies documented a direct association between habit and behaviors (e.g., Aarts & Diksterhuis, 2000; Verplanken & Aarts, 1999). For example, media habit was the strongest predictor for SNS game play (Wohn, 2012).

Collectively, there is limited empirical evidence examining the effects of CMC attributes on psychological need satisfaction in terms of online friendship. Based on previous literature, CMC attributes such as one's attitude and habit could shape his or her behavior. This, in turn, could result higher levels of need fulfillment. Teenagers who hold positive evaluation in terms of online relationship would exhibit stronger Internet habit, and they would report higher levels of psychological need satisfaction. It is also plausible that teenagers' engagement of online communication and online self-disclosure would allow them to successfully interact with friends from cyber space, thus their psychological needs would be satisfied. Thus, the primary aim of this study is to examine that the relationships between attitude towards online relationship formation and internet habit strength, and psychological need satisfaction taking into account the mediating roles of online communication and online self-disclosure.

### **3. Methods**

#### **3-1. Participants**

A total sample of 1572 Malaysian teenagers (673 males and 899 females), aged from 13 to 18 years (mean age 15.05) participated in this study. In terms of ethnic background, 39.1% were Malay, 38% were Chinese, 6.7% were Indian and 16.0% were other ethnic groups. This sample yielded 840 urban and 732 rural participants. In terms of family background, 91.3% of participants lived in a two-parent family, 7.0% lived in a single-parent family, and 1.6% lived in a blended family. The average family size was 5.89 ( $SD = 1.85$ ) and the median monthly household income in the present sample was RM2000.

#### **3-2. Procedure**

Prior to data collection, the author seek approval from the Ministry of Education and the State Education Department. Participants were recruited during their regular classes in schools. Participation in this study was voluntary and participants signed written informed consent. Participants took about 30 minutes to complete the survey. All research surveys were collected with the use a big box. This is to ensure anonymity.

### 3-3. Measures

*Demographic information.* Participants provided information such as age, gender, ethnicity, living areas, family structure, family size, and monthly household income.

*Attitude towards online relationship formation.* Attitude towards Online Relationship Formation Scale (ATORFS; Attrill & Jalil, 2011) was to assess what participants think about formation of relationship formation in online context. Participants rated 6 items (e.g., “I feel that meeting people and forming relationship is important, regardless of whether the person was met through the Internet or in-person”) on a four-point response scale ranging from 1 (*strongly disagree*) to 4 (*strongly agree*). Higher scores indicate one’s positive attitude towards online relationship. The ATORFS possesses good psychometric properties (e.g., Attrill & Jalil, 2011). In this study, a single factor solution (Cronbach’s alpha = .76) was obtained through exploratory factor analysis.

*Internet habit strength.* The extent of internet use could be perceived as a habit was measured by Internet Habit Strength Scale (HSS; LaRose & Eastin, 2004). Participants rated 3 items on a five-point response scale ranging from 1 (*strongly disagree*) to 5 (*strongly agree*). Sample items read “I would miss Internet if they were not available”. Higher scores indicate stronger internet habit. The psychometric properties of the HSS were good (e.g., LaRose & Eastin, 2004). In this study, a single factor with Cronbach’s alpha of .77 was obtained through exploratory factor analysis.

*Online communication.* Frequency (per week) and duration (per day) that participants spent in communication with online friends was measured by Online Communication Scale (ONS; Bonetti et al., 2010). For item 1, participants provided ratings on a five-point response scale ranging from 0 (*none*) to 4 (*everyday*). Sample items read “How many days in the past week have you been online to communicate with online friends or someone that you first met via the Internet”. For items 2, 3, and 4, participants provided ratings on five-point response scale ranging from 1 (*less than 15 minutes*) to 5 (*more than 4 hours*). Sample items read “On the average weekday, approximately how long in total do you communicate with online friend(s)?”. With these items, participants also provided ratings on daily and weekly basis and one day preceding the survey. A global score of online communication could be obtained through standardization, with higher scores indicating greater online communication. The ONS was found to have good psychometric properties in a sample of teenagers from Australia (Bonetti et al., 2010). A single factor with Cronbach’s alpha of .86 was obtained in the present study.

*Online self-disclosure.* The extent to which participants would disclose personal topics to their online male and female friends (i.e., a boy and a girl with whom they regularly communicated online) was assessed by Online Intimate Self-Disclosure Scale (OISDS; Schouten et al., 2007). Participants were presented with a list of 7 potential topics (i.e., “my personal feelings,” “the things I am worried about,” “my secrets,” “being in love,” “sex,” “moments in my life I am ashamed of,” and “moments in my life I feel guilty about”) and asked to indicate how deeply each one disclosed to their online friends for both sexes. Participants rated seven items based on a five-point response scale ranging 1 (*I tell nothing about this*) to 5 (*I tell everything about this*). Higher scores indicate greater levels of online self-disclosure. The OISDS demonstrated good validity and reliability properties in a sample of teenagers from the Netherland (Schouten et al., 2007). In this study, a two-factor solution was obtained through exploratory factor analysis. One item (“disclosed sex topics to female friend”) was discarded because it failed to meet a minimum factor loading of .40 (Nunnally & Bernstein, 1994). Cronbach’s alpha was .87 for disclosure to boys and disclosure to girls.

*Psychological need satisfaction in online friendship.* Participants completed a 9-item Need Satisfaction in Relationship Scale (NSRF; La Guardia et al., 2000). The NSRF yields three subscales: (a) autonomy (3 items; e.g., “*When I am with online friend(s)... I feel free to be whom I am*”), (b) competence (3 items; e.g., “*... I feel like a competent person*”), and (c) relatedness (3 items; e.g., “*... I feel loved and cared about*”). Participants rated these items on a seven-point response scale ranging from 1 (*Not true at all*) to 7 (*Very true*). Higher scores indicate higher psychological need satisfaction. The NSRF demonstrated good psychometric properties in a sample of youth from Western countries (La Guardia et al., 2000). In the present study, a three-factor solution was detected through exploratory factor analysis. Cronbach’s alphas for autonomy, competence, and relatedness were .66, .74, and .75, respectively.

### **3-4. Data Analytic Plan**

A series of statistical analyses with maximum likelihood estimation were performed. Such analyses were completed with the use of Analysis of Moment Structures version 18 (AMOS; Arbuckle, 2006). In particular, a two-step procedure was employed to analyze both measurement and structural models (Anderson & Gerbing, 1988). Several goodness-of-fit indices were used to evaluate model fit: the chi-square statistics, the Root-Mean-Square Error of Approximation (RMSEA), the Comparative Fit Index (CFI), the Tucker-Lewis Index (TLI) (Hu & Bentler, 1999).



Cut off values of .95 and .06, respectively for CFI and TLI, and RMSEA would provide an indication of good model fit (Hu & Bentler, 1999). To assess the mediating roles of online communication and online self-disclosure, we followed Kenny, Kashy, and Bolger's recommendations (1998). Bootstrapping ( $N = 5000$ ) was used to test if the mediated effect detected was statistically significant. This nonparametric resampling procedure is preferred over Sobel test because it yields bias-corrected confidence intervals (CIs) for mediated effects (Preacher & Hayes, 2008). In particular, if CIs do not contain zero, it can be concluded that the mediated effect is statistically significant ( $p < .05$ ).

## 4. Results

### 4-1. Measurement Model

An examination of measurement model consisting 5 latent constructs and 23 observed variables was assessed. The model provided a good fit to the data:  $\chi^2(125, N = 1572) = 499.14$ , RMSEA = .04, CFI = .96, TLI = .95. All the factor loadings ( $\lambda_s > .3$ ) for the indicators on the latent variables were significant ( $ps < .001$ ), indicating that the latent constructs were all well represented by their indicators. Table 1 presents descriptive statistics and correlations among latent variables. As shown in Table 1, all the latent constructs were significantly correlated in conceptually expected ways.

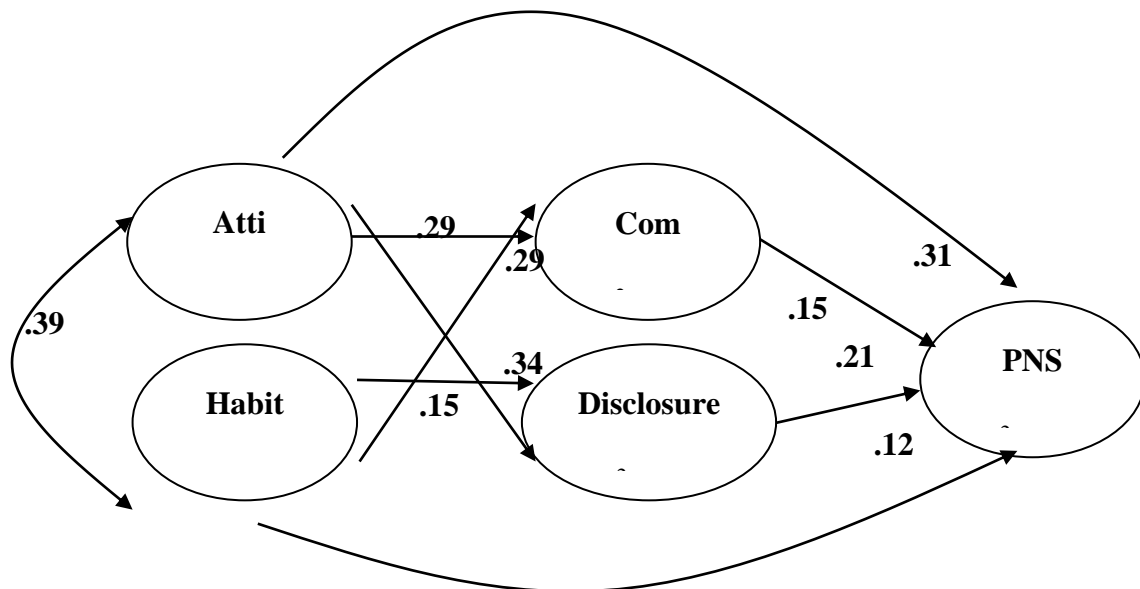
Table 1: Descriptive Statistics and Correlations among Latent Variables

Variable	M	SD	1	2	3	4	5
1. Attitude towards online relationship formation	16.45	2.97	-				
2. Internet Habit Strength	8.92	3.03	.39*	-			
3. Online communication <sup>s</sup>	.00	3.35	.38*	.40*	-		
4. Online self-disclosure	26.54	9.83	.37*	.27*	.36*	-	
5. Psychological need satisfaction	35.47	10.91	.50*	.36*	.39*	.42*	-

Note.  $N = 1572$ ,  $*p < .001$ . Variable with superscript indicates standardized variable.

## 4-2. Structural Model

Figure 1 presents the structural model linking CMC attributes and psychological need satisfaction in online friendships. The structural model provided a good fit to the data,  $\chi^2(126, N = 1572) = 534.18$ , RMSEA = .05, CFI = .96, TLI = .95. Online communication ( $R^2 = .24$ ) was directly predicted by attitude towards online relationship formation ( $\beta = .29$ ) and internet habit strength ( $\beta = .29$ ). Likewise, online self-disclosure ( $R^2 = .18$ ) was directly predicted by attitude towards online relationship formation ( $\beta = .34$ ) and internet habit strength ( $\beta = .15$ ). Psychological need satisfaction in online friendship ( $R^2 = .34$ ) was directly predicted by all CMC attributes (attitude towards online relationship formation;  $\beta = .31$ , internet habit strength;  $\beta = .12$ , online communication;  $\beta = .15$ , and online self-disclosure;  $\beta = .21$ ). All paths were statistically significant.



[Figure 1: Structural model linking CMC attributes and psychological need satisfaction in online friendships. Atti = Attitude towards online relationship formation, Habit = Internet habit strength, Com = Online communication, Disclosure = Online self-disclosure, and PNS = Psychological need satisfaction. Only standardized estimates are presented]

## 4-3. Mediation Analysis

Table 2 presents unstandardized bootstrapping estimates and their associated 95% CIs. Bootstrapping analyses revealed that the total indirect effects of attitude towards online relationship formation on psychological need satisfaction were significantly mediated by mediators, with a point

estimate of .26 (95% CI = .20; .34). The examination of the specific indirect effects revealed that both online communication and online self-disclosure significantly mediated the contribution of attitude towards online relationship formation to psychological need satisfaction with point estimates of .14 and .12, respectively, and their respective 95% of CIs did not contain zero. However, the difference in the strength of the indirect effects between online communication and online self-disclosure was not detectable since zero was contained in its respective CIs (95% CI = -.05; .09). This finding implies teenagers who held favorable attitudes generally engaged equally more online communication and online self-disclosure, and this in turn led to greater psychological need satisfaction.

On the other hand, the total indirect effects of the internet habit strength on psychological need satisfaction were also significantly mediated by mediators, with a point estimate of .28 (95% CI = .20; .36). In particular, both online communication and online self-disclosure exerted significant indirect effects since zero was not contained in each 95% CIs. Interestingly, a significant difference in the strength of the indirect effects was detectable as its respective CIs did not contain zero (95% CI = .04; .20). Results yielded that the indirect effect via online communication (estimate = .19) was greater than the effect via online self-disclosure (estimate = .09). This finding implies teenagers who possessed stronger Internet habit were more likely to spend more time communicating compared to self-disclosure, and this in turn lead to higher psychological need satisfaction.

Table 2: Unstandardized Bootstrapping estimates and 95% confidence intervals

Model pathways	Bootstrapping estimate	BCA 95% CI	
		Lower bound	Upper bound
From attitude towards online relationship formation to psychological need satisfaction			
Via online communication	.14*	.10	.20
Via online self-disclosure	.12*	.08	.18
Total indirect effects	.26*	.20	.34
Effect contrast	.02	-.05	.09
From internet habit strength to psychological need satisfaction			

Via online communication	.19*	.13	.27
Via online self-disclosure	.09*	.04	.13
Total indirect effects	.28*	.20	.36
Effect contrast	.12*	.04	.20

*Note.*  $N = 1572$ . BCA = bias-corrected and accelerated. CI = confidence intervals. \*  $p < .05$ .

## 5. Discussion

The present study examined the associations between CMC attributes (attitude towards online relationship formation, internet habit strength, online communication, and online self-disclosure) and psychological need satisfaction in online friendships using a large sample from Malaysia. Besides, this study also investigated the mediating roles of online communication and online self-disclosure in the links between attitude towards online relationship formation and internet habit strength, and psychological need satisfaction. The mediational model was supported: attitude towards online relationship formation and internet habit strength exert influences on psychological need satisfaction within online friendships in two ways. First, attitude towards online relationship formation and internet habit strength directly affect psychological need satisfaction. Second, attitude towards online relationship formation and internet habit strength indirectly affect psychological need satisfaction through online communication and online self-disclosure.

That is, in addition to the direct impacts of attitude towards online relationship formation and internet habit strength on psychological need satisfaction, both attitudes and habit have motivational implications for behaviors. The indirect effects of online communication and online self-disclosure on the relationship between attitude towards online relationship formation and psychological need satisfaction were equally strong. It could be argued persuasively that personal interest in interacting with others through online is a critical influence on both time spend usage and intimate communication. Like offline friendship, online friendship is a form of self-determined relationship (Fehr, 1996). Hence, acceptability of making friends in cyberspace appears to enhance commitment (e.g., frequency of communication) and intimacy (e.g., disclose information about the self) in a relationship, which in turn, heighten the sense of psychological need satisfaction.

On the other hand, the indirect effect of online communication was greater than online self-disclosure in the relation between internet habit strength and psychological need satisfaction. One

possible explanation is that teenagers who perceived internet use as customary manners would spend a large amount of time in online communication, rather than disclose personal information. This in turn, could encourage psychological need satisfaction. This finding lends support to the notion that frequent pattern is more facilitated as habit increases in strength (Aarts & Dijksterhuis, 2000). This could be particularly true for adolescents in cyber era—they are heavily exposed to the Internet (Baym, 2010). Despite this internet habitual use, adolescents' willingness to disclose personal information in virtual world could be low—they are cautious and restrictive about what to disclose in CMC platforms by virtue of their familiarity with CMC and their overall experience using the Internet.

The present findings shed light on developing national policies and health promotion strategies to improve teenagers' psychological well being. Prevention and intervention could target attitudinal- and habit-based orientations that function as significant “behind-the-scenes” factors contributing to online communication behaviors and formation of online friendships. As noted by Deci and Ryan (2000), psychological need satisfaction could be nurtured when people are fully engaged in something meaningful, interesting, and pleasurable. Positive CMC attributes of psychological need satisfaction can help to change the general impression that CMC comes to harm to teenagers and highlights what makes CMC worth engaging is well overdue.

The present study is certainly not without limitations. First, data are cross-sectional which forbids drawing any inferences about causal directions among the variables. Longitudinal or experimental studies are thus needed to reexamine the hypothesized relationships discussed here. The second limitation is that the data in this study were based on self-report scales and may be subjected to response bias. A more refined methodology such as the use of multiple methods may lower the “subjectivity” limitation of the findings. The third limitation is that the sample was recruited from secondary students in Malaysia. These results cannot be extended to other age groups. Conceivably, this paper calls for much further investigation that analyze the findings presented here by recruiting sample from different age cohorts.

Despite these limitations, the present study incorporates positive CMC attributes in the prediction of psychological need satisfaction. Specifically, this is the first study to examine such CMC attributes (operationalized as attitude towards online relationship formation, internet habit strength, online communication, online self-disclosure, and psychological need satisfaction) in relation to online friendship. The present study empirically demonstrates how attitude- and habit-

based orientations could affect online communication behaviors and, in turn, enhance teenagers' need for autonomy, belonging, effectance, from their virtual friendships.

## **6. Acknowledgement**

The author thanks Kit-Aun Tan for his helpful comments on this manuscript.

## **References**

- Aarts, H., & Dijksterhuis, A. (2000). Habits as knowledge structure: Automaticity in goal-directed behavior, *Journal of Personality and Social Psychology*, Vol. 78 (1), pp. 53-63.
- Adams, R. E., Santo, J. B., & Bukowski, W. M. (2011). The presence of a best friend buffers the effects of negative experiences, *Developmental Psychology*, Vol. 47 (6), pp. 1786-1791.
- Anastasi, A. (1988). *Psychological testing* (6th ed.) New York: Macmillan.
- Anderson, J. C., & Gerbing, D. W. (1988). Structural equation modeling in practice: A review and recommended two-stage approach, *Psychological Bulletin*, Vol. 103 (3), pp. 411-423.
- Allan, G. (2008). Flexibility, friendship, and family, *Personal Relationships*, Vol. 15 (1), pp. 1-16.
- Argyle, M. (2011). *The psychology of happiness* (2nd ed.). New York: Taylor & Francis.
- Attrill, A., & Jalil, R. (2011). Revealing only the superficial me: Exploring categorical self-disclosure online, *Computers in Human Behavior*, Vol. 27 (5), pp. 1634-1642.
- Barak, A., & Suler, J. (2008). Reflections on the psychology and social science of cyberspace. In A. Barak (Ed.), *Psychological aspects of cyberspace: Theory, research, applications* (pp. 1-12). Cambridge, UK: Cambridge University Press.
- Baym, N. K. (2010). *Personal connections in the digital age*. Cambridge, UK: Polity Press.
- Benson, M. J., McWey, L. M., & Ross, J. J. (2006). Parental attachment and peer relations in adolescence: A meta-analysis, *Research in Human Development*, Vol. 3 (1), pp. 33-43.
- Bonetti, L. Campbell M. A., & Gilmore, L. (2010). The relationship of loneliness and social anxiety with children's and adolescents' online communication, *CyberPsychology, Behavior, and Social Networking*, Vol. 13 (3), pp. 279-285.
- Bukowski, W. M., Motzoi, C., & Meyer, F. (2009). Friendship as process, function, and outcome. In K. H. Rubin, W. M. Bukowski, & B. Laursen (Eds.), *Handbook of peer interactions, relationships, and groups* (pp. 217-231). New York: Guilford.
- Cantor, N., & Malley, J. (1991). Life tasks, personal needs, and close relationships. In G. J. O.

- Fletcher & F. D. Fincham (Eds.), *Cognition in close relationships* (pp. 101-125). Hillsdale, N.J.: Erlbaum.
- Chou, C., & Peng, H. (2007). Net-friends: Adolescents attitudes and experiences vs. Teachers concerns, *Computers in Human Behavior*, Vol. 23, pp. 2394-2413.
- Collions, A., & Miller, L. C. (1994). Self disclosure and liking: A meta-analytic review, *Psychological Bulletin*, Vol. 116, pp. 457-475.
- Deci, E. L., & Ryan, R. M. (2000). The “what” and “why” of goal pursuits: Human needs and the self-determination of behavior, *Psychological Inquiry*, Vol. 11 (4), pp. 227–268.
- Deci, E. L., & Ryan, R. M. (2008). Facilitating optimal motivation and psychological well-being across life’s domains, *Canadian Psychology*, Vol. 49 (1), pp. 14-23.
- Derlega, V. J., Metts, S., Petronio, S., & Margulis, S. T. (1993). *Self-disclosure*. Newbury Park, CA: Sage.
- Fehr, B. (1996). *Friendship processes*. Thousand Oaks, CA: Sage.
- Gagné, M. (2003). The role of autonomy support and autonomy orientation in prosocial behavior engagement, *Motivation and Emotion*, Vol. 27, pp. 199-223.
- Hu, L., & Bentler, P. M. (1999). Cutoff criteria for fit indexes in covariance structure analysis: Conventional criteria versus new alternatives, *Structural Equation Modeling*, Vol. 6 (1), pp. 1-55.
- Jang, H., Reeve, J., Ryan, R. M., & Kim, A. (2009). Can self-determination theory explain what underlies the productive, satisfying learning experiences of collectivistically oriented Korean students? *Journal of Educational Psychology*, Vol. 101, pp. 644-661.
- Jourard, S. M. (1971). *Self-disclosure: An experimental analysis of the transparent self*. Oxford, England: John Wiley.
- Katz, E., Blumler, J. G., & Gurevitch, M. (1974). Utilizations of mass communication by the individuals. In J. G. Blumber, & E. Katz (Eds.), *The uses of mass communication: Current perspectives on gratifications research* (pp. 19-32). Beverly Hills, CA: Sage.
- Kenny, D. A., Kashy, D., & Bolger, N. (1998). Data analysis in social psychology. In D. Gilbert, S. Fiske, and G. Lindzey (Eds.), *Handbook of social psychology* (4th ed., pp. 233-265). New York: McGraw-Hill.
- Koh K. T., Wang, C. K., Erickson, K., & Cote, J. (2012). Experience in competitive youth sport and needs satisfaction: The Singapore Story, *International Journal of Sport Psychology*, Vol. 43,

pp. 15-32.

- Kraut, R., Kiesler, S., Boneva, B., Cummings, J., Helgeson, V., & Crawford, A. (2002). Internet paradox revisited, *Journal of Social Issues*, Vol. 58, pp. 49–74.
- La Guardia, J. G., Ryan, R. M., Couchman, C. E., & Deci, E. L. (2000). Within-person variation in security of attachment: A self-determination theory perspective on attachment, need fulfillment, and well-being, *Journal of Personality and Social Psychology*, Vol. 79, pp. 367-384.
- LaRose, R. & Eastin, M. S. (2004). A social cognitive theory of internet uses and gratifications: Toward a new model of media attendance, *Journal of Broadcasting & Electronic Media*, Vol. 48 (3), pp. 358-377.
- Ledbetter, A. M., Mazer, J. P., DeGroot, J. M., Meyer, K. R., Mao, Y., & Swafford, B. (2011). Attitude towards online social connection and self-disclosure as predictors of Facebook communication and relational closeness, *Communication Research*, Vol. 38 (1), pp. 27-53.
- Luo, X. (2002). Uses and gratifications theory and e-consumer behaviors: A structural equation modeling study, *Journal of Interactive Advertising*, Vol. 2 (2), pp. 34-41.
- Luyckx, K., Vansteenkiste, M., Goossens, L., Duriez, B. (2009). Basic need satisfaction and identity formation: Bridging self-determination theory and process-oriented identity research, *Journal of Counseling Psychology*, Vol. 56 (2), pp. 276-288.
- McKenna, K. Y. A., Green, A. S., & Gleason, M. E. J. (2002). Relationship formation on the Internet: What's the big attraction? *Journal of Social Issues*, Vol. 58 (1), pp. 9-31.
- Mendelson, M. J. & Aboud, F. (1999). Measuring friendship quality in late adolescents and young adults: McGill friendship questionnaires, *Canadian Journal of Behavioural Science*, Vol. 31 (2), pp. 130-132.
- Parks, M., & Floyd, K. (1996). Making friends in cyberspace, *Journal of Communication*, Vol. 46, pp. 80-97.
- Patrick, H., Knee, C. R., Canevello, A., & Lonsbary, C. (2007). The role of need fulfillment in relationship functioning and well-being: A self-determination theory perspective, *Journal of Personality and Social Psychology*, Vol. 92, pp. 434-457.
- Pornsakulvanich, V. (2005). Testing a uses and gratifications model of online relationships. Doctoral dissertation. College of Communication and Information, Kent State University.
- Preacher, K. J., & Hayes, A. F. (2008). Asymptotic and resampling strategies for assessing and



- comparing indirect effects in multiple mediator models, *Behavior Research Methods*, Vol. 40, pp. 879–891.
- Rubin, A. M. (2002). The uses-and-gratifications perspective of media effects. In J. Bryant, & D. Zillmann (Eds.), *Media effects: Advances in theory and research* (pp. 525-548). Mahwah, New Jersey: Lawrence Erlbaum Associates.
- Ryan, R. M., Rigby, C. S., & Przybylski, A. K. (2006). Motivation pull of video games: A Self-determination theory approach, *Motivation and Emotion*, Vol. 30, pp. 347-365.
- Schouten, A. P., Valkenburg, P. M., & Peter, J. (2007). Precursors and underlying processes of adolescents' online self-disclosure: Testing an "Internet-Attribute-Perception" model, *Media Psychology*, Vol. 10, pp. 292-315.
- Sheldon, K. M., Abad, N., & Hinsch, C. (2011). A two process view of Facebook use and relatedness need satisfaction. Disconnection drives use and connectedness rewards it, *Journal of Personality and Social Psychology*, Vol. 100, pp. 766-775.
- Sheldon, K. M., Elliott, A. J., Kim, Y., & Kasser, T. (2001). What is satisfying about satisfying events? Testing 10 candidate psychological needs, *Journal of Personality and Social Psychology*, Vol. 80, pp. 325-339.
- Şimşek, O. Koydemir, S. (2013). Linking metraits of the big five to well-being and ill-being: Do basic psychological needs matter? *Social Indicators Research*, Vol. 112 (1), pp. 221-238.
- Vansteenkiste, M., Lens, W., Soenens, B., & Luyckx, K. (2006). Autonomy and relatedness among Chinese sojourners and applicants: Conflictual or independent predictors of well-being and adjustment? *Motivation and Emotion*, Vol. 30, pp. 273-282.
- Verplanken, B., & Aarts, H. (1999). Habit, attitude, and planned behavior: Is habit an empty construct or an interesting case of goal-directed automaticity? In W. Stroebe & M. Hewstone (Eds.), *European review of social psychology* (Vol. 10, pp. 101–134). Chichester, England: Wiley.
- Walther, J. B. (2010). Computer-mediated communication. In C. R. Berger, M. E. Roloff, & D. R. Roskos-Ewoldsen (Eds.), *Handbook of communication science* (2nd ed., pp. 489-505). Los Angeles: Sage.
- Wohn, D. Y. (2012). The role of habit strength in social network game play, *Communication Research Reports*, Vol. 29 (1), pp. 74-79.

## **International Retirement Migration of Retirees from Developed Countries: Decision-Making Process and Impacts on Destinations**

**TANGCHITNUSORN Kanokwan<sup>1</sup>,**

*Ph.D. student, College of Population Studies, Chulalongkorn University, Bangkok,  
Thailand*

**WONGBOONSIN Patcharawalai**

*Professor of Demography, College of Population Studies, Chulalongkorn University,  
Bangkok, Thailand*

### **ABSTRACT:**

While countries across the globe, particularly the developed ones, are experiencing population ageing, the process by which older individuals becoming a proportionally larger share of the total population, there is a rising flow of international retirement migration (IRM). As the result of migratory phenomenon of people during their ‘third age’ of life, there are a number of people running their ‘fourth age’ of life abroad. Against the notion that IRM is a significant aspect of population geography and of migration studies, with effects on regional economic geography, research on this phenomenon remains relatively sparse and scattered in the realm of international migration literatures.

To come up with a better understanding of the phenomenon, this study adopts an archival research of international retirement migration, based on the case study of the outflow of such migration from developed countries. It notes that the research on IRM had just gained its prominence since in late 1990s. Stimulated by individual lifestyle and the desire to have a better way of life, many senior citizens from advanced economies chose to spend their later-life abroad. However, most previous studies on IRM had focused on individual countries or specific region such as Europe or North America. Hence, based on *Extended Property Acquisition Model* (2013) and the push-pull *Theory of Migration* (1966), this study specifically identifies the IRM process of decision

---

<sup>1</sup> Corresponding author

Contact info: College of Population Studies, Chulalongkorn University, Visid Prachuabmoh Building, Bangkok, THAILAND 10330 Website: <http://www.cps.chula.ac.th>  
Mobile Phone: +66 (0) 840000603. E-mail address: [i\\_cie@hotmail.com](mailto:i_cie@hotmail.com)

making of retirees and the patterns of migration from developed origins to developed destinations and from developed origins to developing destinations across the globe. It identifies commonalities and differences between West-East IRM, besides that within the West and the East. The impacts on destination are also explored and synthesized.

## **KEY WORDS:**

International retirement migration/ Decision-making process/ Impacts/ Developed countries

## **1. INTRODUCTION**

The migration of people in their retirement has been visible in migration literature since 1970s. Such a flow of the population in their third age of life during the 1970s was mainly restricted to that on a national scale, involving several migration patterns within a particular country. They included movements from urban to suburban areas, from urban to amenity areas, and the return migration of retired migrants to the area of origin ([Wiseman & Roseman, 1979](#)). As time goes by, the scope of such migration has extended to cover that at the regional and international levels, while yielding impacts on both the countries of origin and the countries of destination.

Given the wide-ranging definitions of the migration of older people, one can find terminologies to prevail to characterize the flow in IRM literatures: “*retirement migration*,” “*elderly migration*,” “*later-life migration*.” Besides those three dominant terminologies, the followings are also found from the perspective of the purposes of such move: “*lifestyle migration*,” “*seasonal migration*,” “*amenity migration*,” “*leisure-led migration*,” and even “*residential mobility*.” However, in order to study the migration of retirees at the international level, this paper used the term “*International retirement migration*,” which is meant to include both seasonal and permanent settlements of people in their retirement transition as well as in the post-retirement period.

International retirement migration (IRM) is a relatively emerging issue when comparing to other types of international migration. However, with the ongoing momentum of globalization, IRM has accelerated and become one of the significant migration streams. Unfortunately, little is known for the international migration of retired persons. The availability of researches on the topic is also relatively low as IRM studies just being introduced in academic literatures in late 1990s ([Innes, 2008](#)). In addition, the area of IRM research is perceived to be quite “dynamic” that it is required not only single knowledge or discipline to understand but has to use a multidisciplinary approach to help

interpret what is going on in this realm of migration. As a result, the movement of retired persons has drawn interests in various fields of study, particularly in migration studies, tourism studies, and social gerontology ([Truly, 2002](#)).

By reviewing previous studies, this paper tried to come up with a better understanding of IRM, by looking at the migration trends of retirees, specifically from developed origins (Table 1) to developed and/or developing destinations. Commonalities and differences between and within such trends would also be identified. The objectives of this research are threefold: (1) to examine the IRM patterns of retirees from developed origins to developed and/or developing destinations; (2) to identify decision-making process of such moves by mainly using *Extended Property Acquisition Model* ([Åkerlund, 2013](#)) and also integrating *Push-pull Theory of Migration* ([Lee, 1966](#)) to help explain the phenomenon; and (3) to describe the impacts of IRM on destination areas in both developed and developing countries.

List of Developed Countries Categorized by Regions			
North America	Europe	Asia	Oceania
<b>1.</b> United States <b>2.</b> Canada	<b>1.</b> United Kingdom <b>2.</b> Germany <b>3.</b> France <b>4.</b> Italy <b>5.</b> Belgium <b>6.</b> Netherlands <b>7.</b> Luxembourg <b>8.</b> Spain <b>9.</b> Portugal <b>10.</b> Ireland <b>11.</b> Greece <b>12.</b> Cyprus <b>13.</b> Malta <b>14.</b> Estonia <b>15.</b> San Marino <b>16.</b> Switzerland <b>17.</b> Austria <b>18.</b> Slovenia <b>19.</b> Slovak Republic <b>20.</b> Czech Republic <b>21.</b> Denmark <b>22.</b> Norway <b>23.</b> Finland <b>24.</b> Sweden <b>25.</b> Iceland	<b>1.</b> Japan <b>2.</b> Korea <b>3.</b> Singapore <b>4.</b> Hong Kong SAR <b>5.</b> Taiwan Province of China <b>6.</b> Israel	<b>1.</b> Australia <b>2.</b> New Zealand

**Table 1: List of advanced economies categorized by regions**

Source: International Monetary Fund ("[Statistical Appendix](#)," 2013)

## 2. METHODOLOGY

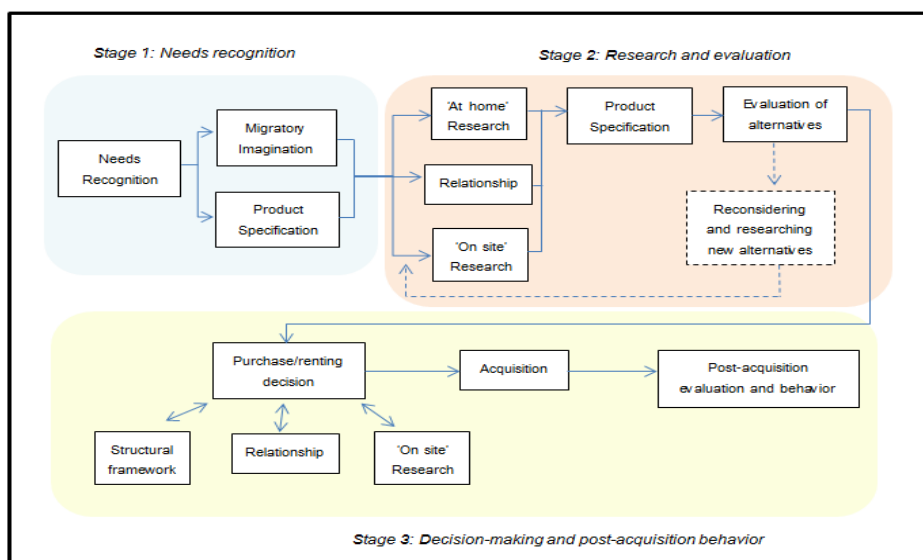
This study applied the review guidance from the *integrative review method*, which was initially introduced in field of nursing. The integrative review allows a researcher to do archival research by combining interested elements in previous literatures from diverse methodologies to answer his/her research question. The integrative review method consists of five stages: (1) problem identification stage; (2) literature search stage; (3) data evaluation stage; (4) data analysis state; and (5) presentation stage ([Whittemore & Knafl, 2005](#)).

**In the first stage**, the identified problem and the research purpose are clearly stated in the part of introduction, where these notions are provided: The problem is the sparse and scattered IRM researches; and the review purpose is to summarize the IRM of retirees from developed countries by looking at the *migration patterns* to several destinations including both developed and developing countries, the *decision-making process*, and the *impacts on destination* countries.

**In the second stage**, the *Single Search* engine of Chulalongkorn University is relied upon to reduce biased search results by giving access to and presenting the results of several databases at the same time. Since 2009, the university has launched its first use of *Single Search*, which allows users to search in all databases simultaneously, including 32 subscribed international academic databases and 10 ThaiLIS subscribed databases, library catalog, image databases, and other search engines such as Google, Bing, OpenDirectory and Yahoo. Hence, in order to avoid inconsistent terminology in the literature search stage, the authors put the term “International retirement migration” into *Single Search* engine on November 10, 2013, resulting in 136 articles on the search list. The term *International Retirement Migration* was typed with the quotation mark on, in order to make the search engine find only materials related to the keyword and discard materials that related to some of words in the keyword.

**In the third stage**, there are two steps of paper selection and evaluation, described as follows. Firstly, only peer-reviewed articles were selected, resulting in 124 eligible articles from 136 articles. Secondly, after reviewing both titles and abstracts, 87 articles were discarded due to many reasons, including, the irrelevance to research question (80), the repeated searching results (6), and the full-text unavailability (1). Thus, 37 articles were finally selected for an integrative review.

**In the fourth stage**, all data were analyzed along the *Extended Property Acquisition Model* (Figure1), which is developed from the simplified consumer behavior model. Like in consumer behavior model, this model also divides the process of property acquisition into three broad stages, including needs recognition, research and evaluation, and decision-making and post-acquisition behavior. The elements under these stages were perceived as themes that help to describe the IRM patterns. Lee’s Push-Pull theory was also relied upon for a better understanding of how migrants established their ‘migratory imagination’ and ‘product specification’ and ‘evaluation of alternatives’ via the information received from self-administered research ‘at-home’ (at origin) and/or ‘on-site’ (at destination) and from mediators or individual agencies.



**Figure 1: Extended property acquisition model**

Source: (Åkerlund, 2013)

The ‘relationship’ between retired migrants and a mediator or property agency has entered during the second stage of property acquisition, which is the research and evaluation stage. It also had great influence on the third stage, which is the stage of decision-making and post-acquisition behavior.

The ‘Structural Framework’ could be best illustrated in the case of European countries, where the European Union (EU) and its Euro currency have facilitated EU citizens to acquire dwellings in other Member States. ([Åkerlund, 2013](#))

So far, the study notes that after purchasing/renting the property at destination, migrants still continue to evaluate their well-being in order to decide on further actions such as returning to origin or changing destinations, if not satisfied, or remaining in the selected destination, if satisfied.

Lastly, **in the fifth stage**, the analysis of migration pattern and decision-making process would be presented and discussed. In addition, the impacts on destinations were aggregated from the literatures. Then, finally, the conclusion and the suggestion for further research would be made.

### 3. RESULTS

According to Table 2, the published year of selected papers ranged from 1999 – 2014, and most of them (43%) were published during 2010-2014. Also, it can be seen that most articles used

primary source of data (59%), most of which applying an in-depth interview method (55%). However, there's one study using both self-administered questionnaire and content analysis of media coverage on Recreational Vehicle (RVs) vacation of French retirees in Morocco ([Viallon, 2012](#)).

Characteristics of selected articles (N=37)				
Year Published	1999-2004	2005-2009	2010-2014	
	9 (24%)	12 (33%)	16 (43%)	
Data source	Primary	Secondary		
	22 (59%)	15 (41%)		
Methodology of primary data	SAQ <sup>1</sup>	IDI <sup>2</sup>	SAQ+IDI	SAQ+CA <sup>3</sup>
	5 (22%)	12 (55%)	4 (18%)	1 (5%)

**Table 2: Basic characteristics of selected papers**

\* **Note:** <sup>1</sup>SAQ: Self-administered questionnaire, <sup>2</sup>IDI: In-depth interview, <sup>3</sup>CA: Content analysis

Table 3 implies that the majority of IRM literatures investigated in this study are of European origins-to-European destinations pattern. Although there are few researches focusing on other continents, the rich contents in those studies still help answer the research questions.

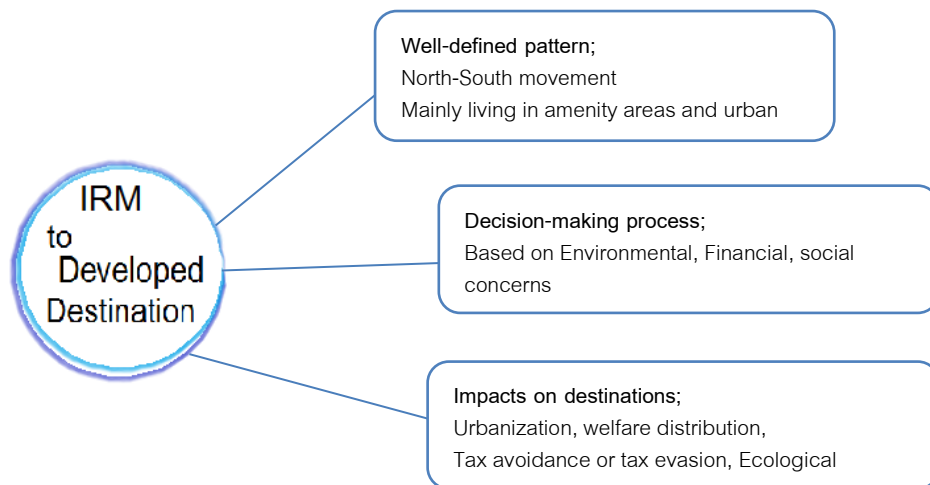
Country of origins and country of destinations categorized by regions					
Destinations	Origins (Developed countries)				
	Europe	North America	Oceania	Asia	Several developed origins
<b>(1) Developed (total = 27)</b>					
<b>Europe</b>	23	-	-	-	2
<b>North America</b>	-	-	-	-	-
<b>Oceania</b>	-	-	-	1	1
<b>Asia</b>	-	-	-	-	-
<b>(2) Developing (total = 7)</b>					
<b>Africa</b>	1	-	-	-	-
<b>Asia</b>	-	-	-	1	2
<b>South America</b>	-	3	-	-	-
<b>Both (1) and (2) (total = 3)</b>	2	1	-	-	-

**Table 3: Country of origins and destinations categorized by regions**

### 3.1 IRM to Developed Destinations

International retirement migration of retirees from developed origins to developed destinations is summarized in Figure 2 to identify migration pattern, decision-making process, and

the impacts on destination. The data are retrieved from 27 studies of IRM to European destinations and 3 on IRM to other developed countries, including the IRM of Canadians to U.S. (1) and the IRM from Japan and other developed countries to Australia (2).



**Figure 2: International retirement migration (IRM) to Developed destinations**

### 3.1.1 IRM to European destinations

Not so surprisingly, most studies were intensively focusing on Europe, since the region is well-known for its long history of integration with a supra-national organization— the European Union (EU), allowing the freedom of movement for all EU citizens. However, it doesn't mean that the EU is the main reason behind the movement across borders of retired people, as the main factor is actually derived from the desire to maximize the well-being of each individual, not the organization and its policies ([Ackers & Dwyer, 2004](#)). The summary of IRM within Europe is outlined in Figure 2.

#### *Migration pattern and characteristics of migrants*

According to the literature review, it can be concluded that the IRM pattern within Europe is quite a *well-defined stream*, which is usually the migration of the more affluent retirees in Northern countries i.e. UK, Germany, Nordic countries to Southern destinations i.e. Spain, Italy, Malta, Portugal ([Bell, Alves, de Oliveira, & Zuin, 2010](#)). However, it is too complicated to give a single explanation to such a movement. Hence, one would describe it as a 'continuing process'— involving



short stays, long stays, or even return visits— rather than a one-time move or permanent move ([Gustafson, 2008](#)).

With regards to the significant characteristics of migrants as appeared in most of the studies, it is common to see a slight predominance of male over female migrants, especially in the younger old-age group(60-69) ([M. A. Casado-Díaz, 2006](#); [Green, 2009](#); [Karen M. Gibler, 2009](#); [Vicente Rodriguez, 2004](#)). On the other hand, based on the study of British Household Panel Study 1991-2007, the predominance of female over male migrants in older old age (80-89) is revealed; and this may be partially described by the higher survival rate of females at older age and the more likelihood of females to become widows, allowing them more independence for migratory decisions ([Evandrou, 2010](#)). In addition, regarding the former occupations, most migrants from Germany belonged to middle management careers, while Scandinavian migrants were self-employed or senior managers ([Åkerlund, 2013](#)).

#### *Decision-making process*

In *needs recognition* stage, the desire to emigrate at an old age derives from the by-product of life cycle, such as independence from children, redundancy of old life in country of origin and the deteriorating health conditions, which together spark the need to migrate in another country ([Åkerlund, 2013](#)). For them, migration may act as an ‘ageless’ strategy to improve their well-being ([Ahmed, 2013](#)). Nonetheless, one study reveals that the age of migrants also play a significant role in determining the successfulness of IRM— in which case one can find ‘mid-life migrants’ to have a higher potential to get assimilated well in the society at destination than the older ones, since most mid-life migrants are of better linguistic ability and more active pursuit of shared interests with native citizens ([Benson, 2010](#)).

On the creation of *migratory imagination* and *product specification*, retirees from Northern Europe often listed warmer climate, lower cost of living, lower cost of housing, lower taxes, health reasons, and slower pace of life as primary determinant pull-factors of destinations ([M. Casado-Díaz, Iacuta, Angeles, Kaiser, & Warnes, 2004](#); [M. A. Casado-Díaz, 2006](#); [Innes, 2008](#); [Karen M. Gibler, 2009](#); [Warnes, King, Williams, & Patterson, 1999](#); [Williams, King, Warnes, & Patterson, 2000](#)). *Climate* is always mentioned in every reviewed article in this study, as it has direct association with the declining health conditions of retirees. Many Northern retirement migrants perceived Mediterranean climate as ‘exceptional,’ i.e. Costa del Sol of Spain with the average annual

temperature of 18° and scant rainfall ([Rodriguez, 2001](#); [Vicente Rodriguez, 2004](#)). On the other hand, the *destination lifestyle* of people in Southern Europe is also perceived to be one important factor that attracts migrants from Northern countries ([Innes, 2008](#)). In terms of *preferences*, one study reveals these preferences among retirees: house at an affordable price; easy access to stores and services (i.e. grocery shops, barber/beauty shops, drugstores, medical clinics, etc.); private car park/garage; cable/ satellite TV; living area on one floor; easy access to public transit; and natural amenities ([Gibler & Taltavull, 2010](#)). Interestingly, one study finds that even *being separate from family who live in origin country*, in common sense, could be perceived as a factor stimulating the return of migrants; however, in some cases this can also be perceived as a pull factor since some migrants believe that living abroad, especially in tourist spots, could make them a more ‘desirable person to visit’ from the perspective of their friends or other members of their family ([Legido-Quigley & McKee, 2012](#)).

During the *research and evaluation stage*, many studies report the on-site research behaviors of retirees through holiday experience at destination countries ([Åkerlund, 2013](#); [Rodriguez, 2001](#)). They also highlighted the role of the mediators such as estate agents, family or relatives, friends, or even expatriate clubs for helping migrants refine their destination choice ([M. A. Casado-Díaz, 2006](#)). A study also mentions these roles of mediators: matchmaking, notarization, translating and preparing documents, guiding and showing houses, helping with house renovation, and helping migrants’ integration into society at destinations ([Åkerlund, 2012](#)).

Regarding the *post-evaluation* of the migration outcome to Southern countries, the reported life satisfaction level in each country is varied, depending on several factors such as the ability to communicate with native people, services especially healthcare service, and the assimilation in destination countries through transnational process. The transnational process or transnationalism can refer to the “intensified transfer or exchange of information, cultural contents, goods, services and people between nation-states,” ([Božić, 2006](#)). Transnational lifestyle can imply migration patterns as it is embedded in the sense of belongings of individuals to the country of origin and the country of destination. Additionally, there are three types of transnational lifestyles: 1) “routinized sojourning,” which signifies a lifestyle that involves less or no multiple-place attachment; 2) “translocal normality,” which has a strong multiple-place attachment but low degree of cultural adaptation; and 3) “multi-local adaptation,” which portrays the lifestyle of migrants with high degree of cultural adaptation and also migrants may possess strong multiple-place attachment ([Gustafson,](#)

[2001](#)). However, according previous studies of IRM within Europe, it can be inferred that migrants are mostly having “routinized sojourning” or “translocal normality” transnational lifestyle, as several findings indicate low interactions between migrants and local people. Hence, the degree of cultural adaptation is low within Europe.

In terms of *post-acquisition behaviors*, British expats scored their well-being in Costa del Sol (Spain) and Malta at ‘very high’ while complaining about poor services and social life in Algarve (Portugal) and Tuscany (Italy) ([Warnes et al., 1999](#)). That is, the post-evaluation of the property acquisition is the important process to indicate the length of stay in destinations as well as the potential return to the country of origins. In some cases, climate, which was used to be a pull-factor before the acquisition, unexpectedly results to be the push-factor of the destination, for example, many British residents reported that the heat during summer in Spain was ‘almost intolerable’ ([Ahmed, 2013](#)). Other reasons that stimulate the desire to return include the hope to return with family in country of origin, the dissatisfaction and constraints of living in urbanized areas, and the feeling of being excluded from the society in destination as they were not be able to communicate in native language, resulting in less or even no interactions with native people ([Ahmed, 2013](#)). In addition, British expats in Malta also mentioned their dissatisfactions against negative sociopolitical and environmental issues such as growing drugs problem, poor garbage management, low-quality road maps, ‘absence of crematoriums’, ‘bird shooting,’ and even trivial thing like the ‘poor quality hospital food’ ([Innes, 2008](#)).

As English has become a second language in several countries, previous studies pointed out that many French, German, and Nordic retired migrants, especially those who cannot speak English, were having a hard time comparing to that of English-speaking migrants in Southern Europe ([Huber & O'Reilly, 2004](#)). However, many community networks in destinations were established to helping the expats during transnational period; i.e. the British Resident Association (BRA) in Malta ([Innes, 2008](#)); the *Fuengirola and District Society (FADs)* with more than 500 registered British members on Costa del Sol in Spain; and the *Club Suizo Costa Blanca* that have united at least 600 Swiss members (mostly German-speaking) on Costa Blanca of Spain ([Huber & O'Reilly, 2004](#)).

Regarding the types of property possessed by foreign retirees either purchasing or renting, there are a lot of housing styles available to serve individual preference; i.e. the *urbanización* in Spain usually having low-rise apartments or single-family houses in different sizes ([Huber & O'Reilly, 2004](#)). However, according to aforementioned characteristics of migration, which is of a

continuing process, it is reported that the elderly, after the first move, may continue their second move at older retirement age to refine needs as in accordance with their deteriorating health conditions and declining personal resources. In this regard, the older retirees usually do these: (1) move from two-story to one-story semi-detached houses in their second move ([Karen M. Gibler, 2009](#)), (2) live in rented houses rather than in the purchased ones, especially in private rented sector, ([Evandrou, 2010](#)).

In addition, regarding the immigrants to Europe during their working age of life and retired in destinations, one study reports that most retired working immigrants would continue to stay in France; some migrants (i.e. Portuguese and those from Central and Southern Africa) prefer to go back if they have a child living in the country of origin; while the rest report the decision to ‘go back and forth’ between origin and destination ([de Coulon & Wolff, 2010](#)).

### **3.1.2 IRM to other developed countries**

Just like the IRM pattern to European destinations, the movement within North America is also a well-defined downward direction, as the literature reveals an ongoing trend of recreational vehicle (RVs) vacations of Canadian retirees in the Sunbelt of United States (i.e. Florida, Arizona, California, Texas), where they spent the vacation for up to 6 month per year ([Northcott & Petruik, 2011](#)).

The case of Japan also suggests these key determinant factors pulling the retired Japanese to Australia: destination’s relaxing environment appropriate for leisure activities, and the attractive Australian lifestyle ([Nagatomo, 2011](#)). The migrant network— the Japanese community in Australia— is found to play an important role as the mechanism helping Japanese migrants to establish the ‘psychological center’ of being Japanese in the absence of a geographic point after acquiring houses/ other types of accommodation there. It facilitates their communication, which allows them to help one another through the transnational lifestyle.

### **3.1.3 Impacts of IRM on developed destinations**

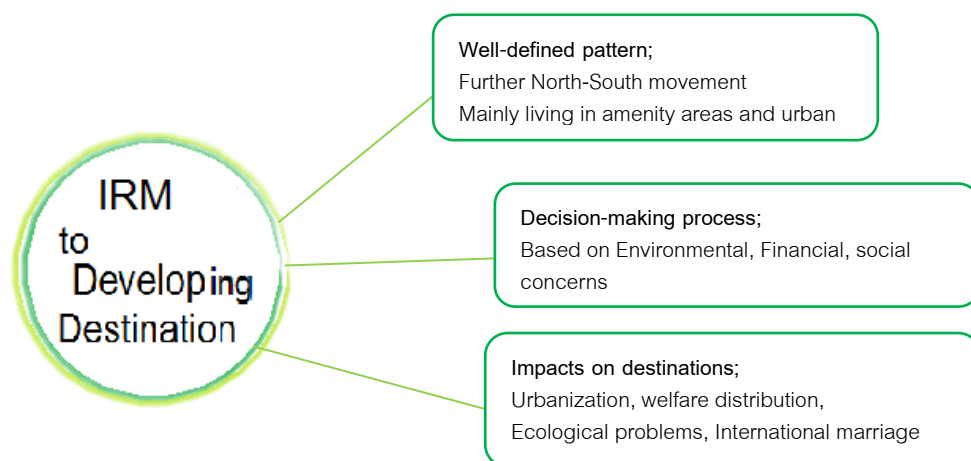
The impacts on destinations can be both positive and negative. The former includes the contribution to the local economy through job creation and income distribution from real estates, besides appropriate utilization of coastal areas towards an urbanized living space ([Vicente Rodriguez, 2004](#); [Warnes & Williams, 2006](#)). However, the increasing retired expats raise concerns on social

and welfare system at destination countries ([Breivik, 2012](#); [Warnes & Williams, 2006](#)). This is in addition to those on ecological impact of the newly emerging urbanized landscape replacing the old Mediterranean landscape, or the “sea change” in Australian context. This is particularly from a biodiversity perspective, reflecting in a decline of bird species, soil degradation, water stress due to higher demand on water ([Gurran, 2008](#); [Zasada et al., 2010](#)).

It is interesting to note that the IRM can also be a vicious strategy for retirees to commit; *tax avoidance* and *tax evasion* ([Coldron & Ackers, 2009](#)). Regarding tax avoidance, for example, to manage healthcare status, German migrants living in Greece may not register as Greek citizens so that they can resume their healthcare rights in Germany, and/or to manage financial status, while the seasonal Nordic migrants may register in France in order to pay 20% less tax when comparing with what they have to pay if registered as citizens in their origin countries. For tax evasion or the “deliberate misrepresentation or concealment of income to the tax authorities,” for instance, some British pensioners, who purposefully register in Spain in order to avoid taxation in the UK, may not pay tax to the country of destination either. Hence, these actions could affect the pension and welfare systems of both sending and receiving countries.

### **3.2 IRM to developing destinations**

International retirement migration of retirees from developed origins to developing destinations is summarized in Figure 3, describing migration pattern, decision-making process, and the impacts on destination. This is based on notions obtained from IRM studies about these destinations: Morocco (1), Asian developing countries (3), and developing countries in South America (3).



**Figure 3: International Retirement migration to developing destinations**

#### *Migration pattern and characteristics of migrants*

Given the ongoing of aging societies in developed countries worldwide, people's concern about the inadequacy of retirement fund has stimulated the need to look for a place with a relatively low cost of living. Developing countries serve as a solution for those with limited income to maximize their well-being and living standard. This fits in the North-South movement, which can be extended in distance terms of geography across the globe in practice. Among others, Thailand serves as a destination, particularly in amenity/urban areas in Bangkok, Pattaya, Chiang Mai, and other Northeast provinces. Most migrants were married to Thai partners, while only small percentage of them (3.3%) married to non-Thai spouse ([Howard, 2008](#)). In addition, the main sources of income were from retirement pension, and individual savings and investments.

#### *Decision-making process*

Obtaining 'on-site' information about a destination before migration is the trend for retired migrants from advanced economies. The case of migration to Thailand of elderly from developed nations reflects the input of these notions as key in their decision making: low cost of living, warm climate, good amenity area, like of Thai lifestyle and culture, and the availability of attractive sexual partners (both men and women) ([Howard, 2008](#)). The latter is particularly revealing among European retirees in Thailand comparing with that of U.S. retirees in Mexico ([Howard, 2008](#); [Sunil,](#)

[Rojas, & Bradley, 2007](#)). Meanwhile, Malaysia serves as an attractive place for tranquility and simple life, political stability and security, ease of communication since most natives can speak English, and a hassle-free retirement scheme, the case in which involves the role of local agents, (Wong & Musa, 2014). The availability of inexpensive labor, financial security and healthcare are also main pull-factors in the case of Mexico (SUNIL et al., 2007). This compares to Morocco, which French migrants perceive as a desirable destination for retirement due to its French-speaking country, climate, kind people, beautiful nature, and more stable politics/ scant terrorism comparing to that of its neighboring country like Algeria (Viallon, 2012). At the same time, the Japanese tend to consider a number of factors, particularly cost of living, environment, climate, quality of healthcare services, and cost of healthcare services, reputation of crimes / violence / terrorism, taxation and visa regulation. Accordingly, Thailand and Malaysia are their choices ([Jones, 2008](#)).

Regarding the post-acquisition and the evaluation of migrant decision, each study points out different problems discovered by retired migrants. Among them, these notions prevails; visa problems; insecurity; negative local reactions; poor healthcare services; ineffective health insurance ([Howard, 2008](#); [Sloane, Cohen, Haac, & Zimmerman, 2013](#)). Yet, the case study of Thailand reflects otherwise from the local reaction perspective. Although the Thai people are generally not fluent in English, the assimilation to Thai society of western retirees is relatively good, as they perceived that they were accepted by Thai people and the society. In addition, the majority of retired migrants reported their wellbeing in Thailand as ‘excellent’ and ‘good,’ as well as, indicated their intentions to learn more about Thai culture and language and that they were accepted by Thai people (HOWARD, 2008).

#### *Impacts on destinations (developing countries)*

The positive impacts are just like those happened in Spain or other countries in Southern Europe, which is job creation once the areas become more urbanized. However, as the result of western retirees reporting high percentage of the availability of attractive partners at developing destinations, one has to be put into considerations of whether the incident occurs by nature or is manipulated. A study by HOWARD (2008) indicates that some Thai women, who married to older Westerners, might actually want to improve their living standards by living on husbands’ pensions.

#### **4. CONCLUSION**

International retirement migration (IRM) is the phenomenon which has recently gained attentions from both scholars and general audience, as its repercussions are visible in all geographical contexts. Unfortunately, the availability of IRM research in Asian context is far less than that of western contexts. However, according to the literature reviews, commonalities and differences of the IRM of retirees from developed origins to (1) developed and (2) developing destinations are found. *Commonalities* include: firstly, the common migration pattern, which is in North-South direction; secondly, the distribution of retired migrants in the country of destinations, which often flocking into urban and amenity areas; and thirdly, the decision-making process, regardless of destinations, retired migrants usually performed ‘on-site’ research by traveling to selected country and consulting mediators (property agents/ friends/ family or relatives) before purchase/renting a property at destination.

On the other hand, *differences* are numerous, for instance, characteristics of migrants, push-pull determinants in origins and destinations, different impacts on different destinations i.e. international marriage in developing countries, but tax evasion/ tax avoidance in developed countries, etc.

The authors are of the notion that existing literatures discusses IRM more from short-term economic perspectives, which doesn’t answer to the question of the long-term impacts on welfare at destinations, especially for the healthcare services. In addition, previous studies provided fewer analyses on socio-cultural and demographic aspects. This leads to the need for further investigations to come up with a better understanding of the phenomenon as well as appropriate policies and measures to deal with the trend. The focus should also be on developed countries outside the European Union, in which, the impacts on destinations and the transnational process of migrants should be addressed.

## **5. ACKNOWLEDGEMENT**

The authors acknowledge Chulalongkorn University and Kyoto University Asian Studies Unit (KUASU) for the financial support, and Prof. Pimpan Silpasuwan for the valuable comments on the study.

## **REFERENCE**

Ackers, L., & Dwyer, P. (2004). Fixed laws, fluid lives: the citizenship status of post-retirement



- migrants in the European Union. *Ageing & Society*, 24(03), 451-475. doi: doi:10.1017/S0144686X0300165X
- Ahmed, A. (2013). Structural Narrative Analysis: Understanding Experiences of Lifestyle Migration Through Two Plot Typologies. *Qualitative Inquiry*, 19(3), 232-243. doi: 10.1177/1077800412466050
- Åkerlund, U. (2012). Selling a place in the sun: international property mediation as production of lifestyle mobility. *Anatolia*, 23(2), 251-267. doi: 10.1080/13032917.2012.687691
- Åkerlund, U. (2013). Buying a Place Abroad: Processes of Recreational Property Acquisition. *Housing Studies*, 28(4), 632-652. doi: 10.1080/02673037.2013.773584
- Bell, S., Alves, S., de Oliveira, E. S., & Zuin, A. (2010). Migration and Land Use Change in Europe: A Review. *Living Reviews in Landscape Research*, 4, 1-49.
- Benson, M. C. (2010). The Context and Trajectory of Lifestyle Migration. *European Societies*, 12(1), 45-64. doi: 10.1080/14616690802592605
- Božić, S. (2006). The Achievement and Potential of International Retirement Migration Research: The Need for Disciplinary Exchange. *Journal of Ethnic and Migration Studies*, 32(8), 1415-1427. doi: 10.1080/13691830600928805
- Breivik, J.-K. (2012). Health migration from Norway to Spain – ambiguous belonging. *Ethnic and Racial Studies*, 35(9), 1634-1653. doi: 10.1080/01419870.2011.599403
- Casado-Díaz, M., Iacuta, Angeles, A., Kaiser, C., & Warnes, A. M. (2004). Northern European retired residents in nine southern European areas: characteristics, motivations and adjustment. *Ageing & Society*, 24(03), 353-381. doi: doi:10.1017/S0144686X04001898
- Casado-Díaz, M. A. (2006). Retiring to Spain: An Analysis of Differences among North European Nationals. *Journal of Ethnic & Migration Studies*, 32(8), 1321-1339. doi: 10.1080/13691830600928714
- Coldron, K., & Ackers, L. (2009). European citizenship, individual agency and the challenge to social welfare systems: a case study of retirement migration in the European Union. *Policy & Politics*, 37(4), 573-589. doi: 10.1332/030557309X435501
- de Coulon, A., & Wolff, F.-C. (2010). Location intentions of immigrants at retirement: stay/return or go 'back and forth'? *Applied Economics*, 42(26), 3319-3333. doi: 10.1080/00036846.2010.482518
- Evandrou, M. F., Jane; Green, Marcus. (2010). Migration in later life: evidence from the British

- Household Panel Study. *Population Trends*(141), 74-91.
- Gibler, K. M., & Taltavull, P. (2010). Using preferences for international retiree housing market segmentation. *Journal of Property Research*, 27(3), 221-237. doi: 10.1080/09599916.2010.518403
- Green, M. E., Maria; Falkingham, Jane. (2009). Older International Migrants: who migrates to England and Wales in later life? *Population Trends*(137), 33-40.
- Gurran, N. (2008). The Turning Tide: Amenity Migration in Coastal Australia. *International Planning Studies*, 13(4), 391-414. doi: 10.1080/13563470802519055
- Gustafson, P. (2001). Retirement migration and transnational lifestyles. *Ageing & Society*, 21(04), 371-394. doi: doi:10.1017/S0144686X01008327
- Gustafson, P. (2008). Transnationalism in retirement migration: the case of North European retirees in Spain. *Ethnic and Racial Studies*, 31(3), 451-475. doi: 10.1080/01419870701492000
- Howard, R. W. (2008). Western retirees in Thailand: motives, experiences, wellbeing, assimilation and future needs. *Ageing & Society*, 28(02), 145-163. doi: doi:10.1017/S0144686X07006290
- Huber, A., & O'Reilly, K. (2004). The construction of Heimat under conditions of individualised modernity: Swiss and British elderly migrants in Spain. *Ageing & Society*, 24(03), 327-351. doi: doi:10.1017/S0144686X03001478
- Innes, A. (2008). Growing older in Malta: experiences of British retirees. *International Journal of Ageing and Later Life*, 3 (2), 7. doi: 10.3384/ijal.1652-8670.08327
- Jones, G. W. (2008). Population Ageing in Asia and Its Implications for Mobility. *Journal of Population Ageing*, 1(1), 31-49. doi: <http://dx.doi.org/10.1007/s12062-009-9000-x>
- Karen M. Gibler, J. M. C.-D., Mari Angeles Casado-Díaz, Vicente Rodríguez, Paloma Taltavull. (2009). Late life second move housing choices of international retiree migrants. *International Journal of Housing Markets and Analysis*, 2(2), 190-210. doi: 10.1108/17538270910963117
- Lee, E. S. (1966). A Theory of Migration. *Demography*, 3(1), 47-57. doi: 10.2307/2060063
- Legido-Quigley, H., & McKee, M. (2012). Health and social fields in the context of lifestyle migration. *Health & Place*, 18(6), 1209-1216. doi: <http://dx.doi.org/10.1016/j.healthplace.2012.08.005>
- Nagatomo, J. (2011). De-territorialized Ethnic Community: The Residential Choices and Networks among Japanese Lifestyle Migrants in South-East Queensland. *Japanese Studies*, 31(3), 423-440. doi: 10.1080/10371397.2011.596525

- Northcott, H. C., & Petruik, C. R. (2011). The Geographic Mobility of Elderly Canadians. *Canadian Journal on Aging/La Revue canadienne du vieillissement*, 30(03), 311-322. doi: doi:10.1017/S0714980811000262
- Rodriguez, V. (2001). Tourism as a recruiting post for retirement migration. *Tourism Geographies*, 3(1), 52-63. doi: 10.1080/14616680010008702
- Sloane, P., Cohen, L., Haac, B., & Zimmerman, S. (2013). Health care experiences of U.S. Retirees living in Mexico and Panama: a qualitative study. *BMC Health Services Research*, 13(1), 411.
- Statistical Appendix. (2013). from International Monetary Fund (IMF) <http://www.imf.org/external/pubs/ft/weo/2013/02/pdf/statapp.pdf>
- Sunil, T. S., Rojas, V., & Bradley, D. E. (2007). United States' international retirement migration: the reasons for retiring to the environs of Lake Chapala, Mexico. *Ageing & Society*, 27(04), 489-510. doi: doi:10.1017/S0144686X07005934
- Truly, D. (2002). International retirement migration and tourism along the Lake Chapala Riviera: Developing a matrix of retirement migration behaviour. *Tourism Geographies*, 4(3), 261-281. doi: 10.1080/14616680210147427
- Viallon, P. (2012). Retired snowbirds. *Annals of Tourism Research*, 39(4), 2073-2091. doi: <http://dx.doi.org/10.1016/j.annals.2012.06.001>
- Vicente Rodriguez, G. F.-M., Fermina Rojo. (2004). International Retirement Migration: Retired Europeans Living on the Costa Del Sol, Spain. *Population Review*, 43(1), 1-36. doi: 10.1353/prv.2004.0009
- Warnes, A. M., King, R., Williams, A. M., & Patterson, G. (1999). The well-being of British expatriate retirees in southern Europe. *Ageing & Society*, 19(06), 717-740. doi: doi:null
- Warnes, A. M., & Williams, A. (2006). Older Migrants in Europe: A New Focus for Migration Studies. *Journal of Ethnic and Migration Studies*, 32(8), 1257-1281. doi: 10.1080/13691830600927617
- Whittemore, R., & Knafl, K. (2005). The integrative review: updated methodology. *Journal of Advanced Nursing*, 52(5), 546-553. doi: 10.1111/j.1365-2648.2005.03621.x
- Williams, A. M., King, R., Warnes, A., & Patterson, G. (2000). Tourism and international retirement migration: New forms of an old relationship in southern Europe. *Tourism Geographies*, 2(1), 28-49. doi: 10.1080/146166800363439
- Wiseman, R. F., & Roseman, C. C. (1979). A Typology of Elderly Migration Based on the Decision

Making Process. *Economic Geography*, 55(4), 324-337. doi: 10.2307/143164

Zasada, I., Alves, S., Müller, F. C., Piore, A., Berges, R., & Bell, S. (2010). International retirement migration in the Alicante region, Spain: process, spatial pattern and environmental impacts. *Journal of Environmental Planning and Management*, 53(1), 125-141. doi: 10.1080/09640560903399905

## **Understanding Care Giving and Care Taking Experiences throughout the Life Course – Focusing on Older Couples in Denmark**

Makiko Morita

PhD fellow at CCWS – Centre for Comparative Welfare Studies

Dept. of Political Science, Aalborg University, Denmark

Guest Research Associate at Dept. of Sociology, Graduate School of Letters

Kyoto University, Japan

### **Introduction**

The systems of providing welfare services interact with older people's everyday lives in a very complex way. Not only the arrangements of systems as such but also the availability of services influence their possibilities and constraints at an everyday level and shape what roles they play within the social network of their everyday lives. These interactions are long-term changing processes as both the systems and wide-ranging conditions in everyday life are neither static nor immutable. However, the long-term interactions of welfare systems and everyday life have, so far, not been explored sufficiently with a qualitative approach.

In particular, the present paper draws attention to how older people, specifically couples, understand the ways that the welfare systems interact with their everyday lives throughout the life course. The demographic change and extended longevity have increasingly stimulated discussions concerning the role of elderly people in society and their socio-economic and political implications due to their growing importance in modern life. Moreover, older couples' understandings of their interaction with the welfare systems at the everyday level reflect upon both their past and present experiences and practices, and this reflection results in forming a significant part of their views and expectations for the future.

Guided by life course approach, the analysis focuses specifically on older couples in Denmark, and explores the following questions; how have older Danish couples experienced care giving and care taking over the life course? How do they perceive these experiences? How have older Danish couples' experienced mutual support and communication with children, grandchildren, parents, neighbours and friends? How do their understandings exert influence on the forming of

expectations and views for the future? The empirical core of the analysis is the qualitative data derived from semi-structured in-depth interviews with couples aged 65 and over in Denmark. This contribution is a part of a PhD project that is a comparative study of Denmark and Japan. However, the present paper is based on the preliminary findings from Denmark since the interviews in Japan are ongoing and will be concluded by the end of February 2014.

## **Conceptual framework and background literature**

### ***1. Welfare services and everyday life***

Comparative studies of welfare state typologies have increasingly been developed during the last two decades. Esping-Andersen's seminal work of welfare (state) regime theory (1990, 1999) is of the greatest importance to the field of study in the last two decades. He classified industrial societies, mostly western societies into three regime types: liberal, corporatist and social democratic. In so doing he has used several indices, but mostly the level of de-commodification. De-commodification refers to "the degree to which individuals, or families, can uphold a socially acceptable standard of living independently of market participation (Esping-Andersen 1990; pp. 37)." In other words, de-commodification is used to measure the degree to which that the welfare states suspend individuals from the market dependency.

In liberal welfare (state) regimes, the state intervention is very limited. Benefits from social security programmes are generally targeted at the low-income group, and social assistance is means-tested. Anglo-Saxon countries including the United States and the United Kingdom represent this model. The conservative regime represented by Germany, predominantly preserves traditional and corporatist status differentials. Assistance is usually residual, which means that the state intervenes only if the family or other groups and organizations fail to fulfill their 'duties'. Finally, the social democratic regime encompasses countries in which welfare principles are in theory extended universally and applied also to the middle class. This regime type is highly de-commodified. Scandinavian countries represent this type. This Esping-Andersen's typology, first published in 1990, has evoked considerable discussion in comparative studies of welfare states and social policy.

It is widely understood that Scandinavian, or Nordic, countries including Denmark have a representative model in their approach to welfare, the so-called Scandinavian/Nordic welfare model, which aims to achieve a high degree of equality for all citizens via generous public provision

(Esping-Andersen 1990; Kemeny 1995; Siim 1997). In the abovementioned work of Esping-Andersen in 1990 and 1999, Denmark was placed within the social democratic welfare regime.

Some scholars point out that the studies of welfare systems, states and social policy have a considerable focus on cash transfers, but disregard social and welfare services which are actually delivered to citizens (Bambara 2005; Jensen 2008). Bambara (2005) for instance challenges Esping-Andersen's welfare regime theory by comparing the de-commodification levels of cash benefits programmes and health care services. Her findings, from the quantitative data analysis of the same 18 OECD countries as in Esping-Andersen's work, inform us of the important role of the provision of services, leading to five clusters which differ from the 'three' worlds of capitalism.

These studies ultimately aimed to challenge the discussions of welfare regime theory, which is not a main argument of this paper. Nevertheless, their emphasis on welfare services calls for attention to recognising the importance of welfare services and this has significant implications for understanding our everyday experiences. For instance, Kuronen's study of motherhood of lone mothers and child care service in Finland and Scotland (2001) indicates the importance of looking into social and welfare services which organise and structure local practices of the single mothers in question. She claims that looking into the locality, in other words, the perspective from inside is especially critical in order to gain the understanding of what it means to be mother in particular cultural and social contexts. Accordingly, the arrangement of social and welfare services are also crucial to everyday experiences of older people. The interplay between the welfare arrangement and everyday experiences of older people influence what roles they play within the social network of their everyday lives. For example, the ways both child and elder care are formulated influences the nature of older people's caregiving and caretaking *vis-à-vis* the younger and sometimes even older members of the family.

## 2. Complementarity role of family

The government is indeed an important provider of the welfare services in Scandinavia countries including Denmark. In this context, family's care activities are generally understood less intense. However, literatures on 'crowding out' vs. 'crowding in' (or 'substitution' vs. 'complementarity') inform us that families and public services do not necessarily show a clear substitution relationship (Harlofson and Hagestad 2012). In other words, highly 'de-familialised' welfare states have not crowded out informal care. Motel-Kilingebiel and his colleagues (2005), for

instance, show that, based on the quantitative analysis of Norway, England, Germany, Spain and Israel, “there is not just a trade-off between family and service support” and “the total volume of support is greater in the well-developed welfare state”.

However, the varieties in the degree of ‘de-familialisation’ of social policy arrangements may influence what support the family provides, what motivate the family to provide support – including the point of whether they are willing to help or feeling burden to do so. In other words, the arrangements of welfare systems and the availability – or unavailability – of services to a significant degree shape possibilities and constraints at an everyday level, which influence what roles older couples in Denmark play within the social network of their everyday lives.

### 3. The life course approach

These interactions of social policy and everyday life are long-term changing processes as both the arrangements of social policy and wide-ranging conditions in everyday life are neither static nor immutable. Thus, the life course approach is of great relevance.

Over a few decades, the academic interests in the temporal order within the life courses have grown and these interests have evolved into the life course approach, which serves to reveal the social and structural mechanisms that underlie the entirety of our life trajectories. As Anxo and Boulin (2006) highlight well, the life course approach regards ‘sequences’ of life events and life stages as important, but not focuses only on specific events, time periods or demographic groups. This ‘holistic’ view is central in the approach.

The life course approach has evolved into the arena of institutions and social policies in particular within the European scholarship. Two German researchers, Mayer and Müller (1986) examined mechanisms wherein the development of the welfare state in Germany penetrates deep into the individual course of life. Mayer (2001) further evolved this discussion of welfare states and life courses, and elaborated the concept of ‘life course regimes’, which are understood as outcomes of differing configuration of welfare systems at the individual level across countries. These life course regimes are firmly rooted in individual educational pathway, employment biography and family trajectory. As Leisering (2003) summarises, within the European scholarship, “the life course itself is seen as a social institution, its emergence as the ‘institutionalization of the life course.’ In this view, the life course is a new social structure in its own right, an ‘institutional program’ that defines a ‘normal biography’, not just a ‘pattern of socially defined, age-graded events and roles.’ ...



In a broader sense, the life course is conceived as the interface of institutional control (macro) and individual strategies of action (micro) (pp.207).”

The trend of combining two dimensions, the life course and welfare states, has furthered especially from a European perspective with more specific foci on different policy areas. For instance, Anxo and his colleagues (2011) thoroughly demonstrated that, based on empirical data of nine European countries, different institutional contexts have markedly influenced on shaping unique patterns of life courses. Their analysis demonstrated that “institutions that provide support at key life stages may not only open up new choices for individuals but also reduce the risks associated with increasingly heterogeneous life courses and erratic employment trajectories and the scarring effects of critical transitions (pp.64)”. Naegele, Barkfoldt, Vroom, Goul Andersen and Krämer (2010) have adapted the life course approach into analysis of working life. They developed a concept, ‘time arrangement’ which reflects on individual and collective social preferences and needs in addition to institutional options and constraints.

Although some classic writings in sociology paid attention to the significance of taking age and sex into account simultaneously (for instance Linton 1942), gender perspective has been in general a marginal point in life course research for a long time (Widmer and Ritschard 2009). For example, it was completely neglected in Mayer and Müller’s discussion of welfare states having impacted on framing life courses of people (1986).

Neugarten is one of a few who had recognised that age and sex have to be discussed at the same time (Hagestad 1996). Describing the case of the United States, Moen (1996) also illuminates the intersection of age and gender. Socio-cultural ideologies associated with age and gender simultaneously prescribe social behaviours and roles over the life course. It means that men and women are very likely to pursue different life trajectories over the life course so that the gender perspective is inseparable from that of ageing (Moen 1995). Arber (2005) investigates the ways in which the marital status impact on men’s and women’s lives over the life course. Her discussion shows that gendered marital biographies lead men and women to having access to different resources in their later lives (ex. pension and social contacts). This means that older men and women *inherit* advantages or disadvantages accumulated from the past lives to their later lives. Therefore, “the present material circumstances and social relationships of older people can only be understood by reference to their past, both present and past being reflected in the categorization of marital status (Arber 2005: p. 136).”

This gender difference of life course experiences is a major motivation for this study to focus on older couples. Particularly, looking into older couples but not just an individual provides an understanding of what it means to have been a couple over their life course. Moreover, the studies on older couples have been scarce whereas there have been numerous researches which centre on older individuals. The few attempts to examine older couples have been conducted with limited consideration, particularly interrelation between the health and psychological aspects of marriage in later life or supportive role of the elderly spouse in caregiving (Walker and Luszcz 2009). Furthermore, the state of being single or with a partner - often in marriage for the modern-day elderly - can lead to a significant difference in wide-ranging aspects of everyday life in old age such as where and with whom they do what.

Guided by the life course approach, this paper draws attentions specifically to older couples' understanding of care giving and taking experiences over the life course. The background literature has informed us that the changing arrangements of welfare systems and accordingly availability – or/and unavailability – of welfare services shape the possibilities and constraints at everyday level over the life course of individuals. However, people's understandings and perceptions of this dynamics have been little investigated so far. How people understand and perceive the experiences by linking their past and present to future views would provide significant implications for future policy making.

The analysis focuses specifically on older couples in Denmark, and explores the following questions; how have older Danish couples experienced care giving and care taking over the life course? How do they perceive these experiences? How have older Danish couples' experienced mutual support and communication with children, grandchildren, parents, neighbours and friends? How do their understandings exert influence on the forming of expectations and views for the future?

### **Postwar modernization - Shifting to the 'dual-earner family model' / standardisation of life course**

In what follows, I give a brief overview of postwar modernisation experienced by the modern day older people in Denmark with regard to men's and women's life courses as the background context for the following analysis. The older Danish people have lived the time of a societal transition where the individual has become the primary unit in determining public provisions

despite of gender. In Denmark, most laws, rights, benefits and obligations have been directed at the individual based on citizenship. This individual orientation underpinned by the universal principle has had a great influence on the women's position in families and relation to the labour market (Knudsen 1999). In the 1950s, 75 per cent of married women were homemakers (Brunse 2013). The male breadwinner family model was predominant. Married couples had joint taxation and a married man received higher unemployment benefits until the 1970s. Reflecting upon this transitional period, some of interviewees combine a time of being a housewife without any occupation and some other time with either full-time or part-time jobs.

It was around the 70s and the 80s, when the dual-earner family model gradually became pervasive in Denmark (Siim 1993). The universal public provision of welfare services have been traditionally recognised as a distinctive feature of the Nordic welfare model. In addition to equal access to universal services and support for all citizens, the Danish government has extended the welfare system to provide extensively high quality services including financial support in particular for children, the elderly, the sick and the disabled. The implication of this kind of universal welfare provision focusing on those people is that families externalise their traditional obligations, which has resulted in a large participation of females in the labour market. The labour market participation rate between 15 and 64 years old for women has been about 75 per cent since the mid-80s, and 85 per cent for men (Goul Andersen 2002). In those days, females' roles dramatically changed. There have been numerous discussions on the achievement of gender equality among feminists in Denmark, and several scholars point out segregation of jobs and disparity of payments between both genders (Siim 1993). However, women's position as workers as well as citizens is more pronounced in Denmark compared to most of the industrialised societies.

On the other hand, males have also experienced a transformation of the institutional expectation for them even though it took place slower than that for women (Siim 1993). According to Siim, public policies have aimed at strengthening the legal rights of fathers during 1980s through extending the amount of time that men could take as the paternity leave. In those days, a mother and a father shared 26 weeks of the parental leave, and the paternity leave was extended from two weeks to ten weeks out of the total share in 1985. 90 per cent of the father's income was guaranteed during his leave. In terms of career patters and family life, the standardised life courses for men and women had become less gendered around the time when modern-day older people formed their family and actively worked.

## **Method and Data**

The empirical data collection is primarily based on in-depth interviews with older couples above 65 years old. The interviews are conducted based on a semi-structured interview guide, which is inspired by Kvale and Brinkmann's semi-structured life world interview (2009). The interview questions include everyday routines, experiences about care taking and giving to and from parents, children and grandchildren, relationship with neighbours and friends and other related questions. All interviews are recorded. In this paper, a Danish couple who live in a suburban neighbourhood of Aarhus and two in Aalborg. Both Aalborg and Aarhus are among the major cities in Denmark.

Three couples were born between the late 30s and the beginning of the 40s, which means before the end of the Second World War. Before providing an analysis of the couples, some work history and their family structure is briefly introduced;

### *Couple 1 Anne and Oscar*

The husband, Oscar was a technical staff at an institute of a university for 40 years and then retired when he was 67 years old. The wife, Anne was a part time cleaning lady at a school for hairdressers and retired at the age of 60. They have two children – a son and a daughter. The son lives in the same city as them and drops by their place frequently for a short time. The daughter is married and has two children. Her family lives in the capital of Denmark, Copenhagen, which is approximately 300 km away from Anne and Oscar's place. The couple meet them about once a month.

### *Couple 2 Gunhild and Bjarne*

The husband, Bjarne was an English and French teacher at a high school also for 40 years. He retired when he became 70 years old. The wife, Gunhild was a bio analyst at a hospital and retired at the age of 65. She had some period of not working, thus have worked for around 30 years in total. They have three children – a son and two daughters. The son and one of the daughters live in Copenhagen. The other daughter lives in Herning. In total, they have seven grandchildren. They meet their families including grandchildren around five to seven times a year.

### *Couple 3 Sanne and Georg*

The husband, Georg was mainly a sales driver at several companies. He went on to early retirement when he was 62. The wife, Sanne was an office worker in different places and also went onto the early retirement when her company at that time went bankruptcy, and started receiving pension at the age of 65. She also had some period of not working and of doing part-time. They have two children – a daughter and a son, both are married and live close to their place (2 and 10 km away respectively), therefore they often see each other. In total, they have four grandchildren.

## **Preliminary Findings**

### *Looking after grandchildren*

Most of the interviewed couples have grandchildren, and they often provide some help for grandchild rearing especially when they are/were small. The common examples in their stories are to pick them up at either day care or kindergarten and look after them until their parents get off work. When the grandchildren get sick and it is difficult for their parents to take day offs from their work, then the couples also try to help the situation. Sanne explained how they helped their children;

We have a daughter in law working in a shop, Føtex. She was working till 8 o'clock in the evening two times a week, and one day We picked up the kids from daycare and had them till our son got off work, so they would come home with us and it was a regular thing that we picked up kids for 5 or 6 years every thursday, because first one of the children, then the other, they were at the same place and that fitted us nicely, because then we could easily pick them up.

Whether they live close to each other and how old grandchildren are, these are important factors of how grandparents interact with their grandchildren. Some of the couples live far from their children and grandchildren, thus they tend to gather for seasonal events such as Easter, Christmas and family members' birthdays but not provide help with childrearing because it is difficult. However, physical distances are sometimes not an obstacle, for instance, Gunhild who lives in Aalborg commented;

I have done that on several occasions, at times I have had to take a flight (to Copenhagen) to help my son look after his kids. Early in the morning, he would then pick me up at the airport. I have also taken a bus there.

She also explained why she even flew to her son's place;

When the kids had been sick for several days, and they (her children) could not get off of work anymore, I would take the bus over there. I have done that to Herning as well, not only Copenhagen.

From their stories, it seems that their help in 'grandchild rearing' is important for their children's family; "my daughter in law expressed to me how grateful that she had been that we had been there for them to take care of their children when they were small (Sanne)." The couples also like it as they said in the interview; however, they do not want it to be their burden.

When the grandchildren were small, there are only one month between the two eldest grandkids, and then I said, "***I do not want to be a daycare center*** everyday from 6-5, I will take them when they are sick or if they have vacation or something, then I can be a ***guest daycare***, and I was doing that for 5-7 years. At that time it was them that got our time, but now they are 14, 15, 16, 17 so they do not need Grandmother anymore, I mean in that way, but they always know where we are. (Sanne)

#### Care for their parents and reflections on the previous experiences

All the three couples' parents have passed away. Some of their parents have died all of sudden because of heart attacks or stroke. Some of the couples had been heavily engaged in taking care of their parents. It took place at the hospitals, nursing homes or at their parents' places. Anne had taken care of her parents and her husband's mother when they became frail. She had a part time job in the afternoon; therefore she had time to help them in the morning.

I went shopping (for her mother in law), and I was there eating with her or were there when she had to eat, because it was hard for her to do it by herself. Not that she physically couldn't, but mentally, and that makes sense, it is comfy to have company. (Anne)

Living together with their parents could be also one of options to be considered. Even though Sanne did not want to do so, it was a thing that she would mention as 'I did not want'. If it was the thing that she even did not consider doing, she may have phrased differently (in fact some couples chose to live with their parents but not the three couples focused in this paper).

I did it in the way that he became demented, and it was necessary to get rid of the house he was living in. And I will be frank, I did not want my father to stay with us, because my mother had died when she had been 58, and this was approximately 10 years after this. So, we did not know how long time that it would take, (if they let him stay). Also I didn't want to because of our conflicting lifestyles, I told him after my mother died that he could not just come here any expect dinner at 18.00, because we could eat at 5 or maybe first at 7, so in the end I said no, you cannot live here. Then he went to a nursing home, where he was in 10 years, and managed to stay at 8 different places during this time, here in the city. And in the end, very very demented. (Sanne)

It is not only them to take care of the parents in their family. Depending on where their parents and other family members live, the primal help may come from their siblings. Gunhild mentioned that her sister mainly took care of her father after her mother's death.

I have three siblings (a brother and sisters), still living in Randers, and after my mother died, it was my sister who lived next door to him and who cooked for him, he would come to them every day to eat. (Gunhild)

It was possible for her father to buy meals from the public sector, however, she mentioned;

I think... I just think it was best for him not to have it brought in from outside. (Gunhild)

She thinks that the family's support was better for her father than the public service at least in terms of cooking. Nonetheless, this does not mean that she would also like to get similar support from her children as shall be seen below.

Oscar's mother was demented and partly blind, that ultimately made her live in a nursing home. Looking back the situation at that time made him reflect on his views in the following way;

The best solution to it would be that it happened in the same way to me, as it did with my father. I mean one minute you are here and the next you are not. Because my experience with nursing homes are not the best, but you can't expect it to be, especially good because people are different, and I mean, and things like dementia that is given in various degrees, some may get affected a little, while others are completely in their own world and can't even eat, I've seen it in the nursing home, actually it was frightening really frightening, I mean I wouldn't wish even my worst enemy to be in a situation like that. Because that is not, that is definitely not a life. (Oscar)

Anne added that;

I think it is because *one has seen how it can happen*, it must be terrible to be dependent on others, now here I don't mean cleaning and these kinds of practical matters this we can work out, but about yourself personally "personal care". I really think that is terrible.

For both husband and wife, to a large extent, their past experiences with care for the elderly influenced constructing their views especially on nursing care.

'Being independent' and 'take care of themselves' are also the value the three couples somehow share. Anne said;

One hopes that you can take care of yourself, our generation has also been raised to believe that we can "*take care of ourselves*" and we want to, and as long as we are able we must do so, and then I hope that I will never have to go to a nursing-home.

When the conversation touched upon their future and preferable care, Bjarne simply said that

We are hoping to keep in shape by doing sports, in many years to come.



He emphasised that he and his wife would like to stay healthy as long as possible. They both go to a gym for training and play tennis together in order to keep their physical capability.

Sanne also said;

It is not always good to stay in your own home as possible, it depends on the situation, but as long as the both of us are here, then I would reckon that we would try and stay *independent* and *take care of ourselves*, and I believe that when we ask for things from the children like we do sometimes today, especially with computers and such, of which I have no understanding.

On the one hand, the couples have helped and taken care of their parents and sometimes other members of the family in the similar age. On the other hand, the couples do not want to rely on their children as much as their parents did. Bjarne mentioned the difference between the relationship of them and their children and of them and their parents.

‘It (their children taking care of him and his wife) would be difficult as they are living in other places. It is not only because of their work, but our two daughters are doctors and our son is vice president in a technology company so they won’t have time to take care of us.

#### Changing ways of mutual communication and support

The couples see the different patterns of way of helping each other within the family compared to old time with their parents and the current time with their children. Bjarne mentioned,

Generations evolve, and new patterns arise, the elderly become more self-sufficient and the kids are loosened from their parents in this way.

I think it has to do with a general development in society, people are more used to take care of themselves, you no longer have the patriarchal system where you are centred around the father. The kids are no longer dependent on their parents, and the parents can see that they have a new role.

Gunhild also sees the transition in her relationship with her children and also in her children's relationship with their children compared with her relationship with her parents;

Before it was the father who took decisions and it was almost like the law. It's not like that anymore, because now (you) talk / negotiate about things, and with your own children it was also different because they were freer and had more autonomy. It was not like that in my childhood, what father decided could not be discussed, and that was how it was.

'We' or 'I' – the contrast to children's generation

Reflecting upon what the couples have seen in their children's and parents' lives, they have reconstructed the patterns of everyday life they have experienced. Some couples have mentioned these differences between their children's and their generations the following way;

[T]oday, you are not only one. So, you don't say I am getting a child, no *we* are getting a child, and so since both of them are attached to the labour market, that they then, its both the kitchen and, so with our own daughters family, there they are betting on her job, which is one where you do not get home at 4 in the afternoon. He cooks everyday, and she drops off the children, he would pick them up and cook when that need was there, and he still cooks everyday, and then she will do it on the weekends. So they *share* it, and so does the others, in a different way but I think its great that they *share that burden*. (Sanne)

In her narratives, she implies that their children share the burden however she did not.

[I]f I were to lose (his wife) now, I could really have to pick myself up to, make anything to eat because I have never done it. And I am not alone in that, ok you could say that our children, their generation is much more minded for *doing things together*, taking care of the babies, making the food and so on, but *my generation is not accustomed to that*. (Oscar)

[W]e were like everyone else, so, now we have lived in this house for about 47 years, and when our children were small, many mothers on this street were homemakers, and we had

something socially together, but that kind of thing...that is how it was and now it is a different time. (Sanne)

The way she described why she has decided to quit a job and become a housewife as 'we were like everyone else' and 'that is how it was' suggests that she thinks, becoming a housewife was not a thing that she would have questioned to do, but rather it was self-evident in her everyday world at that time.

### **Concluding remarks**

Older couples' narratives illustrate that their family and working lives were carried out in parallel to the process of the postwar development of Danish welfare state in which the life courses for men and women had been standardised through the several attempts to achieve gender equality. However, the stories of older couples show that it does not necessarily mean their experiences explicitly embodied the 'gender equality'. When they talk about their parents' generations, gender is a strong distinction of life trajectories, whereas in the narratives of the children's generations, 'individual' is more visible regardless of gender.

Seeing the children's generation, on the one hand, the development of child care - e.g. day care services, introduction of parental leave - was understood as the positive change especially among women who have been a main care taker. On the other hand, de-institutionalisation of elder care may have led the couples to perceive institutional care as for the very terminal period of life associated with dementia, and going to live there is extremely negative for some of the couples.

As the existing literature shows, 'de-familialised' welfare state does not necessarily discourage to providing familial care and support. The older couples frequently help or helped family members (parents, children and grandchildren) and *vice versa*. However, the interviewed couples' understandings suggest that they do not feel obligated to take care of the family members, even though there is almost no other option in some occasions.

This paper is based on a preliminary result from the ongoing PhD project and therefore the analysis has not been concluded. Some differences would be found in the results from interviews with Japanese counterparts, and also the following points should be taken into consideration; age difference among interviewees, having children or not, receiving care or not. Nevertheless, the

couples narratives overall illustrated the continuous interactions of social services and their everyday lives. What the couples have seen influence the choices, decisions and future views to a great extent.

## References

- Anxo, D., Bosch, G. and Rubery, J. (2010) Shaping the life course: A European perspective. In D.Anxo, G.Bosch, J. Rubery (eds.) *The Welfare State and Life Transitions: A European Perspective*. Cheltenham: Edward Elgar,1-77.
- Anxo, D. & J-Y, Boulin. (2006) The organisation of time over the life course: european trends. In *European Societies*, Volume 8, Issue 2: 319-341
- Arber, S. (2005) Inequalities in later life: gender, marital status, and health behaviours. In Svallfors, S. (ed) *Analyzing Inequality - Life Chances and Social Mobility in Comparative Perspective*. Pp. 129- 64. California: Stanford University Press
- Bambara, C. (2005) Cash versus services: ‘worlds of welfare’ and the decommodification of cash benefits and health care services. In *Journal of Social Policy*, 34, pp 195-213. doi:10.1017/S0047279404008542.
- Brunse, H., M. (2013) Sisters Divided: Gender, Politics and the Making of Danish Family Policy, paper presented at NordWel and REASSESS International Summer School, Reykjavik, 15-20 August 2013
- Esping-Andersen, G. (1990) *The Three Worlds of Welfare Capitalism*. Polity Press, Cambridge.
- Esping-Andersen, G. (1999) *Social Foundations of Postindustrial Economics*. Oxford University Press, Oxford.
- Goul Andersen, J. (2002) De-standardisation of the life course in the context of a Scandinavian welfare model: The case of Denmark, Paper prepared for seminar: Recomposing the Stages in the Life Course, Maison des Sciences de l’Homme, Paris, June 5-6th, 2002
- Jensen, C. (2008) Worlds of welfare services and transfers In *Journal of European Social Policy*, May 2008 vol. 21&18 no. 2 151-162
- Leisering, L. (2003) Government and the life course. In J. Mortimer & M. Shanahan (Eds.), *Handbook of the life course* (pp. 205–225). New York: Kluwer/Plenum Publishers
- Hagestad, G. O. (1996) Introduction: Thoughts about the Life Course In *The meanings of age: Selected papers of Bernice Neurgarten*. Chicago: University of Chicago Press.

- Harlofson, K. & Hagestad, G. O. (2012) Transformations in the role of grandparents across welfare states. In Arber, S. and Timonen, V. (eds) *Contemporary Grandparenting: Changing family relationships in global contexts*. Pp. 27-50. Bristol: The Policy Press
- Kemeny, J. (1995) Theories of power in the three worlds of welfare capitalism. In *Journal of European Social Policy*, vol. 5 no. 2; pp. 87-96
- Knudsen, L. (1999) Recent fertility in Denmark – A discussion of the impact of family policy in a period with increasing fertility. *Jinko Mondai Kenkyu [Journal of Population Problems, Tokyo]*, **55**, 3, 3-29.
- Kuronen, M. (2001) Motherhood in family context - Comparing professional practice in maternity and child health care in Finland and Scotland. In Söderling, Ismo (ed.) *Yearbook of Population Research in Finland XXXVI 2000*. The Population Research Institute.
- Kvale, S. & Brinkmann, S. (2009) *InterViews (Second edition): Learning the craft of qualitative research interviewing*. California: SAGE publications.
- Mayer, K. U. (2001) The paradox of global social change and national path dependencies: Life course patterns in advanced societies. In A. E. Woodward & M. Kohli (Eds.), *Inclusions and exclusions in European societies*. Routledge, London, 89-110.
- Mayer, K. U. and Müller, W. (1986) The State and the Structure of the Life Course". In: Aage B. Sorensen, Franz E. Weinert and Lonnie R. Sherrod (eds.) *Human Development and the Life Course: Multidisciplinary Perspectives*. Hillsdale, NJ: Lawrence Erlbaum Associates Publishers, 217-245.
- Moen, P. (1995) Gender, Age, and the life course. In Binstock, R., H. and George, L., K. (eds) *Handbook of Aging and the Social Sciences, Fourth Edition*. Academic Press, London, 171-187.
- Motel-Kilingebiel, A., Tesch-Roemer, C. & Von Kondratowitz, H., J. (2005) Welfare states do not crowd out the family: evidence for mixed responsibility from comparative analysis. In *Ageing and Society*, 25, pp. 863-882
- Siim, B. (1993) The gendered Scandinavian welfare states: The interplay between women's roles as mothers, workers and citizens in Denmark. In Lewis, J. (ed.) *Women and Social Policies in Europe: Work, Family and the State*. Edward Elgar, London, 25-48.

- Siim, B. (1997) Dilemmas of citizenship in Denmark – Lone mothers between work and care, in Lewis, J. (ed.) *Lone mothers in European Welfare Regimes*. Jessica Kingsley Publishers, London, 140-69.
- Walker, R.B. & Luszcz, M.A. (2009). The health and relationship dynamics of late-life couples: a systematic review of the literature. *Ageing and Society*, 29(3), pp.455-480.
- Widmer, E. D. & Ritschard G. (2009) The de-standardization of the life course: Are men and women equal? In *Advances in Life Course Research* 14; 28–39.