# The Age-friendly Attributes of Warkworth: A Case Study of a Rural Town in New Zealand

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# Abstract


## Background

Ageing of the global population is expected to be the predominant demographic pattern of the twenty-first century and is having an impact on nearly every country. The majority of older people have a preference for ageing in place in familiar communities. Ideally, the responsibility for ageing in place should be shared among individuals, communities, and governments. The World Health Organization's age-friendly cities and communities model has become a favoured policy response globally to support ageing in place. New Zealand has followed global strategic direction in support of ageing in place and is committed to the age-friendly model. Population ageing is occurring at a faster rate in rural communities than in urban centres. Although rural ageing has recently gained global attention in gerontology, little is known about the age-friendliness of rural towns and small rural communities in New Zealand. This study aimed to explore the age-friendly attributes of a small rural town in New Zealand and to identify priorities and opportunities to improve age-friendliness.

## Design and Methods

The study employed a single case study design underpinned by Deweyan pragmatism. Case study research allows multiple perspectives of a phenomenon to be explored in the context of the local community. The WHO age-friendly conceptual framework informed the design of the study. A central assumption underpinning the age-friendly model is the dynamic relationship between older people and their environment. A transactional perspective provided an epistemological lens to gain a deeper understanding of the dynamic process of continually adapting to a constantly changing environment. Data were collected from multiple sources using multiple methods including document review, a cross-sectional survey, walking interviews with people aged 65 years and over and face-to-face interviews with retail and service operators in Warkworth. Data from all sources were triangulated to provide an in-depth and nuanced exploration of the case.

## Findings

Four main themes represented the age-friendly attributes: *being established, being present, being involved* and *being responsive*. The findings identified a strong sense of community, older people were custodians of their community, there were strong social networks and local involvement, and the local community was responsive to older people. The participants cared deeply about their town and were committed to making it a better place now and for the future for themselves, other older people ageing in the community and future generations. A

range of priorities and opportunities to advance the age-friendliness of the physical, social, and service environments were identified and recommendations were provided to the local community and levels of government.

## Conclusion

Older people in the Warkworth community are making a significant bottom-up contribution to the age-friendliness of the town. Raising awareness of the age-friendly model would ideally build on existing strengths and age-friendly attributes of the community identified in the present study. The identified strengths of community stewardship and custodianship suggest older people in this community could contribute to decision making in a more structured and official capacity at a local, civic level. This study makes a significant original contribution to our understanding of age-friendliness in rural communities in New Zealand. The findings also have international relevance for rural ageing and age-friendly knowledge and practice by contributing highly contextual place-based evidence. Additionally, applying a Deweyan pragmatic perspective contributes to the theoretical understanding of the age-friendly model. There is an opportunity for local government to facilitate engagement with older people in a more innovative, localised response to age-friendliness in this community. Age-friendly principles should be promoted and embedded in planning processes to ensure the future development of Warkworth provides a liveable and age-friendly environment for its oldest citizens ageing in the community.

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# Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

10 June 2021

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Signature Date

# Acknowledgements

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Finally, I would like to express my deep gratitude to my family and friends for their sustained interest, encouragement, and support throughout my doctoral studies.

# Ethics Approval

Approval for the research reported in this thesis was granted by Auckland University of Technology Ethics Committee (reference number 18/418) on 16 November 2018. The ethics approval letter is shown in Appendix A.

# Chapter 1. Introduction

## Introduction

Are our communities appropriate places for older people to age in place? This is a question being posed at the global level by citizens and governments of many countries, cities, towns, and small communities in response to rapid population ageing. Consequently, there is heightened interest globally and in New Zealand in creating age-friendly environments that are inclusive of older people. The majority of older people live independently in the community in their own homes whether owned or rented and many older people choose to remain living in their familiar communities as they age. However, age increases the risk of illness, chronic health conditions and disability, and for those living alone, the risk of social isolation. To enable ageing in place in preferred locations, the physical, social, and service environments must be appropriate for the changing support needs of older people. Despite the ageing demographic projections, attributes of most cities, towns and rural areas favour the lifestyle patterns of younger people and working age cohorts rather than an ageing population. A deeper and more nuanced understanding of the challenges and opportunities of an ageing population is required to inform the design of all-age-inclusive physical and social infrastructure (Scharlach & Lehning, 2016).

## Research Purpose

In response to population ageing trends and increased emphasis on ageing in place, the New Zealand government has committed to the World Health Organisation's (WHO) age-friendly cities and communities framework by becoming an affiliated member of the Global Network for Age-friendly Cities and Communities (GNAFCC). Central government, through the Office for Seniors, has developed an age-friendly toolkit based on collated global and national resources to assist communities in implementing age-friendly programmes (Neville et al., 2021). The most recent New Zealand social and health policies on ageing reflect this commitment and provide direction and guidance for communities to be more age inclusive. At the local level, Auckland Council has launched the *Age-Friendly Auckland* programme and has begun working towards an application to join the GNAFCC.

Like many developed countries, regional towns and rural areas in New Zealand are home to higher percentages of older people than main urban centres. Although the actual number of older people is far greater in main urban centres, structural population ageing (the increasing proportion of older people within the total population) is more pronounced in rural areas. This trend is expected to continue as older people choose to live and age in place in rural areas and

younger people move to larger urban centres. Rural communities globally and in New Zealand are experiencing rapid population change. While some rural communities have experienced population decline, many regional towns in New Zealand are experiencing population growth. Warkworth, the setting for the current study, is home to a high percentage of older people living in the township and surrounding rural communities. Further, the town has been identified for major development and is expected to undergo rapid population growth over the next two decades. There is a dearth of international evidence on age-friendliness in diverse rural places, particularly in the context of rapid population expansion. In addition, little is known about the age-friendliness of small rural towns in New Zealand from the perspectives of older people ageing in the community and the people who serve them.

## Research Aims and Questions

Considering this lack of empirical evidence and to inform policy and practice in the New Zealand context, the aim of this study is to:

- Provide an empirical knowledge platform to communities, and local and central government in New Zealand to inform strategies for implementing age-friendly initiatives

The two research questions to be addressed are:

1. What are the age-friendly attributes of Warkworth?
2. What are the priorities and opportunities for advancing the age-friendliness of Warkworth?

A single, holistic, exploratory case study methodology, informed by the WHO age-friendly conceptual model and underpinned by a Deweyan pragmatic perspective, was utilised to address the research questions.

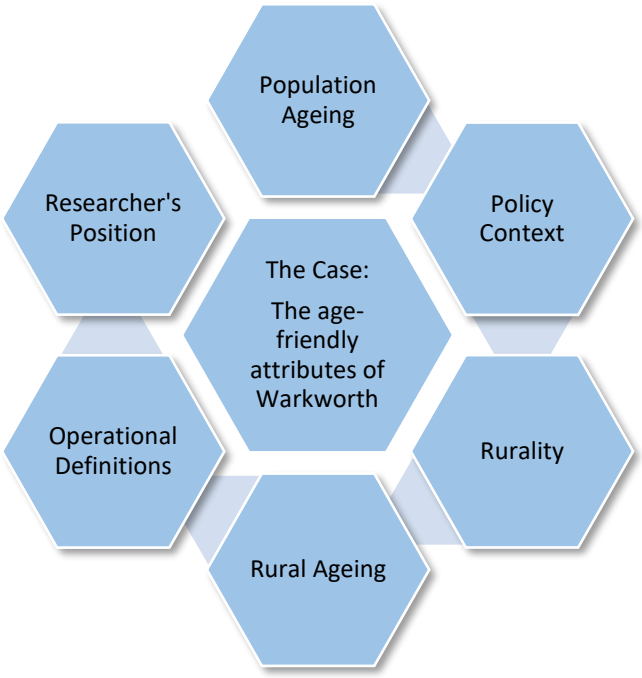
## Background and Rationale for the Study

In this chapter the contextual background and rationale for the current study is presented. The chapter commenced with an introduction to the topic, the research purpose, aim and the research questions. The next section of the chapter presents the contextual components that support the 'case' (Figure 1). First, population ageing trends starting at the global level, and moving down to New Zealand, Auckland, the local board, and the study setting, Warkworth, are presented. Second, the policy response to population ageing at the global, New Zealand and local levels are discussed. Third, the significance of rurality is explained. Fourth, rural

ageing is discussed. Fifth, key operational definitions are explicated and finally, my position as the researcher is outlined. The chapter concludes with an overview of the thesis chapters.

**Figure 1**

*Contextual Background to the 'Case'*




## Population Ageing

The predominant demographic trend of the twenty-first century is set to be the ageing of the world's population (Skinner et al., 2018). Population ageing has been identified as an unprecedented global phenomenon and is having an impact on nearly every country in the world.

### Global Ageing Trends

Population ageing occurs when the average age of a given population increases (Berry, 2021). The global population aged 65 years and over is increasing more quickly than any other age group (United Nations [UN], 2019). The two main drivers of population ageing are increased life expectancy and a declining birth rate. Increased life expectancy is a major contributing factor to numerical population ageing which is an increase in the actual number of older people (Jackson, 2011). Life expectancy at birth has increased due to development of global social and economic policies that have driven improvements in public health in the last 50 years resulting in many more people surviving childhood (World Health Organization [WHO], 2015b). Along with life expectancy from birth, life expectancy at 65 years has significantly improved. Life expectancy from 65 years is the average number of additional years a person

can expect to live. From 2015-2020 the average global life expectancy from 65 years has been 17 years. This is expected to increase to 19 years by 2045-2050. The UN referred to this global phenomenon as a longevity revolution (UN, 2019).

A declining birth rate is the main force behind structural ageing which is an increase in the percentage of older people in the population. Along with numerical and structural ageing, baby boomers (the cohort born after the Second World War and up until 1964) began entering older adulthood in 2011 (Jackson, 2011). Structural ageing in rural areas is further driven by out-migration of younger people to urban centres and in-migration of older people joining those ageing in place. The culmination of these demographic trends has resulted in rapid population ageing. Currently 703 million people are aged 65 years and over in the global population. This figure is expected to double by 2050 reaching 1.5 billion (UN, 2019).

## New Zealand Ageing Trends

The present population of New Zealand is estimated to be 5.1 million based on the 2018 Census (Statistics New Zealand, 2018a). Currently, 15 % of the New Zealand population is aged 65 years and over (Statistics New Zealand, 2018a). In some regions and communities in New Zealand this percentage is much higher. The 65 years and over population is expected to grow at an unprecedented rate as more New Zealanders live longer, the birth rate decreases, and baby boomers continue to enter older adulthood. It is expected that by 2034 there will be 1.2 million people aged 65 years and over, making up 21 % of the total population (Minister for Seniors, 2019). Although the older population in New Zealand is predominantly European, the number of older people is increasing across all ethnicities (Minister for Seniors, 2019).

Globally and in New Zealand those aged 85 years and over are the fastest growing group within the 65 years and over age group (Glasgow & Brown, 2012). The number of New Zealanders aged 85 years and over is projected to almost double from 86,800 in 2018 to 169,100 in 2033 according to Statistics New Zealand population projections at the 50$^{th}$ percentile or median (Statistics New Zealand, 2016a). Living alone is a noticeable trend in older adulthood (Statistics New Zealand, 2016b). People aged 65 years and over are projected to make up 55 % of all people living alone by 2034 (Minister for Seniors, 2019). Those aged 85 years and over are more likely to live alone, have given up driving and have more chronic health problems and disabilities (Glasgow & Brown, 2012).

Population ageing is occurring unevenly across New Zealand. In particular, population ageing is occurring more rapidly in the sub-national areas outside of the main urban centres. Already over 41% of towns and 29% of rural communities have greater than 20% of people aged 65

years and over compared to 15% New Zealand wide (Jackson, n.d.) These data reflect the difference in ageing structure between urban and rural places. To inform central government ageing policies and funding models in New Zealand, it will be important to understand the local experiences of older people ageing in towns and rural communities.

## Auckland Ageing Trends

Auckland has the largest share of New Zealand's population with 1,590,261 people at the 2018 Census (Statistics New Zealand, 2018a). The sustained growth Auckland has experienced is expected to continue, reaching approximately 2.4 million people over the next 30 years (Auckland Council, 2018a). Currently 12 % of Auckland's population is aged 65 years and over (Statistics New Zealand, 2018a). Compared with the whole of New Zealand (15 %), Auckland has a younger population, particularly noticeable in the 20–24-year age group, reflecting the range of employment and educational opportunities available. Notwithstanding Auckland's relatively younger populace, population ageing is expected to be a prominent trend shaping the future of Auckland (Auckland Council, 2018b).

Population ageing in Auckland is being influenced by both numerical ageing and structural ageing (Auckland Council, 2018b). Like global and New Zealand structural ageing trends, Auckland's structural ageing is being driven by a falling birth rate and increased life expectancy (Auckland Council, 2018b). The percentage of people aged 65 years and over is projected to increase to 18.4 percent by 2043 (Auckland Council, 2018b). Structural ageing in Auckland will be particularly noticeable in the 85 years and over age group which is projected to more than triple, increasing from 23,500 in 2018 to 79,270 in 2043 (Auckland Council, 2018b; Statistics New Zealand, 2017a). However, the age structure of Auckland is not evenly distributed with marked differences between local board areas and across ethnic groups (Auckland Council, 2018b).

While structural ageing is projected to have the greatest effect in the New Zealand European population, structural ageing is also occurring rapidly within the Māori population in Auckland as life expectancy for Māori increases. The percentage of the Māori population in Auckland aged 65 years and over (kaumātua) is expected to rise from 5.6 % in 2018 to 11.4 % in 2038 (Auckland Council, 2018b). The age structure of the broad classification of Asian ethnicity shows a younger population; although, the increase in the Asian population aged 65 years and over in Auckland from 18,924 in 2013 to 31,353 in 2018 suggests this ethnic group will also experience structural population ageing over the next 30 years (Auckland Council, 2018b; Statistics New Zealand, 2017a).

## Rodney Local Board Ageing Trends

Rodney Local Board is the most northern of the Auckland Council's 21 local boards. It is a predominantly rural area with a widely dispersed population. Although Rodney is one of the smallest local boards population wise, with only four percent of the total Auckland Council area population, it has the largest land mass in the region constituting 46 % of the Auckland Council area (Auckland Council, 2017). The total population of Rodney in 2018 was 66,800 and is expected to increase by approximately 40 % to 92,900 by 2033 (Statistics New Zealand, 2017b).

Rodney Local Board area has a high percentage of people aged 65 years and over (17 %) compared with New Zealand (15 %) and Auckland (12 %) (Statistics New Zealand, 2017b, 2018a). Demographic projections indicate Rodney will experience structural population ageing at a dramatically higher level than the whole of New Zealand trend. The population of people aged 65 years and over in the Rodney area is projected to increase by approximately 107 % from 11,500 in 2018 to 23,800 in 2038. Furthermore, the 85 years and over age group is expected to almost quadruple from 970 in 2018 to 3790 in 2038 (Statistics New Zealand, 2017b).

Rodney Local Board area has a very high percentage of people of European ethnicity (89 %) in comparison to the whole of Auckland Council area (53 %) at the 2018 Census (Statistics New Zealand, 2018a). The percentage of European ethnicity in Rodney is higher in the 65 years and over age group (94.6 %) and higher still in the 85 years and over age group (98 %). These trends reflect the traditionally agrarian environment and historical settlement patterns of European people in the Rodney area. However, the ethnic and cultural diversity of Rodney is likely to increase with the planned urban development in the area and the projected growth in population.

## Warkworth Ageing Trends

Warkworth is the largest town in the Rodney Local Board area and is 57 Kilometres north of Auckland City centre. The total population of Warkworth at the 2018 Census was 5631. The population increased by 37 % from the 2013 to 2018 Census (Statistics New Zealand, 2018a). Based on population growth projections related to future urban development, Warkworth's population is expected to increase by 20,000 people over the next 30 years (Auckland Council, 2018b). Warkworth has a high percentage of people aged 65 years and over (27 %) compared with Rodney (17 %), Auckland (12 %) and the whole of New Zealand (15 %). Of those aged 65 years and over, almost 17 % are aged 85 years and over (Statistics New Zealand, 2018a). Some

of the smaller communities around Warkworth also have a high percentage of people aged 65 years and over. For example, Snells Beach, a coastal settlement on the East Coast, approximately eight kilometres from Warkworth, has 28 % of the population aged 65 years and over and for nearby Sandspit this figure is 31 % (Statistics New Zealand, 2018b). Consequently, Warkworth and many proximal small settlements have become ageing places, a term used by geographers to describe places with increasing numbers of older people (Skinner et al., 2014).

## The Policy Response

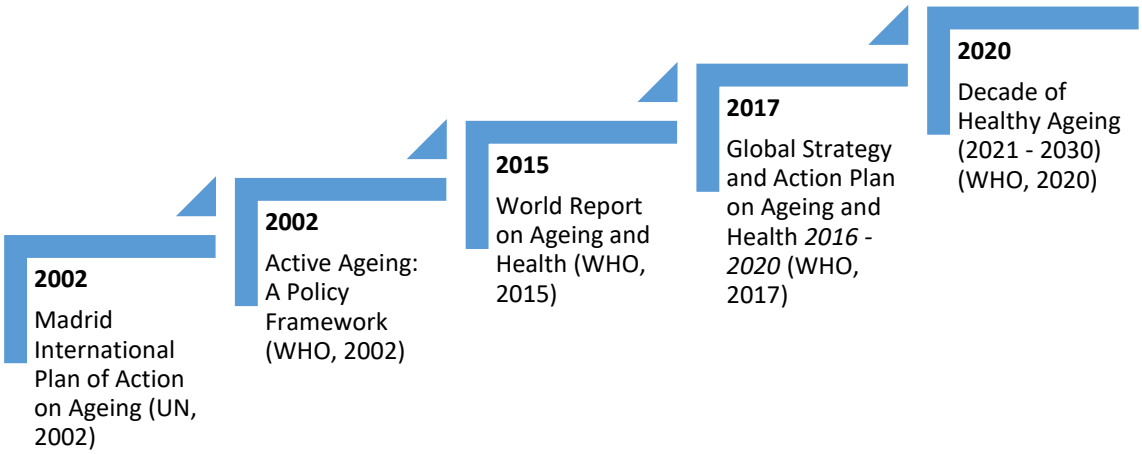
Urgency to address population ageing has driven advancement in global ageing policies over the last two decades. Global ageing policies provide centralised direction and guidance for countries to develop their own ageing policies, plans and strategies at national and local level. This section presents policy responses to population ageing at global, New Zealand and local levels.

### Global Ageing Policies

The global policy response to population ageing is illustrated in Figure 2.

**Figure 2**

*Progression of Global Ageing Strategies*




Two foundational documents, the *Madrid International Plan of Action on Ageing* (UN, 2002) and *Active Ageing: A Policy Framework* (WHO, 2002), have guided global action on ageing over the last two decades (WHO, 2015b). The first document, the Madrid International Plan of Action on Ageing (UN, 2002) endorsed in 2002 by the United Nations General Assembly and subsequently adopted by 159 governments present at the Second World Assembly on Ageing in Madrid, was considered a pivotal point in ageing policy direction. The Madrid plan focused on three key priorities: older persons and development; advancing health and well-being into

old age; and ensuring enabling and supportive environments (UN, 2002). Further, promoting ageing in place and positive views of ageing were central to advancing the plan's priorities (UN, 2002; WHO, 2015b).

The second document Active Ageing: A Policy Framework (WHO, 2002) was a contribution by the WHO to the Second United Nations World Assembly on Ageing in 2002. The WHO had advanced their work on ageing and health during the International Year of Older Persons (1999) with active ageing a major theme (WHO, 2002). Part five of Active Ageing: A Policy Framework provided policy direction for all levels of governance to implement policies recommended by the Madrid International Plan of Action on Ageing. Active ageing is defined by the WHO as "the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age" (WHO, 2002, p. 12). The active ageing framework incorporated a life course approach and recognised the diversity of older people and ageing experiences. A major strength of the Active Ageing: A Policy Framework was its endorsement by the UN; thus, providing a clear mandate for governments to embrace active ageing as a policy focus (WHO, 2002). These two foundational documents are situated within the legal framework of the international human rights law (WHO, 2015b) informed by the *Universal Declaration of Human Rights* (1948) (UN, n.d.). The intention of international human rights law is to protect individuals of all ages and groups against any discrimination including age and disability.

While the Madrid International Plan of Action on Ageing (UN, 2002) and Active Ageing: A Policy Framework (WHO, 2002) have both provided broad strategic direction, concern was raised over the lack of detail they provided on how countries could achieve systemic change (WHO, 2015). Since 2002 global progress on the three key priorities set out in the Madrid International Plan of Action on Ageing has been considered by the WHO to be inconsistent and inadequate (WHO, 2017). To address shortfalls in the global response to population ageing priorities, the *Global Strategy and Action Plan on Ageing and Health 2016-2020* (WHO, 2017) was adopted by the Sixty-ninth World Health Assembly and signed by the WHO member states in May 2016. Although the revised strategy built on the Madrid International Plan of Action on Ageing (UN, 2002) and Active Ageing: A Policy Framework (WHO, 2002), there was increased integration of ageing and health. The Global Strategy and Action Plan on Ageing and Health 2016-2020 (WHO, 2017) was informed by the *World Report on Ageing and Health* and incorporates the WHO's updated concept of healthy ageing (WHO, 2015).

The WHO defined healthy ageing as "the process of developing and maintaining the functional ability that enables well-being in older age" (WHO, 2015, p. 28). Functional ability enables

older people "to be and do what they have reason to value" (WHO, 2015, p. 28) and integrates the interaction between the individual's intrinsic physical and mental capacities and the physical and social environments they inhabit (WHO, 2015). The updated notion of healthy ageing provides a conceptual framework for health and social policy. Central issues in promoting healthy ageing are recognising inequities, enabling older people's agency and autonomy, and understanding the diversity of older people and the environments they inhabit.

The Global Strategy and Action Plan on Ageing and Health 2016-2020 (WHO, 2017) sets out the following five main objectives that provide strategic direction at the global level for countries to work towards:

- Commitment to action on healthy ageing in every country
- Developing age-friendly environments
- Aligning health systems to the needs of older populations
- Developing sustainable and equitable systems for providing long-term care (homes, communities, institutions); and
- Improving measurement, monitoring and research on healthy ageing

Drawing on the *2030 Agenda for Sustainable Development* these five objectives are underpinned by principles of human rights, equality, equity, and intergenerational solidarity. These principles take account of the great diversity of ageing populations and the impact of inequality and inequity on ageing experiences (WHO, 2017).

The most recent global ageing initiative is the UN *Decade of Healthy Ageing (2021-2030)* (WHO, 2020) which further builds on the Global Strategy and Action Plan on Ageing and Health (WHO, 2017) and incorporates the three key priorities of the Madrid International Plan of Action on Ageing mentioned earlier (WHO, 2002). The Decade of Healthy Ageing (2021-2030) was launched in December 2020 in honour of the International Day of the older Person 2020. This strategic plan has been developed with older people at the centre and responds to the call for action in a concerted, multi-sectoral collaboration that is in synch with the goals of the UN 2030 Agenda for Sustainable Development. Combating ageism is identified as a high priority in Decade of Healthy Ageing (2021-2030) with the imperative to "change how we think, feel and act towards age and ageing" (WHO, 2020, p. 8). A further priority for member governments is to promote age-friendly cities and communities at the national, regional, and local level to enable older people to remain connected to their communities. Global policies on ageing promote ageing in place or older peoples' right to make informed choices about where they live (Sixsmith et al., 2017).

## Ageing in Place

Ageing in place is generally accepted as staying at home in the community for as long as possible rather than moving into a long-term aged care setting (Martens, 2018; Scharlach & Lehning, 2016; Wiles et al., 2012). The majority of older people live independently in the community and have a preference for remaining in familiar places as they grow older (Dye et al., 2010; Oswald et al., 2011; Scharlach & Lehning, 2016). This preference for ageing in familiar places is complex but is considered to be closely associated with the sense of identity and continuity derived from attachment to people and place (Burholt & Naylor, 2005; Rowles, 1983; Rubinstein, 1990). A wide range of community characteristics are influential in older people's decision to age in place including accessibility, affordable transport, opportunities to be involved in the community and a range of social and health services (Alley et al., 2007). Further, older people are more likely to stay in their own homes if they are well informed about services and support available in their communities (Jorgensen et al., 2009).

Ageing in place has been identified as a complex and continually evolving process of integration and reintegration into a place (Cutchin, 2016). This process requires negotiation and renegotiation of identity and meaning "in the face of dynamic landscapes of social, political, cultural, and personal change" (Wiles et al., 2012, p. 358). These changes must be constantly negotiated to facilitate older people's decisions to age in place. Cutchin (2001) argued, this understanding moves ageing in place from an outcome to a process as the relationship between the person and the place is constantly transforming. The ongoing negotiation and renegotiation intensify as older people reach more advanced age and towards the end of life. The challenge for ageing in place policies is being able to support older people's decision to remain living in their local communities, including the last years of their life (Molinsky & Forsyth, 2018; Sixsmith et al., 2017).

How ageing in place is experienced has much to do with the places in which people live and grow old in (Chapman & Powell, 2009). Thus, critique of ageing in place policies have centred on the suitability of the environments in which older people reside (Molinsky & Forsyth, 2018; Sixsmith et al., 2017). For example, good housing conditions are associated with positive physical and mental health benefits (Sixsmith et al., 2017). While ageing in place literature has largely focused on the home environment (Gitlin, 2003; Wahl & Weisman, 2003), recent global interest has centred on the impact of neighbourhoods and communities beyond the home in understanding ageing in place (Dye et al., 2010; Kendig, 2003; Peace et al., 2011; Wiles et al., 2012). Expectations to age in place are significantly influenced by the quality of the neighbourhood and perceptions of safety (Lehning et al., 2015). Thomas and Blanchard (2009) argued, the term ageing in place should be extended to ageing in the community; thus,

widening the scope of the living environment to include a multidisciplinary community approach and compelling communities to consider their age-friendliness.

To support older people's preference to age in place in familiar communities, strategic policies to promote enabling and inclusive environments are crucial. Cities and towns have typically been designed for younger and employed people. It is only in recent decades when demographic forecasts have highlighted the imperative of a rapidly ageing population that town planners and designers have begun to turn their attention to the relationship between the quality of the built environment and healthy ageing (Burton et al., 2011; Hogan et al., 2016). It has been argued that ageing in place policies should be part of a larger, multi-sectoral policy response including urban design, housing, transport, social services, and health care (Martens, 2018). Further, to support ageing in place, vertical policy is required from global down to all levels of government at national level (Phillips & McGee, 2018). To improve the effectiveness of ageing in place policies, experts have proposed a more inclusive approach to planning living environments in partnership with older people and increased interdisciplinary collaboration (Buffel, 2018; Sixsmith et al., 2017). The voices of older people themselves are ideally included from early planning stages (Phillips & McGee, 2018). In addition to health and social policies, local communities should support older people to age in place; thus, broadening the responsibility beyond the individual. The WHO age-friendly cities and communities model has become a favoured global health policy response to support ageing in place.

## The WHO Age-Friendly Cities and Communities Model

The WHO launched the *Global Age-Friendly Cities: A Guide* in 2007 to meet the challenges and opportunities of an ageing population, ageing in place policies and older peoples' aspirations to remain connected to their communities (WHO, 2007). The WHO describe an age-friendly city as one that "adapts its structures and services to be accessible to and inclusive of older people with varying needs and capacities" (WHO, 2007, p. 1). The Global Age-Friendly Cities: A Guide was designed to promote and support active ageing by responding to the urgent need for enabling and inclusive environments highlighted by the Active Ageing: A Policy Framework underpinned by the three pillars of health, participation, and security (WHO, 2002).

The Global Age-Friendly Cities: A Guide was the product of a major research project undertaken in 33 cities around the world. The perceptions of older people as experts in their communities, care givers and service providers formed the basis of eight main themes identified as important for communities to be age-friendly: outdoor spaces and buildings; transportation; housing; social participation; respect and social inclusion; civic participation

and employment; communication and information; and community support and health services (WHO, 2007) (Figure 3). The research that informed the Global Age-Friendly Cities: A Guide was undertaken in cities in response to rapid urbanisation trends. The *Age-friendly Rural and Remote communities: A guide* was developed in Canada around the same time following a similar research design to reflect the high proportion of older people living in rural areas and small towns driven by structural ageing (Federal Provincial Territorial Ministers Responsible for Seniors, 2007). The age-friendly model has subsequently been widely referred to as age-friendly cities and communities to reflect the diversity of communities implementing age-friendly programmes (Plouffe & Kalache, 2011).

**Figure 3**

*WHO Age-friendly Model (WHO, 2007)*


Source: Global Age-friendly Cities: A Guide (Worl Health Organisation, 2007)

To encourage commitment to the age-friendly model, the *Global Network of Age-friendly Cities and Communities* (GNAFCC) was established in 2010 with the overall mission to inspire, connect, and support communities to become increasingly age-friendly. By the end of 2020, 1114 communities across 44 countries had joined the GNAFCC (Remillard-Boilard et al., 2021). While nations can apply to become affiliated members of the GNAFCC, a key strength of the network is the encouragement for communities of any size to apply for membership. Despite growing commitment to the age-friendly agenda, there is limited global evidence on the effectiveness of age-friendly programmes in supporting older people to age in place (Lehning et al., 2015). The WHO age-friendly model is presented in more in-depth in chapter two, including how it has been utilised as the conceptual framework for the current study. The next section presents the New Zealand policy response to population ageing trends.

## New Zealand Ageing Policies

New Zealand's two major ageing strategies, *Better Later Life – He Oranga Kaumātua 2019 to 2034* (Minister for Seniors, 2019) and the *Healthy Ageing Strategy* 2016 (Associate Minister of Health, 2016) have been informed by the aforementioned global ageing policies and initiatives. The New Zealand strategies provide national and local policy direction on ageing and are complimented by several health and social policies including *New Zealand Health Strategy* 2016, *He Korowai Oranga – Māori Health Strategy* 2014, the *New Zealand Disability Strategy* 2016; the *New Zealand Carers' Strategy* 2008; and the *New Zealand Carers' Strategy Action Plan 2019-2023*. Better Later Life – He Oranga Kaumātua 2019 to 2034 replaced the *New Zealand Positive Ageing Strategy* (2001). The New Zealand Positive Ageing Strategy (2001) responded to the active ageing theme advanced during the 1999 International Year of Older Persons (Dalziel, 2001). A critical review of the New Zealand Positive Ageing Strategy (2001) in 2014 highlighted a problematic emphasis on older people's independence and personal responsibility for health and wellbeing (Office for Senior Citizens, 2014). The underlying themes of activity and productivity risked rendering invisible the reality for frail and dependent older people (Davey & Glasgow, 2006). Notwithstanding these shortfalls, the New Zealand Positive Ageing Strategy (2001) made progress across the 10 goals geared towards promoting the wellbeing of older people and prevailed for 18 years.

The more contemporary strategy, Better Later Life – He Oranga Kaumātua 2019 to 2034, was published and launched in November 2019 to provide policy direction to central and local government, non-government organisations, businesses, and communities for the next 15 years. Better Later Life – He Oranga Kaumātua 2019 to 2034 provides targeted, measurable indicators geared to "create opportunities for everyone to participate, contribute and be valued as they age "(p. 18). A Ministerial Steering Group has been convened to conduct regular reviews and monitor the progress of action plans (Minister for Seniors, 2019). Better Later Life – He Oranga Kaumātua 2019 to 2034 promotes a more inclusive approach by incorporating inclusive pronouns such as *we* and *us* (meaning all New Zealanders) when referring to the ageing population rather *them* and *they,* previously used in the New Zealand Positive Ageing Strategy (2001). The intention of this more inclusive language is to position ageing as a normal part of the life course.

The age-friendly model has been referenced in Better Later Life – He Oranga Kaumātua 2019 to 2034 in two of the five key areas for action: enhancing opportunities for participation and social connection; and making environments accessible. Arguably, the age-friendly framework intersects with all five key areas for action. Although the rationale for this selective reference

to the age-friendly model is unclear, it may relate to the highly centralised and compartmentalised political system in New Zealand. Further, assimilating centralised policies at the local government level is hampered by the narrow jurisdictional scope of local government, especially in relation to health care and social services. Jurisdictional fragmentation between small rural communities and provincial government was identified as a barrier to sustaining age-friendly programmes in the rural Canadian context (Ryser et al., 2021).

The demographic profile outlined in the Better Later Life – He Oranga Kaumātua 2019 to 2034 document indicates population ageing is likely to have a greater impact on small towns and rural areas because of increased demands on local services and infrastructure. Despite this observation, the strategy is predominantly oriented towards the urban context. The *2014 Report on the Positive Ageing Strategy,* which reported on progress towards meeting the New Zealand Positive Ageing Strategy (2001) goals, identified that more attention to access issues for older people living in rural communities was required and that disparities in access to services in rural areas could widen in the future (Office for Senior Citizens, 2014). In progressing the Better Later Life – He Oranga Kaumātua 2019 to 2034 agenda, it will be important for central government to monitor the impact of the ageing population on service access and the age-friendliness of rural communities.

The second major ageing strategy in New Zealand, the Healthy Ageing Strategy 2016, replaced the former *Health of Older People Strategy* 2002. The New Zealand Healthy Ageing Strategy 2016 is nested within the New Zealand Health Strategy 2016 and builds on central health themes. The New Zealand Healthy Ageing Strategy 2016 reflects current ageing demographic trends and aligns with current global ageing strategies. The Healthy Ageing Strategy 2016 incorporates the updated WHO concept of healthy ageing and has a strong focus on the life-course approach and the diversity of ageing presented in World Report on Ageing and Health (WHO, 2015). Central tenets of the revised New Zealand Healthy Ageing Strategy 2016 are supporting ageing in place and promoting the age-friendly communities model.

The New Zealand government is beginning to respond with a more inclusive ageing agenda and more inclusive language as evident in these strategies. Further, Better Later Life – He Oranga Kaumātua 2019 to 2034 provides a framework for collaboration across central government portfolios, local government, non-government organisations, business, and communities. Central government in New Zealand has prioritised ageing in place as a policy direction since the launch of the New Zealand Positive Ageing Strategy 2001. Ageing in place was one of the 10 strategic goals in the 2001 strategy and has continued to be a priority in the

Better Later Life – He Oranga Kaumātua 2019 to 2034 strategy. Clear progression of ageing in place, as a strategic policy, is evident in Better Later Life – He Oranga Kaumātua 2019 to 2034 where the focus has shifted to include ageing in the community. This is an important shift in focus as older people are known to spend more time in their local neighbourhoods and towns as they get older (Grant et al., 2010). Supporting older people's preference to age in place will require increased attention to features of the physical, social, and service environments that impact on the experience of ageing in the community. Indeed, age-friendly research was a key priority identified during recent consultation with older people and stakeholders at a series of ageing well research priority setting workshops, held in the five main cities in New Zealand (Doolan-Noble et al., 2019).

Central government in New Zealand, through the Office for Seniors, has committed to an age-friendly New Zealand agenda, culminating in acceptance as an affiliate member of the WHO GNAFCC in 2018. In response to priorities identified from community engagement and consultation, the New Zealand version of the age-friendly framework substitutes the domain *respect and social Inclusion* with *diversity and culture* to reflect established bi-culturalism and commitment to *Te Tiriti o Waitangi* (founding legislative document of New Zealand) and the increasing diversity of the people and places. A recent process evaluation of three age-friendly pilot programme sites identified key success factors to implementing age-friendly initiatives in New Zealand included having strong community engagement and fostering a 'bottom-up' approach. Recommendations included ensuring a diverse representation on age-friendly committees (Neville, Adams, Napier, & Shannon, 2018; Neville et al., 2021). The *Age-Friendly Aotearoa New Zealand Toolkit* was developed to guide communities in progressing age-friendliness. To date, two New Zealand cities have joined the WHO GNAFCC (SuperSeniors, n.d.). Notwithstanding this progress, the emphasis in New Zealand has remained predominantly on cities and larger urban areas. Little attention or support has been given to rural communities in developing formal age-friendly programmes. Thus, the age-friendliness of rural communities in New Zealand remains largely unknown. The following section reviews how local government in Auckland has responded to an ageing population.

## Auckland Ageing Policies

Auckland is a large local council consisting of 21 local boards. Local councils in New Zealand represent and make decisions on behalf of their local communities. Although local councils work within a legislative framework, established and maintained by central government, they are responsible for local democracy, local choice, and local accountability. In 2010, there was a major restructuring of the local government in the Auckland area. Auckland Regional Council

became Auckland Council with the amalgamation of eight previous councils. Auckland Council was thereafter referred to as a unitary authority which would be expected to act in a similar way to regional councils (Department of Internal Affairs, 2011). Within Auckland Council there are five main council-controlled organisations responsible for essential infrastructure including transport, water, and waste.

At this regional level, Auckland Council has a Seniors Advisory Panel to provide ongoing advice on issues important to older people and to facilitate their engagement (Auckland Council, 2021b; Duncan, 2016b). Recommendation from the Seniors Advisory Panel to Auckland Council to initiate a WHO age-friendly programme culminated in Auckland Council passing a resolution in 2018 to progress membership to the WHO GNAFCC (Blakey & Clews, 2020). Wide community-level engagement has been completed and the project is currently at the action plan development stage. As part of their regional community engagement, the Age-friendly Auckland team conducted a consultation workshop focused on the *Outdoor Spaces and Buildings* domain of the age-friendly model at the Warkworth Town Hall In 2019. Prior to adoption of the final plan and submission of the application to the WHO, further political and community consultation had been planned in 2020 (Auckland Council, 2021a). The Age-friendly Auckland plan includes all 21 local boards; however, the plan has largely been initiated at a regional level.

## Rodney Local Board and Warkworth

Rodney Local Board provides local leadership and acts as an interface between the local communities such as Warkworth and Auckland Council (Department of Internal Affairs, 2011). The local board membership consists of mainly locally elected representatives and some appointed representatives. Local boards in New Zealand are accountable to the communities they serve for allocated and statutory decisions. Responsibilities of local boards in New Zealand include facilitating local economic development, maintenance and administration of public buildings and parks, and improvements to local environments (Auckland Council, 2020b; Duncan, 2016b). A major function of local boards is to represent the interests of communities they serve and provide an advocacy role. This includes monitoring public opinion and responding to local priorities and identified needs.

Every three years, local boards within Auckland Council produce a local plan to provide strategic direction for local decision-making. Although the plans are informed by local community consultation and are expected to reflect local values, priorities, and preferences, they are restrained by the overall vision and budget constraints of the Auckland Unitary Plan (Duncan, 2016a). There has been ongoing contention between local rural priorities and

funding models, leading rural communities in north Rodney to believe their needs are not being adequately met by the Auckland Council. There is a perception that Auckland Council is too big and too remote, has a bias towards urban needs and lacks understanding of rural issues. This dissatisfaction has been fueled by a perceived lack of meaningful engagement and participation in local decision-making processes (Duncan, 2016a).

There is no specific reference to the ageing population, age-friendliness or the specific needs of older people ageing in place in the Rodney Local Board Plan 2020 (Auckland Council, 2020b). Warkworth is situated within the Rodney Local Board area and is under the jurisdiction of Auckland Council. While the region-wide Age-friendly Auckland programme has been initiated, neither Rodney Local Board nor Warkworth has a recognised local age-friendly profile. The following section reviews the significance of rurality to the current study.

## Rurality

Rural populations are usually categorised as living outside of urban and metropolitan areas, typically small towns, and dispersed settlements. There are no standardised global definitions of rurality; therefore, individual countries have developed their own definitions (Scharf et al., 2016). Consequently, definitions vary widely (Halseth et al., 2019). Lack of definitional clarity has inspired ongoing debate on the meaning of rurality (Halseth et al., 2019; Menec et al., 2011; Phillipson & Scharf, 2005; Skinner et al., 2021). Defining and classifying rurality is problematic because diverse migratory patterns have resulted in rapid change in the demographic profile of rural areas. Moreover, the social, cultural, and economic contexts of rural communities are constantly changing (Walsh et al., 2012). Most definitions of rurality focus on population size, density and distance from urban centres and have been informed by national statistics data (Halseth et al., 2019).

Recent critique of the demographic and geographic approach to defining rurality has centred on the major variability surrounding rural communities' individual circumstances, conditions, and capacity to endure change. The notion of degrees of rurality has been proposed to account for community characteristics and identity, such as history and culture, in addition to numerical and spatial interpretations of rurality (du Plessis et al., 2004). Markey et al. (2010) agreed there should be more flexibility in defining rurality to capture the rich diversity and heterogeneity of the rural condition. Similarly, it has been suggested an urban-rural continuum should replace the current urban-rural dichotomy to better reflect the diversity of contexts and issues older people face ageing in rural and urban communities (Menec et al., 2011). Then again, Hedlund (2014) argued the urban-rural continuum is too linear and does not account for complexity. Manifestly, a more fine-tuned understanding of rurality is required to inform

policies, programmes, and funding models (Markey et al., 2010; Ryser et al., 2021). Consequently, rural gerontologists have identified a need for more nuanced place-based rural research to reflect the variety of rural contexts and to update increasingly historic and stereotypical rural ageing themes (Scharf et al., 2016).

In New Zealand rural areas are categorised according to the level of urban influence: rural areas with high, moderate, or low urban influence, and highly rural/remote areas (Statistics New Zealand, 2004). Urban influence is primarily based on the percentage of residents commuting to an urban area for employment. Although proximity to health and other essential services that people require are factored into level of urban influence, migration trends and experiences of ageing in rural contexts have not been considered in the current rural definitions. Warkworth has been identified as a growing rural node by Auckland Council. Staged development planned over the next 20 years is expected to transform Warkworth from a small rural service town to a satellite town providing a comprehensive range of services to a wide rural catchment area (Auckland Council, 2018b). It is unknown how this planned development and rapid population growth will impact on older people ageing in place in this rural community.

## Rural Ageing

Population ageing is occurring at a much faster pace in rural regions than in urban centres (Berry, 2021; Skinner & Winterton, 2017; WHO, 2015b). Globalisation and shifting demographic profiles have contributed to considerable population change in rural communities (Phillipson & Scharf, 2005). While declining birth rates and longevity have significantly contributed to rural ageing, the major driving force behind rural population ageing is complex migration patterns (Berry, 2021). The two main migration patterns that drive rural population ageing are in-migration of people around retirement age into rural areas and out-migration of younger people seeking higher educational and employment opportunities (Berry, 2021; Burholt & Dobbs, 2012; Krawchenko et al., 2016). The out-migration of younger people includes loss of child-bearing potential which further contributes to an older age structure (Glasgow & Brown, 2012). These global trends have resulted in a disproportionate percentage of older people living in non-urban areas (Berry, 2021; Glasgow & Brown, 2012).

The in-migration trends of people to rural areas in mid to late adulthood and early retirement has been referred to as counter-urbanisation (Skinner et al., 2021; Stockdale & MacLeod, 2013). Complex push and pull factors are known to influence older people's migration decisions. Push factors relate to the previous residential environment; whereas pull factors relate to the new residential environment (Spina et al., 2013). Although motivation behind

migration to rural areas is not easily classified, predominant patterns include seeking a change in lifestyle, return migration to rural places and seeking more affordable housing. It is yet unknown what impact increased workplace flexibility and remote working trends, stimulated by the COVID-19 pandemic, will have on net migration in rural places.

In-migration to rural places presents both benefits and challenges for older people in rural communities. On one hand, more affluent migrants typically contribute to local communities and drive demand for new services, creating employment opportunities and attracting younger in-migrants (Heley & Woods, 2021). Thus, the skills and resources newcomers bring to rural communities may provide benefits for rural sustainability. Further, newcomers may advocate for age-friendly features (Winterton et al., 2018). On the other hand, there may be conflicting needs between in-migrants and older people ageing in place.

Complex migration patterns have contributed to structural ageing in Warkworth. Younger people aged 18–25 years typically leave the town to pursue a range of employment and tertiary educational opportunities available in urban centres. Amenity migration and ageing in place trends have increased the percentage of older people living in Warkworth and surrounding rural areas. Rural areas with natural amenities such as Warkworth and the surrounding area typically attract more affluent older migrants with skills and financial flexibility (Berry, 2021; Heley & Woods, 2021). Returning migrants may also bring local knowledge and social connections (Heley & Woods, 2021). Considering the growing complexity in residential history, rural communities such as Warkworth should be prepared for the changing needs of in-migrants and those ageing in place as they move from an active third age to the fourth age when increased health and social support may be required (Heley & Woods, 2021).

Interest in older people's experiences of ageing has gained momentum over the past decade considering the changing rural contexts (Burholt & Dobbs, 2012; Glasgow & Brown, 2012; Keating et al., 2013; Menec et al., 2011; Podgórniak-Krzykacz et al., 2020; Skinner et al., 2021; Skinner & Winterton, 2018; Urbaniak et al., 2020; Vidovićová, 2018). Rural contexts are known to present specific challenges and opportunities for older people (Skinner & Winterton, 2018). On one hand, older people experience inequitable access to essential health services, transportation options (Neville, Adams, Napier, Shannon, et al., 2018; Neville, Napier, Adams, & Shannon, 2020; Novek & Menec, 2014) and information technology (Warburton et al., 2014). On the other hand, rural places are often depicted as idyllic with close-knit communities and informal care (Hanlon & Poulin, 2021). Rural generalisations, typically underpinned by these dichotomous narratives about ageing in rural places, have recently been challenged in

favour of more nuanced understanding (Hanlon & Poulin, 2021). Underlying this critical view of rural ageing is the realisation of constant change in rural profiles and heterogeneity of ageing in rural places. Furthermore, the diverse experiences of ageing in rural places both influence and are influenced by the constant change in rural profiles (Winterton, 2021).

Social, political, and economic transitions, driven from top down political and economic conditions, have impacted rural communities more severely than urban centres (Halseth et al., 2019; Keating et al., 2013; Skinner & Winterton, 2017; Walsh et al., 2014). Community-based research has highlighted local context variability on the effects of political and economic restructuring (Ryser et al., 2021). Attitudes from central and local government towards older people can affect the availability of resources in rural communities (Phillipson & Scharf, 2005). Small towns dependent on specific resources and industries are particularly vulnerable to economic restructuring (Ryser et al., 2021). The loss of core industries in some small towns has resulted in rapid out-migration of working-age people leaving a high percentage of older people ageing in the community (Wiersma & Koster, 2013). Depopulation has threatened the viability of many small towns, resulting in regionalisation of publically funded services, gradual reduction in infrastructure investment and closure of services such as shops, post offices, and public transport (Keating et al., 2013). Equally, many rural communities, including Warkworth, have experienced growth-related pressure on existing infrastructure and services from in-migration of retirees and seasonal tourism (Keating et al., 2013). It is expected that rapid ageing from migration trends and ageing in place in rural areas will drive increased demand for local rural services (WHO, 2015). The next section of the chapter presents key operational definitions utilised in the current study.

## Operational Definitions

Several terms used throughout this thesis require clarification in how they have been interpreted and applied. These terms include age-friendly, attributes, community, and a strengths-based approach.

### Age-friendly

The WHO age-friendly model is integral to this thesis. It was utilised as the conceptual framework to inform the design of the study. As explained earlier in this chapter, the WHO age-friendly model has been promoted as a global response to population ageing; accordingly, the government in New Zealand has adopted this model. While the eight age-friendly domains identified by the WHO (outdoor spaces and buildings; transportation; housing; social participation; respect and social inclusion; civic participation and employment; communication

and information; and community support and health services) were utilised in the design of the current study, I acknowledge the uniquely Aotearoa New Zealand age-friendly model includes an emphasis on bi-culturalism and diversity. The age-friendly model is discussed in more depth in chapter two.

## Attributes

Attributes, utilised as a noun, means characteristics and/or qualities of people or places (Merriam-Webster, 2021). I chose to utilise the term attributes as it provided a broad scope to include features, qualities and characteristics of the town, the environment, and the people. Further, the term attributes enabled an opened ended and inductive approach to compliment the age-friendly framework as the conceptual model used to guide the study design and processes.

## The Meaning of Community

Throughout this thesis, I have utilised the term community to encompass the understanding that communities of place and communities of interest are interrelated (Means & Evans, 2011). Chalmers and Joseph (1998) proposed a community is both a unit of analysis and "a context for the description of human experience" (p. 157). Thus, the notion of community encompasses geographical and sociocultural meanings. This understanding of community resonates with Dewey's pragmatic and transactional perspective, explained in chapter four, as the philosophical foundation for this case study. Although the current study setting is bounded by the geographical limits of the Warkworth Township, both communities of place and communities of interest were relevant to the participant's everyday experiences of ageing. This contextual complexity and blurring of boundaries are integral aspects of case study research.

## A Strengths-based Approach

This study aimed to explore the age-friendly attributes of the Warkworth community from a strengths-based perspective. A strength-based approach is respectful of local culture and values and existing social networks. In utilising this approach, identifying priorities and opportunities to improve age-friendliness is future focused and congruent with the pragmatic philosophical foundation of the study. Further, a strengths-based approach challenges negative attitudes and assumptions about older people that can interfere with development and execution of health and social policies (Officer & de la Fuente-Nunez, 2018; Sao Jose et al., 2019).

Outdated perceptions and misconceptions about older people and ageing are widespread and deeply entrenched in society (Sao Jose et al., 2019). Alarmist language is frequently used by media when reporting on population ageing. Older people are often portrayed as vulnerable, frail, and dependent presenting a burden on society by increasing demand for pensions and health care services (Glasgow & Brown, 2012; Neville, Napier, Adams, Shannon, et al., 2020; WHO, 2015b). Ageism is poorly recognised and unchallenged as a form of discrimination (WHO, 2017). Recent international ageing and health strategies suggest a more positive outlook by emphasising the opportunities population ageing can provide to individuals and societies (WHO, 2015). Thus, this study aimed to identify community strengths, manifesting as age-friendly attributes, rather than community deficits.

## My Position as Researcher

My professional interest in the age-friendly topic and decision to undertake the current study evolved from a previous study exploring 49 older people's perceptions of ageing in Warkworth (Neville, Napier, Adams, Shannon, et al., 2020). My master's thesis was based on the data collected from fifteen participants aged 85 years and over (Napier, 2016; Neville, Adams, Napier, Shannon, et al., 2018). The study found features of the physical and social environment could present both barriers and enablers to engagement. Moreover, the study found a more in-depth understanding of the relationship between older people and their environment was warranted. Feedback from the study's participants and other stakeholders in the community indicated keen interest in advancing age-friendly research. During the last five years I have been involved in research projects related to ageing, social isolation, loneliness, and age-friendly communities (Neville, Adams, Napier, & Shannon, 2018; Neville, Adams, Napier, Shannon, et al., 2018; Neville, Napier, Adams, & Shannon, 2020; Neville, Napier, Adams, Shannon, et al., 2020; Neville et al., 2016; Neville et al., 2021; Wright-St Clair et al., 2017). Therefore, the current study advanced my research interests and honoured the commitment to the Warkworth community.

In the early stages of designing the study, I explored the idea of age-friendly readiness as the focus. During document review and my consultation with local community leaders, I came to realise the notion of age-friendly readiness was laden with assumptions about this community. As this community already had a high percentage of older people, I realised I would not be entering a research field that was devoid of age-friendliness. I decided to change my focus to a more exploratory and strengths-based approach with an openness to the discovery of prevailing age-friendly attributes. A key priority in undertaking this study was to be as close as possible to older people's experiences in their environment. Further, I wanted to gather both

breadth and depth of data from multiple perspectives to gain a broad but nuanced understanding of older people's everyday experiences.

In choosing a research design that could support multiple perspectives, I reviewed various design options for incorporating multiple sources of data within one study. With these priorities in mind, my options narrowed down to utilising a mixed methods research design or case study methodology. While a convergent mixed methods design was an early option, I settled on case study methodology as this approach allowed more flexibility for gathering data from multiple sources as well as utilising multiple methods. At a more personal level, I am a resident of Warkworth. While I do not consider myself to be a rural native, I have lived in the surrounding rural area for the past 18 years. Therefore, I have a strong personal interest in advancing the age-friendliness of this rural community.

## Overview of the Thesis

The thesis is presented in ten chapters.

### Chapter One – Introduction

In chapter one the study topic was introduced followed by presentation of the research purpose, aim and research questions. The contextual background and rationale for the study were explained. Then, key operational definitions for the thesis were outlined followed by my position as the researcher. Finally, an overview of the thesis structure was presented.

### Chapter Two – Conceptual Model and Theoretical Perspectives

In chapter two, I present the WHO age-friendly framework as the conceptual model that has informed this study. The chapter begins with an overview of the evolution of the WHO age-friendly movement followed by a discussion on how the age-friendly model has been applied in policy and practice, including implications for future development of the model. This is followed by critical analysis of theoretical perspectives that underpin the age-friendly model. Chapter two concludes by explaining how the theoretical perspectives have informed the current study.

### Chapter Three – Literature Review

Chapter three provides a review of the literature on age-friendly research undertaken in rural communities in order to situate the current study.

### Chapter Four – Methodology

In chapter four I present the pragmatic philosophical foundation of the study. I then present case study research and provide the rationale for utilising this methodological approach.

### Chapter Five – Methods

In chapter five I explain the research process and methods. The demographic data for the survey and interview participants recruited for the study are presented. This is followed by a discussion of how ethical and cultural considerations for the study were managed. Finally, I explain how rigour was achieved.

### Chapters Six to Nine – Research Findings

In chapters six to nine the findings from the study are presented. Four main themes, *being established, being present, being involved* and *being responsive* are presented across the four chapters.

### Chapter Ten – Discussion

In chapter ten, I present a critical discussion of the findings in relation to the extant literature and the research questions. I provide recommendations for policy and practice from the findings. The implications for future research are presented. Then the contributions to New Zealand and international knowledge and practice are explained. The chapter concludes with limitations of the study.

## Chapter Summary

This chapter has presented the context and rationale for the study. The New Zealand government has followed global strategic direction in support of ageing in place and promoting age-friendly environments. Although the evidence is clear that rural communities are ageing more rapidly than urban centres, ageing policies in New Zealand are predominantly oriented towards the effects of urbanisation. Little is known about the age-friendliness of rural communities in New Zealand. To address this dearth of empirical knowledge, this study explored the age-friendly attributes of Warkworth, a rural town in the upper North Island of New Zealand. In the next chapter the conceptual and theoretical perspectives underpinning the current study are presented.

# Chapter 2. Conceptual Model and Theoretical Perspectives

## Introduction

In this chapter, the WHO age-friendly model and theoretical perspectives that informed the study are presented. The chapter begins with an overview of how the WHO age-friendly model has evolved from early ageing policies. This is followed by a discussion of core components integral to the age-friendly model. The second part of this chapter presents a critical discussion of the theoretical perspectives underpinning the age-friendly model. The chapter concludes with an explanation of how the theoretical perspectives have informed the current study.

## Evolution of the WHO Age-friendly Cities and Communities Movement

Although the WHO age-friendly cities and communities model was launched in 2007, the emergence of the age-friendly movement has been traced back to 1982. This was when the *Vienna International Plan of Action on Ageing* was adopted at the UN First World Assembly on Ageing in Vienna and subsequently endorsed by the UN General Assembly (Rémillard-Boilard, 2018). The Vienna document was the first global strategy on ageing and responded to an increasing focus on global population ageing. The Vienna plan provided important guidance to governments in developing policies and programmes across multiple domains of society. These were domains that impacted on older people's well-being including health, nutrition, housing, education, employment, income, the environment, and social welfare. Despite the strategic direction the Vienna plan offered, its medical model roots and focus on disability and decline, associated with ageing, were highlighted as limitations (Buffel et al., 2019; Kalache, 2016).

The second important advancement in the age-friendly movement was adoption of the 1986 WHO *Ottawa Charter for Health Promotion* following the first International Conference on Health Promotion in Canada. This seminal charter remains influential in health promotion policy and has been credited with shifting the view from the individual at risk of disease to a larger focus on the role of organisations, communities, and environments (Thompson et al., 2018). While not specifically focused on older people, evidence of the charter's impact can be recognised in the development of the age-friendly movement. For example, re-orienting health and services towards shared responsibility among multiple levels in society; strengthening community actions; and creating supportive environments throughout the life course (Buffel et al., 2019; Kalache, 2016; WHO, 1986).

Two decades after the First World Assembly on Ageing in Vienna, the UN General Assembly held the Second World Assembly on Ageing in Madrid to consider progress since adoption of

the Vienna plan. Following this assembly, the two policy documents, the Madrid international plan of action on ageing (UN, 2002) and Active Ageing: A Policy Framework (WHO, 2002), explained in chapter one, were adopted. Thus, both documents are widely considered to be foundational to global ageing policies and practice over the last two decades and to the age-friendly movement (Buffel et al., 2019; WHO, 2015b).

Prior to the launch of the WHO Global Age-friendly Cities: A Guide in 2007, the concept of an age-friendly environment had already started to advance in some countries following introduction of the concept during the International Association of Gerontology and Geriatrics (IAGG) World Congress of Gerontology and Geriatrics held in Rio de Janeiro in 2005 (Buffel et al., 2019). Organisations such as the American Association of Retired Persons (AARP), the International Federation on Ageing (IFA), and AGE Platform Europe had already established various brands and programmes (Phillipson & Buffel, 2020). These brands included 'liveable community', 'elder-friendly environment', 'lifetime neighbourhood' and 'ageing-friendly' communities (Buffel & Phillipson, 2018; Lui et al., 2009; Oberlink & Stafford, 2009; Scharlach, 2012). This initial interest was followed in 2005 by the conception of the WHO Global Age-friendly Cities research project (WHO, 2007).

Some of the programmes mentioned above have aligned with the principles of WHO age-friendly model while maintaining their own unique brands and features that reflect their political, cultural, and environmental contexts (Lui et al., 2009). Although various global age-friendly programmes share many similarities, they differ in the degree of emphasis they attribute to the physical and social environments and individual approaches to governance (Lui et al., 2009). For example, some programmes employ a more 'top-down' or government driven approach while others offer a more 'bottom-up' or local community driven approach (Lui et al., 2009). Some programmes have rebranded to align more closely with the age-friendly model. Advantages of the WHO age-friendly model over other models include its endorsement by the United Nations as a global strategic policy, making it the preferred model internationally, and the ability to make international comparisons. The next section of the chapter presents a review of the literature on the age-friendly model.

## Review of the WHO Age-friendly Cities and Communities Model

Following launch of the Global Age-friendly Cities: A Guide in 2007 and the subsequent Age-friendly Rural and Remote Communities: A Guide in the same year, there has been growing interest in progressing the age-friendly agenda; albeit, mainly from the Global North (Buffel & Phillipson, 2018; Plouffe & Kalache, 2011). In recognition of this regional bias, the Global Network of Age-Friendly Cities and Communities (GNAFCC) initiated steps to broaden the

membership to other regions including Southeast Asia, Latin America, the Eastern Mediterranean and Africa (Warth, 2016). Recent progress in Asian countries in adopting age-friendly programmes reflects the expanding reach of the age-friendly movement (Chao & Huang, 2016; Lin et al., 2019; Suriastini et al., 2019; Woo & Choi, 2020). The following section provides a discussion of core components identified from the literature considered to be integral to initiating and sustaining age-friendly programmes. These components include assessment of community age-friendliness; diversity and inclusion; the bottom-up approach; the top-down approach; collaborations, partnerships and multidisciplinary considerations; and advancing the age-friendly research agenda.

## Assessment of Community Age-friendliness

Assessing the age-friendliness of communities is an important early step in age-friendly programmes. Despite the importance, there is lack of consensus in the literature on how age-friendly assessments should be undertaken. Soon after the Global Age-friendly Cities: A Guide was launched the *Checklist of Essential Features of Age-Friendly Cities* was developed to reflect the barriers and priorities older people had identified in their communities (Plouffe et al., 2016). The checklist has been widely used as a starting point for communities to assess age-friendliness and to monitor progress of age-friendly programmes. Notwithstanding widespread use since 2007, recent scrutiny has highlighted several limitations of the checklist approach (Plouffe et al., 2016). Foremost was the concern that a predetermined checklist of age-friendly features may misrepresent age-friendliness as a standard to be achieved rather than a continuous improvement process (Liddle et al., 2014). Secondly, a prescribed checklist imposed by local authorities is associated with a top-down approach, whereas advocates of the age-friendly model strongly promote the active engagement of older people in assessing community age-friendliness (Buffel, 2019; Menec & Brown, 2018). Thirdly, a purely quantitative approach using a checklist may not capture the holistic, dynamic, interrelated, and interdependent nature of the age-friendly domains identified from a qualitative approach (Keating et al., 2013; Liddle et al., 2014; Novek & Menec, 2014).

To avoid a checklist of generic features, which may fail to account for local context and the diversity within communities, it has been suggested that communities involve local older people in adapting and refining the checklist to reflect local priorities and opportunities. Ideally, assessment of age-friendliness should reflect how the environment is directly experienced by older people (Plouffe et al., 2016). More recently, the WHO created a set of core indicators to address some of the age-friendly checklist's limitations. Increased emphasis was placed on the implementation process, continual improvement, and the imperative to

adapt the age-friendly framework to suit local contexts (Menec & Brown, 2018; WHO, 2015a). Evaluation of the core indicators across international pilot communities found the indicators provided an adaptable method for measuring the impact of features in the physical and social environment on older peoples' well-being and equity (Kano et al., 2018). Further, core indicators could enable international comparisons to be made for informing public policies at community and environmental levels (Moulaert & Garon, 2016).

The core indicators were developed specifically for an urban context; therefore, rural communities are encouraged to identify local priorities and opportunities to inform local programme implementation and assessments. However, assessment data is typically collected at regional level; thus, the data collected may not accurately reflect the age-friendly community characteristics and priorities of smaller towns and neighbourhoods (Lehning & Greenfield, 2017). This disconnection between regional government and local communities has implications for the sustainability of age-friendly programmes at the local level (McCrillis et al., 2021). Notwithstanding these limitations, the core indicators were designed to support communities of any size and to be regularly revisited and updated, reflecting the dynamic and multidimensional complexity surrounding the age-friendly movement (WHO, 2015a).

## Diversity and Inclusion

Limited inclusion and involvement of diverse groups of older people in the development of age-friendly programmes has been highlighted in recent literature. Age-friendly initiatives have largely favoured active and engaged older people and groups (Buffel & Phillipson, 2018; Buffel et al., 2020; Golant, 2014). Further critique has highlighted the predominantly Eurocentric focus of age-friendly programmes (Phillipson, 2018; Plouffe et al., 2016) resulting in underrepresentation of specific cohorts of older people including migrants and refugees (Buffel et al., 2020). The age-friendly model has predominantly developed to reflect individualistic social norms, a strong cultural pattern in Western countries. To be more inclusive of East Asian countries, incorporation of the oriental paradigm in the age-friendly model has been proposed to account for the fundamental cultural differences between the East and the West (Chao & Huang, 2016). For example, cultural norms in countries such as Indonesia inhibited older peoples' active participation in civic matters. The government driven top-down approach discouraged older peoples' involvement in age-friendly endeavours (Suriastini et al., 2019).

In addition to ethnic and cultural groups, perspectives from a diverse range of older people have been underrepresented in the development of age-friendly programmes. To foster a more equitable approach, it has been proposed including greater representation from the

lesbian, gay, bisexual, transgender, and questioning (or queer) (LGBTQ) community; older people with frailty and dementia (Bacsu et al., 2019); and older people with intellectual disabilities (Miskimmin et al., 2019). In support of this approach, targeting age-friendly initiatives to specific groups and complex issues has been suggested as more realistic for some communities (Golant, 2014). Experts agree that awareness of diverse cultural traditions and perspectives will be crucial for informing inclusive programmes in future age-friendly initiatives (Buffel & Phillipson, 2018). Evidence from research undertaken in rural places indicates older people were actively involved in their communities, yet how rural communities were positioned to design culturally inclusive age-friendly programmes has largely been unexplored (Keating et al., 2013; Menec et al., 2014; Novek & Menec, 2014; Walsh et al., 2014).

## The Bottom-up Approach

A bottom-up approach includes older people as active partners in age-friendly initiatives (Plouffe et al., 2016). Empowering older people by facilitating local age-friendly 'champions' to drive initiatives is considered essential to the sustainability of age-friendly programmes (Menec et al., 2014; Russell et al., 2019). Local communities are encouraged to identify local priorities and determine how best to enhance age-friendliness (Lui et al., 2009). Ball and Lawler (2014) argued, programmes driven from a bottom-up approach were more likely to achieve desired outcomes that make a real difference to the lives of older people. In contrast, programmes imposed on communities may be politically driven and unsustainable if funding is withdrawn. Thus, a bottom-up approach should be promoted from the early stages of implementing age-friendly programmes.

To promote a bottom-up approach, communities are encouraged to undertake a local grassroots participatory approach with older people to capture community's unique features (Buffel & Phillipson, 2018). Despite the imperative to involve older people in designing and implementing age-friendly programmes, experts claim participatory and co-research approaches are under-developed in gerontology research (Buffel & Phillipson, 2018). It has been argued that merely consulting older people and involving them on steering groups and committees does not go far enough. Instead, the gold standard of the co-design approach involved older people in partnership with academic researchers in all phases of the research and implementation process (Buffel, 2018; Fudge et al., 2007). However, to ensure co-research initiatives were undertaken successfully, several priorities have been suggested to foster a positive contribution to the age-friendliness of communities. These priorities included ensuring communities were appropriately funded to enable expertise and resources to train co-researchers, and managing identified risks associated with unrealistic expectations, potential

power imbalances and ethical challenges (Baldwin et al., 2018; Buffel, 2018; Burholt et al., 2016).

## The Top-down Approach

While championing age-friendly initiatives from the 'bottom-up' was important for age-friendly programme sustainability; equally, a 'top-down' approach with strong leadership from central, regional, and local government was considered essential for establishing and sustaining age-friendly initiatives (Spina & Menec, 2015; Warth, 2016). Central government commitment and leadership was identified as important for providing strategic direction for an age-friendly agenda (Menec et al., 2014; Neville et al., 2021). For example, central government in New Zealand provides strategic direction for communities initiating age-friendly programmes and resources including an initial grant (Ministry of Social Development, 2018). Standalone local age-friendly initiatives may be unsustainable if they lack ongoing funding and coordinated support (Ball & Lawler, 2014). Age-friendly programmes were susceptible to the effects of global economic recessions and austerity measures such as closure of libraries and senior centres, and reduction in homecare services (Buffel & Phillipson, 2016; Kendig et al., 2014). The impact of the recent global pandemic COVID-19 on age-friendly programmes globally is yet to be fully realised.

A top-down approach did not preclude smaller communities from initiating age-friendly programmes. Ball and Lawler (2014) proposed, age-friendly programmes initiated at the local level and supported by the levels of government could serve as pilot or test sites. Successful local programmes could then inform central policies, practices, and funding streams. Further, local age-friendly community initiatives could aim to address specific issues that link to larger policy agendas such as social isolation (Ball & Lawler, 2014). In other words, communities should act locally but think nationally. Others agree, rural communities were ideally placed to trial innovative initiatives on a small scale (Menec, Bell, et al., 2015).

Countries with central, regional, and local levels of government, such as Canada, have found rural communities, especially, benefitted from regional government support as they may lack local capacity to implement and sustain age-friendly programmes (Menec et al., 2014). However, evidence suggests age-friendly programmes were more successful when there was local government representation on steering committees (Menec et al., 2014; Russell et al., 2019). Formal resolutions passed by local governments were beneficial for sustainability of age-friendly programmes as they signalled a stronger commitment. However, few rural communities had achieved that level of commitment (Blakey & Clews, 2020). Further, formal

commitment was typically interrupted following central and local government elections; thus, challenging continuity of programmes (Brasher & Winterton, 2016; Menec et al., 2014).

## Collaborations, Partnerships and Multidisciplinary Considerations

Along with commitment and funding from all levels of government (Menec et al., 2014; Spina & Menec, 2015), cross-sectoral and multi-disciplinary relationships were necessary for sustainability of age-friendly programmes (Plouffe & Kalache, 2011). Age-friendly programmes were ideally included in mainstream policy and practice (Buffel & Phillipson, 2018). Diverse collaborative partnerships between public, private, and not for profit organisations were required, particularly in implementing complex age-friendly initiatives related to housing, transport, physical infrastructure, and technological solutions (Scharlach, 2016). Glicksman et al. (2014) argued for increased collaboration across the sectors of policy, planning, practice, and research to progress age-friendly agendas.

Despite the importance to sustainability of programmes, establishing collaborative partnerships was known to be time consuming and required commitment of people and resources (Lehning & Greenfield, 2017). Barriers to fostering partnerships within communities included competing interests with existing groups and the perception of competing for scarce resources (Russell et al., 2019). To foster the collaborative approach, Garon et al. (2014) proposed commitment to a new form of governance incorporating a pluralistic, participatory, and collaborative model. Further still, there has been wide accord for researchers to be included in all stages of age-friendly programmes to ensure ongoing rigorous processes were followed (Brasher & Winterton, 2016; Garon et al., 2014; Menec & Brown, 2018; Sun et al., 2017) and to evaluate the benefits to older peoples' health and well-being (Warth, 2016).

In addition to multi-sectoral collaboration, research teams from diverse disciplines have recognised the changing needs of an ageing demographic and expressed interest in planning for an ageing population (Ball & Lawler, 2014; Carroll et al., 2020). Interdisciplinary interest has been particularly evident in urban planning, urban design, and architecture (Aksoy & Korkmaz-Yaylagul, 2019; Alidoust et al., 2018; Frochen & Pynoos, 2017). While these disciplines have typically worked in discreet silos, recent literature suggests they are beginning to recognise synergies between their disciplines and others (Ring et al., 2017). For example, the interdisciplinary field of gerontechnology aims to bring ageing and technology together to improve aspirations and opportunities for older people (Marston & van Hoof, 2019).

Technological advances in smart technology and the Internet of Things (IoT) are increasingly being incorporated into ageing in place strategies (Marston & van Hoof, 2019). To reflect

increased emphasis on the smart city movement, Marston and van Hoof (2019) proposed a domain of technology be included in the age-friendly framework. These authors asserted, a technology domain would broaden interest in the age-friendly framework from a wider range of disciplines and contribute to the establishment and sustainability of age-friendly programmes. However, it could be argued the age-friendly domain, communication and information, provides the scope and flexibility to incorporate technological advances. Notwithstanding, the age-friendly model should be regularly redressed at the global and local level to reflect current trends across all domains.

There were multiple benefits for sustainability of age-friendly programmes from multidisciplinary collaborations. Benefits included innovative practices and cost effectiveness in sharing limited resources (Buffel & Phillipson, 2018; Buffel et al., 2020; Phillipson, 2018; Scharlach & Lehning, 2016). For example, there were clear links between walkable communities and improving energy efficiency (Phillipson, 2018). It has been proposed that these collaborations could foster community development initiatives that were beneficial across the life course. While arguments for a wider focus on all-age-friendliness have merit, there was a risk of losing the focus on older people who should directly benefit from age-friendly programmes and be included as active partners in the implementation process in their communities (Scharlach, 2016).

## Advancing the Age-friendly Research Agenda

Evaluating the impact of age-friendly programmes on older people's health and well-being has been identified as an urgent priority by WHO in advancing the age-friendly research agenda (WHO, 2020). Research should focus particularly on outcomes for older people (Ball & Lawler, 2014). An international research network has been proposed in order to centralise age-friendly research and support the policy arm of the GNAFCC. Additionally, there is a compelling argument for aligning the age-friendly agenda with broader strategies such as sustainable development goals at global and local levels (Buffel & Phillipson, 2018). Incorporating process evaluations into age-friendly programmes supported continuous improvement (Buffel & Phillipson, 2018). Recent evidence-based evaluation tools have been designed to capture the processes and outcomes in a way that reflects the dynamic, complex, and multidimensional nature of age-friendly programmes (Buckner et al., 2017).

As discussed earlier, co-research with older people has been identified as central to the collaborative design of age-friendly programmes, yet there is little evidence on the success of co-research efforts (Buffel & Phillipson, 2018; Buffel et al., 2019). To advance participatory research, Greenfield et al. (2019) proposed a foundational community gerontology framework

to guide researchers in working alongside communities at the meso level. This approach integrates research, policy, and practice and specifically directs attention to the community level while providing a bridge between the micro and macro levels. In the following section of the chapter the theoretical perspectives that underpin the age-friendly model are discussed.

## Theoretical Perspectives Underpinning the WHO Age-friendly Model

The age-friendly model is underpinned by theories drawn from ecological theories of ageing. The sub-disciplines of environmental gerontology and more recently, geographical gerontology have drawn on these ecological theories to advance understanding of the age-friendly model in policy and practice. Building on these theoretical underpinnings, Deweyan pragmatism and Dewey's transactional perspective, suggest a more holistic way to view the dynamic relationship between older people and their community environments. This section discusses the ecological theories on ageing, environmental gerontology, and geographical gerontology. The transactional perspective is woven into the discussion to emphasise its contribution to understanding the complex person-environment relationship. The chapter concludes with an explanation of how Dewey's transactional perspective informed the current study.

### Ecological Theories on Ageing

The dynamic relationship between older people and their environment is a key assumption underpinning the WHO age-friendly framework. Ecological theories have been utilised extensively to explain this relationship (Keating et al., 2013; Menec et al., 2011). The ecological systems model has been beneficial in understanding contexts of ageing and the interrelationship of factors that influence ageing in the micro, meso, and macro environments (Bronfenbrenner, 1981; Menec et al., 2011; Winterton et al., 2015). This model provided a framework to present the contextual background for the current study. The demographic trends and policies on ageing at the local, national, and global levels, presented in chapter one, provided the context for the complex interrelationships between the study's participants and their rural community.

Within the suite of ecological theories, two theoretical models have been influential in understanding the dynamic relationships of older people in their environment. The first theory, the ecological model of ageing (EMA), commonly referred to as the competence-press model, is frequently referenced as the theoretical background for the reciprocal relationships between older people and their environment (Diaz Moore et al., 2003; Lawton & Nahemow, 1973). The EMA claims a dynamic relationship between the competence of an individual and environmental press. In other words, changes in the intrinsic capacity of the person or changes

in the demands of the environment can result in disharmony between the person and the environment (Wahl & Lang, 2003). Implicit within these relationships is the assumption of social norms and values that make up the socio-cultural context in the environments where older people live (Lawton & Nahemow, 1973).

The second notable theory frequently referenced in the age-friendly literature is the congruence model of person-environment interaction, often referred to as the P-E fit model (Kahana, 1982). According to this theory, a positive fit occurs when the environmental influences are equal to the person's capabilities. When the environmental influences become greater than the person's capabilities, the person may or may not be able to adapt to the environment; thus, impacting on health and well-being. The WHO age-friendly model was designed to guide communities "to adapt its structures and services to be accessible to and inclusive of older people with varying needs and capacities" (WHO, 2007, p. 1). Therefore, the age-friendly model broadens the focus beyond individual older people, having to adapt to their changing environment, towards attention on the physical, social, and service environments on which older people depend for active ageing and ageing in the community.

Both the EMA and the P-E fit models originated within the psychological sciences and developed mainly through the positivist paradigm. Hence, there has been a predominant focus on quasi-experimental and correlational studies with reliance on the objective measurement of various dependent and independent variables (Diaz Moore et al., 2003). Inquiry using the competence-press model typically involves measuring the capabilities of the individual using a set of behavioural competencies and measurement of discreet features of the environment. Thus, in the EMA approach, behaviour was understood to be a product of the person and the environment interactions. This translates to studying the person and the environment separately and predicting the relationship between them. Because of the focus on objective measurement, multiple extraneous variables must be controlled (Diaz Moore et al., 2003). Consequently, the contextual whole is reduced to individual components.

More recently, it has been argued that the EMA has relied too heavily on this dualist, interactional perspective (Cutchin & Dickie, 2012; Diaz Moore et al., 2003). Instead, a transactional perspective, embedded in Deweyan pragmatism, has been advanced as a more holistic perspective for understanding the relationship between the person and the environment. The transactional perspective could offer "the inseparable wholeness of a given event" (Diaz Moore et al., 2003, p. 475). Lawton was sympathetic to a more holistic approach; despite not pursuing this line of inquiry himself, he actively encouraged other researchers to do so. Indeed, as Diaz Moore et al. (2003) pointed out, Lawton's world view had started to

incorporate a more pragmatic and applied orientation, evidenced by a research proposal he designed towards the end of his life. This unrealised late work, which proposed a case study methodology using multiple methods and a more inductive approach grounded in human experience, was designed to advance a more practical application of the EMA (Lawton, 2000, as cited in Diaz Moore et al., 2003).

## Environmental Gerontology

As a sub-discipline concerned with the environments of ageing, environmental gerontology has been credited with advancing the EMA and P-E fit models within the broader social gerontology discipline (Schwarz, 2012). Whether environmental gerontology has progressed far from its positivist, psychological science roots has been called into question (Schwarz, 2012). Further critique has been directed at a lack of theoretical development underpinning person-environment relationships (Kendig, 2003). There has been a groundswell of interest in advancing a more pragmatic philosophical approach to studying older people in their environments. This view assumes an increased emphasis on the inquiry and context rather than scientific theories. Further, a pragmatic approach recognises the tentativeness of research findings in constantly changing real world settings (Schwarz, 2012). It has been proposed a pragmatic approach would be ideally suited to a more holistic view such as offered by case study methodology. Incorporating multiple perspectives and grounding the inquiry in local contexts would ultimately improve the lives of older people (Schwarz, 2012). It is interesting to note the similarities between these more contemporary debates and Lawton's aforementioned latter work, adding credence to the critique of environmental gerontology's lack of theoretical progress.

Environmental gerontology has predominantly focused on the home and residential aged care environments; whereas, the wider surroundings where older people spend time, such as neighbourhoods in both urban and rural settings, have received less attention (Kendig, 2003; Wahl & Oswald, 2016). The reason for environmental gerontology's focus on home environments likely reflects historic social and political priorities related to care environments and special housing. In response to recent conceptual and empirical scrutiny of the discipline's somewhat narrow perspective on the spatial aspects of ageing environments, environmental gerontology experts agree the speciality requires a fresh perspective (Wahl & Oswald, 2016). Despite the limited study contexts, Kendig (2003) argued environmental gerontology's theorisation on enabling and supportive environments significantly influenced the social trends and political direction that underpinned the age-friendly movement.

A further aspect of the debate on the progression of environmental gerontology was the lack of consideration given to the temporal component of inquiries on older people in their environments. Golant (2003) argued that temporal properties, as constructs in person-environment interactions, were underdeveloped in environmental gerontology and proposed the transactional perspective, with a more holistic approach, more fully encompassed people, place, and time. For example, beyond the more obvious life course considerations, the time of day or night and different seasons of the year provide meaning in older people's transactions in their environment. In addition to recognising the temporal aspects of environments, there has been increased focus on the meaning of places and the socially constructed nature of places (Andrews et al., 2018). These geographical aspects on ageing have contributed to more interpretative perspectives on the contexts of ageing by advancing temporal and spatial consideration of ageing experiences (Scharlach & Diaz Moore, 2016).

## Geographical Gerontology

The spatial aspects of ageing have been progressively influenced by scholarship on the geographies of ageing (Rowles, 1986; Skinner et al., 2018; Warnes, 1981) and the subsequent "spatial turn" (Skinner et al., 2018, p. 4), resulting in the emergence of geographical gerontology as a new discipline (Andrews et al., 2007; Andrews et al., 2009). The concept of place, as conceived by geographical gerontology, has been described as dynamic and complex rather than a static container for human activity (Andrews et al., 2007). Geographical gerontologists claim the study of environments of ageing should include geographical dimensions of ageing including "place, space, scale, landscape and territory" (Skinner et al., 2018, p. 3). This broadening of scope was deemed important considering the diversity of places where older people were ageing. A wide range of topics were considered relevant to the geographies of ageing including demography and distribution; migration of older people; socioeconomics and housing; access to and delivery of services; and activity and mobility patterns (Warnes, 1981). Although geographical gerontology shares some common ground with gerontology, environmental gerontology, and environmental psychology, it has progressed the theoretical concepts of place and space extensively in the past two decades and intersects with a range of disciplines including planning and architecture (Andrews et al., 2009).

Geographical gerontology has contributed to knowledge on ageing in place, migration patterns of older people, contexts of ageing (including rural ageing), and place integration theory, themes relevant to the current study. Experts in the field summarise the transactional perspective that lies at the heart of geographical gerontology as an "increasingly nuanced

appreciation for the reflexive, transactional and mutually constitutive relationships between older people and the spaces and places in which and through which age and ageing occur" (Skinner et al., 2018, p. 4). Despite being a core focus for geographical gerontology, the everyday activities of older people in community environments remains an underexplored topic for geographical gerontology (Cutchin, 2014). Similarly, the study of age-friendly communities has received little attention to date from geographical gerontology.

The relational aspect of ageing in the community is especially important to the study of age-friendly communities. In asserting this relational premise, the inseparability of older people and their physical and social environments is understood. In other words, older peoples' everyday experiences are embedded in the dynamic places where they live (Cutchin, 2001; Wiles et al., 2017). The concept of person-environment interactions and transactions have been explored by several disciplines (Cutchin, 2018) including humanistic geography (Rowles, 1986), behavioural geography (Golant, 2003) and environmental gerontology (Diaz Moore, 2014; Golant, 2003; Lawton & Nahemow, 1973). The humanistic branch of geography is grounded in sense of place and place attachment theory and has dramatically advanced understanding of ageing in place and migration decision-making (Rowles, 1986).

Building on these theoretical perspectives and to extend the humanistic perspective, Cutchin (2001) proposed a geographical pragmatism by drawing on a Deweyan pragmatic perspective on the relationship between older people and their environment. Cutchin asserted, Dewey's pragmatic perspective traversed beyond the subjective meaning of place to a non-dualist position where he viewed a situation as a whole rather than separating the subjective experience from the observed situation. Further, Dewey had a focus on continuity; thus, experiences in the present were integrated with the past and the future. Further still, Cutchin claimed the concept of place integration encompassed this notion of geographical pragmatism. Thus, Dewey's focus on temporal and spatial aspects resonates closely with central themes within geographical gerontology. A highly relevant aspect of Dewey's pragmatic approach was the utmost importance he placed on the future. In this way, pragmatism has relevance to the age-friendly model where the goal is to continually improve environments where older people live.

## The Transactional Perspective

As explained above, Dewey's transactional perspective builds on theoretical concepts within environmental gerontology and geographical gerontology. The notion of a transaction was articulated in Dewey's later work and was described as the holistic action of an "organism-in-environment-as-a-whole" (Dewey & Bentley, 1949, p. 109). From my readings on Dewey's

pragmatic philosophy, the transactional perspective resonated strongly with the theoretical foundation of the age-friendly model.

The transactional perspective provided a deeper understanding of the contextual and dynamic relationship between people and their environment. Scharlach (2016) reasoned, the transactional perspective moved the person-environment fit model a step further by increasing our understanding of how change over time affects both older people and the places they live in. Further, the transactional perspective can explain how these relationships are mutually defining and constitutive (Cutchin & Dickie, 2012). These viewpoints are congruent with the notion that age-friendliness is not a standard to be achieved at one point in time; rather it is a continual process.

The transactional perspective can illuminate the contextual experience at individual and societal levels. Everyday life, from a transactional perspective, is shaped by habits, indeterminate situations, and the need to make decisions (individually or collaboratively) in everyday social situations. These conditions of everyday life take place within complex environmental and community relationships (Cutchin et al., 2017). An example from an everyday situation might be an older person removing a rubbish bin obstructing the footpath knowing from previous experience this is problematic for the mobility of older people. Viewed from the transactional perspective this purposeful action has effected a change in the environment and was driven by the desire to improve a situation in the environment for others.

There is growing support for a more pragmatic philosophical approach to studying the relationship between older people and their environments (Cutchin et al., 2017; Scharlach, 2016; Schwarz, 2012). As the transactional perspective continues to be developed within geographical gerontology, more theoretical development is required in how it can inform the WHO age-friendly model. This study has utilised a transactional perspective to underscore the dynamic relationship older people have with their environment in continually adapting and improving the environment. A more detailed account of the transactional perspective, situated within Deweyan pragmatic philosophy, is explained in chapter four.

## Chapter Summary

Chapter two presented the WHO age-friendly cities and communities model as the conceptual model informing the current study. With roots traced back to Vienna in 1982, the age-friendly movement has evolved into an internationally recognised ageing strategy. A key advantage of countries adopting the WHO age-friendly model was having the endorsement of the United

Nations. As a model situated within a global ageing strategy, it was possible to collaborate at the global level and to make international comparisons. Core components of the age-friendly model important for initiating and sustaining age-friendly programmes were presented and discussed. The second half of the chapter provided a critical discussion of the theoretical perspectives underpinning the age-friendly model. Ecological theories on ageing have made a significant theoretical contribution to understanding the complex relationships between older people and their environment. More recently, the transactional perspective, embedded within Deweyan pragmatism, has been proposed as a more holistic theoretical perspective to understand these complex relationships. This study has utilised a pragmatic perspective to extend what is known about the theoretical underpinnings of the age-friendly model. The next chapter presents a review of the literature on age-friendly research undertaken in rural communities in order to situate the current study.

# Chapter 3. Literature review

## Introduction

This chapter presents a critical review of the extant literature on age-friendly research undertaken in rural communities since the launch of the Global Age-friendly Cities: A Guide in 2007. Opportunities for future research were identified and how the current study contributes to rural age-friendly research is explained in relation to the research aim and questions.

## Age-friendly Research in Rural Communities

The emerging body of literature on age-friendliness has predominantly arisen from studies undertaken in urban centres. This high level of interest in urban centres reflects the policy response to rapid urbanisation and the increase in actual numbers of older people ageing in urban environments (Fitzgerald & Caro, 2014; Steels, 2015). As explained earlier, rural communities have a higher proportion of older people because of structural ageing and are ageing more rapidly than urban centres. Yet, globally, the age-friendliness of rural communities has received little attention.

The rural age-friendly research that has been undertaken has largely been led by Canada including the research that informed the Age-Friendly Rural and Remote Communities: A Guide. Subsequent rural age-friendly research has predominantly been undertaken in rural and remote communities in Canada, reflecting the high proportion of older people ageing in these communities. Much of this rural age-friendly scholarship has contributed to international policy and practice development. Notwithstanding Canada's contribution, few other countries have contributed to the rural age-friendly literature.

Although mainly undertaken in urban centres, age-friendly studies have proliferated. A recent systematic review shows the number of published papers has risen sharply since 2014 (Torku et al., 2020). The review included predominantly urban studies except for one paper where urban and rural communities were studied (Novek & Menec, 2014) and the inclusion of an integrative review of rural age-friendly studies (Neville et al., 2016). A further review investigated factors that facilitate or hinder the implementation of age-friendly programmes. Six out of the 13 included papers focused on rural communities (Menec & Brown, 2018). Several of the rural papers were studies of various aspects of age-friendly programmes implemented province-wide in rural and remote areas of Canada (Menec et al., 2014; Nykiforuk et al., 2019; Russell et al., 2019; Spina & Menec, 2015). The current literature review focused on age-friendly studies undertaken in rural communities internationally. To follow, is a

description of the search strategy utilised to identify peer reviewed age-friendly studies undertaken in rural communities following the launch of the Global Age-friendly Cities: A Guide in 2007.

## Search Strategy

In 2016, I undertook a systematic search of the literature on age-friendly studies in rural communities for an integrative review of the factors related to building age-friendly rural communities (Neville et al., 2016). The retrieved literature provided a base of empirical studies to inform my doctoral research project. At the beginning of 2018, I conducted a new scoping search of the databases: Scopus, Web of Science, CINAHL and Google Scholar using search terms related to healthy ageing, ageing in place, rural ageing, and age-friendly cities and communities. The 2018 scoping search informed the present study's aim, research questions, and design.

To identify studies undertaken in rural communities, a combination of search terms was used to reflect the different terminology sometimes used to describe age-friendly environments (Lui et al., 2009). These terms included: "age-friend* community" OR "liveable community" OR "elder-friendly community" OR "age-friendly place*" AND rural. Because of the escalating interest in the age-friendly topic explained above, it was necessary to set up alerts in databases including Scopus, Web of Science and Google Scholar to capture newly published papers. Ongoing database searches continued throughout the study. The indices of journals known to publish age-friendly studies were searched regularly as were the reference lists of relevant papers. Additionally, authors on the age-friendly topic were followed to identify their recent publications. Papers were included in the literature review if they were published in English language from January 2007 to February 2021, reported on empirical studies related to the WHO age-friendly model and undertaken in rural communities.

## Rural Age-friendly Studies

A total of 22 rural age-friendly papers met the inclusion criteria and were included in the literature review. The next section presents the chronology and origin of included rural studies and the methodological approaches used. This is followed by a critical review under the following categories derived from the literature: characteristics and features of rural age-friendly communities; assessing rural age-friendliness; implementation and sustainability of rural age-friendliness; and promoting age-friendliness and addressing ageism. Finally, the opportunities for future research are presented.

## Chronology and Origin of Studies

Thirteen of the papers were undertaken in Canada indicating Canada has continued to lead the way in rural age-friendly research (Colibaba et al., 2020; Keating et al., 2013; Krawchenko et al., 2016; McCrillis et al., 2021; Menec, Hutton, et al., 2015; Menec et al., 2016; Menec et al., 2014; Menec & Nowicki, 2014; Novek & Menec, 2014; Nykiforuk et al., 2019; Russell et al., 2019; Spina & Menec, 2015; Wiersma & Koster, 2013). Five of the Canadian studies were undertaken in the province of Manitoba, Canada (Menec, Hutton, et al., 2015; Menec et al., 2016; Menec et al., 2014; Menec & Nowicki, 2014; Spina & Menec, 2015). Manitoba had an early interest in the age-friendly agenda as Portage la Prairie, a city in Manitoba, was one of the 33 participating cities in the research project that informed the WHO age-friendly model (Menec, Hutton, et al., 2015). In 2008, the provincial government of Manitoba launched the Age-friendly Manitoba Initiative to support rural communities in this predominantly rural province to implement age-friendly programmes. A formal partnership was established between the Manitoba Seniors and the Healthy Aging Secretariat, the provincial department concerned with older adults' issues, and a university research team funded by a national research funding agency. This enabled the research team to undertake community consultations, facilitate community age-friendly assessments and undertake a province-wide, process evaluation study (Menec et al., 2014).

The papers originating from Canada reported on a wide range of age-friendly topics reflecting the development of the age-friendly model since it was launched in 2007. Studies reported on various aspects of age-friendliness including: older adults perception of age-friendliness (Novek & Menec, 2014); what makes a good fit between older people and their rural communities (Keating et al., 2013); supportive environments for physical activity across age-friendly rural communities (Nykiforuk et al., 2019); the experiences of volunteering within an rural age-friendly context (Wiersma & Koster, 2013); and a formative evaluation of province-wide implementation of AFCC initiative (Menec et al., 2014). More latterly, studies have begun to focus on evaluating age-friendly programmes including the challenges and opportunities for sustaining age-friendly programmes (McCrillis et al., 2021; Russell et al., 2019); and the perspectives of older adults on the implementation and sustainability (Colibaba et al., 2020).

A small but increasing number of rural age-friendly studies have been undertaken in other countries including United States of America (Barber, 2013; John & Gunter, 2016), Australia (Hancock et al., 2019; Winterton, 2016), Ireland (Walsh et al., 2014), Poland (Podgórniak-Krzykacz et al., 2020), Czech Republic (Vidovićová, 2018), New Zealand (Neville et al., 2021) and transnational (Menec, Bell, et al., 2015). These studies focused on age-friendly

characteristics (Barber, 2013; John & Gunter, 2016), understanding ageing well from an age-friendly lens (Hancock et al., 2019), the integration of rural age-friendliness and smart technologies (Podgórniak-Krzykacz et al., 2020), examining the relevance of age-friendliness to rural communities (Walsh et al., 2014), measurement and evaluation of rural age-friendliness (Vidovićová, 2018), exploring barriers to rural age-friendly social participation (Winterton, 2016), expert opinions on implementing age-friendly programmes (Menec, Bell, et al., 2015), and the barriers to communities in New Zealand developing age-friendly initiatives (Neville et al., 2021). While the New Zealand study did not focus specifically on the age-friendliness of rural communities, it included a rural district as one of the pilot sites.

The age-friendliness of rural communities has only recently gained attention in Asian countries (Lin & Huang, 2016). Similarly, emerging interest from Eastern European countries and Australasia reflects growing attention on the appropriateness of the environment for older people in rapidly ageing rural communities. Lack of empirical evidence from New Zealand reflects its early stage in age-friendly development. Research on the age-friendly attributes of rural communities in New Zealand is warranted in light of commitment to the WHO age-friendly framework at central government level in New Zealand.

## Methodological Approaches

The majority (13) of the reviewed studies used qualitative methods such as focus group discussions and individual interviews (Colibaba et al., 2020; Hancock et al., 2019; Keating et al., 2013; McCrillis et al., 2021; Menec et al., 2014; Neville et al., 2021; Novek & Menec, 2014; Nykiforuk et al., 2019; Russell et al., 2019; Spina & Menec, 2015; Walsh et al., 2014; Wiersma & Koster, 2013; Winterton, 2016). A further six used quantitative surveys (Barber, 2013; Menec, Hutton, et al., 2015; Menec et al., 2016; Menec & Nowicki, 2014; Podgórniak-Krzykacz et al., 2020; Vidovićová, 2018) and two used mixed methods (John & Gunter, 2016; Krawchenko et al., 2016). Case study methodology was evident in six of the included studies (Colibaba et al., 2020; Keating et al., 2013; McCrillis et al., 2021; Spina & Menec, 2015; Walsh et al., 2014; Winterton, 2016). Four of these studies specifically elaborated on the use of case study methodology (Colibaba et al., 2020; McCrillis et al., 2021; Walsh et al., 2014; Winterton, 2016).

Few of the reviewed rural studies provided methodological justification or critique on choice of research design. However, several of the studies utilised a combination of quantitative and qualitative data suggesting benefits to having breadth and depth of data (Menec et al., 2016). While the studies utilised a range of methods including surveys with open and closed questions, focus groups and/or individual interviews, none of the included rural studies used

mobile interviewing methods or direct observation to collect data on the everyday experiences of older people.

## Characteristics and Features of Rural Age-friendly Communities

The included studies focused on a range of aspects of the WHO age-friendly model in diverse rural community settings. The majority of papers provided a description of the local context of the communities under study; albeit to differing levels of detail. Characteristics and features of rural community contexts considered relevant to age-friendliness included: demographic characteristics such as community size; changing demographic patterns and percentage of people aged 65 years and over (Menec, Bell, et al., 2015; Menec, Hutton, et al., 2015; Menec et al., 2016; Spina & Menec, 2015; Walsh et al., 2014); geographical features such as location and proximity to other places (Menec, Bell, et al., 2015; Walsh et al., 2014); and environmental and climatic conditions (Krawchenko et al., 2016; Novek & Menec, 2014). Different combinations of these community characteristics impacted on age-friendliness (Keating et al., 2013; McCrillis et al., 2021; Walsh et al., 2014). Further, rural community characteristics were continually changing over time because of structural ageing, demographic churn, socio-cultural changes, and economic conditions (Keating et al., 2013; Walsh et al., 2014).

### Demographic Characteristics

The age-friendliness of rural communities could be enhanced or challenged by demographic characteristics. Community size presented both advantages and disadvantages to age-friendliness (Spina & Menec, 2015). On one hand small rural communities were restricted in the range of services and social opportunities available to older people (Novek & Menec, 2014; Spina & Menec, 2015; Vidovićová, 2018). On the other hand, many older people were attracted to small rural communities by the small-town atmosphere, attachment to the place, and sense of belonging (Menec et al., 2014; Spina & Menec, 2015; Walsh et al., 2014).

Demographic 'churn' from out-migration of younger people and in-migration of newcomers typically transformed the composition of rural communities over time (Walsh et al., 2014). Social rituals and social cohesion inevitably altered as social networks changed. A multiple case study of rural communities in Ireland found remote island communities supported each other through informal relational dynamics that generated trust and cohesion driven by the imperative to be self-sufficient (Walsh et al., 2014). These interdependent and reciprocal relationships, along with overlapping formal and informal services, mitigated the effect of some of the demographic changes. Being geographically isolated likely contributed to these community characteristics. Similarly, the findings from a Canadian study, of two disparate rural towns, support the premise that age-friendliness was a dynamic process since characteristics

of rural communities were continually changing over time (Keating et al., 2013). A further advantage of smaller communities related to having less bureaucracy and closer engagement with the local community, factors considered beneficial for implementing age-friendly programmes at the local level (Menec et al., 2014).

Complex demographic patterns were changing the nature of rural communities internationally, resulting in more socio-economic and cultural diversity (Walsh et al., 2014). Changes in the demographic composition of a rural resource town in Canada, undergoing economic transition, contributed to perceptions of vulnerability and increased tension between established older residents and newcomers (Wiersma & Koster, 2013). The town relied on voluntary work provided by long term, older residents. There was a perception that newcomers were reluctant to participate in voluntary work. Then again, other studies found older people, as newcomers, contributed a range of valuable skills when they relocated to rural communities (Keating et al., 2013). Walsh et al. (2014) found out-migration impacted volunteer availability and could threaten the sustainability of rural services. Wiersma and Koster (2013) cautioned against accepting the dominant positive discourse on voluntarism in the context of changing demographic profiles in rural communities. Other studies also identified the risk of over-estimating the role of volunteers in small communities (Skinner et al., 2013). These findings highlight how the complex interplay of community attributes and demographic change have impacted the lives of older people in rural communities.

Changes in the age composition of rural communities impacted age-friendliness. Rural communities with a large proportion of older people, sometimes referred to as retirement communities, provided advantages for age-friendliness (Menec, Hutton, et al., 2015; Menec et al., 2016; Spina & Menec, 2015). An age-friendly survey undertaken in rural communities in Canada found a higher percentage of people aged 65 years and over was related to higher scores in age-friendliness (Menec et al., 2016). These findings suggest the demographic profile of communities shaped how services were planned and prioritised (Spina & Menec, 2015). While some rural communities had recognised the advantages of attracting an older population, other rural towns focused their community development strategies on attracting and retaining younger people and families. The focus on attracting younger people reflected a perception they were more vital to the economic sustainability of their communities. Despite these dichotomous positions, many rural communities were striving to find a balance between retaining younger and older people (Spina & Menec, 2015). Further, intergenerational reciprocity provides age-friendly benefits. For example, older people offered informal child minding for younger neighbours in exchange for outdoor manual work (Novek & Menec,

2014). These findings underscored the heterogeneity of rural communities and the interrelatedness of community characteristics.

### Geographical Features

Notwithstanding the social advantages of small communities, location and proximity to other places was found to have implications for age-friendliness (Menec, Bell, et al., 2015; Menec, Hutton, et al., 2015; Walsh et al., 2014). Widely dispersed populations and long geographical distances from larger towns and urban areas challenged the age-friendliness of remote rural communities in Canada (Menec, Bell, et al., 2015). Older peoples' decision to relocate or remain living in rural areas was heavily influenced by access to health services and transportation (Keating et al., 2013). Understandably, highly remote rural communities struggled with age-friendliness due to poor access to health care and other services (Menec, Hutton, et al., 2015). Then again, some rural communities situated more proximally to large urban centres were found to be less age-friendly than rural communities more geographically distanced from urban centres in Manitoba, Canada (Menec, Hutton, et al., 2015). Arguably, communities with reasonable access to larger centres did not need to be as age-friendly. Menec, Hutton, et al. (2015) suggested this finding related to the assumption that older people living in rural communities, close to urban centres, had access to services and opportunities in larger centres. However, these authors argue, high car reliance in these rural communities became problematic when older people were no longer able to drive. Thus, to support ageing in place in rural locations, transport options, walkability, and accessibility needed to be enhanced.

Jurisdictional fragmentation was found to challenge the sustainability of age-friendly programmes in rural communities (McCrillis et al., 2021). Jurisdictional fragmentation occurred when urban and rural communities were arbitrarily amalgamated or regionalised into a singular geographic unit. In a recent multiple case study undertaken in Ontario, Canada, McCrillis et al. (2021) found age-friendly programmes implemented at a region-wide level were perceived to favour the larger urban centres in terms of resourcing and programme support. Consequently, smaller, rural communities within these regionalised areas experienced weak geographic connectivity. These geographic conditions impacted on community-level factors associated with age-friendly sustainability such as community champions, collaborative partnerships, and local council involvement (McCrillis et al., 2021). These findings suggest actively involving small communities in the planning stage of age-friendly programmes may have benefits to successful programme implementation and sustainability. Early collaboration may strengthen geographic connectivity and mitigate complex geographical factors exacerbated by jurisdictional fragmentation.

Topographical features and climatic conditions impacted on the age-friendliness of rural places (Krawchenko et al., 2016; Novek & Menec, 2014). Older people ageing in place in low lying coastal areas in Nova Scotia, were vulnerable to the effects of climate change. These findings supported the proposition of linking place and social vulnerability to the age-friendly agenda (Krawchenko et al., 2016). Similarly, snow and extreme weather patterns were problematic for older people living in remote rural settings (Novek & Menec, 2014). Older people living in remote rural communities were inclined to support each other because of their sense of community (Menec et al., 2014). Shared history and pride in their communities provided benefits for age-friendliness (John & Gunter, 2016; Keating et al., 2013). The diverse demographic and geographic characteristics of rural communities, and changing social, political, and economic conditions impedes making meaningful comparisons of rural communities. Consequently, place-based studies, such as the current study, were needed when studying age-friendliness to understand and explicate the unique contexts of rural communities (Menec, Hutton, et al., 2015).

## Assessing Rural Age-friendliness

Assessment of communities' age-friendliness, a fundamental aspect of the age-friendly process, is usually undertaken in the early stages of implementing age-friendly programmes to establish a baseline and identify local challenges and priorities (WHO, 2007). As discussed earlier, Canada has led the way in implementing programmes in rural and remote communities (Neville et al., 2016). As a result, the majority of empirical evidence from rural age-friendly assessments has arisen from the Canadian hinterland (Menec, Hutton, et al., 2015; Menec et al., 2016). The methodological approaches to age-friendly assessments have been debated in the literature. While quantitative surveys were relatively quick to administer and useful in gaining a wide perspective, qualitative methods were known to yield richer and more in-depth data (Menec et al., 2016; Plouffe et al., 2016).

Major strengths of the research project that informed the Age-Friendly Rural and Remote Communities: A Guide included the international scope across multiple sites and the breadth of qualitative data collected. This project was undertaken in rural and remote communities across eight Canadian provinces. To capture a comprehensive representation of each rural community's age-friendliness, 10 focus group discussions included older people (n = 96) and care givers (n = 11). A further 10 focus groups with service providers (n = 104) from the public, private, and voluntary sectors were held in the same communities (Federal Provincial Territorial Ministers Responsible for Seniors, 2007). The rural guide was intended as a starting point for community-based assessment. Communities wanting to design age-friendly

assessments are encouraged to identify local assets and barriers for age-friendliness with the view to improving the environment for older people.

When designing studies on age-friendliness, the merits of quantitative and qualitative methodologies should be careful weighed. Menec et al. (2016) proposed a pragmatic approach in selecting the appropriate methodology and participant group most likely to yield valid information in relation to the research question. These authors used two different quantitative survey tools to compare subjective age-friendly assessments of community residents with the objective assessments of municipal officials across 39 rural communities. The aim of the study was to investigate whether municipal officials could provide a reasonable assessment of age-friendliness, useful in undertaking cross-community comparisons (Menec et al., 2016). While general congruence was found between the two participant groups, the officials consistently over-estimated age-friendliness relative to the local residents' ratings. In addition to categorising similarities and differences in the two participant groups' perspectives, the findings identified limitations of surveys in capturing the more nuanced perspectives of local residents. Furthermore, by focusing on individual age-friendly domains, quantitative assessments may fail to capture the interrelatedness of the domains (Plouffe et al., 2016). Thus, combining quantitative and qualitative methods to assess age-friendly features may capture breadth and depth of data as well as illuminating the interrelatedness of the domains and the relationship between older people and their environments (John & Gunter, 2016; Plouffe et al., 2016).

The interrelatedness and interdependence of the age-friendly domains has been widely acknowledged (Liddle et al., 2014; Menec et al., 2011; Novek & Menec, 2014; Plouffe et al., 2016; WHO, 2007). For example, older peoples' participation in rural communities is heavy contingent on having reliable transportation (Colibaba et al., 2020; Neville, Adams, Napier, Shannon, et al., 2018; Novek & Menec, 2014; Plouffe et al., 2016). Likewise, access to information was associated with social participation and access to health care and other services (Colibaba et al., 2020; Hancock et al., 2019). Understanding the interrelatedness and interdependence of the domains was important for coordinated, collaborative, and multisector policy responses to priorities and opportunities identified from community age-friendly assessments (Plouffe et al., 2016).

The question of whose perspective is the most informative in providing insight into rural age-friendliness has been raised in the literature (Menec et al., 2016). Again, research objectives generally guided the selection of participant groups. Studies focused on assessment of rural age-friendliness have typically engaged more than one perspective from the following

participant groups: community leaders, local government officials, age-friendly committee members, other community stakeholders, and community residents (John & Gunter, 2016; Keating et al., 2013; Menec, Bell, et al., 2015; Menec, Hutton, et al., 2015; Menec et al., 2016). Notwithstanding the benefits of these different perspectives, few studies have purposively sought the perceptions and everyday experiences of older people ageing in the community on the age-friendliness of their rural communities despite the embedded ideology of prioritising older peoples' perspectives within the age-friendly model (Colibaba et al., 2020; Hancock et al., 2019; Novek & Menec, 2014; Vidovićová, 2018).

The emerging body of international literature on rural age-friendliness consistently identifies features within the physical environment and service environment as presenting the greatest challenges to rural age-friendliness (Colibaba et al., 2020; Hancock et al., 2019; John & Gunter, 2016; Keating et al., 2013; Menec, Hutton, et al., 2015; Novek & Menec, 2014; Walsh et al., 2014; Winterton, 2016). These features included: lack of or poorly maintained physical infrastructure (Hancock et al., 2019); limited transport options (Winterton, 2016); limited housing options to support ageing in the community (Novek & Menec, 2014); and inequitable access to health care services (Hancock et al., 2019; John & Gunter, 2016; Menec, Hutton, et al., 2015). In a recent survey, rural dwelling older Australians identified access to affordable community and health services was a priority (Hancock et al., 2019). Similarly, results from a large survey of 1,373 people across 56 communities in Canada indicated transportation, housing, and health care services were confronting and challenging to address, especially in the smaller rural communities. One the other hand, results from the same survey showed the age-friendly domains of social participation, and communication and information were more easily addressed (Menec, Hutton, et al., 2015).

Conditions in the social environment were found to counteract some of the challenges to age-friendliness in rural communities associated with distance from services (Keating et al., 2013; Menec, Bell, et al., 2015; Walsh et al., 2014). As identified earlier, older peoples' decisions to relocate or remain living in rural areas were heavily influenced by access to services and transportation (Keating et al., 2013). Geographical challenges of rural areas could be moderated by flexible services and informal practices. Where community members worked in multiple roles, they were apt to provide impromptu assistance to older people (Walsh et al., 2014). Similarly, reciprocity enacted within established social networks provided informal social support in rural communities (Anderson et al., 2018; Bell & Menec, 2015). These findings reiterate the need for in-depth age-friendly inquiries within diverse rural communities to illuminate the holistic, multi-layered, and dynamic conditions.

## Implementation and Sustainability of Rural Age-friendly Programmes

Studies on the process of implementing rural age-friendly programmes and factors that influence their sustainability have been reported in the literature (Colibaba et al., 2020; McCrillis et al., 2021; Menec, Bell, et al., 2015; Menec et al., 2014; Neville et al., 2021; Nykiforuk et al., 2019; Podgórniak-Krzykacz et al., 2020; Russell et al., 2019; Spina & Menec, 2015; Wiersma & Koster, 2013; Winterton, 2016). Understanding how programmes are implemented and sustained is useful for informing communities considering implementing age-friendly programmes. These studies mainly focused on the perspectives of age-friendly experts (Menec, Bell, et al., 2015), policy influencers (Nykiforuk et al., 2019), and age-friendly committee members or community leaders (McCrillis et al., 2021; Menec et al., 2014; Neville et al., 2021; Podgórniak-Krzykacz et al., 2020; Russell et al., 2019; Winterton, 2016). Only a few of these rural studies specifically sought the perspectives of older people ageing in the community about age-friendly programmes (Colibaba et al., 2020; Spina & Menec, 2015; Wiersma & Koster, 2013). Findings from a study, where older people's experiences of participating in age-friendly activities were explored, suggested older people were more concerned about the experience of ageing in place, and community dynamics and connections than the operational aspects of age-friendly implementation and sustainability (Colibaba et al., 2020). Major concerns identified by the older participants related to lack of scope and reach of age-friendly programmes, particularly in addressing transportation and housing, and reaching more socially isolated older people in the community (Colibaba et al., 2020).

Older people ageing in rural communities were often well positioned to implement grassroots level initiatives and to provide critical feedback on their effectiveness and sustainability (John & Gunter, 2016; Scharlach, 2016). Rural communities typically relied on local skilled leadership and organisational skills volunteered by older people to administer and sustain age-friendly initiatives (Colibaba et al., 2020; Keating et al., 2013; Neville et al., 2016; Neville et al., 2021). Conversely, lack of skilled leadership and volunteer capacity threatened sustainability of community groups, highlighting the importance of succession planning (Menec, Bell, et al., 2015; Neville et al., 2021; Skinner & Joseph, 2011; Wiersma & Koster, 2013; Winterton, 2016).

Over-reliance on volunteers and committees put pressure on limited capacity, hastened burn-out, and threatened sustainability of rural age-friendly programmes (Russell et al., 2019). The significant time commitment required of older people on age-friendly steering groups made it difficult to attract and retain volunteers (Neville et al., 2021). In order for programmes to endure and to preserve the bottom-up approach, Russell et al. (2019) proposed fostering community champions and partnerships. Hence, identifying the skills and capacity of

community volunteers was crucial for sustaining ongoing leadership (Menec, Bell, et al., 2015). A further strength of age-friendly programmes involved sharing human and other resources across communities in relatively close proximity (Spina & Menec, 2015).

Commitment from all levels of government and funding were recognised success factors in sustaining rural age-friendly initiatives (Menec et al., 2014; Spina & Menec, 2015; Winterton, 2016). Where countries have adopted age-friendly programmes at central government level, the expected pathway was to provide governance and support for regional and local authorities to implement initiatives at the local level. New Zealand has followed this top-down approach to age-friendly implementation with gradual buy-in and commitment from local government bodies. Process evaluation of three pilot age-friendly programmes in New Zealand, including one from a rural district, found support from central government and buy-in from local councils were key success factors in implementing the programmes. However, community engagement or bottom-up approaches had limited involvement from Māori and migrant groups (Neville, Adams, Napier, & Shannon, 2018; Neville et al., 2021). Conversely, rural age-friendly initiatives in Poland have lacked the top-down political support and policy priority, making it difficult to implement age-friendly initiatives (Podgórniak-Krzykacz et al., 2020). In many of the studies, the more challenging domains of transportation, housing, and health care required multi-disciplinary and cross-sector collaborations along with central government commitment to implement and sustain (Colibaba et al., 2020; John & Gunter, 2016; Russell et al., 2019; Winterton, 2016).

As discussed in this review, unique combinations of community factors impacted on the implementation and sustainability of age-friendly programmes (Colibaba et al., 2020; McCrillis et al., 2021; Russell et al., 2019; Spina & Menec, 2015). Thus, it was important to understand contextual features of individual rural communities prior to implementing age-friendly programmes (McCrillis et al., 2021). A sense of community and social connectivity in rural places were found to provide beneficial conditions for rural age-friendly sustainability despite weak geographic connectivity (McCrillis et al., 2021). These findings highlighted the possible impacts of social and jurisdictional conditions on rural communities and should be considered prior to implementing age-friendly programmes to foster long-term sustainability.

Pre-existing local community strengths were found to provide benefits to rural age-friendly sustainability (Russell et al., 2019). These authors proposed age-friendly sustainability could be conceived as the implementation gap between the beginning stages and long term viability of the programme. Likewise, Fitzgerald and Caro (2014) emphasised the benefits of establishing the pre-conditions of communities in preparation for implementing age-friendly programmes.

Further, Menec, Bell, et al. (2015) identified the importance of establishing the local governance and funding models within the larger policy context when implementing age-friendly programmes. These findings suggest rural communities should begin by identifying their unique community contexts, characteristics, and existing strengths before implementing age-friendly programmes. This approach had several advantages for implementing successful age-friendly programmes including supporting a bottom-up approach, raising local awareness of age-friendliness at the local level, and improving sustainability of age-friendly initiatives.

## Promoting Age-friendliness and Addressing Ageism

Promotion of the age-friendly concept was an ongoing activity that rural communities understood was important in maintaining momentum of age-friendly programmes (Menec, Bell, et al., 2015; Menec et al., 2014; Nykiforuk et al., 2019). A rights-based approach to public engagement has been proposed to heighten awareness of competing political, economic, and social interests. This reinforces the need to promote the full and equitable inclusion of older people in raising awareness of community-based age-friendly objectives (Nykiforuk et al., 2019). Recognition and celebration of milestones and achievements was effective in raising awareness and championing age-friendliness in rural communities (Menec et al., 2014). Further, linking age-friendly initiatives to existing plans and strategies worked well for some communities. For example, improving walkability and accessibility of buildings benefitted all ages and provided efficiencies across planning committees and processes (Menec et al., 2014). Some communities had intentionally focused on intergenerational activities to raise awareness of the age-friendly concept. Communities with a smaller percentage of older people found promoting the benefits of age-friendly services and infrastructure to both younger and older people improved awareness and community buy-in (Menec et al., 2014).

Engaging and involving the local business community in age-friendly initiatives improved the success of programmes (Menec et al., 2014; Russell et al., 2019; Spina & Menec, 2015). Some communities, however, had found businesses had a low level of interest and lacked awareness of older peoples' priorities and the many challenges they faced. Some age-friendly committees in rural Manitoba had employed strategies to successfully raise business awareness including attending local business community meetings; designing a brochure for businesses suggesting local innovations to make businesses more age-friendly; and establishing age-friendly business competitions and awards (Menec et al., 2014).

Forming partnerships and collaborations with local businesses was considered essential for sustainability. For example, a rural bus service in Newfoundland and Labrador, partially funded by the provincial government and managed by an operating board and volunteers, had been

sustained by donations from local organisations and businesses (Russell et al., 2019). These successful collaborative endeavours could serve as business models for other communities to follow. Conversely, some age-friendly initiatives had to compete for scarce community resources and struggled to sustain beyond the initial stages of implementation (Russell et al., 2019). Further still, some rural communities were too small to attract funding or to offer the range of businesses and services older people required (Spina & Menec, 2015). Evidence on how the business and retail sector respond to older customers or promote age-friendliness within their sector is lacking in the literature. Moreover, little is known about the attitudes and practices of business and service operators towards older people ageing in rural communities in New Zealand.

Underlying ageist attitudes could impede progress on age-friendly programme implementation. Communities were encouraged to proactively introduce strategies to address ageism. Suggestions included: highlighting contributions older people made to their rural communities; supporting older people in leadership roles; and facilitating intergenerational communication and fostering mutual respect (Menec, Bell, et al., 2015). Overcoming internalised ageism in older people was also important for inclusive age-friendly programmes. Fear of being perceived as old or lonely could result in the self-exclusion of some older people (Bell & Menec, 2015). The age-friendliness of rural communities was challenged by limited funding, inadequate infrastructure, lack of transportation options, and limited health services (Winterton, 2016). Therefore, it was important to establish the motivation and commitment of rural communities for ensuring the physical, social, and service environments were appropriate for older people ageing in the community.

## Opportunities for Future Age-friendly Rural Research

Four major areas for future age-friendly research were identified from the reviewed rural studies. Firstly, in-depth community-level inquiries were warranted to identify the unique features associated with age-friendly programme sustainability (Keating et al., 2013; McCrillis et al., 2021; Menec, Bell, et al., 2015; Menec, Hutton, et al., 2015; Walsh et al., 2014). The authors of several studies cautioned against making one-size-fits-all assumptions about rural communities and rural age-friendly programmes (Keating et al., 2013; McCrillis et al., 2021; Menec, Bell, et al., 2015; Walsh et al., 2014). Evidence suggests individual community factors and combinations of factors were greatly influential in sustaining age-friendly programmes. This highly contextual approach was considered necessary in studying rural communities where both people and place were changing rapidly (Keating et al., 2013; Walsh et al., 2014).

Thus, the current study will employ a single, exploratory case study research design to explore the age-friendly attributes of a small rural town in New Zealand undergoing rapid growth.

Secondly, exploring the pre-existing strengths within rural communities was beneficial to age-friendly sustainability (McCrillis et al., 2021; Russell et al., 2019; Walsh et al., 2014). Understanding both the social and geographical connectedness of rural communities before embarking on an age-friendly programme could improve sustainability (McCrillis et al., 2021). For example, establishing how individual rural communities perceived their local identity as well as their identity as part of a larger region. This was important when age-friendly programmes were rolled out across rural communities in a top-down approach as part of a larger jurisdiction. Walsh et al. (2014) recommended comprehensive assessment of rural communities' capacity to become age-friendly. Assessment should consider informal practices and social connections, important factors in withstanding some of the threats to age-friendly sustainability.

Case studies to evaluate age-friendly programmes could inform community leaders and policy makers about the success factors of other initiatives. Learning from previous experience was useful for planning early implementation processes (Neville et al., 2021; Russell et al., 2019). Again, it was important to understand communities' unique characteristics and the transferability of local experiences. Few studies have focused on the pre-existing age-friendly features and strengths of rural communities. The current case study will contribute to this research area by exploring the age-friendly attributes of Warkworth and the priorities and opportunities for improving age-friendliness prior to formal programme implementation.

Thirdly, there was strong support for undertaking in-depth, community-level qualitative studies (Channer et al., 2020; Colibaba et al., 2020; Hancock et al., 2019; John & Gunter, 2016; Menec, Bell, et al., 2015; Menec et al., 2014; Menec & Nowicki, 2014; Novek & Menec, 2014; Nykiforuk et al., 2019; Podgórniak-Krzykacz et al., 2020; Vidovićová, 2018; Walsh et al., 2014). Walsh et al. (2014) proposed, a more involved qualitative component in age-friendly research would provide a more in-depth and nuanced understanding of age-friendliness and its meaning in rural settings. Moreover, few studies purposefully recruited older people as participants (Colibaba et al., 2020; Novek & Menec, 2014); therefore, the everyday experiences of older people ageing in rural communities were limited in the current age-friendly literature.

Fourthly, there was an opportunity to further develop the relational perspective for place-based age-friendly research (Walsh et al., 2014). The relational perspective moves the inquiry closer to older peoples' connections within their communities and to a greater understanding

of the broader context of social, cultural, political, economic, and environmental factors (Keating et al., 2013; McCrillis et al., 2021; Menec, Bell, et al., 2015; Walsh et al., 2014). The notion of a place as a static geographical location is challenged by the relational perspective. Instead, places are viewed as constantly changing over time from people's transactions in the environment (Heatwole Shank & Cutchin, 2016). For example, the way older people experience their environment changes as they age. A relational, place-based age-friendly research agenda resonates with the recent call from geographical gerontology experts to reconceptualise the notion of place (Andrews et al., 2018; Skinner et al., 2015; Winterton, Hulme Chambers, et al., 2014).

There has been recent interest in methodological approaches for collecting relational, place-based data to better understand the relationship between older people and their environment (Cutchin, 2018; Hand et al., 2017). Inquiries that capture older peoples' everyday experiences in real-time have potential to generate new knowledge on the relationships between older people and their environments (Hand et al., 2017). Results from a recent scoping review identified the use of mobile methods, including go-along or walking interviews, photovoice, mapping methods and a range of geospatial technology methods, to study person-place transactions (Hand et al., 2017). Researchers using mobile techniques typically used a combination of methods to gain multiple perspectives with an emphasis on qualitative and interpretive approaches. While the studies provided details of the mobile methods, Hand et al. (2017) identified lack of epistemological positioning and methodological rigour. Further, the reviewed studies were undertaken in urban neighbourhoods or suburban areas; therefore, the use of mobile technologies in rural areas was underexplored. Greenfield et al. (2019) suggested novel geospatial methods would be congruent with the community-level research they proposed in their recent community gerontology framework. Despite the advantage of mobile methods in getting close to the everyday experiences of older people in real-time, empirical evidence in the use of mobile methods in rural age-friendly studies is lacking. To address this paucity of evidence, the current study will combine walking interviews and participant observation as one of the methods within the case study research design.

## Chapter Summary

A critical review of the empirical literature on age-friendly programmes in rural communities was presented. While the age-friendly model provides policy direction and a conceptual framework, there remains much debate on how to assess and understand the age-friendliness of diverse contexts of ageing, including rural communities. Further, this review established the benefits to programme sustainability in understanding the unique characteristics of rural

communities prior to implementing age-friendly programmes. While international interest in rural contexts is beginning to increase, age-friendly research in rural places has predominantly been undertaken in Canada. New Zealand is in the early stages of implementing a national age-friendly programme. The aim of the present case study is to provide an empirical knowledge platform to communities, and local and central government in New Zealand to inform strategies for implementing age-friendly initiatives. This will be achieved by exploring the age-friendly attributes of Warkworth, a rural community undergoing rapid population growth. Beyond the New Zealand context, it is expected the study will contribute to international rural ageing and rural age-friendly knowledge and practice. The next chapter presents the methodology and philosophical perspective utilised for the current case study.

# Chapter 4. Methodology

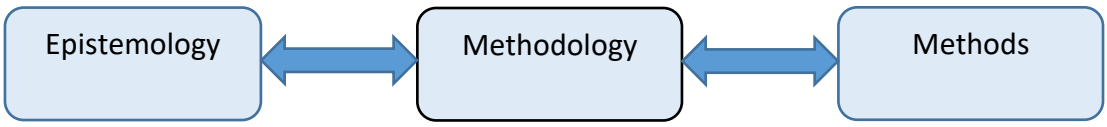
## Introduction

This chapter presents the methodology and philosophical foundation of the study. Methodological decisions may be influenced by a range of considerations including worldview and how reality is perceived; an allegiance to a particular research or practice discipline; or the research question itself suggests a particular approach. For this study the research questions and an intense study of the literature on age-friendly cities and communities influenced the decision to use a case study methodology underpinned by the philosophical tradition of pragmatism.

The age-friendly literature indicated multiple perspectives were more likely to provide the breadth and depth of data needed to explore age-friendly attributes. Case study research methodology supported using multiple perspectives and multiple sources of data. Further, a pragmatic perspective provided an effective epistemological lens to explore the relationship between older people and their environment, a central theoretical assumption in the age-friendly framework. Following the pragmatic approach, the methodology for this study occupies a central position and mutually connects with epistemology/philosophical perspective on one side and methods utilised on the other side as shown in Figure 4 (Morgan, 2007).

**Figure 4**

*Relationship Between Epistemology, Methodology and Methods (Morgan, 2007)*




The chapter begins by revisiting the research aim and questions. Secondly, the rationale for using pragmatism as the philosophical perspective underpinning this study is presented. Thirdly, case study research is explained and justified as the methodology that guided the study design. Finally, the main features of the current case study design are explained.

## The Research Aim and Questions

The purpose of this study was to explore the age-friendly attributes of Warkworth, a small rural town. The aim is to provide an empirical knowledge platform to local and central government in New Zealand to inform strategies for implementing age-friendly initiatives. Thus, the research questions for the case study were:

- What are the age-friendly attributes of Warkworth?
- What are the priorities and opportunities for advancing the age-friendliness of Warkworth?

## The Philosophical Position

This section begins with a discussion of the philosophy of pragmatism followed by the historical roots of pragmatism. Then Dewey's pragmatic theory of knowing; experience as a central concept in pragmatism; and Dewey's theory of inquiry are discussed in context of the current study.

### The Philosophy of Pragmatism

Case study methodology provides a way to view the phenomenon of interest from multiple perspectives and supports the use of multiple research methods across traditionally disparate research paradigms (Luck et al., 2006). Thus, the pragmatic position between objectivism and subjectivism provided a good fit as the philosophical foundation for this case study. A distinguishing feature of pragmatism is rejection of the dualism between mind and matter (Gross, 2018). A major historical change in philosophical thinking emerged when René Descartes, a 17$^{th}$ century French philosopher, proposed the idea that human consciousness was separate from the body. Descartes suggested reality constituted two different and separate substances, mind and matter (Biesta, 2010; DePoy & Gitlin, 2011). The distinction between the mind and matter (or the body), is the basis for the concept of mind-matter dualism (Biesta, 2010). From the dualist perspective there are two opposing positions, objectivism and subjectivism.

Objectivism is based on the belief that reality exists independently of human consciousness. Subjectivism is the belief that reality is subjective, and the human mind ascribes meaning to an object that it comes to know through the senses (Crotty, 1998). Pragmatist philosophy has come to occupy the ontological position between realism or objectivism on one side and idealism or subjectivism and constructivism on the other side. On the realism side of this paradigmatic divide is the positivist theoretical position that underpins quantitative methodologies and on the idealism side is the interpretivist and constructivist theoretical perspectives that underpin qualitative methodologies (Johnson & Onwuegbuzie, 2004). The critique of the division between objectivism and subjectivism/constructivism has distinguished philosophical pragmatism (Mjøset, 2009). By rejecting the dualism of these opposing positions, pragmatism has offered a middle ontological position and a bridge across this division;

therefore, was a suitable foundation for the current case study methodology (Johnson & Onwuegbuzie, 2004; Mjøset, 2009).

A distinction needs to be made between the more commonly used term pragmatism and philosophical pragmatism. Philosophical pragmatism is distinct from a pragmatism that merely suggests justification for using a particular research approach and a set of research methods that best suits a particular research question (Biesta, 2010). There is a tendency for pragmatism to be utilised as a paradigm in social research in order to justify using mixed methods without meaningful engagement with pragmatism's philosophical foundation. Pragmatism has been largely omitted from discussions on research paradigms; thus, its potential in social research has been underdeveloped (Morgan, 2014b). There is a risk of using philosophical pragmatism as a comprehensive justification for using a range of different research methods. Instead, Biesta (2010) proposed philosophical pragmatism provides a "set of philosophical tools that can be used to address problems" (p. 96) and can assist researchers to ask more precise questions about research design and methods. Following an in-depth review, pragmatism, in particular Deweyan pragmatism, was utilised as the foundation for the current study, exploring the age-friendly attributes of Warkworth from multiple perspectives.

Finding a straightforward definition of pragmatism that pragmatists agreed on was difficult leading to claims the meaning of pragmatism is "vague" and "ambiguous" (Talisse & Aikin, 2008, p. 2). This lack of clarity may reflect wide application of pragmatism in the ethical, political, and environmental domains. Further, pragmatism has been constantly developing over the last century as an epistemology, a philosophy, and as a theory of inquiry (Talisse & Aikin, 2008). Pragmatism has been referred to as a "living philosophy" (p. 3) with unresolved questions, suggesting there is ongoing debate on the various positions and claims of pragmatism (Talisse & Aikin, 2008). To situate Deweyan pragmatism as the philosophical foundation for this case study, in a contemporary sense, it was helpful to review the history and development of pragmatism.

## The Historical Roots of Pragmatism

Pragmatist philosophy can be traced back to classical antiquity when the notion of absolute and true knowledge was challenged by philosophical groups such as the Sceptics, the Stoics, and the Epicureans (Hothersall, 2018). Classical philosophical pragmatism was first introduced in America in the late 19$^{th}$ century initially by Charles Sanders Peirce (1839-1914) and subsequently advanced by William James (1842–1910) and John Dewey (1859–1952). Substantial technological and social changes that occurred during the latter part of the 19$^{th}$ century and early 20$^{th}$ century provided the conditions for social reform (Hothersall, 2018;

Maxcy, 2003). Although the classical pragmatists approached pragmatism with their own influences, they were united in challenging the claim that social science could gain knowledge of the real world using a single scientific method (Maxcy, 2003). Although Peirce and James developed the early ideas, associated with the philosophy of pragmatism, Dewey has been more widely credited with developing classical pragmatism (Bacon, 2012).

The historical progression of pragmatism can be divided into early pragmatism (1860-1930) and neo-pragmatism from the 1960's. Pragmatism stalled and made negligible advancement as a social science inquiry tradition in the period between 1930 and 1960. The effects of the First World War and the financial depression in America were thought to have halted the advancement of pragmatism from the 1930's. Further, the rise of analytical philosophy contributed to pragmatism being displaced as a university course in America during this time (Gross, 2018; Maxcy, 2003). Other notable pragmatists were George Herbert Mead (1863–1931) and Arthur F. Bentley (1870-1957) (Maxcy, 2003). Pragmatism was re-visited in the late 1960's and was developed in new directions by neo-pragmatists such as Kaplan, Rorty and Bernstein. Neo-pragmatists have redefined some of the former pragmatists work and relationships between these earlier forms of pragmatism (Maxcy, 2003). Consequently, pragmatism has developed and continues to develop into a heavily nuanced philosophical tradition as a result of varied interpretations (Biesta & Burbules, 2003).

Dewey was known as an original philosopher as well as a renowned educator. His conjoined interests across the disciplines of philosophy, psychology, and pedagogy influenced his writing (Shook & Margolis, 2008). Dewey's long life and prolific writing, spanning six decades, contributed to his notoriety as a philosopher of pragmatism (Shook & Margolis, 2008). His work on reality, knowledge, and the process of inquiry has been credited as the most detailed and developed model of pragmatism (Biesta, 2010). Further, his development of the process of inquiry and the relationship to human action is considered to have endured the test of time and continues to have relevance today in a range of disciplines (Biesta, 2010; Biesta & Burbules, 2003; Cutchin & Dickie, 2012; Gross, 2018). Dewey named his pragmatic epistemological stance the *theory of knowing.* This epistemological viewpoint encompassed the transactional perspective which has influenced the design and execution of the current case study.

## Dewey's Pragmatic Theory of Knowing

Dewey's theory of knowing has provided the epistemological foundation for the current study. By rejecting the epistemological dichotomy of objectivism and subjectivism, Dewey's theory occupies the middle ground of inter-subjectivity (Biesta, 2010). In his earlier work, Dewey

proposed that knowing involved interactions between organisms and their environments. The influence of Charles Darwin's ecological, naturalist perspective can be seen in Dewey's earlier work in developing his theory of knowing (Dewey, 1920). In subsequent work Dewey and his colleague Arthur Bentley came to prefer the term transaction over interaction (Garrison, 2001). As discussed in chapter two, Dewey and Bentley (1949) proposed the concept of transaction was more holistic and used the phrase "organism-in-environment-as-a-whole" (p. 109) to emphasise this concept. Dewey and Bentley (1949) considered the concept of transaction to not only be more encompassing than the concept of interaction, but it placed the relational process of the organism in the environment foremost (Biesta & Burbules, 2003). An analogy using the human body illustrates this. The human heart is a sub-functioning part of the body. A heart separated from the body cannot be fully understood nor can the heart continue to exist without the unity of the body (Garrison, 2001).

The notion of transactions has practical application in health science. The occupational sciences have utilised the transactional perspective as a more holistic theoretical position than Lawton's person-environment model (Dickie et al., 2006). The person-environment fit model is widely accepted as the theoretical foundation for the age-friendly model (Lawton, 1982; Menec et al., 2011). However, justification for a transactional perspective centre on the premise that the person and the environment are not viewed separately but are co-constitutive where "constructs function in relation to each other" (Lee Bunting, 2016, p. 329). The transactional perspective has provided an insightful lens to view ageing in place (Cutchin, 2003) and has been utilised in the current study to deepen understanding of the theoretical foundation of the age-friendly model.

Dewey's theory of knowing is acquiescent of a material world and transactions occurring in the real-world context (Biesta, 2010). Thus, Dewey did not reject realism outright. However, unlike the objectivist tradition that ascribes to "the notion that truth and meaning reside in their objects independently of any consciousness" (Crotty, 1998, p. 42), knowing, according to Dewey, comes about from constantly changing transactions between organisms and their environments (Biesta & Burbules, 2003). In other words, humans can only be in touch with and experience reality through this transactional experience (Biesta & Burbules, 2003). This understanding supports undertaking the current study as close as possible to where the transactions take place in the real-world context.

Dewey's theory rejects subjectivism which assumes knowledge is a product of the human mind (Biesta & Burbules, 2003). He assumed knowledge was a construction intrinsic to the organism-environment transactions themselves. Thus, the dynamic balance between the

organism and environment is the result of action with ongoing construction and re-construction. This form of constructivism is distinct from the constructivism that claims meaning is constructed in human minds while engaging in the world (Crotty, 1998). In Dewey's notion of the pragmatic social constructivism, there was no separation between the organism and the environment or a priori thought before the transaction. Garrison (1998) clarifies this distinction as "the unity of the whole act precedes the discrimination of stimuli and response, that is, what is stimuli and what is response emerge as the act unfolds" (p. 45). Transactions occurred as a whole in the context of the community ethos (Garrison, 1998). In making this distinction, and acknowledging that transactions are located in reality, Dewey's constructionism has sometimes been referred to as transactional constructivism (Biesta & Burbules, 2003; Vanderstraeten, 2002). Thus, the transactional perspective transcends the traditional dichotomies of dualism. In rejecting dualism, pragmatism can flatten the hierarchy between different ways of knowing (Biesta, 2010; Biesta & Burbules, 2003; Morgan, 2007).

## Experience as a Central Concept in Pragmatism

In Dewey's transactional approach, experience is generated from transactions between living organisms and their environments; thus, it is a central concept in pragmatic philosophy (Morgan, 2014b). Experience is considered to be both the process and the outcome of transactions (Elkjaer, 2009). Transactions have a two-fold effect where humans act on the environment and cause change and then subsequently humans are affected by changes they make in the environment. During transactions, humans are adapting and adjusting to the environment in an active, dynamic, and future focused manner (Biesta & Burbules, 2003). As such, experience was concerned with actions and their consequences (Biesta & Burbules, 2003). Dewey (1920) explained this concept of experience in his book *Reconstruction in Philosophy*:

> The organism acts in accordance with its own structure, simple or complex, upon its surroundings. As a consequence the changes produced in the environment react upon the organism and its activities. The living creature undergoes, suffers, the consequences of its own behaviour. This close connection between doing and suffering or undergoing forms what we call experience (p. 86).

A contemporary example of Dewey's concept of experience was the uncontrolled disposal of substances into waterways resulting in sediment and contamination of rivers and lakes. Thus, human actions also become consequences that humans must suffer. In learning from experience, processes have been developed to protect and improve the quality of waterways. In this way experience is gained from changes humans made to their environments and then these changes could be experienced by subsequent transactions. Thus, humans actively learn

and gain experience through transactions occurring in the social and cultural context of their environments.

Dewey contended that human experience was context specific, immersed in cultural and historic context (Dewey, 1938; Morgan, 2014b). The situational context of experience in Dewey's theory of inquiry can be understood as experiencing objects and events "in connection with a contextual whole" (Dewey, 1938, p. 66). Even though an object or an event may present as a prominent feature of the situation, they should not be considered in isolation. Transactions occurred in the environmental context with all its messiness and complexity. Dewey's insistence on defining and explaining the context of action was similar to defining the case, the context, and setting boundaries in a case study (Stake, 1995). The contextual whole of a situation is always unique and therefore a situation cannot be duplicated; although, some of the objects and events within situations are recurrent and repeatable in other situations (Dewey, 1938). Thus, by explicating the context and the boundaries of the case, there was the possibility of transferability.

Dewey proposed that humans were acculturated beings; thus, cultural ceremonies and rituals become meaningful in the process of coordinated human action (Biesta & Burbules, 2003). Furthermore, Dewey considered moral and ethical concerns were crucial to experience (Dewey, 1922). He considered humans, as part of social groups, had a collective concern about making a better world for themselves and for the future (Cutchin & Dickie, 2012; Dewey, 1922). This is illustrated in Dewey's words:

> Our individual habits are links in forming the endless chain of humanity. Their significance depends upon the environment inherited from our forerunners, and it is enhanced as we foresee the fruits of our labors in the world in which our successors live (Dewey, 1922, p. 21).

Thus, being part of a community meant there was continuity of the past, present, and future.

A persistent criticism of pragmatism has been its preoccupation with the individual or micro-level and that it has little to contribute to the meso-level (social networks and community) and macro-level (socio-political) in society (Gross, 2018). According to Gross (2018), the recent commentary from both critical realists and analytical sociologists on pragmatism's lack of broader sociological theory development is misplaced. Instead, Gross claimed, recent sociological inquiries using a pragmatic case study approach of large-scale events have contributed to the theoretical development of pragmatism at the meso and macro-level (Gross, 2018). Similarly, Cutchin et al. (2017) highlight emerging use of Deweyan pragmatism applied at a community level. Notwithstanding emerging theoretical development of meso and

macro level pragmatist inquiry, Gross contends that more refinement was required. As discussed earlier in this chapter, the holistic view of transactions is fundamental to Dewey's philosophical perspective. Dewey consistently argued that transactions were enmeshed in moral, ethical, historical, sociocultural, and political environments. These central tenets lend support to a community-level focus. While the philosophy of pragmatism continues to be an emerging theoretical perspective with relevance to community-level inquiry, it was considered appropriate as the philosophical foundation for this community-level, highly contextual case study research.

Dewey believed experience was a process of action and intelligent reflection that was in constant forward motion in a world that was constantly changing (Dewey, 1920). According to Dewey's theory of knowing, this complex learning process occurs in the real-world context and culminates in forming habits (Garrison, 2002). Although habits are an established way of transacting in the world and can be enacted at an almost subconscious level, the slightest change in the transaction can result in disequilibrium. Because of the constant change and forward motion of the real world, Dewey's theory of knowing offers only possibilities rather than absolute truth or certain knowledge (Biesta, 2010). Experience from transactions involves action and consequences, and these will always be contextually and temporally bound (Biesta, 2010). Thus, the learning or outcomes of inquiry can only be what Dewey referred to as "warranted assertions" (Dewey & Bentley, 1949, p. 208). Knowledge from experience is always transient and subject to change; thus, tentative, or fallible (Elkjaer, 2009). Again, the context of action, in a constantly changing and open world, is crucial to the transaction between the person and the environment.

The notion of transactions between people and their environment has recently been applied to decisions older people make concerning ageing in place, indicating the relevance of Dewey's pragmatism as a contemporary social philosophy (Cutchin, 2003, 2016). Iwarsson et al. (2013) proposed using a transactional approach for researching older people's mobility in outdoor environments. These authors argued against the traditional dualist approach of studying objective features in the environment separately from older people's capabilities. Instead, they suggested use of multiple methods within case study methodology and increased use of mobile research techniques to capture the complex transactional relationships between older people and their environment.

## Dewey's Theory of Inquiry

Dewey proposed that *common sense* inquiries were undertaken in response to, what he referred to as, indeterminate situations encountered during everyday transactions between

people and their environments (Dewey, 1938). His use of the term common sense inquiry was arbitrary but it captured the continually occurring difficulties and predicaments arising from transactions in the physical, social, and service environments of everyday life. Dewey maintained, scientific inquiry differed from common sense inquiry only in the level of care and rigour of the processes in undertaking the inquiry (Dewey, 1938). Further, as researchers belonged to larger research communities they were influenced by the types of research questions posed and the research methods utilised (Morgan, 2014a). Dewey did not provide a prescriptive method for undertaking an inquiry; rather, he provided a reconstructive theory of the process of inquiry that he referred to as the logic of inquiry (Dewey, 1938).

Dewey proposed that common sense inquiry and scientific inquiry followed a similar problem-solving process (Dewey, 1938). In this way Dewey was advancing a philosophy that had practical application to real world problems in peoples' everyday lives rather than purely an intellectual pursuit (Elkjaer, 2009; Gross, 2018). For example, a common sense inquiry may be triggered when an older person is no longer feeling safe driving a car; a situation representing an indeterminate situation. Dewey (1938) defined inquiry in this way:

> Inquiry is the controlled or directed transformation of an indeterminate situation into one that is so determinate in its constituent distinctions and relations as to convert the elements of the original situation into a unified whole (p. 104)

According to Dewey, people go through an intellectual and creative process of weighing up the significance or insignificance of factors and deciding on whether to act or not act on the situation (Dewey, 1938). As a result, there was adjustment and ordering of day-to-day actions in real world contexts.

Dewey (1938) proposed that peoples' responses to their physical environment were heavily influenced by cultural and social conditions. While common sense inquiries started with everyday situations for individuals or their social groups, Dewey claimed they were undertaken within the wider political and sociocultural context. Iwarsson et al. (2013) found older people thought about solutions to everyday problems based on what they themselves could do as well as what policy makers might do. Common sense inquiries were undertaken in the environments where people live. Humans, as social beings, live, act, and undertake inquiries in interrelated physical and sociocultural environments. Thus, the complexity of the context in which inquiries were undertaken was central to Dewey's theory of inquiry (Dewey, 1938). Because common sense inquiries were infused with sociocultural meaning and context, applicable to social problems in society, these inquiries were not merely at the individual level (Gross, 2018).

To gain an appreciation of how socio-cultural factors determine human action, Dewey submitted "… one would have to follow the behaviour of an individual throughout at least a day …" (Dewey, 1938, p. 42). This way of knowing lends theoretical justification for the walking interview method discussed in chapter four. This method was a way of illuminating the everyday transactions between older people and their physical and social environments. Furthermore, in dealing with indeterminate situations, older people undertake common sense or everyday inquiries to drive change in their communities. This process resonates with the bottom-up approach, a central feature in the age-friendly cities and communities model (Lui et al., 2009).

## The Five Stages of Inquiry

Dewey proposed five main stages in his theory of inquiry. As explained earlier in this section, Dewey applied the same principles to common sense and scientific inquiries. The first stage was recognition of the indeterminate situation referred to as the antecedent condition of inquiry. An imbalance occurred between the person and their environment triggering an unsettled and uncertain situation; thus, setting the scene for an inquiry (Dewey, 1938). The second stage comprised identifying the problem. According to Dewey (1938), progressing from an indeterminate situation to an inquiry involved considering the unsettled situation to be problematic. The problem is examined and possible solutions were considered. In defining the problem, decisions were made about what data were selected and what were rejected to identify relevancy.

The third stage Dewey (1938) referred to was the determination of the problem-solution. This was the conceptual stage of the inquiry. The constituents of the case were scrutinised to determine what features were definite and settled. These features became the facts of the case. In the present study, for example, the facts of the case may include relevant documents and geographical characteristics of Warkworth. The facts of the case can be observed and may be spatially and/or temporally fixed at a given point in time. For example, determining the research question/problem and defining the case and the boundaries in a case study.

The fourth stage of Dewey's theory of inquiry is the analytic stage of the inquiry where sense is made of the data collected. The fourth stage involved reasoning processes, including evaluating potential actions and consequences (Morgan, 2014b). Observation or collection of information was required initially to distinguish possible facts of the case (Dewey, 1938). This might include ongoing review of the literature and analysis of relevant documents, typically undertaken in case studies. Dewey clarified how use of the term observation in his theory of inquiry was unlike the observation of natural science research where the researcher takes an

objective stance external to the object of inquiry. Instead, the researcher appreciates the object or phenomenon of the inquiry as an aspect of the whole complex environment. For observations to be determined as facts of the case, they need to be scrutinised with ideas that provide meaning to what is being observed (Dewey, 1938). Meanings, in research are often underpinned by theory and grounded in the literature; thus, what is already known and relevant to the case. There is a continual checking of new ideas and established facts. This is an iterative, interrelated two-way process (Biesta & Burbules, 2003). In this way, deductive, inductive, and abductive analytic reasoning are all useful processes in the inquiry. As the facts of the case become increasingly clear, ideas regarding the indeterminate situation and feasible solutions will become more precise. Ideas come to be considered "anticipated consequences" as they become more precise and grounded in the observable facts of the case (Dewey, 1938, p. 109).

The final stage of Dewey's theory of inquiry was testing whether the indeterminate situation could become a determinate situation (Dewey, 1938). If not, there was more work and learning to be done. As explained earlier, Dewey avoided the concepts of knowledge and truth, preferring to call the outcomes of inquiry warranted assertions. He regarded the outcomes of inquiry as always provisional with little guarantee of the continuation of settled situations. The learning related to the nature of the ongoing and continuous relationship between actions and consequences. Thus, warranted assertions needed to be tested in new inquiries (Biesta & Burbules, 2003). This final stage would involve sharing research findings with the local community and dissemination of the research to wider practice, policy, and research communities.

Dewey's theories of knowing and inquiry can be applied in the everyday experiences of older people in their environments. Older people and their environments are constantly changing. Accordingly, transactions between older people and their environments are considered dynamic and in constant flux. Hence, there is ongoing experience and learning as a consequence of transforming indeterminate situations into determinate situations presenting a temporal component (Biesta, 2010). An imbalance between the older person and the environment may become an indeterminate situation that could become the antecedent for a common sense inquiry. If the balance is restored, the situation may once again become determinate. Dewey (1920) proposed both the person and the environment were changed by the experience and these changes continued to have effects on peoples' lives. Recently, it has been proposed Dewey's theory of inquiry and writings on social reconstruction may provide a suitable theoretical framework for rural gerontology academics to assist older citizens to effect

change at the community level (Cutchin, 2020). Moreover, Dewey's theory of inquiry resonates with the bottom-up approach of the age-friendly model.

### A Brief Summary of Pragmatism

This section has presented pragmatism as the philosophical foundation of the study. Although pragmatism was originally founded in the 19th century, it continues to evolve and have contemporary relevance for community-based research where the focus is increasingly on a bottom-up or a community-led approach. Concepts central to pragmatism, and more specifically Deweyan pragmatism, were discussed including Dewey's theory of knowing and the transactional perspective; the concept of experience; and Dewey's theory of inquiry. I have provided justification for utilising Deweyan pragmatism as a philosophical foundation to address the research topic and to deepen understanding of the case in the current inquiry: the age-friendly attributes of Warkworth. The next section presents case study research as the methodology.

## Case Study Research

This section of the chapter begins by presenting the development and application of case study research. This is followed by a discussion of case study research as a methodology. Next, the case study design, including identifying the 'case', the case study design decisions and the theoretical proposition are explained.

### The Development and Application of Case Study Research

The development of case study research and its application in many different forms and disciplines has contributed to wide interpretation and misrepresentation (Simons, 2009). However, there is general agreement that case study research is suited to holistic, in-depth, and comprehensive inquiry of complex issues in the real-world contexts where the boundaries between the context and issue lack clarity (Flyvbjerg, 2011; Harrison et al., 2017; Merriam, 1998; Simons, 2009; Stake, 1995; Yin, 2018). Case study gained traction as a form of inquiry in the field of anthropology and sociology in the early 20th century; in particular, through in-depth ethnographic studies in the field of anthropology associated with the Chicago School of Sociology (Creswell & Poth, 2018). Advancement of case study research in sociology in the 1920's has been partly attributed to the demand for a more complementary qualitative component in contextualising quantitative analysis (Tight, 2017). Notwithstanding preference for quantitative research approaches, qualitative case study research again gained favour in education in the 1960's. This resurgence responded to the discipline's predominant use of quantitative studies and systems analysis. Notably, Robert Stake was influential in developing

case study research in education, particularly in evaluation studies. Case study fulfilled a perceived need in education to capture a variety of different perspectives in understanding the dynamics of process and curriculum implementation (Stake, 1995).

Case study research has continued to advance into a widely recognised form of inquiry. A diverse range of disciplines have subsequently influenced its evolution, including history, psychology, education, architecture, health, and nursing (Gangeness & Yurkovich, 2006; Johansson, 2003; Luck et al., 2006; Merriam, 1998; Simons, 2009; Stewart, 2014; Taylor, 2013). Ongoing critique of case study as a research design has contributed to and shaped its theoretical development (Foreman, 1948). Case study research is often used in the study of organisations and physical locations. The book *Middletown: A study in modern American culture* has been exemplified by case study experts as an early example of case study research undertaken in a community context (Lynd & Lynd, 1929; Yin, 2014). Recently case study research has been utilised in studies on ageing in cities and communities (Burns et al., 2012; Heenan, 2011; Keyes et al., 2014; Winterton, Warburton, Clune, et al., 2014), community liveability studies (Heatwole Shank & Cutchin, 2016), and age-friendly community studies (Colibaba et al., 2020; Lehning, 2014; McCrillis et al., 2021; Neal et al., 2014). Despite wide application, definitions of case study research are somewhat ambiguous because of various interpretations from researchers in diverse disciplinary fields (Verschuren, 2003).

## Defining Case Study as a Methodology

The plethora of definitions and lack of definitional consensus makes it challenging for researchers attempting to provide a comprehensive and definitive statement about case study. The definitions tend to emphasise aspects of case study that researchers prefer and believe to be most important and relevant. Stake (1995), Yin (1994) and Merriam (1998), renowned authors who have written extensively about case study research and applied it in their respective disciplines, have similarly placed emphasise on specific aspects of case study research. Stake (2000) emphasises the unit of study or the case being studied and highlights the flexibility in the design of a case study:

> Case study is not a methodological choice but a choice of what is to be studied. By whatever methods, we choose to study the case. We could study it analytically or holistically, entirely by repeated measures or hermeneutically, organically, and by mixed methods – but we concentrate, at least for the time being, on the case (p. 435).

Stake (1995) qualifies this flexibility by suggesting the choice of methods in case study research should reflect the researcher's style and circumstances. Stake's stance on case study research

is influenced by an interpretivist stance, providing validation for using multiple methods and multiple sources of data in the case study design.

Merriam's philosophical position is situated between a realist and idealist ontology, reflecting an intersubjective and holistic approach (Merriam, 1998). Case study methodologists have situated Merriam's philosophical position within pragmatism (Brown, 2008). Merriam attributes the myriad of definitions to the importance individual researchers have assigned to various aspects of case study including the process and the product of case study (Merriam, 1998; Merriam & Tisdell, 2016). For example, Merriam draws on qualitative research strategies and validation tools. Having used case study extensively in education, Merriam concluded that delimiting or bounding the case or the object of study, "is the single most defining characteristic of case study research" (Merriam, 1998, p. 27). Likewise, Van Wynsberghe and Khan (2007) emphasise delimiting the case and setting tight boundaries around the case defines a case study. Thus, the case, whether it is a group, a programme, or a community, is bounded within a specific context.

Yin's post-positivist stance and scientific background in social and cognitive sciences has influenced his definition of case study and his structured approach to case study design (Brown, 2008; Yin, 2014, 2018). His definition emphasises the research process, portraying case study as an in-depth empirical inquiry in the real-world context "especially when the boundaries between the phenomenon and the context are not clearly evident" (Yin, 2009, p. 18). The lack of clarity between phenomenon and context means there can be an "interdependency of social phenomena" (Verschuren, 2003, p. 129); thus, a holistic approach is supported in case study research. Other authors have highlighted the real-life contemporary contexts that case studies are undertaken in (Bassey, 1999; Swanborn, 2010; Van Wynsberghe & Khan, 2007; Verschuren, 2003) while others have emphasised the holistic nature of case study research (Foreman, 1948; Stake, 2000; Thomas, 2016; Verschuren, 2003).

Experts in case study differ in their views of using case study as a methodology (Creswell & Poth, 2018; Taylor, 2013) or as a method (Stake, 2000). Creswell and Poth (2018) found case study has been defined as a methodology, a design, a comprehensive research strategy, and a method; however, they prefer to define case study as a methodology in qualitative research and that it "may be an object of study as well as a product of the inquiry" (p. 96). On the other hand, Stake refers to case study as a method, emphasising the centrality of the 'case' and flexibility of design. Similarly, Yin (2014) has consistently identified case study as a research method, comparing it to other research methods such as a survey, an experiment, or an analysis of archival records. However, Yin recently clarified his stance on case study research as

a methodology, asserting that case study research should be considered a mode of inquiry supporting a wide range of qualitative and quantitative research methods (Yin, 2018). Verschuren (2003) agrees with the flexibility case study provides; however, argues it is holistic in nature and distinguished from reductionist research strategies used in experimental research.

Case study is widely considered as a research approach with methodological flexibility. Rosenberg and Yates (2007) agree with Stake (2000) that the research question and the 'case' should guide methodological choices. Thus, claiming the choice of methods is a pragmatic rather than a paradigmatic decision in case study research. Adding to this debate, Flyvbjerg (2011) submits there is a trend towards problem-driven rather than methodologically driven approaches to research; thus, the combination of qualitative and quantitative methods can be more useful. Luck et al. (2006) argue convincingly that case study can have a flexible ontological, epistemological, and methodological position and propose that "case study offers a bridge across the paradigms" (p. 108). This flexible approach has become more widely accepted across academic disciplines as researcher's ontological and epistemological position influences how the researcher approaches case study research (Harrison et al., 2017; Rosenberg & Yates, 2007). According to Yin (2014), case study research is useful for descriptive, exploratory, and explanatory studies. Yin argues too much emphasis has been placed on hierarchical levels in social science research and counters the persistent belief that case study should only be used in exploratory phases of investigations. In his most recent book, Yin (2018) continues the debate on the methodological basis of case study research by interrogating the tendency for case study research to be classified as qualitative research. He proposes that case study research should be viewed as a separate "all-encompassing mode of inquiry" (p. 16) with its own conventions and applications.

In order to claim case study research is a methodology, the researcher's epistemological position needs to be made explicit, "readers need to be able to discern theoretical assumptions about the nature and validity of knowledge claims of case study" (Taylor, 2013, p. 118). Deweyan pragmatism provides the philosophical foundation for the current case study methodology as it deepens the understanding of the 'case': the age-friendly attributes of Warkworth. Furthermore, rigour and methodological integrity should be clearly demonstrated (Rosenberg & Yates, 2007; Yin, 2018). The next section presents the design decisions for the current case study.

## The Case Study Design

My understanding of case study methodology has been influenced by Merriam, Stake, and Yin. I have drawn on aspects from each of their approaches to design the case study. Although my Deweyan philosophical position is closest to Merriam pragmatic viewpoint, I have relied to a greater extent on Yin's five stages to guide the research process. However, within Yin's framework I have drawn on strategies and tools offered by Merriam and Stake where they are more aligned with the study's philosophical foundation. In this section of the chapter, I explain the 'case' (the unit of analysis), the type of case study design, and the theoretical proposition that guided design of the case study.

### The Case

While the definition of case study research remains in contention, it has been long held and widely accepted across disciplines that the central focus of case study research is an intensive and detailed examination of a single unit or a 'case' (Luck et al., 2006; Merriam, 1998; Ragin, 1992; Stake, 2000; Yin, 2018). Stake places great emphasis on the 'case' as central to defining a case study. He refers to particularisation, gaining a thorough understanding of the 'case', as opposed to generalisation as the purpose of the case study. Thus, there is recognition of the uniqueness of the 'case'. It has been argued that every study involving analysis of social phenomena, bounded by time and place, could be classified as a case study; thus, a clear conception of the term 'case' is crucial (Ragin, 1992). Ragin argued that different conceptions have distorted the meaning and application of a 'case' over time. This misrepresentation has had implications for the methodological position of case study and has contributed to the enduring rift between quantitative and qualitative social science. Therefore, a 'case' should be a complex functioning unit, be studied in its natural context using a range of methods, and be contemporary (Johansson, 2003).

The 'case' is integral to designing the case study. Stake (1995) distinguishes case study designs as intrinsic, instrumental, or collective. An intrinsic case study is chosen when the researcher is interested in understanding a particular 'case' and investigates issues critical to the 'case', whereas an instrumental study is when a 'case' is used to understand an issue other than the 'case' itself. A collective case study is the investigation of more than one 'case'. Stake makes the distinction between these types of case study to allow the researcher to make informed decisions regarding what methods to use. The current study fits within an intrinsic case study design, reflecting interest in the 'case': the age-friendly attributes of Warkworth.

Yin categorises case studies based on characteristics of the 'case', claiming a single case study can be *"… critical, unusual, common, revelatory or longitudinal …"* (Yin, 2014, p. 51). According to Yin (2018) an unusual 'case' is one that deviates from the usual or everyday occurrence. The rationale for selecting the town of Warkworth, as the central focus of this case study, has several considerations highlighting its unusual circumstances. Firstly, there is an accelerating trend of in-migration of people retiring or moving to the area in late adulthood and out-migration of younger people seeking employment and educational opportunities. This has resulted in 27% of the Warkworth population being aged 65 years and over. This percentage is significantly higher than the New Zealand wide figure of 14%. Secondly, Warkworth, a service town for the many surrounding small rural communities and the farming community, experiences large seasonal influx of tourists and people on vacation into the area. Thirdly, Warkworth has been identified by the Auckland Council as a town that will experience significant population growth over the next 20 to 30 years. These factors provide a unique and unusual set of circumstances that have, as yet an unknown impact on older people ageing in Warkworth.

In defining the 'case', attention is given to the boundaries of the 'case'. The boundaries of the case and the context are often difficult to delineate (Thomas, 2016). This lack of clarity is typical of case study research. The researcher should provide reasoning about the interrelationships between the 'case' and the context and rationale for identifying the 'case' (Yin, 2014). The current study has defined theoretical, geographic, and temporal boundaries that have guided the research design and methods. The case study site (Warkworth) and the boundaries for the 'case' are presented in chapter five, the methods.

## Design Decisions

Four categories of case study design have been proposed by Yin (2014): the single-case study (holistic), the single-case (embedded), multiple-case (holistic), and the multiple-case (embedded). The current case study utilised a single-case, holistic design. This means the overall focus is on the 'case' or unit of analysis as a whole. This design decision reflects the central focus of this study was the age-friendly attributes of Warkworth. The multiple methods and research techniques were selected for their suitability in addressing the research questions (Yin, 2018). Case study methodology supports the use of multiple methods and data sources. This approach is suitable for studying the liveability and age-friendliness of communities where multiple perspectives and breadth and depth of data captured and illuminated the complexity of the topic. This enables triangulation of data and is essential to ensure rigour and robustness in case study research.

Triangulation in case study research has been likened to the navigational principle it was borrowed from where lines of inquiry intersect from different reference points (Yin, 2018). Denzin (2017) proposed four categories of triangulation: methodological, theoretical, data, and investigator triangulation. Methodological triangulation is a commonly used form of triangulation whereby multiple methods are used to collect data. Methodological triangulation is underpinned by the notion that no single method is superior as all methods have strengths and weaknesses not always easily overcome. Theoretical triangulation involves utilising more than one theoretical perspective when analysing the same set of data. Data triangulation entails utilising multiple sources of data and sampling strategies. This may include viewing the same phenomenon at different times and in different places (Stake, 1995). Investigator triangulation is when more than one researcher observes that same phenomenon or data is presented without interpretation to more than one researcher. This category of triangulation tests the reliability of the data and may identify researcher bias (Denzin, 2017).

Several sources of data (data triangulation) and multiple methods (methodological triangulation) were utilised to collect and analyse data in the current study. Further, academic supervisors were involved in both quantitative and qualitative data analysis; thus, providing investigator triangulation. A defining feature of case study research is the way the variety of methods used provide different information and insights. While multiple levels of triangulation within a case study enhance the rigour and robustness of the case study (Yin, 2014), a key strength of triangulation from a pragmatic perspective is to gain a more nuanced view rather than seeking a single truth. This acknowledges the possibility of multiple realities that change over time (Yin, 2018). The use of triangulation for the current study is discussed in more detail in the context of the research process and methods in chapter five.

## Theoretical Proposition

Theoretical propositions provide theoretical direction for what is to be studied (Yin, 2014). Case study research designs can be descriptive, exploratory, or explanatory. The purpose of the current study was to explore the age-friendly attributes of Warkworth, reflecting both a theoretical position and an openness to new findings and interpretations. Thus, this exploratory case study utilised both deductive and inductive analytical processes. The overarching theoretical proposition that guided this study was derived from the WHO age-friendly cities and communities conceptual framework: inclusion of older people is contingent on feeling valued and having opportunities to fully participate in liveable communities (Winterton, Clune, et al., 2014; WHO, 2007). As explained in chapter two, the ecological theory of ageing, developed within environmental gerontology, provides a theoretical foundation for

the age-friendly model. A central line of reasoning in this thesis relates to extending this theoretical position to incorporate a transactional perspective, informed by Deweyan pragmatism and advanced by geographical gerontology.

## Chapter Summary

This chapter has presented case study as the methodology for the study and Deweyan pragmatism as the philosophical foundation. The main philosophical perspectives relevant to the current study have been presented including Dewey's theory of knowing, experience as a central concept in pragmatism, and Dewey's theory of inquiry. A pragmatic perspective deepened the understanding of the transactions between older people and their environment in a real-world setting. Within the pragmatic tradition, knowing is always tentative in a constantly changing world. Case study methodology was selected for the current study, the age-friendly attributes of Warkworth, as it afforded a way to study a complex phenomenon in the natural context from multiple perspectives. Pragmatism occupies an epistemological position between objectivism and subjectivism; thus, provided a suitable philosophical foundation for this case study research and the use of multiple methods. Additionally, Dewey's pragmatism provided a useful theoretical lens to consider the notion of age-friendliness in this study. The following chapter presents how the case study research was undertaken framed by Yin's five stages: design, prepare, collect, analyse, and share.

# Chapter 5. Research Methods

## Introduction

The previous chapter presented the philosophical and methodological approach for the current case study research design. This chapter presents the research process and methods followed by a discussion of how ethical and cultural considerations for the study were managed and concludes with an explanation of how rigour was achieved. Although other case study research theorists including Merriam and Stake influenced the study process, Yin's five stage case study research framework provided structured guidance in undertaking the current case study research (Yin, 2018). Consistent with this approach, the presentation of the research process and methods used for all sources of data are presented within the framework of Yin's five stages: design, prepare, collect, analyse, and share.

## Stage One: Design

As discussed in the previous chapter, the current study utilised a single, holistic, exploratory case study design. This was an intrinsic case study design as the issues under investigation were critical to the 'case', the age-friendly attributes of Warkworth (Stake, 1995). The 'case' was selected because of its unique circumstances. Warkworth is a small town with a very high percentage of older people ageing in place and has been earmarked by the local council for substantial population growth. Data collection was designed to gather both breadth and depth of data. A document review was utilised to provide both contextual information and data relevant to the 'case'. An age-friendly survey (based on the WHO age-friendly framework) was employed to gather breadth of data related to older peoples' perceptions on the age-friendliness of the town. The walking interview method was designed to provide in-depth data on the age-friendly experiences of older people. Finally, the face-to-face interviews were expected to provide in-depth data on the experiences of retail and service providers serving older people in Warkworth during everyday transactions. Analysis involved triangulating these multiple sources by converging strands of data to provide a nuanced exploration of the 'case'. To follow is a detailed description of Warkworth, the case study site.

### The Case Study Site

Warkworth is one of the oldest towns in New Zealand with European settlement dating back to 1843. Warkworth has strong historical identity for both Māori and European cultures. The land in the area was acquired by the Crown from local Māori around 1841 (Keys, 1954). Māori called Warkworth 'Puhinui', meaning a plume at the bow of a war canoe (Ministry for Culture

and Heritage, 2020). Māori occupation of the area mainly centred on the coastal areas; however, the Mahurangi River was used for canoe access to inland resources. Māori sites of archaeological interest have been recorded including a Māori pathway connecting the head of the Mahurangi River to Kaipara on the west coast and natural landforms acting as terraces for growing taro (Brassey & Walker, 2018). The earliest recorded European settler was John Anderson Brown who established a water-driven sawmill close to the Mahurangi River, which traverses the town. Warkworth became a settlement around 1852. John Anderson Brown has been credited with naming Warkworth from his connection to the town of Warkworth in Northumberland, England (Brassey & Walker, 2018). Many of the streets in the older part of Warkworth are named after noble families, villages, and a river from Warkworth, Northumberland area.

The main commercial centre of Warkworth Township sits alongside the Mahurangi River. Historically, the river was an important means of transport for goods and passengers with a range of small vessels and steamers using the fully navigable river prior to sealing of the state motorway between Warkworth and Auckland in the 1930's (Brassey & Walker, 2018; Keys, 1954). In more recent years, sedimentation has limited the navigability of the river; thus, water vessels are dependent on tidal movement. The Mahurangi River continues to be an important feature of the town with walkways and green spaces along sections of the river front. The historic scow Jane Gifford, restored by a team of local volunteers, is berthed in the river close to the main street and is used for special events and tourism (The Jane Gifford Society, 2013).

The topography of the town and surrounding areas is mainly rolling hills with some flat land. The state highway passes through Warkworth, effectively dividing it into two halves. The commercial centre of the town lies to the east of the highway and consists of a main street and several connecting streets close to the river. A light industrial area is situated on the west side of the state highway. The main residential areas are predominantly clustered around the town centre with some newer sub-divisions on the outskirts of the town. Currently the town is surrounded by rural land and farms. Warkworth is close to east coast beaches (10-20 kilometres) making it a popular holiday destination and attractive to visitors and tourists.

Warkworth is an established service town providing a range of services and amenities to smaller rural towns and communities, lifestyle blocks and farms. Retail services include two supermarkets, three pharmacies, women's and men's clothing, several second-hand goods stores, hardware, gardening, electronics, books, gifts, and textiles. Hospitality services include a selection of cafes, restaurants, fast food outlets and public houses. There are several banks, petrol stations, real estate agencies, a post shop, public library, an Auckland Council service

centre, an information centre, primary and secondary schools, and churches of various denominations. Health care services include two medical centres, a private surgical hospital, long term aged care facilities, hospice services, and a range of dentistry, optometry, and audiology practices. Further, there are three retirement villages, two veterinary practices, several fitness centres, and a selection of trade services. Social infrastructure and organisations catering to older people include a Returned and Services Association, a bowling club, a Men's Shed, SeniorNet, a Grey Power group, Rebus groups (formally Probus), a University of the Third Age (U3A), a Bridge Club, and a range of other special interest groups.

As a long-established town, Warkworth has several historic sites and buildings. Some of the sites have historic heritage significance including a lime works and a concrete dam, both of which were part of a thriving cement industry in Warkworth until 1924 (Brassey & Walker, 2018). Many of the original buildings still stand and some are listed as historic places including the Town Hall, the Masonic Hall, the former Courthouse, the former post office, and one of the churches. Consultation undertaken by Auckland Council during development of the Warkworth Structure Plan in 2018 revealed maintaining the town centre was a priority for Warkworth residents. The river was identified as a 'jewel in the crown'. Feedback suggested local people wanted the river to be dredged so it could once again transport people up the river from Auckland. The historic heritage assessment report supported future preservation of relevant historical sights not yet protected. Further, recommendations were made to extend the river front walkway to incorporate the cement works historical sites.

Warkworth has a base of long-term residents with long history in the area. Many of the original families have streets and parks named after them and some of their descendants still live in the area (Keys, 1954). As explained in chapter one, the town has a very high percentage of people aged 65 years and over and 85 years and over in comparison to Auckland and the whole of New Zealand due to structural ageing trends. Warkworth's relative proximity to Auckland (approximately 60 Kilometres) makes it a popular retirement destination. Auckland Council has identified Warkworth as a growing rural node with staged development planned over the next 20 years. A large area of the surrounding land has been zoned as future urban and has been marked out for the anticipated future growth. The new state highway extension (Ara Tūhono) from Puhoi in the south to Warkworth, is due for completion in June 2022. The new highway is expected to reduce travel time to Warkworth. Based on projected housing construction, Warkworth's population is expected to increase by 20,000 people over the next 30 years. This development will transform Warkworth from a small rural service town to a satellite town providing a range of services to a wide rural catchment area (Auckland Council, 2018a). The planned development of Warkworth and increase in population is expected to

increase the number and range of employment opportunities, potentially attracting a more diverse population and range of age groups. Furthermore, the sustained trend of retiree in-migration to the Warkworth area is expected to continue.

## Boundaries of the Case

Identifying and explaining the boundaries of the 'case' is a defining feature of case study research (Merriam, 1998). The current 'case' had theoretical, geographic, and temporal boundaries. The WHO age-friendly cities and communities framework provided theoretical boundaries around the 'case' by guiding development of the research questions, the theoretical proposition, data collection, and data analysis. As explained in the previous chapter, the theoretical proposition was based on the notion that inclusion of older people is contingent on feeling valued and having opportunities to fully participate in liveable communities (Winterton, Clune, et al., 2014; WHO, 2007). The survey tool and interview schedule were informed by the WHO age-friendly framework and Age-friendly Aotearoa New Zealand. Older adulthood was defined as 65 years and over, reflecting eligibility to access the New Zealand government superannuation.

The 'case' had geographic boundaries defined by the physical parameters of Warkworth as the town. Although some older participants lived outside the Warkworth Township, they were eligible to participate if they accessed Warkworth for their usual retail and service needs. Temporal boundaries were governed by collecting data at one point of time (Thomas, 2016; Yin, 2014). The use of multiple sources of data supported the integrity of the case (Yin, 2018). The sources of data were relevant documents, people aged 65 years and over living in or around Warkworth who participated in the study survey, people aged 65 years and over living in or around Warkworth who participated in walking interviews, and local business and service operators within the Warkworth Township who participated in face-to-face interviews. While these sources of data were integral to the 'case', some people and resources interacted and interrelated in complex ways but were external to the case or provided context to the case (Thomas, 2016). For example, groups and individuals consulted as part of the preparation stage of the study.

# Stage Two: Prepare

Preparation for the current case study research involved developing research skills, consulting with the Warkworth community and developing a research protocol.

## Developing Research Skills

Case study research requires the researcher to have a range of research and technical expertise in addition to effective communication skills (Yin, 2018). Preparing to undertake this case study involved identifying what research skills would be required and developing skills by attending training sessions and workshops on use of computer software (Qualtrics, NVivo 12 and IBM SPSS), data analysis and academic writing.

## Consultation with the Local Community

Establishing an inclusive relationship with the local community was important for developing trust and a collaborative approach to undertaking community-based age-friendly research (Buffel, 2018). Consultation commenced early in the research process and built on previous relationships established with a group of older people living in the Warkworth area fostered during an earlier research project. As explained in chapter one, this earlier study focused on barriers and enablers to older people's engagement in Warkworth and the surrounding rural communities. The study results were presented and discussed during two follow up meetings in Warkworth. This local group indicated interest in progressing age-friendly research in Warkworth. During the development of the current case study, I provided regular email updates on the progress. The ongoing interest and support from this local community group was integral to the development of this current research project and the recruitment process. The consultation process progressed with meetings held with the local board chairperson and the manager of the local business association in Warkworth to discuss the study's research aim and questions. The purpose of these meetings was to establish relationships with local community leaders and to gauge interest in the research topic. During the early stages of the project, I liaised with several local community groups and was invited to attend and present at local group meetings including Warkworth Area Liaison Group and SeniorNet to promote and explain the research project. Consultation with these groups enabled new contacts to be established and further assistance with participant recruitment.

This inclusive approach and community engagement continued throughout the data collection stage including consultation with older people, community groups, the local iwi (Ngāti Manuhiri), local cultural groupst, and local council representatives. Ngāti Manuhiri were consulted in the early stages of the project's development. Although Ngāti Manuhiri showed an interest in the project, they did not wish to be directly involved at that stage. However, the results of the research project will be made available to the wider community and are expected to be of interest to local iwi. The local group representing Pacific peoples in the Warkworth area, Mahu Vision Community Trust, were similarly informed of the research

project and have actively engaged with the research project. Cultural representatives were available to provide cultural advice as necessary. As part of the consultation process, community groups including Grey Power, Age Concern, the Returned and Services Association (RSA), the Warkworth Bowling Club, Rebus, SeniorNet, and the local faith-based groups were consulted in engaging their membership and others with links to the community in the recruitment process.

In the period following data collection for the current study, Age-friendly Auckland held a community workshop at the Warkworth Town Hall as part of their region-wide, cross-sector community engagement to support their commitment to joining the WHO Network of Age-friendly Cities and Communities. From my association with Age-friendly Auckland through the Auckland University of Technology Centre for Active Ageing, I was invited to present findings from the earlier study in Warkworth described above and to assist with facilitating the workshop. I forwarded the workshop information and invitation to my Warkworth consultation group as the workshop topic, outdoor spaces and buildings, was considered to be of interest to the group. Some of the issues identified by workshop participants regarding the usability of the outdoor environment and buildings were observed during data collection in the current study.

### Developing a Case Study Protocol

A case study protocol outlining the research process was developed based on the research proposal and ethics application. The protocol guided all aspect of the case study research process. A case study protocol forms an important part of the chain of evidence and increases the dependability of the research process and confirmability of the research findings (Yin, 2018). Further, a comprehensive case study protocol may contribute to the transferability of the study to other similar contexts.

## Stage Three: Collect

This section details the recruitment and data collection processes undertaken. Multiple methods were utilised in this case study to collect data consistent with methodological triangulation. In case study research qualitative and quantitative methods can be used to address the unit of analysis or the ‘case’ (Yin, 2014). Previous studies investigating age-friendliness indicated quantitative methods were effective in capturing the breadth of views about community features, whereas qualitative methods portrayed the holistic and interrelated features (Plouffe et al., 2016). Case study methodology does not require a sequential approach to collecting the different sources of data (Yin, 2018). Thus, practical

decisions related to being a sole researcher influenced data collection from the following multiple sources:

- Document review
- Cross-sectional, prospective survey of people aged 65 years and over
- Walking interviews and participant observation
- Individual interviews with businesses, services, and local board member

Data collection commenced with document reviews in 2018 to identify documents relevant to the research questions. Survey data were collected during April and May 2019. Walking interviews with people aged 65 years and over were undertaken from April to June 2019 and the face-to-face interviews with business and service providers took place in June and July 2019.

## The Document Review

A review of documents is considered to be an essential research method in a case study; it affords a deeper understanding of the case (Yin, 2014) and provides context to the case (Bowen, 2009). Triangulating evidence from documents may verify or corroborate other sources of evidence. Equally, document analysis may uncover contradictory evidence; thus, requiring further investigation or revealing a new or different understanding of the case (Bowen, 2009).

The initial systematic search and review of printed and electronic documents was undertaken in 2018. Documents were included if they had relevance to the research aim and questions. The time frame for inclusion extended from 1980 to the present time to include foundational documents from the WHO and associated organisations related to the development of the WHO age-friendly model. Some of the included documents provided contextual information in addition to being sources of data. Sources of global documents included the United Nations and WHO. Sources of national and regional documents included New Zealand Central Government, Auckland Council, Rodney Local Board and the Warkworth community. Relevant documents included the Auckland Council Unitary Plan, Rodney and Warkworth local board strategic plans, community consultation and feedback documents, minutes of council, local board meetings and the Warkworth Liaison Group meeting minutes. Additional sources of documented data were local and national media reports, including the Mahurangi Matters, a local news media company based in Warkworth. Publications were searched for news items that were relevant to the research topic. Local community group newsletters, available meeting minutes as well as social media platforms used by the local community were regularly reviewed for relevant data.

The document review and analysis were ongoing and iterative throughout the research process as continual changes were occurring in the case study setting throughout the duration of the research project. For example, local council and local board meeting minutes as well as local media were regularly reviewed for relevant documents.

## The Survey

A cross-sectional prospective survey was utilised as one of the data collection methods. The survey tool was a modified version of the *Age-friendly Community Survey 2017* designed by Age Concern North Shore and used in similar projects undertaken by several local community boards in Auckland. The Auckland University of Technology Centre for Active Ageing (ACAA) in partnership with Auckland Council and Hibiscus and Bays Local board used a modified version of the Age-friendly Community Survey 2017 in a research project in the Hibiscus and Bays area in 2018. One of the aims of that project was to test and refine the Age-friendly Community Survey 2017. The ACAA project team made minor modifications to the Age-friendly Community Survey 2017 before commencing the Hibiscus and Bays area project. Firstly, four of the existing questions were changed into first person questions to enable participants' responses to reflect their own personal perspectives and experiences. Secondly, four questions were added to the survey from the Older People's External Residential Assessment Tool (OPERAT) (Burholt et al., 2016):

- I enjoy living around here,
- I think of this as a desirable place to live,
- I feel safe around here during the day, and
- I feel safe around here at night

The same rating scale used in the Age-friendly Community Survey 2017 was used for these additional questions. Thirdly, the further question "I am involved in my neighbourhood/community in the ways I want to be" was included to reflect the Hibiscus and Bays Local Board 2017 plan.

This modified version of the Age-friendly Community Survey was used for the present study following further minor modifications to ensure the survey questions were relevant to the local context in Warkworth. The first three questions in the section on respect, social participation, and inclusion were altered to be more comprehensible and to facilitate more individualised responses. The benefits of using the modified version of the Age-friendly Community Survey were two-fold. Firstly, the survey was tested and refined during research projects undertaken in several local board communities. Secondly, the results could be

compared with data gathered from these other areas within in New Zealand using this survey tool.

Recruitment commenced with advertising the study and survey in the local community through community group newsletters, community noticeboards, four local and regional libraries, faith-based organisations, Warkworth Community Facebook page, and word of mouth. The chairperson of the local board promoted the survey through established networks in the Warkworth community. Additionally, a snowball technique was used to supplement recruitment. Further, older people from the consultation group promoted the survey to their networks, with some being associated with multiple groups. The inclusion criteria for the survey were people aged 65 years and over living in a private dwelling (as owners or tenants), including independent-living retirement units, within Warkworth and the surrounding area. Following consultation with a statistician and academic supervisors, a target of 200 completed surveys in either electronic or paper format was agreed on. This figure was based on five percent of the population of people aged 65 years and over living in Warkworth and the proximal surrounding area.

A participant information sheet was provided with the survey (Appendix G). Consent was indicated by completing the survey. Respondents were asked to rate a series of questions and statements in the survey (Appendix C). The Likert scale provided six responses to choose from: strongly disagree, disagree, neutral, agree, strongly agree, and don't know. The survey included four open ended questions with space for written comments. This allowed survey respondents to qualify some of their responses and provided a broad range of qualitative data. The survey was designed to estimate the prevalence of specific perceptions and experiences of people aged 65 years and over of community age-friendliness. Data from the survey were used to triangulate with the other sources of data from the document review, walking interviews and participant observation, and face-to-face interviews in addressing the 'case'.

The electronic survey was created on Qualtrics XM survey platform. The survey was distributed electronically using an anonymous URL inserted into newsletters and copied onto posters promoting the survey. Paper copies of the survey and sealed drop boxes for depositing completed surveys were distributed to three retirement villages in Warkworth, the Returned and Services' Association, the Warkworth Bowling Club, and the Warkworth library. Surveys were also distributed to three regional libraries in Snells Beach, Point Wells, and Leigh to include older people living outside of Warkworth who regularly access Warkworth services. Additionally, paper copies of the survey were distributed through networks established during consultation with local groups. Posters promoting the survey and how to return completed

surveys were displayed on community noticeboards (Appendix B). The survey was active online and available at the physical locations for eight weeks from the beginning of April to the end of May 2019. During this time, regular monitoring and restocking of paper surveys was undertaken. A total of 224 paper surveys were distributed. At the completion of the specified period of time, the electronic survey on Qualtrics was closed and the paper copies were collected from the various community locations in the sealed drop boxes provided.

## Walking Interviews and Participant Observation

Walking interviews were undertaken in the Warkworth Township. This type of interviewing where the researcher walks along and interacts with the participant is becoming a recognised method in social science (Carroll et al., 2020; Clark & Emmel, 2010; Evans & Jones, 2011). Different approaches to conducting walking interviews have been reported on in the literature over the last decade including go-along interviews, walk-along interviews, talking whilst walking, and the docent method (Anderson, 2004; Carpiano, 2009; Chang, 2017; Clark & Emmel, 2010; Evans & Jones, 2011; Kusenbach, 2003; Van Cauwenberg et al., 2012). These various approaches reflect different aims and purposes associated with specific methodological stances including phenomenology, ethnography, and grounded theory (Kinney, 2017). Despite the versatility of the walking interview method, it has not been widely utilised in health research (King & Woodroffe, 2019).

Walking interviews have been characterised as a fusion of interviewing and participant observation (Carpiano, 2009). Walking along side participants enabled direct observation of participants in the naturally occurring context and observing everyday transactions first-hand (Morgan et al., 2017). Walking interviews have been found to increase the researcher's knowledge and understanding of how participants experience their physical and social environment (Carpiano, 2009; Carroll et al., 2020; Clark & Emmel, 2010). The aim of the walking interviews in the current study was to gain a more direct and deeper understanding of how older people experienced and negotiated the physical, social, and service environment in Warkworth. The interaction between the researcher and participant in the physical environment allowed a deeper understanding of the participant's experiences in their environment than would otherwise have been possible in a traditional sitting down face-to-face interview (Butler & Derrett, 2014; Carpiano, 2009). Observations made during walking interviews by both researcher and participants provided useful prompts for questions and the opportunity to clarify participant's experiences and the context they occurred in.

Walking interviews and participant observations have been used successfully with a range of methods including quantitative and other qualitative methods (Carpiano, 2009; Clark &

Emmel, 2010). Participant observation in the naturally occurring context is often one of the methods included within case studies (Morgan et al., 2017; Yin, 2018). The walking interview method used by Carpiano (2009) is situated within the interpretivist paradigm with interpretive understanding gained from observation, explanation, and interpretation in the familiar environment. The walking interview and participant observation method was well suited to the transactional perspective employed in the current study. It has been suggested walking interviews generate more in-depth and nuanced data about the nature of person-place relationships (Hand et al., 2018). Being mobile alongside participants in the current study allowed exploration of the participant's physical and social environment by asking questions, listening, and directly observing transactions (Carroll et al., 2020; Gardner, 2011). Thus, walking interviews facilitated discovery of the complexity and dynamism of ageing in the community setting. Further, the walking interview method has been recognised as an effective way of involving community members in identifying and creating ways to address priorities and improvements in their local environment (Carpiano, 2009). This collaborative approach resonates with the principles embedded in the WHO age-friendly framework. The methods suggested by Carpiano (2009), together with those of Clark and Emmel (2010), were used to guide the walking interviews and participant observation protocols used in the current study.

Recruitment for the walking interviews was through an invitation to participate attached to the back of the survey and on posters displayed in key locations where older people gathered in the Warkworth area (Appendix C). Inclusion criteria for the walking interviews were:

- People aged 65 years and over who access Warkworth for their usual activities and business
- Living in a private dwelling (as owners or tenants), including retirement units, in the Warkworth area
- Ability to mobilise around the physical environment either walking or using any form of mobility aid
- Ability to participate in a 60-minute interview while moving around

Prospective walking interview participants initially contacted the researcher by phone or email and were screened for eligibility. Fifteen participants were recruited for walking interviews. Twelve participants responded to the invitation to participate attached to the survey or on advertising posters displayed in the Warkworth area. Three participants were recruited from snowballing to provide a more diverse sample. This included a further two male participants and a participant with a significant physical disability.

## Demographic Data and Profile for Walking Interview Participants

Fifteen older people aged between 71–89 years (mean age 78.33 ± 4.89 years) participated in walking interviews in the township of Warkworth. All participants identified as European, New Zealand European or Kiwi (colloquial term for New Zealand European identity), 10 were female, and 10 were married or living with a partner. Eight were living in license to occupy accommodation (retirement village living) with the remainder (n=6) in their own home and one in rental accommodation. Thirteen participants were retired and eight were currently volunteers. Only two participants were in paid employment, one in full-time and one in part-time employment. The majority of participants were drivers (n=11) and used their own cars. Two were dependent on a mobility scooter to mobilise and two usually walked into the town centre from home. Most participants perceived their health to be good (n=12). Two perceived their health to be average and one poor. Most left home to go out at least daily (n=12) and the remainder (n=3) went out twice or more a week (Table 1.)

**Table 1**

*Demographic Data and Profiles for Walking Interview Participants*

| Pseudonym | Gender | Age | Ethnicity | Relationship status | Location of residence | Home type | Years in area | Occupation | Mode of transport | Self-perceived health | Mobility | Going out frequency |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Jane | Female | 75 | NZ European | Married/lives with partner | Warkworth | License to occupy | 49 | Part-time director | Drives own car | Good | Independent | Daily |
| Bob | Male | 89 | NZ European | Married/lives with partner | Warkworth | License to occupy | 89 | Retired | Motorised scooter | Good | Uses mobility aids | More than daily |
| Mary | Female | 77 | NZ European | Widowed | Snells Beach | Own home | 9 | Volunteer | Drives own car | Good | Independent | Daily |
| Linda | Female | 78 | NZ European | Divorced | Warkworth | Own home | 11 | Volunteer | Drives own car | Good | Independent | Daily |
| Jack | Male | 71 | Kiwi | Single/lives with friend | Warkworth | Rented home | 20 | Retired | Drives own car | Poor | Needs assistance | Daily |
| Frances | Female | 75 | European | Married/lives with partner | Warkworth | License to occupy | 10 | Volunteer | Walking | Good | Independent | Daily |
| Sally | Female | 87 | NZ European | Married/lives with partner | Warkworth | Own home | 26 | Retired | Drives own car | Good | Independent | Twice or more a week |
| Marion | Female | 78 | European | Married/lives with partner | Warkworth | Own home | 6 | Retired | Walks or relies on others | Good | Independent | Daily |
| Diana | Female | 79 | NZ European | Married/lives with partner | Warkworth | License to occupy | 20 | Volunteer | Drives own car | Good | Independent | Daily |
| Maude | Female | 80 | NZ European | Widowed | Warkworth | License to occupy | 28 | Volunteer | Drives own car | Good | Independent | Daily |
| Helen | Female | 80 | NZ European | Widowed | Rural Warkworth | Own home | 49 | Salesperson | Drives own car | Good | Independent | More than daily |
| Philip | Male | 74 | NZ European | Married/lives with partner | Warkworth | License to occupy | 8 | Volunteer | Drives own car | Good | Independent | More than daily |
| Eva | Female | 82 | European | Married/lives with partner | Warkworth | License to occupy | 4 | Retired | Motorised scooter | Average | Uses mobility aids | Twice or more a week |
| Bill | Male | 73 | NZ European | Married/lives with partner | Warkworth | Own home | 44 | Volunteer | Drives own car | Good | Independent | Daily |
| Barry | Male | 77 | NZ European | Married/lives with partner | Warkworth | License to occupy | 1 | Volunteer | Drives own car | Average | Independent | Twice or more a week |

## Walking Interview Preparation

I met with all the participants prior to the walking interviews for the planning and preparation stage. These meetings took place either in the preceding days or immediately prior to the walking interview. Participants were given a detailed participant information sheet to read (Appendix H). The walking routes and technical aspects of the interview were discussed extensively with participants prior to giving consent. Consent included agreeing to audio recording of the interview using a portable digital audio-recording device (Appendix J).

Following the consenting process, walking interview participants were included in a participatory process in planning their walking route. Some participants had given thought to a specific walking route. These participants had identified particular features of the environment or issues they wanted to point out. Other participants took a more spontaneous and flexible approach. It was important to obtain a balance between allowing participants freedom and control to present their town and providing sufficient information to ensure collection of useful data (Clark & Emmel, 2010). More than half of the walking interview participants preferred to start their interview from their homes in Warkworth.

A walking interview protocol (Appendix F) was developed to guide the process (Carpiano, 2009; Clark & Emmel, 2010). Safety issues were discussed during the planning session. The walking interviews were provisionally scheduled with close monitoring of weather forecasts; thus, could be postponed and re-scheduled if the weather was unfavourable. Walking alongside participants in their familiar environment was an experience unique to each participant. Some participants had disabilities and mobility aids that had to be considered and attention was given to participant's safety throughout the walking interview. The schedule was flexible to enable spontaneous discussion and the interviews were conversational in style rather than structured (Yin, 2014).

The walking interview schedule (Appendix D) was guided by the eight domains of the WHO age-friendly framework: outdoor spaces and buildings; transportation; housing; social participation; respect and social inclusion; civic engagement and employment; communication and information; and community and health services (WHO, 2007). Participants were asked a wide range of questions associated with living in the Warkworth area, getting to, from and around the town, and accessing shops and services. Observations made during the walking interview of how participants negotiated and transacted with their environment prompted discussion and further questions. This style of unstructured interviewing and participant observation is typical during walking interviews and enabled me to experience the environment in real time, ask relevant questions of participants and gain a deeper

understanding of the 'case'. Thus, as Carpiano discovered, I was able to learn "about the local area via the interplay of the respondent's ideas and the researcher's own experience of the respondent's environment" (Carpiano, 2009, p. 267).

It must be acknowledged that any research interview remains a contrived situation, considering it is not normal practice for a person to walk along beside someone they have recently met discussing their perceptions and experiences (Kusenbach, 2003). However, power imbalances within the research relationship can be mitigated to some degree in a walking interview allowing participants to share their experiences more freely. Walking together provided a more inclusive and empowering experience than a traditional sit-down interview (Carpiano, 2009; Kinney, 2017).

The walking interviews were audio recorded using a small, handheld digital audio recorder with multiple built-in microphones. Researchers experienced in the walking interview technique recommended participants wear a lapel microphone to ensure a high-quality audio recording (Carpiano, 2009; Clark & Emmel, 2010). Tests undertaken in the current study field prior to the walking interviews indicated that a lapel microphone was not necessary. The audio device utilised in the current study recorded the participant's and researcher's voices clearly over any extraneous sounds from traffic and other noises.

During the walking interviews street names, locations, and specific buildings were recorded on the audio device to enable recognition of landmarks when transcribing the recorded interviews. Time was allocated at the end of each walking interview to ask any remaining questions, continue any discussions, and to clarify any observations made during the walking interview. Field notes were recorded immediately following the interviews. Field notes included tracking the walk on a map of Warkworth and additional observations and impressions gained from the walking interview. Duration of walking interviews was determined by the participants and ranged from approximately 45 – 90 minutes. While the sample size was flexible, walking interviews concluded once data saturation was considered to be achieved at 15 participants. I opted to personally transcribe all audio recorded interviews verbatim to ensure thorough familiarisation with the data.

## Individual Face-to-face Interviews

Face-to-face, semi-structured interviews with open-ended questions were conducted with local businesses and service providers, and a local board representative. Data were collected on attitudes and practices that could influence the age-friendliness of Warkworth. An interview schedule was developed from reading the age-friendly literature and business

resources available from the WHO age-friendly cities and communities website pages (Appendix E). Questions were designed to identify features of the physical environment that supported access and utility for people with a range of mobility and sensory perception capabilities with a particular focus on serving older customers. The interview schedule was flexible and open ended to reflect the diversity of businesses and services in the local area.

A purposive recruitment strategy was utilised. The inclusion criteria for individual face-to-face interviews were:

- People who own or operate a business or provide services in Warkworth
- Ability and willingness to participate in a 30 - 45-minute interview

Participants were recruited from local businesses, services, and the Rodney Local Board. Local business association networks were enlisted to promote the project and to recruit participants for the face-to-face interviews. Business and services representing a diverse range of retail and service providers and the Rodney Local Board were approached using publicly available contact details. An initial email was sent explaining the research project in a participant information sheet (Appendix I) and followed up by a phone call to the appropriate person. Sixteen participants were recruited and provided written consent (Appendix K). Individual interviews were undertaken lasting approximately 30 - 45 minutes. Except for one interview, conducted at a local café, all face-to-face interviews were conducted at participants' place of work. Again, interviews were audio recorded and transcribed verbatim soon after data were collected.

The participants were from a range of retail and services in the town. Retail included two supermarkets, a menswear store, a women clothing store, a pharmacy, a recycled goods store, a post shop and bookstore, a café, and a centrally located retirement village. Services included a private surgical hospital, an optometry practice, a taxi service, the local Returned and Services Association, public library, a faith-based organisation, and the local board. Most of the retail and service operators interviewed owned the business or service; those who were not owners were the day-to-day operators. During one of the face-to-face interviews, the manager of the second-hand store invited four of the older volunteers to contribute to the interview. After providing information about the study and gaining their written consent, the four volunteers joined in the interview.

## Stage Four: Analyse

Data analysis in case study research involves analysing data from multiple sources. In order to manage this large amount of raw data, Yin (2018) recommends establishing and maintaining a

comprehensive database that contains the raw data or evidence from all data sources. The database in this case study comprised of numeric and narrative data stored in electronic format that was easily retrievable. Copies of the database were stored on portable hard drive devices and cloud storage facilities. The database is an essential element in maintaining the chain of evidence necessary to demonstrate construct validity (Yin, 2018) or confirmability of the case study findings (Miles et al., 2014). A chain of evidence enables the entire research process from research questions to final report to be traced (Yin, 2018).

Few methodological guidelines are available in the literature for case study researchers to follow when analysing case study data (Houghton et al., 2015; Yin, 2018). Therefore, it is imperative that techniques and processes are recorded thoroughly and accurately to demonstrate rigour when reporting case study research (Houghton et al., 2015; Yin, 2018). Field notes made during the data collection stage were included in the database. Additionally, memos and journal entries, which recorded insights and thoughts about the data, formed part of the database (Bazeley, 2018). Yin (2018) asserts, findings should be supported by more than a single source of data to be able to claim triangulation or convergence of evidence has been utilised effectively. In this study the findings derived support from the multiple sources of data. Consistent with a pragmatic perspective in this real-world setting, there was a reliance on abductive reasoning with continual movement back and forth between deductive and inductive reasoning (Morgan, 2007). In the following section, the methods utilised for managing, processing, and collating data from each source of evidence are presented followed by the how data triangulation or converging of evidence from the entire database was employed to identify codes, categories, and the final themes that are presented as the findings in chapters six to nine.

## The Documents

A comprehensive inventory of reviewed documents was maintained as part of the case study database. Most of the documents were stored electronically in the study database in secure folders. Some documents were more accessible in hardcopy format, and these were stored in hardcopy folders. Documents were categorised as global, national, local government, or Warkworth. Documents were reviewed for relevance. Some documents were included for establishing the demographic, geographic, and historical context for the ‘case’. Documents considered relevant for the ‘case’ itself were posed questions related to the age-friendly framework and topics related to the ageing population. Questions posed to documents included:

- What references are there to an ageing population?

- What references are made to the needs of older people?
- What reference is made to features of the environment that can influence age-friendliness?
- What references are there to the WHO age-friendly agenda?
- What policies and/or strategies direct the age-friendly agenda?
- What is the commitment to the age-friendly agenda?

During the analytic process, data from documents identified as relevant were compared to the other data sources to find converging lines of inquiry. Where data were incongruent, further analysis was undertaken and presented in the findings.

## The Survey

The electronic surveys (128) were screened for eligibility on the Qualtrics platform. Fifteen blank electronic surveys were deleted and a further three electronic surveys with no demographic data and minimal responses were deleted after consultation with two academic supervisors. The decision was made that surveys would still be eligible if a minimal number of responses were missing but there were some demographic data entered. The remaining 110 electronic surveys were exported to a spreadsheet in Microsoft Excel version 15.0.5337.1001. The data were formatted for IBM SPSS version 25 and a codebook was created for all variables. Variables were defined in readiness for importing the data from the Excel spreadsheet into IBM SPSS. A data file was created in IBM SPSS and the electronic data set imported. A total of 101 paper surveys were collected. One paper survey was deemed ineligible due to the age of the respondent. Thus, 100 completed paper surveys were assigned a unique identifier and coded according to the codebook. The data from the paper surveys were manually added to the electronic survey data in the IBM SPSS data file. The final number of cases in the survey data set from both electronic and paper surveys totalled 210.

Data cleaning commenced with line-by-line screening of the data to check for errors. Frequencies for the categorical variables gender, ethnicity, and residential location were run to ensure the minimum and maximum values made sense. Descriptive statistics for mean, standard deviation, and minimum and maximum were run to screen the continuous variables (Pallant, 2016). Minor errors detected in the data were checked against the Qualtrics responses and manually corrected in the IBM SPSS data file. Once data cleaning was completed, descriptive statistic for mean, standard deviation, and minimum and maximum were run.

Quantitative data outputs were displayed as tables and bar charts, exported to Microsoft Word documents, and added to the case study database. Responses to the four open-ended qualitative survey questions were exported to a Microsoft Word document, formatted, and added to the database. Subsequently these qualitative data were imported into NVivo 12 Plus for data analysis. Both quantitative and qualitative data from the survey were analysed in a triangulation process with the other data sources and presented as part of the narrative in the four findings chapters. To follow are the demographic data for the survey respondents.

## Survey Respondents Demographic Data

Of the 210 survey respondents, 135 (67.8%) identified as female, 64 (32.2%) as male, and 11 (5.2%) did not respond. Age data were collected in age ranges. The highest percentage of respondents were aged 70–74 years (29.9%) followed by 75–79 years (27.4%) and the lowest percentage were aged 90–94 years (3.5%) (Figure 5). The majority of respondents identified as New Zealand European (n=191, 95.5%). Four respondents identified as Māori (2%), four identified as British (2%), and one respondent identified as Pacifica peoples (0.5%). Slightly over half of the respondents lived in Warkworth (n=104, 55.9%). Not all respondents included their place of residence; however, many lived in the surrounding smaller towns, villages, farms, and lifestyle properties (Figure 6). Over a third of the respondents had lived in the Warkworth area for more than 21 years (35.6%) while only 11.4% had lived there less than 5 years.

**Figure 5**

*Survey Respondents (n=210) by Age Group Presented as Percentages*

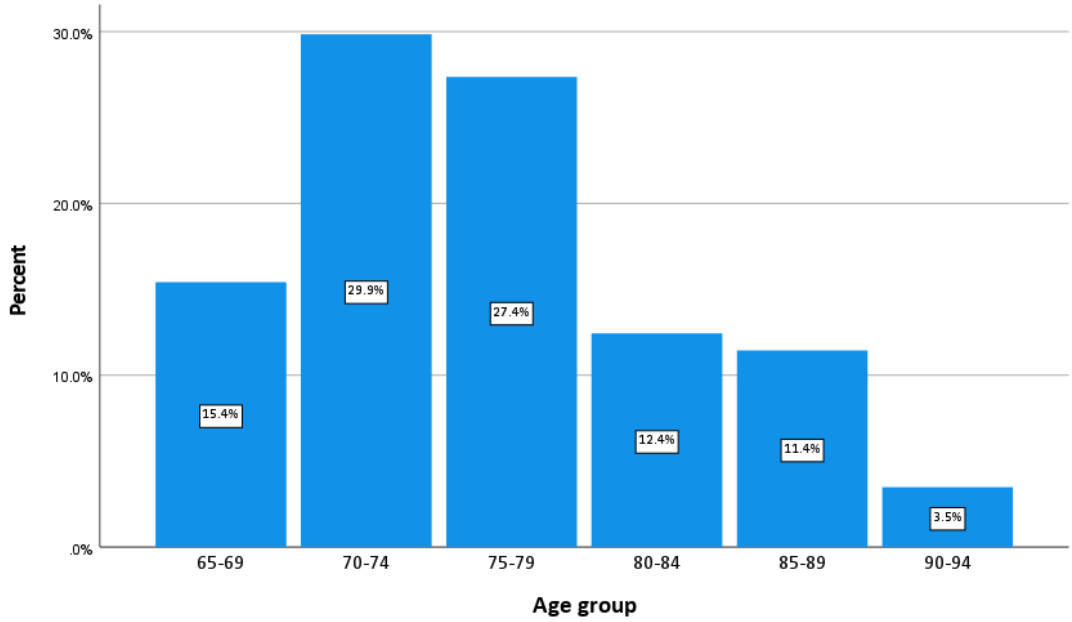
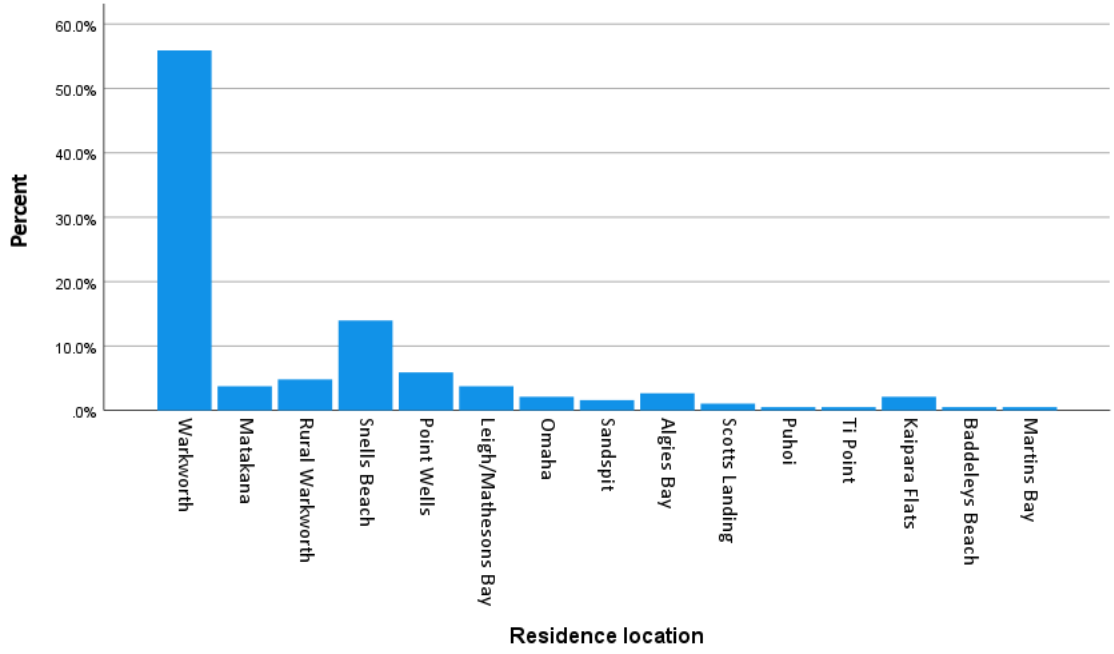



**Figure 6**

*Survey Respondents Residential Location as Percentages*




## Interview Data and Qualitative Survey Data

Transcribing recorded interviews commenced as soon as possible following each interview and continued between scheduled interviews. During transcription of the walking interviews, specific locations pointed out by participants such as buildings, street crossings, and other features of the environment, were labelled. Having the individual walking routes mapped out

as I transcribed interviews enabled me to clearly recall each walking interview as I transcribed. As the walking interviews were informal and conversational in nature, participants sometimes laughed during the interviews and at times there were long pauses when we were crossing a road or where we were unable to walk side-by-side. Where applicable, laughter and the reason for longer pauses were indicated in the transcripts.

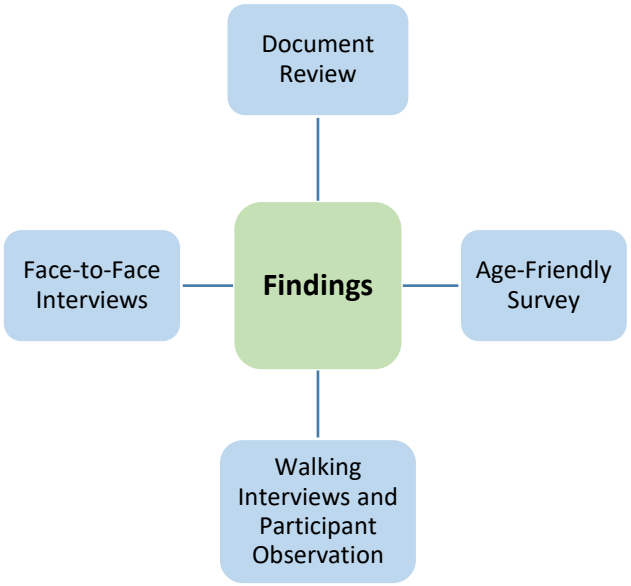
After transcribing all interviews, the transcripts were read through again and minor corrections made. All transcripts were prepared in a consistent format and uploaded to the data analysis computer software package NVivo 12 Plus. The walking interview participant's real names were removed from transcripts before uploading to NVivo and each was assigned a pseudonym. Additionally, walking interview participants and face-to-face interview participants were assigned a unique identifier to enable data tracing. An electronic list of participant's names, pseudonyms (for walking interview participants) and unique identifiers was kept in a password protected computer. Three separate folders were created in NVivo for walking interview transcripts, face-to-face interview transcripts and qualitative comments extracted from the surveys. Prior to importing into NVivo, the qualitative comments extracted from the surveys were collated into the four qualitative questions in Microsoft Word documents. Each survey respondent's unique identifier was attached to their individual comments to enable data tracing. To maintain anonymity, the unique identifiers for survey respondents were removed from comments presented in the findings.

## Triangulation of Evidence

Triangulation or convergence of evidence was utilised throughout the analytic process consistent with the case study research design. This process involved converging data from the multiple sources during analysis as opposed to analysing each source of evidence separately (Yin, 2018). Thus, the findings were constructed by utilising these different sources of evidence (Figure 7). The analytic process involved moving backwards and forwards across the entire database bringing strands of data together from the survey, walking interviews, face-to-face interviews, and documents to provide converging lines of evidence and incorporating the multiple perspectives on the 'case', the age-friendly attributes of Warkworth.

**Figure 7**

*Convergence of Evidence from the Multiple Sources of Data*




## The Analytic Process

Data analysis commenced during data collection and transcription of interviews. Early ideas from the data were noted in analytic memos. Once the interview transcripts were organised in NVivo, a more systematic process of coding across all data sources in the database was undertaken. Data analysis was guided by the process described by Miles et al. (2014). I was drawn to these authors' analytic techniques and methods because they have developed an analytic process unrestrained by a particular philosophical tradition. Within the spectrum of qualitative research traditions, Miles et al. (2014) refer to themselves as predominantly pragmatic realists. Similar to Dewey's pragmatic philosophy, they resist the dualism of the mind and the real world. Much of Miles et al. (2014) extensive experience in conducting and writing about qualitative analysis has been derived from ethnographic studies and case study research. Congruent with case study methodology, these authors advocate using a flexible and eclectic approach with whatever methods produce verifiable and credible meanings from the data. Furthermore, their methods for analysing data from large databases and from multiple sources aligned well with Yin's case study approach (Yin, 2018).

Data analysis employed an abductive reasoning approach, which combined both deductive and inductive coding. The first cycle of coding was predominantly descriptive. Initial codes were partly influenced by the eight domains of the age-friendly conceptual framework that underpinned the case study and guided the interview schedules and survey questions. Equally, many of the initial codes were created inductively from the data. Initially 54 codes were created. These first level codes were organised into hierarchies of parent and child nodes

within the NVivo programme. Each code was given a code description. Transcripts were coded and segments of data were assigned to the first level codes. Large amounts of data were assigned to codes that related to the physical environment. For example, data pertaining to the quality of footpaths was highly prevalent across the whole database. This was unsurprising considering the importance of footpath quality to getting around the town and age-friendliness.

In the first cycle of coding the data contained in each code were summarised and synthesised in a written memo within NVivo. The summaries included data from documents, the survey, interviews, and qualitative comments from the surveys. Lines of convergence were noted, and differences were investigated. For example, footpath quality was a prevalent finding across the database. Footpaths were experienced differently amongst participants. The interviews and qualitative comments provided rich and in-depth data on the quality and usability of footpaths, the survey showed a high level of dissatisfaction with the quality of footpaths, and local media had reported on local responses to footpath related issues. After summarising each code, I took time to reflect on the codes and data. This involved using abductive reasoning across all sources of evidence within each code.

During the first cycle of coding, codes were loosely grouped into three main categories: the physical environment, the social environment, and the service environment to reflect the age-friendly framework. While most of the codes were grouped within these categories, with some cutting across more than one category, the codes were mainly descriptive at this stage (Miles et al., 2014). Although it was important to be immersed in the data in this early stage of data analysis, it was equally important to step back from direct focus on the data. I continued to use analytic memos to record ideas that would arise unexpectedly, sometimes in the early hours of the morning or when immersed in other activities. These insights were important for making sense of the data and to relate findings to existing and emerging research on the age-friendly topic. During this immersive, analytic process, Dewey's pragmatic perspective provided a deeper understanding of the data. This iterative and abductive analytic process led to the higher level of analysis or the second level of coding (Miles et al., 2014).

Second level coding or pattern coding is "an interpretive act" (Miles et al., 2014, p. 90) and involves revising, condensing, grouping, and regrouping codes. Some codes were merged and renamed to eliminate repetition and overlap. In the process of revising codes, descriptive codes were transformed into more action-oriented codes (Miles et al., 2014). For example, during the process of reviewing the early codes and categories, I was drawn to the walking interview transcripts and field notes and my attention started to shift from the physical

features of the environment to how the environment was experienced by participants. My insights and interpretations continued to be influenced by the transactional perspective and the holistic nature of participant's experiences. While reflecting on the 'case' at the centre of the study, the age-friendly attributes of Warkworth, I started to see deeper meanings related to the strengths-based approach underpinning my research questions. Using a transactional perspective revealed deeper interpretation and understanding of the findings. Codes became more abstract and were revised to reflect this interpretation and new understanding.

I began to condense codes and group them into categories. As patterns were discovered, tentative themes and sub-themes were considered. Miles et al. (2014) maintain this stage needs to be fluid; the researcher should "work with loosely held chunks of meaning, to be ready to unfreeze and reconfigure them as the data takes shape" (p. 87). The second level coding stage involved a lengthy and iterative process of checking and rechecking codes, categories, and themes against the qualitative data, the survey data, and relevant documents until higher level meanings were identified. During this time, I continued to use memos to record analytic ideas. These insights were important for making sense of the data and contributed to transformation of the data into a coherent thematic map. Thematic maps were used to track development of themes and sub-themes and were regularly reviewed and discussed during supervision meetings with my primary supervisor. Eventually, final themes and sub-themes were identified and agreed on as accurately accounting for the meanings across the entire database with relevance to the 'case', the central focus of the study. The findings triangulated from across all sources of evidence are presented in chapters six to nine in four themes and associated sub-themes.

## Stage Five: Share

Plans had been made to present the study findings as part of a symposium of age-friendly research in New Zealand at the *Vision for Ageing in Aotearoa* conference in Wellington in April 2020 jointly convened by Age Concern New Zealand and New Zealand Association of Gerontology. Due to the COVID-19 pandemic, the conference was postponed and rescheduled for October 2020. Again, due to the pandemic the conference was postponed until September 2021. The report of this study will be shared with the academic community and relevant stakeholders including the local Warkworth community, the Rodney Local Board, Age-friendly Auckland, Age Concern North Shore, and Office for Seniors. Finally, research papers will be crafted and submitted to relevant peer reviewed academic journals for publication.

## The Ethical Considerations

Ethical approval for the study was granted by Auckland University of Technology (AUTEC) on 16 November 2018 under reference 18/418 (Appendix A). The ethical considerations for the study included: informed and voluntary consent; respect for rights, and privacy and confidentiality; minimization of risk; and social and cultural sensitivity and commitment to the principles of the Tiriti o Waitangi (Treaty of Waitangi).

## Informed and Voluntary Consent

### Survey Participants

Potential participants were invited to complete a paper or electronic survey via advertising flyers and the participant information sheet (Appendix G). The project was promoted through local community groups. Third parties were approached to assist with recruitment. The contact details of the researcher and primary supervisor were provided for participants to seek further information regarding the research project and process. Completion of the survey indicated consent to participate. Participants who completed the survey had the option of entering a competition to win $100 grocery gift voucher. A separate process was developed for both paper and electronic surveys to ensure anonymity of participants if they entered their contact details for the grocery competition.

### Walking Interviews

Participants who completed the survey were invited to participate in a walking interview. Information attached to the survey invited participants to contact the researcher for information and the opportunity to discuss and ask questions about the walking interview (Appendix C). Initial contact from potential participants for walking interviews was when they contacted the researcher. The purpose of the walking interview was explained verbally and in the written participant information sheet provided to potential participants. Voluntary written consent was gained through a staged or process consent procedure (Munhill, 1988). Process consent has been used successfully in other studies where it was important to build rapport and establish trust with participants (Glesne, 2016; Napier, 2016). Likewise, trust building and debriefing strategies were incorporated into the walking interview method (Chang, 2017; Gardner, 2011). Cultural advisors were available if required to guide the consent process. Participants undertaking walking interviews were offered a $20 grocery gift voucher as Koha at the completion of the interview.

### Face-to-face Individual Interviews

A similar informed consent process was undertaken for the face-to-face interviews with business operators, service providers, and local board representative (Appendix K). A written participant information sheet was emailed to participants ahead of the interview and opportunity was provided prior to the interview for discussion and questions before signing a consent form (Appendix I). The right to withdraw from the research project at any time was made explicit to all participants.

## Respect for Rights and Privacy and Confidentiality

The documents identified for the document review were available for public access. There were no issues identified that related to access or confidentiality of documents. The walking interviews were conducted in public spaces in a small town; thus, there was a reasonable possibility of encounters and interactions with people known to the participants. Managing confidentiality during these incidental encounters was discussed during the consent process. Other studies found in some instances participants took control of confidentiality issues and explained the research and presence of audio recording devices to people they stopped to talk to (Clark & Emmel, 2010). Notwithstanding, it was necessary at times to pause the audio recording when participants stopped to talk to other people we encountered during the walking interview. Although some participants explained the interview situation during these encounters, confidentiality was maintained throughout the walking interviews.

Digital audio recordings, consent forms, and all data collected were stored in a locked cupboard in the researcher's office or on a password protected computer throughout the research project. The survey was fully anonymised and identification codes were used for all interview data. Pseudonyms were used to replace any identifying names of people or places where confidentiality was required. Participants were informed that at the completion of the research project all research data and information would be stored in a secure location at AUT for five years and then destroyed in accordance with AUT research document management policy.

## Minimisation of Risk

All potential risks of harm were discussed and minimised. Risks were minimal as the interview questions were not be deeply personal. However, self-disclosure at any level has a potential to be uncomfortable. Walking interview participants were visible to other people in the community where they live with the potential to cause discomfort; thus, participants were observed for signs of distress or discomfort. Establishing rapport and building trust with

participants was instrumental in minimising discomfort. All participants were given the option of having a support person present during the interview. Except for one walking interview undertaken with a married couple, all participants opted to undertake the interview without a support person. All participants collaborated on the location and walking routes for the interview. This collaborative approach was important to ensure walking routes were safe and appropriate for participants particularly those with functional disabilities and using mobility scooters. Accordingly, preparation for the walking interview was integral to the design.

## Social and Cultural Sensitivity and Commitment to the Principles of the Tiriti o Waitangi (Treaty of Waitangi)

Internationally, awareness has begun to move from the predominantly Eurocentric focus of age-friendly programmes to more ethnically inclusive models (Phillipson, 2018). A recent evaluation study of the processes used to implement age-friendly initiatives in New Zealand identified engagement processes with Māori needed to be strengthened to ensure Māori were appropriately involved as partners in planning and implementing age-friendly initiatives (Neville et al., 2021). Although the local iwi was consulted, involvement of Māori in this study was limited to being participants in a mainstream approach as set out in the Te Ara Tiki guidelines (Hudson et al., 2010).

The principle of whakapapa was upheld by consulting with and sharing information about the research project with the local iwi, Ngāti Manuhiri. Consultation included providing information about the research project aim and questions and the proposed research impact. As explained earlier in this chapter, the local iwi was not inclined to be involved beyond being informed of the project at the time contact was established. I had gained experience working on several research projects on age-friendly related topics and research involving face-to-face interviews with older people including those aged 85 years and over living in Warkworth. Further, I had worked with people from a range of ethnicities and social groups in professional practice. Having lived in Warkworth and surrounding area for approximately 20 years, I had local knowledge of the area and established connections in the local community. Further, this research project was part of a doctoral thesis and supervised by three senior researchers with extensive experience in community-based research with older people and ethnically diverse groups.

The principle of tika was enacted by consulting and providing information to the local iwi about the recruitment process. Published ethnicity data from the research project will be displayed in a format that will be useful to other potential researchers. The principle of manaakitanga was upheld by ensuring there was provision for facilitating cultural advice from

elders or others to potential participants. Similarly, cultural advisors and senior researcher advisors from AUT were available to provide cultural support if required. Further, ethics approval information and research supervisor contact information were included on the participant information sheet. Rapport and trust were established prior to interviews. Robust confidentiality and privacy processes were maintained within the scope of the research design as outlined earlier. Koha was offered to the older adult participants to recognise their contribution to the research project congruent with AUT guidelines.

## Research Rigour

The ultimate aim of research is to produce findings that have impact on theory and practice. To ensure research findings are trustworthy and reliable, the quality and integrity of the research process should be demonstrated. How research rigour is demonstrated typically aligns with the paradigmatic approach and the assumptions that underlie the rationale for the research. Notwithstanding, there has been ongoing contention regarding how research rigour should be demonstrated in qualitative research designs (Merriam & Tisdell, 2016). Yin concentrates on construct validity, internal validity, external validity, and reliability, concepts drawn from the post-positivist paradigm. Merriam and Tisdell (2016) argue a constructivist approach should focus on methodological rigour and the strategies researchers utilise to ensure trustworthiness of the research. Consequently, these authors suggest integrating the concepts of internal validity, reliability, and external validity with Lincoln and Guba's categories of credibility, consistency/dependability, and transferability to frame trustworthiness (Lincoln & Guba, 1985). Based on the constructivist and pragmatic approach proposed by Merriam and Tisdell (2016), the strategies employed in the current case study research to ensure trustworthiness are presented under the following categories: credibility (internal validity), consistency/dependency (reliability), and transferability (external validity).

### Credibility (Internal Validity)

Credibility relates to the how well the findings match reality. Thus, how credibility is managed reflects the researcher's world view of reality. Viewed from the philosophical perspective of pragmatism, reality is multidimensional, holistic, and dynamic (Merriam & Tisdell, 2016). Consistent with this approach, the aim of this study was not to seek a single truth or reality. Rather, the findings drawn from multiple perspectives at one point in time are considered tentative or warranted assertions.

Credibility or internal validity is enhanced by gaining more than one perspective of the phenomenon under investigation (Merriam & Tisdell, 2016; Yin, 2018). This was achieved in

the current study by utilising data triangulation (multiple sources) and methodological triangulation (multiple methods). A key contribution to the credibility of this study was my close proximity to participants during walking interviews and participant observations. Direct observation and interaction with participants while they were actively participating in their usual environments enabled an in-depth understanding of their everyday experiences. Walking alongside participants illuminated the complexity within their real-world context. Time was spent collaborating with the participants before walking interviews to plan the routes. Walking alongside participants provided opportunities to clarify and gain a deeper understand of their unique perspectives. These strategies provided the opportunity to establish trust and mitigate the potential power differential; thus, adding to the faithfulness of the findings.

Transcribing all interviews personally and extensive time immersed in the data enabled a high level of familiarisation across the database. Data analysis extended over several months to allow in-depth interpretation of the data. Analytic processes were guided by the methods recommended by Miles et al. (2014). Investigator triangulation occurred during regular meetings with supervisors to discuss methodological and analytic decisions, research findings, thematic mapping, and agreeing on final themes and sub-themes (Merriam & Tisdell, 2016). Many participants indicated interest in receiving a summary of findings once the study was completed.

## Consistency/Dependability (Reliability)

Dependability of research typically relates to the extent to which a study can reliably be repeated and yield similar findings. Merriam and Tisdell (2016) argue, in qualitative research this notion does not account for the constant flux in situations and multidimensional perspectives. Instead, the findings should be consistent with the data collected and the findings should make sense. In the current case study there were multiple perspectives, a constantly changing context, and findings were considered tentative. Strategies utilised to enhance credibility in this study included creating and following a research protocol, maintaining a chain of evidence, and keeping a comprehensive audit trail. The audit trail included providing a detailed record of all stages of the research process and use of data management and analysis software such as NVivo 12 Plus and IBM SPSS. Further, researcher reflexivity was practiced throughout the study by keeping a personal research journal. Ideas, thoughts, and reflections on my own position and feelings related to all aspects of the research process were recorded. Reflecting on my preconceptions and acknowledging my thoughts and bias was important in distinguishing my role as researcher and resident in the same town

where data collection was undertaken. Analytic memos were effective in recording the progression of ideas and interpretations of data.

### Transferability (External Validity)

Transferability relates to how the findings of the study could be applied in similar situations. Transferability of a study and applicability of the findings is a decision made by other researchers (Merriam & Tisdell, 2016). Strategies to enhance transferability in the current study included the use of thick, rich description, appropriate illustrative quotations from the data, and in-depth interpretation. Further, a detailed account of the current study context and the comprehensive description of the entire research process would allow other researchers to assess the transferability of the current study to other locations.

## Chapter Summary

This chapter has presented a detailed account of the methods utilised to address the aim of the study and the research questions. Yin's five stages: design, prepare, collect, analyse, and share provided the framework for presenting and explaining the methods utilised for the study. Utilising a single, holistic, exploratory case study design, data were collected from multiple sources utilising multiple methods. Analysis involved triangulation across the whole database to find convergence of evidence. Ethical considerations and how they were addressed were explained. Finally, strategies to enhance research rigour were presented. Chapters' six to nine present the study findings in four themes and associated sub-themes.

# Chapter 6. Being Established

## Introduction

The findings from the case study are presented in chapters' six to nine. Four main themes were identified from the data to represent the 'case' – the age-friendly attributes of Warkworth and to address the research questions:

- What are the age-friendly attributes of Warkworth?
- What are the priorities and opportunities for advancing the age-friendliness of Warkworth?

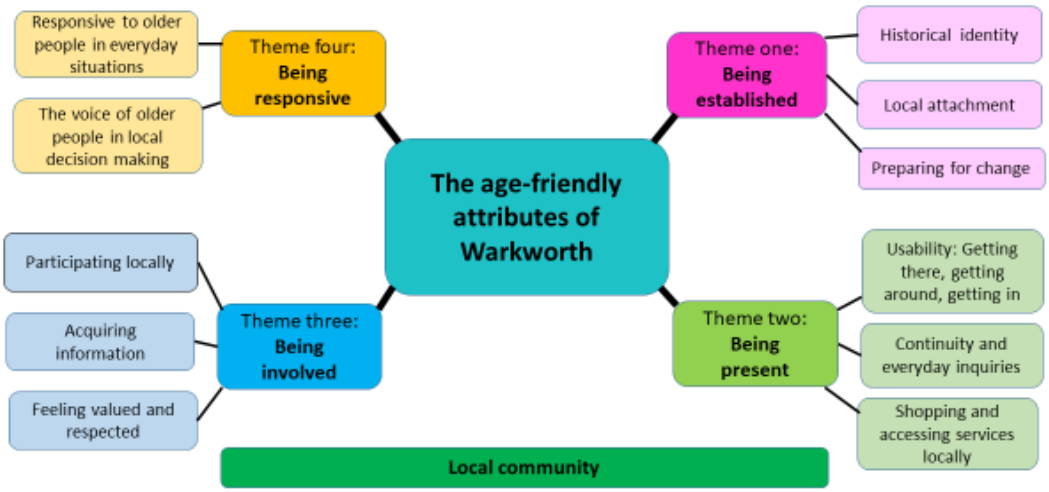
Data triangulation was undertaken by converging evidence from 210 completed surveys, 15 walking interviews with older people, 16 face-to-face interviews with business and service operators, and documents including from local media, minutes from meetings, publications held in the local library collections, and other relevant documents. Converging evidence from multiple sources provided a nuanced understanding of the 'case'. Four themes were identified: *being established, being present, being involved* and *being responsive.* Although the four themes were supported by all sources of data, some themes represented certain data sources more than others. For example, in the theme *being present* data from the walking interview participants were more prominent. Conversely, in the theme *being responsive* the data from the retail and service operators were more prominent.

## Presenting the Findings

The findings were organised into four themes and associated sub-themes (Figure 8) and presented across the four findings chapters. The themes are presented in a narrative format using all sources of evidence. Survey data are represented numerically and presented as part of the narrative. To support the narrative and provide more clarity, some quantitative data are displayed in bar graphs. A summary of all survey question results is in Appendix L. Where quotations are used to support and illustrate the qualitative findings, the source of the data are provided. Quotations from walking interviews are followed by the participant's pseudonym and age. Quotations from retail and service operators are followed by unique interview codes assigned during data collection (B1 – B16). As explained in the methods chapter, four volunteers joined one of the interviews as participants. Quotations from the volunteers are followed by the interview code and V1–V4. Where specific documents are referred to or quoted, they are followed by a reference. This chapter presents the first theme *being established* and the three associated sub-themes: *historical identity, local attachment,* and *preparing for change*.

**Figure 8**

*Thematic Map of all the Themes and Sub-themes*



## Theme One: Being Established

The first theme *being established* captured the dynamic relationship participants had with their town with respect to the past, present, and future. The first sub-theme *historical identity* captures how the rich history of the town contributes to its community spirit. The second sub-theme *local attachment* embodies the strong sense of belonging and pride in the town expressed in ways participants care for the physical and social aspects of their town. The third sub-theme *preparing for change* encompasses the acute awareness of the changes Warkworth was undergoing, the anticipation and concern for the ongoing development of the town, and how the development was being managed.

## Historical Identity

Warkworth exists and thrives today because of the relationship people have had with their town throughout its long history. Historical documents record Warkworth as a town with a strong community spirit (Jackson, 2019). Listening to participant's stories and memories of their past, it was evident their knowledge and experience contributed to a strong sense of community identity. Prior to European settlement, the coastal areas of the Mahurangi area, where Warkworth is situated, were occupied by several Māori sub-tribal groups often referred to as Te Kawerau (Brassey & Walker, 2018). Warkworth's subsequent establishment as a European settlement in 1843 has continued to contribute to its enduring status as an historic town within the New Zealand context. As such, the Mahurangi area has considerable cultural importance to those who call it home. Many of the buildings in the town have been classified as having historic significance to New Zealand. Further, the town's connection to Warkworth in Northumberland (England), highlighted during walking interviews, was a meaningful feature of the town's identity.

The historic identity contributes to the ongoing strong sense of community identity Warkworth has accrued. It was evident many of the walking interview participants were proud of their town and had a strong attachment to its historical features. The main street and the river were especially important as they represented the historical settlement and continued to be part of the main commercial centre of the town. During the walking interviews, participants avidly pointed out several original buildings still standing, including the town hall, the Masonic Hall, the former Courthouse, the former post office and one of the churches. Review of documents revealed many buildings and artefacts around the town have been listed as historic places and continue to be treasured by the local community (Heritage New Zealand, 2020). These historical buildings and sites were symbols representing the special character of Warkworth.

Some of the local residents had personal connections to historic buildings and houses in the town.

> *A lot of them have a deep interest in heritage of the area, particularly if they are long connected with the area … we have a lot of people that are aged living in this area who have lived here their whole lives … so they have a big interest in heritage and some of the buildings round town and an interest in helping up at the museum, with things up there, an interest in the cement works, some of the old concrete houses because they grew up in them, the old quarry cottages. Some of them grew up in those so they have an attachment to the heritage of the place. (Local board representative B1)*

The main street and trading areas were originally constructed alongside the Mahurangi River by early settlers. It was evident walking interview participant's strong connection to the river was influenced by the town's history. The river's aesthetic features were frequently highlighted; participants expressed pleasure in walking and sitting along the riverside. Philip, a walking interview participant, pointed out fixed plaques on the wharf representing local people's financial contributions to the development of the riverside. These plaques embodied the deep significance of the river to the town and its connections to the past.

> *What I wanted to point out was, you know one of the jewels in Warkworth's crown is the Mahurangi River down there and there is a walkway along there, boardwalk and that was built by the community, funded by the community, you can see all the tablets saying this company donated, provided this section or whatever and that's great. (Philip, 74)*

Bob, another walking interview participant, expressed his pleasure in seeing the signs and information kiosk displaying the history of Warkworth along the riverside walk, "I love this here, the history" (Bob, 89). Being able to provide information about the town's history to visitors and newcomers in a visually appealing way increased the sense of pride in the town. To complement the visual displays, a group of local residents had recently innovated and installed a 'digital storytelling trail' where people could access audio recordings of anecdotal stories of historical significance using their smart phone ("Digital stories bring history to life," 2019).

This strong attachment to the town and its history underpinned the genuine concern many participants expressed about the deterioration in the quality of the river. Concern predominantly centred on accumulated silt over many years and the effect on water quality and functionality of the river.

> *… they remember it [the river] being cleaner, they remember being able to get up there on boats, they remember when it wasn't full of sediment, and they could swim and dive off the wharf and they used to fish there. So, they see the deterioration in the quality of the water so that makes them*

> *interested in the environmental impacts of development on the river. (Local board representative B1)*

Helen recalled the river being a means of transport from her childhood, “the river used to be completely navigable. I can remember coming up here as a kid with my father in his boat” (Helen, 80). A tributary of the river flowed through Helen’s rural property, and she reflected on the river’s continuity and her connection to the town the flowing river symbolised. It was evident that participants who remembered those bygone days deeply cared about the current and future health of the river. The gradual overgrowth of mangrove trees in the river, cultivated by the increase in sedimentation, had presented a contentious issue in the town.

> *They [older residents] are very interested in mangroves because, it’s a chicken and egg thing with the mangroves, the sedimentation creates an environment where the mangroves thrive, and then the mangroves anchor all that and become a breeding ground. But they remember it when there wasn’t as many mangroves. As I say when they used to be able to get a boat up there and now, they can’t or the view. Their view used to be of a waterway and now it’s a mangrove forest. So, they are often interested in mangroves, sometimes for, sometimes against. Sometimes they understand why the mangroves have become almost an infestation and other times they just want the mangroves gone and, you know, restored to its previous state. (Local board representative B1)*

Dredging of silt to help restore the river had been initiated by the Mahurangi River Restoration Trust, a group of committed local people from the community. The group aimed to restore the river to a more healthy and usable state; thus, improving the economic viability of the town. At the local board and local council level there was an appreciation of the value of the river to the local community, evidenced by acknowledgement of the river’s importance in the local Community Aspirations document and in the Warkworth Structure Plan. The dredging plan had stalled due to lack of funding ("Dredging operations falter as River Restoration Trust runs out of cash," 2019). Local government restructuring had resulted in loss of access to a Regional Development Fund from central government. Although the local board and private individuals had injected funds in attempts to continue the work, the ongoing costs had been prohibitive. Some participants had closely followed the progress of the dredging including how it was funded as illustrated by Bob’s comment, “I think they’re trying to find funds … they promised to have some of the provincial funds and then all of a sudden they said no you can’t have the provincial funds” (Bob, 89). The vision was to create sufficient depth in the river to allow larger boats to come up the Mahurangi River to Warkworth, thereby providing an alternative route into Warkworth and generating economic growth ("Dredging operations falter as River Restoration Trust runs out of cash," 2019).

Bob had lived in Warkworth or the surrounding areas his whole life. In addition to preserving the river as an attractive feature of the town, his interest extended to geological and ecological features of the river environment and how it had developed. As I walked alongside Bob on his motorised scooter, he pointed out the interesting rock formation in the river and shared some of his knowledge of how the river had developed over time.

> *The rivers magic. You see all those rocks and see how they were formed. They've been formed on their side, so that means the earth was pushing in this way … those up there [rocks] are flat and you see how these are on their edge. (Bob, 89)*

Sally was interested in how the native bush on the other side of the river had regenerated. She connected this to the settlement of Warkworth, "that was all pure clay all across there because it had been kauri of course and when the first settlers came, they chopped down all the kauri and took it into the city to build houses" (Sally, 87). The importance of the Mahurangi River as a valued natural resource was further verified in the Warkworth Structure Plan identifying the river as "Warkworth's taonga" or treasure (Auckland Council, 2019).

The historic scow, the Jane Gifford, permanently moored on the river beside the town, represented another source of pride for local residents. The old scow had been meticulously restored by a team of local volunteers and continued to contribute to local tourism and special events (The Jane Gifford Society, 2013). Jack, one of the walking interview participants, pointed her out as we walked and explained:

> *That's the Jane Gifford they have a lot of weddings and things on board, it's a boat that's restored … they've got people who take trips down the river, back and forth … they do tours up and down the river" (Jack, 71)*

In planning the walking interviews, some participants suggested specific places to walk including sites of historic heritage significance. Diana (79) shared her knowledge of the historic lime kiln along the Kowhai Reserve track. The historic importance of the lime kiln was further identified from the review of local documents. The lime works and the original concrete dam were part of a thriving cement industry in Warkworth until 1924 and were identified as places of historic value in the Warkworth Structure Plan. Consultation with local residents, undertaken by Auckland Council during the development of the Warkworth Structure Plan, reinforced the importance of the established historical character of the town (Auckland Council, 2019). Recommendations from the assessment of historic heritage sites, undertaken by Auckland Council in 2018 during development of the Warkworth Structure Plan, supported preservation of relevant historical sights not yet protected. Further, recommendations were

made to extend the river front walkway to incorporate historical sites at the cement works (Auckland Council, 2019).

According to local documents, many of the original families have streets and parks named after them and some of their descendants still lived in the area (Keys, 1954). As explained earlier, some of the original streets in the older part of Warkworth were named after noble families, villages, and a river from Warkworth, Northumberland. While walking in the older part of the town, Sally expressed a particular interest in this connection to Warkworth in Northumberland, England.

> *... the streets going one way are named after people who lived there like Percy, Lord Percy was one of the people in Warkworth, I forget the others, Lilburn and Bertram I think. And the streets going the other way are named after villages near Warkworth, like Morpeth and Alnwick and Coquette which should be spelt Coquet, the river than runs through Warkworth. (Sally, 87)*

The history of the town had relevance to the present and the future as participants identified features of the natural environment that had been there before they were born and would be there into the future. A large oak tree close to where Sally lived brought Warkworth's long history into focus as expressed in her comment, "it would be 125 years old and it is just lovely to have them around" (Sally, 87). Sometimes preserving the past had to be weighed up with current and future safety needs of local people as identified by Philip when he pointed out tree roots encroaching on the footpath along the riverside walkway, "it's because of the tree and they're not going to chop down the tree obviously, it's part of the history of Warkworth but the roots, what the roots are doing is they're tilting the [footpath]" (Philip, 74).

Knowledge of the local town's history and its development contributed to participant's attachment and sense of belonging. This sense of belonging and pride in their town was evident in participant's willingness and enjoyment in sharing their knowledge and memories of how the town had changed over the years.

> *The sale yards were up here somewhere, I think probably on the other corner and Bank Street went from the river, that's why it's Bank, it's bank of the river, and it's still a dedicated road from about there I would think and it goes straight down to the river from here … but of course it got cut when they put State Highway one through there, it got cut in half. (Helen, 80)*

Bob remembered the earlier town layout before the main highway was constructed when the main street was the only access into Warkworth.

> *I can remember Warkworth when it only had a metal road, when it was a metal road on the main street and I can remember in the early 30's they put a strip of concrete out by the showgrounds on the road there, and that was to see whether they would concrete the roads at that time they were thinking about concreting. (Bob, 89)*

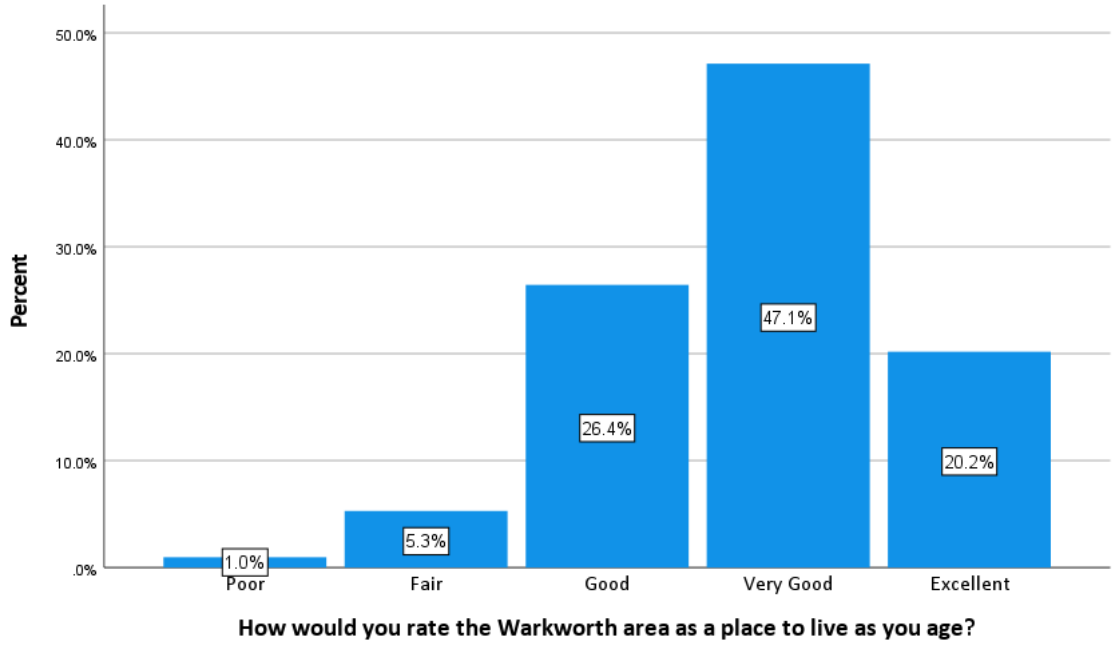
Participants shared first-hand local knowledge of how buildings had been used and recreated through time. "That used to be the police station originally, but it wasn't like that, it's been rebuilt about 30, 40 years ago" (Helen, 80). Some shops in the main street had been established for many years and were part of the tradition of the retail sector. The following comment from a retail participant illustrates this historical significance, "the shop has been here for so long. So, they've seen the shop change through owners … they've got to know me in the shop" (retailer/service operator B6). Preserving the past and repurposing buildings was particularly valued by the walking participants who were long term residents. The past and the present had been brought together with the refurbishing and upgrading of the old town hall to a more modern and functional hall. As Jane (75) pointed out, "we've got a town hall now". Bob (89) reminisced about going to the movies in the town hall when he was a boy and organising dances in the hall for the Young Farmers Club. Bob's reminiscences were important for linking the past to the present. Further, they provided context to public places that became infused with meaning once participants talked about their personal connections to places and their everyday uses.

## Local Attachment

The second sub-theme, *local attachment*, captured participant's physical and social connection to Warkworth evidenced by their everyday experiences and perceptions of the town. Satisfaction with one's place of residence and feeling attached to that place can promote well-being and support ageing in the community (Andrews et al., 2007). In response to the survey question "how would you rate the Warkworth area as a place to live as you age", two-thirds of respondents thought it was excellent (20.2%) or very good (47.1%) and the remaining third perceived it to be good (26.4%), fair (5.3%) or poor (1.0%) (Figure 9). These data indicate more respondents rated Warkworth favourably as a place to live. The broad scope of this question should be acknowledged. The qualitative data added more nuanced understanding of specific local priorities and opportunities to improve the environment.

**Figure 9**

*Survey Response to "How would you rate Warkworth area as a place to live as you age?" in Percentages*




Interview participants and survey respondents expressed positive perceptions, "it has a very good feel" (Frances, 75), "the area is a great place to live" (survey respondent), and "it's a nice community feel" (retailer/service operator B8). Regarding the survey statement "I enjoy living around here", the majority of respondents strongly agreed (76%) or agreed (20.7%) (Figure 10). Similarly, a majority strongly agreed (71%) or agreed (26.1%) with the survey statement "I think of this as a desirable place to live" (Figure 11). While these survey statements seem similar at first glance, "I enjoy living around here" was more self-focused whereas, "I think of this as a desirable place to live" was more outward and community focused.

Written comments provided further nuanced understanding of respondent's feelings about living in their respective local areas and/or Warkworth as a place they regularly spent time in. For example, many comments related to feeling safe. "More lighting in streets. My street has poor lighting" (survey respondent). It was evident from survey respondents' comments that a wide range of features in the physical, social, and service environments contributed to respondents' overall satisfaction. As just under half of the respondents (44%) lived outside of Warkworth, it is possible some had their local community in mind as opposed to Warkworth when responding to the aforementioned survey questions. Overall, these survey data indicated a relatively high level of satisfaction with the place where respondents lived.

**Figure 10**

*Survey Response to Statement "I enjoy living around here" in Percentages*

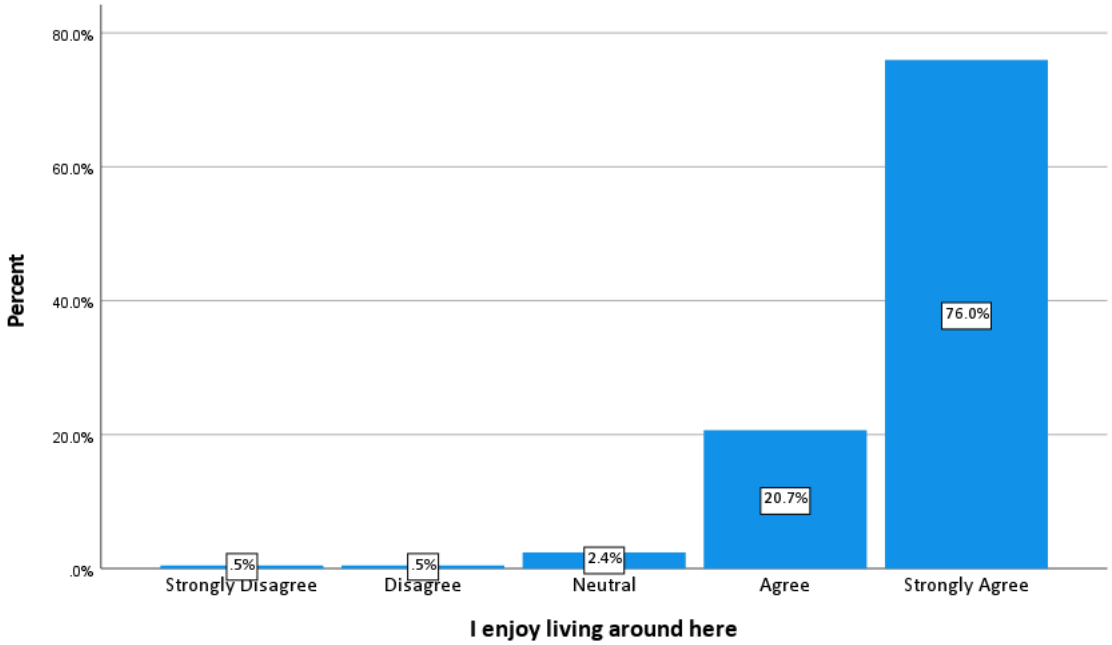
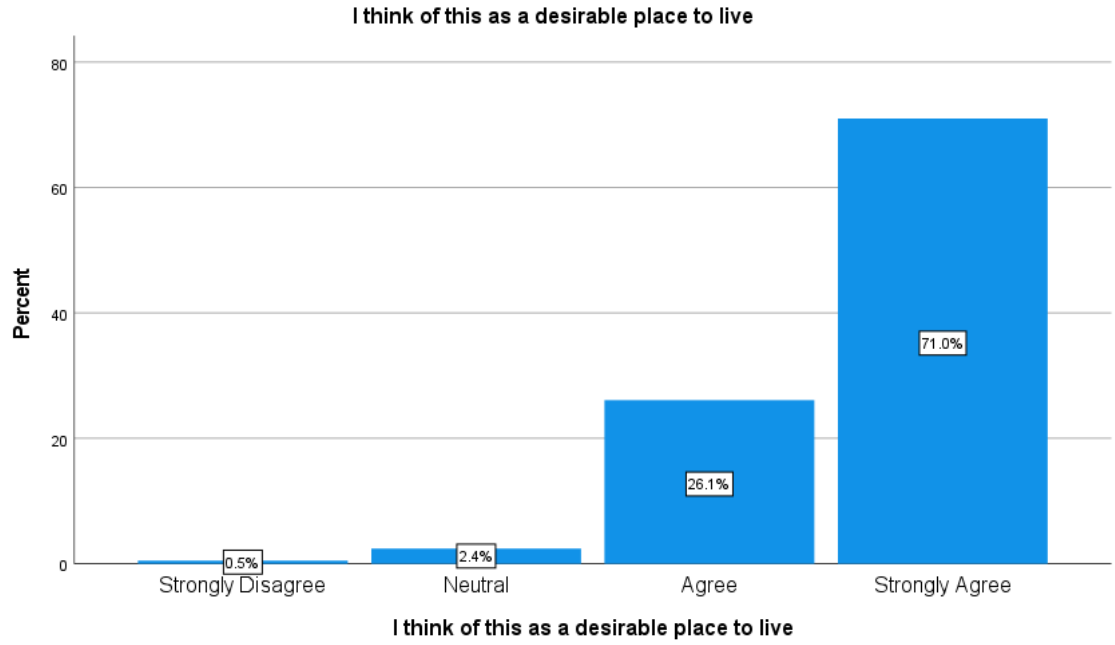



**Figure 11**

*Survey Response to Statement "I think of this as a desirable place to live" in Percentages*




The walking interviews provided participants with the opportunity to view their local town thoughtfully and to share their impressions in real time. Further, it was possible to observe participant's demeanour while walking alongside. Although demeanour varied depending on the topics being discussed, a sense of pride in their town was predominantly evident. Helen

expressed deep attachment to the town from being a long term resident in the Warkworth area. Although having travelled extensively, Helen could not image living anywhere else.

> *… it's a lovely town and it's good because it's a complete entity. It's still a small town but we've got all facilities and everything, it's sort of a standalone place. … I find it marvellous; I love living here. Every now and then over the years I thought about going somewhere else, but I couldn't now I've lived here too long. (Helen, 80)*

Helen's description of the town focused on physical features and convenience. Bill's recent move into town from a rural lifestyle property had been a practical decision related to health and moving closer to his family. Bill's recent experiences of the physical and social aspects of the town were positive.

> *I find it very, very good. I actually really enjoy living in Warkworth. I did enjoy living up out in the country but because I had a bad hip, I had to move into Warkworth. I couldn't keep up that property. But since I've been here, I love it … everything is handy. I'm handy to all the facilities in Warkworth. You know there's no trouble if I need to go to the doctor I can just walk down to the doctors. Um, yeah, I enjoy living in Warkworth and I enjoy being around people. … I think Warkworth's got a lot going for it. (Bill, 73)*

While moving into the town had been beneficial for Bill, not all participants were entirely satisfied with the move to a smaller town. Barry and his wife had recently moved to Warkworth from a larger urban area, again to be closer to family. He admitted to being reluctant to move to Warkworth but had started to settle in and establish some social connections. Barry was impressed with the friendliness of people in the town but expressed his struggle with the small-town mentality of the local community, "we've settled in here, the people are very nice, um it's just things like, I think they're behind the times up here" (Barry, 77). With a background in retail and marketing, Barry had made some of his own assessments of how Warkworth could advance its commercial sector. He was keen to share his impressions and expertise with the local business community but was treading carefully as a newcomer in town. Moving from a large urban setting to a small town in older adulthood required major adjustment and compromise; not all newcomers developed feelings of attachment to the town.

> *I regret coming here because of lack of entertainment and having to go to Auckland for shows, theatre etc. So, it is not Warkworth's problem that I am not really settled, just did not know I am not a 'country girl' until I was. My friends in Auckland seem to have more interesting lives. (Survey respondent)*

Local attachment and a sense of belonging to the town were evident in the way both older participants, and retailers and service operators talked about informal encounters that

frequently occurred when they were out and about in the town. “We live in a small town and it’s a bit of a standing joke, you go down the road at lunchtime and come back with three appointments … and the same at the supermarket” (retail/service operator B7). Operating a business and being a resident in a small town offered the opportunity to make more meaningful connections across boundaries as one retailer explained, “It is the personal touch of a town like this, you get to know all your customers and the customers get to know the owners” (retailer/service operator B6). Although maintaining professional boundaries had to be carefully negotiated in small town settings, these informal encounters highlighted the importance of these multidimensional relationships to social cohesion and sense of belonging in small communities.

Strong attachment to the town was associated with genuine care for the environment. As identified earlier in this chapter, many walking interview participants expressed concerns about the health of the river. Further, seeing and noticing the physical environment during the walking interviews prompted some participants to comment on untidy areas from long grass and weeds, overflowing rubbish bins, and the duck excrement that littered the riverside walkway. Bob commented on an area where weeds had recently been sprayed and long grass cut back along the riverside, “It’s good to see all this rubbish sprayed on the edge here” (Bob, 89). Bob appeared genuinely upset when indicating where several of the inscribed brass plaques, set into the concrete along the riverside, had been removed in acts of vandalism. “It’s a shame people have dug some of these out … there’s one taken out there, and another one there” (Bob, 89). Many interview participants and survey respondents focused on how the town could look better by tidying flower beds and adding hanging flower baskets to brighten up the main street. Mary pointed out litter overflowing from rubbish bins on the grass by the river and suggested how the physical environment could be improved, “one of the things I feel about down here is that perhaps there could be a few more rubbish bins” (Mary, 77).

Warkworth’s identify as an established small town has continually evolved over many years. Cultural events that promoted the town and generated interest in the local area fostered the sense of local pride and had become traditional annual events. Helen (80) mentioned her enjoyment in going to the annual Christmas Carols staged in the local park. The annual Kowhai Festival, now in its 50$^{th}$ year, was acclaimed to be the second longest-running festival in New Zealand and attracted up to 20,000 visitors ("Festival pride to the fore," 2019). The Kowhai Festival had developed into a celebrated multigenerational event for the wider district and was supported by organised activities in the month leading up to the festival day. The Mahurangi Winter Festival of Lights was a more recently established annual festival held beside the river and in the main street of the town. Similarly, the intention of this festival was to bring the

wider community together, to promote the town and to attract more visitors in the winter ("Mahurangi festival of lights set to beat the winter blues," 2019).

The cultural events had enhanced community spirit and local place identify by providing the opportunity for local people of all ages and ethnicities from the wider area to connect and celebrate their cultures. The events had continued to develop organically, partly in response to demographic changes, to become more inclusive of older people. For example, a local retirement village had initiated events for older people including a gymkhana for mobility scooters and a writing workshop for older people wanting to write for their grandchildren. A competitive event organised for users of mobility scooters was reported on the front page of the local newspaper ("Summerset gears up for a fun open day," 2019). This article, in promoting a positive image of older people participating competitively in their community, countered some of the stereotypical assumptions on ageing and encouraged inclusivity of older people. Further, raising awareness of older people with diverse capabilities aligned with the age-friendly domain of respect and social inclusion. The success of these established local community events was further evidence of the strong community spirit the town had accrued over the years ("Community spirit sustains much-loved festival," 2019).

## Preparing for Change

Interview participants generally accepted Warkworth was changing and viewed the town's development as inevitable; although, not without careful consideration of the proposed changes. As explained earlier, Warkworth was identified as a growing rural node by Auckland Council and staged development was planned over the next 20 years. The Warkworth Structure Plan sets out how Warkworth is expected to grow and change over the next two to three decades (Auckland Council, 2019).

Both survey respondents and interview participants expressed concern for the town's physical infrastructure and capacity to support new development. During the summer months, when the population increased substantially, participants had already noticed strain on existing infrastructure. More specifically, it was evident some participants were interested in how development of the town would affect the ageing population.

> *Warkworth's changing, it's not only getting busier, we do have an ageing population that are being attracted into town because of some of the other facilities that are being provided but we are not keeping up with it in terms of our transport infrastructure and our pedestrian friendly areas. (Local board representative B1)*

Participants wondered how the balance between growth and demand would be managed across a range of community domains. Philip had been involved in a local campaign to address traffic flow in Warkworth and expressed deep concern that existing infrastructure was inadequate for projected growth, “so Warkworth, you are going to have 25,000 people there and the bottom line is we’re actually not even prepared to upgrade the existing superstructure let alone infrastructure, make it ready for 25,000 people” (Philip, 74). Other interview participants and survey respondents had similar reservations. Bill questioned the town’s capacity to provide the utilities to support a larger population, “I don’t know how Warkworth’s going to cope with all the houses that are going to be built. The facilities here won’t cope with it … I think the facilities aren’t actually coping with things as it is” (Bill, 73).

Some participants adapted to changes in the environment by weighing up the advantages and disadvantages of development. Linda pointed to a large area of open pasture as we walked along the narrow rural road behind her home. The pasture was adjacent to a new housing subdivision. Linda watched sheep grazing in the pasture from her kitchen window while keeping a watchful eye for signs of development.

> *Now you see, I look out onto this [large slopping grassy pasture] and every time there’s no sheep there, I think ah, I’m pretty sure it’s been sold but they’re still grazing and working on it … well at the moment I’ve got a lovely outlook. (Linda, 78)*

Linda was already anticipating the loss of her rural views and peaceful surroundings and remarked, “I’m sure it’s been sold. See there were big trees there, they’ve just cut those down in the last six months” (Linda, 78). Despite her reservations about the proposed development, Linda could see advantages from the associated improvements to the physical infrastructure that typically accompanied urban development. Linda reasoned, adding a footpath onto the rural road she liked to walk along would improve safety and usability, “I thought maybe they’re going to widen the road and make it decent … if you had a wide footpath, only at one side, that would solve a heap of problems” (Linda, 78).

The recent installation of two new pedestrian crossings, perceived to have appeared almost overnight, was highlighted by several participants during the walking interviews. The crossings had provoked considerable debate in the local community ("Warkworth crossings spark heated public criticism," 2019). The main issue of contention appeared to be the rationale for positioning the new crossings in such close proximity to the busy round-a-bout. Bill’s reasoning on how he reacted to this alteration to the physical environment demonstrated how change involved a process of adjusting and adapting.

> *… they put in the extra pedestrian crossings down by the round-a-bout and when I first saw that I was driving and I thought what a stupid place to put them, you know, right here by the crossings but I thought about it afterwards … I thought the reason they've been put in is older people can actually go across the road to get to buses and I thought they could have put it a little further away from the round-a-bout, um but I can see why they've done it. (Bill, 73)*

Bill's assessment of the new crossings demonstrated an empathy for older people. His attitude towards older people's needs may have been informed by his active involvement in a local organisation that advocated for older people. Jack had also struggled with the changes brought about by the new crossings. He articulated his perception that dealing with change was a process of getting used to a new normal.

> *… it's just I think you sort of get used to certain lifestyle and everyone settles for comfortability and when there's a change it becomes uncomfortable for a certain amount of time and then again you settle for the thing. (Jack, 71)*

Jack's explanation resonates with Dewey's transactional approach in understanding the relationship between older people and their environment (Dewey & Bentley, 1949). When faced with an indeterminate situation older people must re-negotiate their environment by exploring and trying news ways to restore the balance and create a more determinate situation. In this situation, discussing and understanding the rationale for installing the new crossings was integral to the process of renegotiating the environment.

The demographic profile of Warkworth was expected to change as the town developed and expanded. The commercial sector anticipated increased employment opportunities and affordable lifestyles would attract a greater mix of age groups to the town. This changing demographic was expected to have an impact on trade. The commercial sector was keeping appraised of local developments as explained by one retailer.

> *… we need to be aware of what the population is doing, with the population increasing and the population is getting younger … in Warkworth more people buying up here that can't afford in Auckland. We need to be aware of that and try and get them in the door as well. (Retailer/service operator B6)*

Along with the in-migration of younger people attracted by employment opportunities, the in-migration of retirees to the Warkworth area was expected to be a sustained trend. There was a realisation, especially from the older participants, that more housing would be required to accommodate the increasing older population. Bill pointed out the location where more apartments for older people were planned in the centre of town.

> *They're going to have another one [retirement apartments] at where the supermarket used to be [Four Square supermarket] and it's going to be here as well [the corner site]. I think they've bought this area as well. So, this is going to be a pensioner home at some time. There's going to be a lot of old people. (Bill, 73)*

The change in population had already had a social impact on participants. One of the volunteers had noticed fewer familiar faces in the town, "I can come to Warkworth and not know anybody now and yet I knew everybody" (service volunteer B12 V2). This feeling was echoed by written comments in the survey, "the community as a whole is forever expanding, years ago everybody knew everybody, now the town seems full of strangers" (survey respondent). Less familiarity with the local population had heightened concerns for security. Jack associated increased security measures around the town to a changing population.

> *I think the thing that scares people the most is that you've now got security guards at the WINZ office, the pension office, all the time, that's kind of scary. We've had a few armed robberies, the service stations and banks and things like that. That's only happened in the last six, seven years whereas before it used to be not too bad. (Jack, 71)*

The changing demographic profile was being closely monitored by the Returned and Services Association (RSA). This group provided a high-profile social club located in the centre of the town. This well-known organisation was established after the First World War to provide support and a social forum for returning service people. The local club executive constantly re-evaluated the service to ensure sustainability of the organisation. The challenge was to attract a wider membership with contemporary events and activities while ensuring core services and priorities were meeting the needs of current members.

> *… this club I think it's probably only about 30 percent of members are ex-services or returned people … most of our World War Two veterans have gone, I can think of two or three of them that we still have … traditionally we've had a big influx of members after world wars but we don't want any more world wars though … a lot of our older members, their parents were in the wars and if we're not careful, all our members will pretty much slowly die out which is why we're trying to change with the times. (Retail/service operator B11)*

Participants expressed attachment to their main street and the central commercial hub. Warkworth had a long, established history of providing a range of services and amenities to the town, farms, and smaller rural communities in the area. Retaining the town centre as the main commercial hub was emphasised as a priority during consultation with the local community in the development of the Warkworth Structure Plan. A key high-level objective stated, "the existing Warkworth town centre by the Mahurangi River will remain as the focal

point for retail, office, community and civic space for the town" (Auckland Council, 2019, p. 19). Thus, the stated planning principle "retain the current town centre as the focal point and 'beating heart' of Warkworth" clearly reflects this priority (Auckland Council, 2019, p. 40). The structure plan provided a hierarchy of centres. The existing town centre was positioned at the top of the hierarchy above several local and neighbourhood commercial centres and two large format retail sites. Despite the emphasis on retaining the existing town centre at the top of the hierarchy, some participants were concerned about the impact of the new commercial centres provided for in the structure plan.

> *I think a lot of it will be in the little hubs, you know, one opposite the showgrounds and up where the service station is, there's probably quite a lot of shops and things there. It won't help the shops in Warkworth. (Diana, 79)*

Alternatively, some participants preferred the concept of having all the retail stores concentrated in one place. Jane expressed a preference for the convenience of large retail centres she had experienced in other places, "you go to an area and everything's there in that one area. You park and you spend the whole day and you've done all your shopping" (Jane, 75). Other interview participants could visualise the convenience of smaller neighbourhood retail hubs if well designed and connected.

> *… the whole village and subdivision will be built around walking tracks and cycling tracks and you'll be able to walk. There'll be a shopping centre within walking distance. So, things were designed to do without a car almost and also connect up with public transport. (Retail/service operator B16)*

These differences in vision suggested diverse perspectives and circumstances related to the life stages and capabilities of participants.

As established earlier in this chapter, participants valued the historical features of the town but equally asserted ideas on how to maximise use of the town and the river. Philip speculated on how the town could be more orientated towards the river with improved utilisation of space around the river. There seemed to be an acceptance that change was incremental and had to be managed effectively. Philip explained, in the shorter term, plans were underway to install feature lighting in the trees beside the river to make the area more interesting and attractive especially at night.

> *… sadly, to me the town has turned its back on it [the river] … the way that it's been built from way back … that's a really long term project but in the meantime let's make it easier for pedestrians to get here and use it and sit and look and enjoy it. (Philip, 74)*

A key idea in the Warkworth Community Aspirations report, publicised in 2017, was for “attractive public spaces that connect the town with the river” (Warkworth Community Forum, 2017, p. 10). In realising this aspiration, the local board had recently signed off on concept plans to remodel the outdoor space between the old Masonic Hall and the public library. A terraced design would replace the existing inaccessible slope to improve connectivity between the river and the main street ("Community space with connections," 2019).

There was intense local interest in Warkworth’s development. Survey responses and perceptions of interview participants indicated a sense that change was inevitable. A group of local stakeholders had collated a photographic collection for a time capsule to capture Warkworth’s development as it transitioned from a small rural town to a larger satellite town. Photographs would be taken every five years from specific vantage points, guided by global positioning system coordinates, to capture the unprecedented change Warkworth was expected to experience over the next decade. The photographic time capsule would be included in the Warkworth Museum’s collection along with Warkworth’s existing collection of historical photographs ("Photo time capsule launched," 2019). The perceived intention of the photographic initiative was to preserve the connections between Warkworth’s past, present, and future as an established town. This local initiative illustrated the collective sense of awareness that significant change was underway.

The projected growth in the Warkworth area was expected to increase demand for healthcare services. Currently, two general medical practices, a community health unit, and a private surgical centre provided local healthcare for older people in Warkworth. Although generally satisfied with the quality of the existing primary healthcare services, survey respondents and interview participants expressed concern about capacity to meet demand. This concern was illustrated by the following excerpt.

> *They are hugely busy; my neighbour was discharged from hospital and the hospital said to her go and see your doctor straight away. She had to wait two weeks before they would see her. So yes, we don’t have enough doctors. (Frances, 75)*

Demand for emergency response services had risen as the population increased, putting pressure on local emergency services. There was a perception that services were stretched as indicated by the following survey response, “there is no afterhours or weekend medical help. We are told to call an ambulance. If they are busy a fire engine will be sent. These are manned by volunteers who should not be called for medical emergencies” (survey respondent).

Survey respondents and interview participants recognised a growing need for an acute care hospital.

> *… you need to have access to a hospital … if you look at the statistics on accidents up through the Dome [Dome Valley and hills north of Warkworth] and Matakana Road, Snells Beach and the amount of helicopters that have had to come in and take people away, right, so you need a hospital local. (Jack, 71)*

The long trip to the nearest public hospital was identified as uncomfortable for older people as expressed in this survey comment, "as we are of an age, the sheer delight of a local hospital would be great. Having experienced the long and rough ride in an ambulance - was very painful" (survey respondent). With the nearest public hospital 50 Kilometres away, the need for a new acute care hospital north of Auckland within the next 20 years had been identified in the Northern Region Long Term Investment Plan (NRLTIP). The Northern Regional Alliance (NRA) was established in 2013 to provide support to the District Health Boards (DHB) in Auckland and Northland in meeting central government and local DHB health goals. The NRA had developed the NRLTIP to provide strategic direction over the next 25 years (Auckland Council, 2019; Northern Regional Alliance, 2021). The NRLTIP projected 79% of the 2,055 additional beds deemed necessary by 2036, if current population growth continued, would be required for people aged 65 years and over (Northern Regional Alliance, 2018). People in the local community had speculated that Warkworth was well positioned geographically as a site for this new acute care hospital service.

> *… they've [NRA] put a plan together and they say in 20 years there'll be a hospital in the north here. Now, it hasn't been decided whether it's Silverdale, Orewa or here but it makes sense for it to be in Warkworth. (Retail/service operator B14)*

Although a limited range of specialist services were available in Warkworth, interview participants perceived publically funded surgical services available closer to home would make a major difference to the lives of older people in the Warkworth area. There was a perception among walking interview participants that capacity at the local private surgical hospital was not being maximised as expressed by Helen (80), "It seems a pity that [surgical centre] is not used more. We are lucky to have a facility like that, but it's underutilised". Similarly, survey respondents highlighted medical service capacity "there are private medical facilities here which could be utilised better if shared with government services" (survey respondent). The distance to publically funded surgical services in the city presented a challenge as indicated by a survey respondent, "it is very hard to have to travel so far … the road is scary, and we do not enjoy one little bit having to go up and down for clinics and surgeries". This was particularly

relevant for procedures commonly required by older people, such as ophthalmology procedures where several trips to the hospital were required before and after surgery. Progress had been made on bringing some public surgical services to the local community using locally established surgical services as explained by a retail/service operator.

> *… at least it'll be a start and the idea being that eventually there'll be a full public service here for consults and for Avastins and for cataracts and other day stay surgery. You'll still have to go to Auckland for major, other surgery that you would need. (Retail/service operator B14)*

Pharmacies in small communities provided essential services particularly for older people ageing in the community who were more likely to access services close to home. Pharmacists in small rural communities typically established long term relationships with their customers as part of their service as articulated by one service operator, "the whole reason I'm a pharmacist is that I love chatting to people and I love going out into the store and chatting to them, getting to know customers" (retail/service operator B8). Recently, large corporate pharmacies had introduced discounting of the fixed consumer co-payment on medications. The New Zealand Ministry of Health recovers a five dollar consumer co-payment for each subsidised prescription medicine from pharmacies. Usually, consumers only qualify for a prescription subsidy once they have reached 20 prescriptions per family in a given year (Ministry of Health, 2014). There was concern this discounting on prescriptions by large corporate pharmacies had the potential to threaten the viability of small community pharmacies with limited ability to compete as the following excerpt illustrates:

> *… they've [large pharmacy corporation] said "we'll give all your prescriptions for free" … if you cut off five dollars, which isn't even that much for three months' worth, but if you have 10 of those medicines then its 50 bucks, it does add up … that's what I'm concerned about. (Retail/service operator B8)*

Pharmacists played an important role in monitoring high risk and long term medications. As explained in the following excerpt, they regularly liaised with local clinicians about medication dosages and interactions.

> *… we would call the doctors 20 times a day for stuff that the doctor has either prescribed, that's like an incorrect dose or the other medicine that they're on that will make a bad interaction where they'll be really unwell, or you can't even read what the doctor has written on it. It's not only about giving out the medicine and talking the person through that medicine but it's also there's so many errors that if I just did it, that person would be really unwell. (Retail/service operator B8)*

There was genuine concern that health information and health promotional services, routinely provided by local pharmacists, may be undervalued by the health system and at risk if larger corporate organisations became more prominent in the rural healthcare market. It was considered important that locally based services, such as pharmacies, were able to withstand widespread discounting in order to deliver essential health care services close to home for older people ageing in place. The care and concern expressed by survey respondents and interview participants for the sustainability of their local health care services was consistent with the attitudes of stewardship.

## Chapter Summary

Chapter six, the first of four findings chapters, commenced with an explanation of how the findings are presented. This was followed by presentation of the first theme, *being established,* as representing an age-friendly attribute in this study. There was evidence of strong local attachment to the town influenced by the town's historic identity, a sense of belonging and pride in the town, and a robust community spirit. These qualities have been recognised as important for establishing and sustaining age-friendly programmes. Further, *being established* was identified as an age-friendly attribute in this study because of the solid foundation it provided for ageing in the community and facing the development proposed over the next two to three decades.

Priorities and opportunities for advancing the age-friendliness of the environment were identified. While participants acknowledged problematic situations, they suggested ways to improve their environment, consistent with the strengths-based approach. Although change was recognised as inevitable, there were concerns regarding demand on existing services. Having infrastructure in place to support the increase in population and planned development was perceived to be a priority. The strong sense of community identity, associated with a feeling of belonging and pride in the town, underpinned and sustained the attitudes of stewardship towards the town. This strong community attitude may act as a buffer for the indeterminate situations encountered in transactions between older people and their environment and can influence ageing in place decisions. The theme *Being established* represents the valuable contribution older people provide in preserving their town's history, caring for their environment, and providing a vision for the future of their town.

# Chapter 7. Being Present

## Introduction

In this chapter the second theme *being present* and associated three sub-themes are presented. *Being present* encompasses everyday experiences of being in the town. The first sub-theme, *usability: getting there, getting around, and getting in* embraces experiences and perspectives of the usability of the physical environment including mobilising in and around the town. The second sub-theme *continuity and everyday inquiries* encompasses the negotiation and renegotiation enacted in everyday transactions in a continually changing environment. The third sub-theme, *shopping and accessing services locally* captures the experiences of engaging in everyday activities in the town.

## Usability: Getting There, Getting Around and Getting In

Sub-theme one is concerned with everyday experiences of the usability of the town across three related loci, *getting there, getting around, and getting in.* Although the term accessibility is used extensively in the age-friendly literature and may be useful for assessing some environmental features, the concept of usability more accurately explained the transactional relationship older participants had with their environment while *being present* in the town. The three loci of *getting there, getting around, and getting in* were found to be both interrelated and overlapping. This was particularly noticeable when conducting the walking interviews as participant's focus traversed back and forth across these loci at various times during the interviews.

The first loci, *getting there,* captured survey respondents and walking interview participant's perceptions and experiences of travelling from their homes into the commercial centre of Warkworth. Just over half of survey respondents (55.9%) lived in the township of Warkworth. This meant many of the survey respondents lived in smaller surrounding towns and settlements outside of Warkworth and would regularly travel into town to shop, socialise, access services, participate in group activities, and for employment and volunteer roles. Some of the walking interview participants walked or used mobility scooters to get into the town centre from their homes; although, the majority relied on a private vehicle as their main means of transport and for getting to the town centre. Reliance on driving to get from home into the town was commented on by many survey respondents and interview participants. "I am lucky I can still drive. Will have to leave the area when I can no longer drive" (survey respondent). Walking up and down the hilly terrain of the town to get to the town centre was recognised as difficult by this walking interview participant, "this could be the disadvantage for

a lot of people in Warkworth, it is quite steep … if you go over to new residential areas, it's pretty steep" (Helen, 80). *Getting there* was foremost contingent on having a means of transport; for many it involved negotiating rural roads, dealing with traffic congestion, and finding somewhere to park the car.

Although the home environment was not directly investigated, many of the walking interview participants reflected on the suitability of their home and their changing needs as well as connectivity to the centre of town. Several walking interview participants lived in one of the three local retirement villages. The newest retirement apartments in Warkworth had recently been designed and constructed to fit into the commercial centre of the town. Survey respondents and walking interview participants living in these apartments extolled the advantages of the central location. The following survey comment affirms the easy walking distance to local shops and services. "It suits us well and we chose to live in the heart of the town so we could walk to all the available facilities" (survey respondent). In contrast, the other two retirement villages were located on the edges of the town and separated from the centre of town by the state highway and complex intersections presenting residents with more difficult access to the town centre.

Although retirement villages were an acceptable option for many older people and frequently perceived by planners as the solution to older people's housing needs, many of the participants did not share this perception. The age segregation of retirement villages was highlighted, "I see the need for retirement villages, I hate them, but I see the need for them but to me they stifle spontaneity of intergenerational action" (Linda, 78). Others identified financial barriers sometimes faced by older people and were concerned about the ongoing costs required to support living in a retirement village.

> *… you've got to be able to pay the money … and then you've got the monthly fee … choices are kind of limited and if you've never actually owned your own home and you haven't got much in the way of savings. (Frances, 75)*

There was a perception that retirement villages were geared towards European residents and lacked cultural diversity, "that exclusivity and I'm being very general here … usually white, middle class we'll say" (Linda, 78). These concerns called into question the support for ageing in the community when there was lack of alternative housing options for people to choose from. More housing options for older people wanting to downsize but remain in their community was identified as a priority and opportunity for future housing development as exemplified in the following quotation.

> *Well pretty much the choices when you're old, depending how fit you are, you can stay where you are in your own home and try and manage all the jobs that need doing or you can sell and move into somewhere like here [retirement village]. (Frances, 75)*

Access to a range of housing options is one of the WHO age-friendly domains. The importance of having a range of suitable housing options was identified by walking interview participants. Sally had recently experienced how limited the housing options were for downsizing from a large family home to a more manageable property. Sally had lived with her husband in their large home in Warkworth for almost 30 years. They loved the large mature trees surrounding their property and enjoyed their views of the river and surrounding rural land. However, they were beginning to find the constant maintenance of the garden demanding. These conflicting factors were carefully weighed up as they tentatively looked to downsize and reduce their workload. Sally and her husband had struggled to find a house in the local area they would consider home as she explained, "I don't need a house as big as we are living in now, but I'd like a smaller place, but I'd like to have my own house and my own property" (Sally, 87). Mary wondered if compact house designs she had seen in other places might be more attractive to older people.

> *A duplex where you've got the centre wall and a house either side and a little bit of ground about and on some of these sections they would do very nicely because people don't want a lot … if you could have one of those perhaps a little two bedroom, I think you need one if someone comes to stay, but with a nice design. (Mary, 77)*

The need for a mix of housing types was identified in the Warkworth Structure Plan (Auckland Council, 2019) with provision for 7,500 new dwellings comprising apartments, terraced housing, and town houses, in high and medium density areas, to larger sections in lower density areas on the fringe of the town. The Warkworth Structure Plan sits under the Auckland Unitary Plan and was developed by Auckland Council in consultation with the local community to guide future urban growth in Warkworth. The plan specifies higher density housing to be concentrated around small neighbourhood convenience centres and transport routes. Although the structure plan does not specifically address the housing needs of older people, one of its stated planning principles proposes to provide "a range of housing options in Warkworth so that it is a place for people to live at all stages of life". Further, the Warkworth Structure Plan reflects the identified need to have a range of tenure types in the mix of new housing development, "there are multiple types of tenures on the housing continuum, which need to be established to ensure affordable housing in the community" (Auckland Council, 2019, p. 75). The provision of a range of housing options was congruent with the *Age-friendly Auckland* model being developed by Auckland Council. Community consultation undertaken by

the Age-friendly Auckland project team in 2019 identified the need for different housing types, models, and sizes to enable people to age in place in communities of choice (Auckland Council, 2020a). However, it remains unknown how suitable the proposed housing will be for older people wanting to downsize and be closer to services in Warkworth.

Everyday routines and habits had developed for getting around the town to visit the usual places. Maude guided me along her usual walking route. She explained the shortest route and the safest places to cross specific roads.

> *It's probably best to cross here because it's quite good and the traffic moves quite quickly along here … when I walk to town, I choose to go round this way, just cuts a little bit off. Probably best to cross here where there's no lights and there's no traffic at the moment. (Maude, 80)*

Similarly, Helen demonstrated her knowledge of local shortcuts, "I think we'll walk through there, it's easier than walking down there … there's all sorts of little ways you can get about, quite useful this up here, takes you back to the middle of town" (Helen, 80). Helen walked briskly and confidently but she was aware that these shortcuts were not usable for all capabilities. She pointed out places that would be challenging for some older people with disabilities, "all this would be hard, wouldn't it? One of the women in [retirement village], who uses a frame, told me it's really difficult, she's had to work out where she can go and where she can't go" (Helen, 80).

As well as identifying challenges older people with functional and cognitive disabilities faced in the physical environment, Phillip felt he needed to advocate for those with limited capacity to speak out about issues, "I am rubbing shoulders with people who are having all these problems and of course it's not only the mobility thing it's areas they can socialise in, have their meetings in Warkworth" (Philip, 74). Similarly, Bob's focus extended beyond his own needs. He had noticed other older people using mobility scooters around the town and thought it would be useful to have a local mechanic who specialised in mobility scooters. Bob predicted there would be growth in the local mobility scooter market with an ageing population and thought the community should be prepared for this form of transport.

> *… what we need here is really somebody that will be a mechanic for mobile scooters. As we get older, as the population gets older, well there's going to be more and more scooters and the nearest guy is in Orewa and you've gotta go down and see him. (Bob, 89)*

It was Bob's concern for the safety of older people using mobility scooters that motivated him to share his concerns about the physical environment. During the walking interview Bob led

the way along the scenic bush track within the local park. Bob's expertise in operating a mobility scooter gave him confidence to travel off the main sealed footpaths; although, he had not negotiated the park during the wet winter months when the ground could get waterlogged. Bob carefully negotiated across a large, raised tree root protruding across the pathway. He stopped to explain his ideas on how to make the track safer and improve the usability for mobility scooters.

> *... they could cut it off, it wouldn't hurt the tree at all because that's from that big Totara that's hanging out there and it's got plenty of roots in underneath, but for some reason it grew that root into the bank, but you know it wouldn't hurt the tree one little bit. (Bob, 89)*

Recalling everyday challenges of getting into and around the town, prompted walking interview participants to offer their ideas on improvements. For example, the competing needs between people and traffic in the town. Mary questioned local priorities in considering the traffic flow in a particularly busy part of the town. "I rather wonder if it wouldn't be better if motorists didn't have the right of way, I think we need to think a little bit about who's the most important, cars or the people?" (Mary, 77). Bill had also given considerable thought to traffic flow and parking challenges.

> *I think a one-way system would be great and it could work quite easily in that loop … You'd get twice as many cars parked … both sides of the road angle parking … and for the old people going across pedestrian crossing they've only got to watch for one way. It would make it so much easier all round. (Bill, 73)*

Similarly, Jack explained he had made an appointment to see the local Member of Parliament about his concerns regarding the placement of the new pedestrian crossings in the centre of the town. "I've got an appointment on Wednesday to go and see them and um, so I'll see what happens after that" (Jack, 71). These situations capture the attitudes of community custodianship and active citizenship in wanting to improve the environment for themselves and others.

Getting into town for some walking interview participants required a lot of determination. A particularly salient and insightful walk undertaken with Eva (82), revealed her precarious trip into the town centre. Eva and I started the trip from her home at one of the retirement villages on the periphery of the town. Eva regularly made this trip on her mobility scooter from home into town across the Hills Street intersection, a busy and notoriously complex intersection separating her home from the town. Despite careful planning, the trip involved an

uncomfortable, bump ridden journey along pot holed footpaths while avoiding low hanging vegetation. Eva expressed the discomfort it caused her, “the bumps they hurt me so badly”.

Eva usually scheduled her trips to avoid peak traffic times. As we waited patiently for a small break in the flow of traffic at the intersection, separating Eva’s home from the town centre, she explained how unpredictable the traffic flow was at the intersection, “I could stand there for 10, 20 minutes before they let me go”. Eva directed me as we crossed the road, “so I go now to the middle”. In a short break in the traffic, we made a dash for the middle of the road where there was a small island not quite wide enough to safely harbour a mobility scooter. It felt insecure standing in the centre of a busy road with Eva. Once safely across the road on the town side of the intersection Eva and I moved along the very narrow footpath where cars frequently cut the corner. At the corner Eva asked me to walk on the outer aspect of the footpath so I could ensure her wheels stayed firmly on the footpath. Eva’s scooter barely fitted the width of the footpath, and she had to manoeuvre around several potholes on the footpath surface as she navigated around the corner towards the centre of the town.

Survey respondents and interview participants emphasised the longstanding hazard Hills Street intersection had presented to pedestrians. Another interview participant, Frances (75) was concerned older people less capable of crossing the intersection may be excluded from using the town centre, “I think the people up that end [towards Totara Park] do feel cut off and isolated”. Frances, like Eva, had also persisted in negotiating this complex intersection despite the safety concerns. This perseverance suggests the importance for participants in being present in their local town and expressing their autonomy.

Maude’s experience of *getting there* was very different to Eva’s experience. Maude lived in another local retirement village, also on the town fringe, but on the other side of the town. Maude suggested we walk from the retirement village into town and back allowing me to experience with her the physical environment between her home and in the town centre. Maude would usually drive the five-to-ten-minute trip into the town centre as she found it more convenient to use her car when shopping. Although Maude enjoyed walking when the weather was favourable, she explained her preference to have a specific destination in mind. “I hardly ever go for a walk for the sake of walking, if there’s a reason to get to somewhere, if it’s possible for me to walk, I will” (Maude, 80). Maude consistently watched for traffic, which she explained moved quickly and unpredictably at times. The footpaths surrounding the retirement village appeared to be wider and in better condition than in the older part of the town centre, suggesting more recent construction associated with the retirement village building process.

Some walking interview participants lived closer to the centre of town. Sally lived in a hilly part of the township within a 10-minute walk of the centre of town. I met Sally at her home before we set off on one of her usual walking routes. The journey with Sally started with going down her very steep driveway and included walking up and down steep streets and into the park. Sally took confident strides as she talked about the history of the local area and stopped to look at gardens, trees, and birds along the way. These frequent pauses allowed Sally to recover from mild shortness of breath on exertion.

Traffic congestion was highlighted as problematic for getting in and out of the town. Traffic inhibited the freedom to travel around the area and access Warkworth for shopping and services as observed by Diana (79). "I would hate to live anywhere east because it's absolutely dreadful coming this way for the last two years … sometimes its two hours to get from Matakana to here [Warkworth] which is ridiculous". Survey respondents and interview participants had noticed worsening traffic congestion getting into Warkworth at weekends and holidays, particularly when tourists and people came up to Warkworth on holiday. At these times long queues of traffic frequently blocked access to residential roads as shown by the following excerpt, "there's masses of traffic heading up towards Matakana, and it gets even worse and harder to actually get out of our road and into the main Matakana Road" (Frances, 75).

Philip had been actively involved in the community action group that had lobbied about traffic congestion. He explained the complexity in balancing several factors: traffic volumes and flow, the needs of the local older people as pedestrians, and the needs of the local business community.

> *… one of their prime concerns is keeping traffic moving … nobody likes the idea of subways or overpasses and they're particularly impractical for young and elderly, so that's not a solution to the problem either. Ultimately, it's to get the traffic out of the town, isn't it? Nobody wants that to happen (laughs). Most of all the business community. (Philip, 74)*

Traffic movement in the town was experienced in different ways. Some were concerned that cars moved too quickly for older people moving around the town. Others found drivers were generally considerate and stopped appropriately at crossings, especially for older people. Multiple priorities and opportunities for improving traffic issues were identified from survey respondent's comments. These included more traffic calming strategies, lowering the speed limits, improving traffic flow, improving the condition of roads, and holding activities at times and venues where older people could avoid traffic congestion. Retail and service participants worried about the effect of worsening traffic congestion on their business viability because

older people sometimes found getting to retail and services challenging. As one retail/service operator explained, “there are quite a few senior people who are our customers and then sometimes they don’t want to come due to the traffic scenario” (retail/service operator B10). One the other hand, another retail/service operator suggested city traffic and paying road toll fees on the motorway system deterred many older people from leaving town to shop and access services, “any chance of not going through the tunnel and dealing with the traffic and all that” (retail/service operator B6). The diversity of perspectives and experiences suggest contextual factors at the local and regional levels impacted on the usability of the town for older people.

Worsening traffic congestion made it more difficult for the local taxi service to transport older people into Warkworth for appointments or to shop.

> *The Hills Street intersection is ridiculous. We get stuck in traffic constantly. Even coming back in from Snells Beach now at certain times of the day takes quite a long time … some days during the summer months it takes an hour just to come in from Matakana. (Retail/service operator B5)*

The transport services provided by the local taxi services incorporated many age-friendly features. Firstly, they provided a door-to-door transport service; a service known to be important for older people ageing in the community. Secondly, the taxi service was often the first point of call for older people wanting information about how to access subsidised taxi fares. Older people were often referred to the Total Mobility Scheme and guided to apply for this benefit as explained here:

> *I get a lot of calls asking how they get that Total Mobility card because a lot of people don’t know and also a lot of people who can’t get freely into town and back again get given them as well. So, we have a lot of Total Mobility customers. (Retail/service operator B5)*

Thirdly, regular special training enabled staff to assist people with disabilities, “how to assist people, make them comfortable” (retail/service operator B5). The door-to-door service typically involved physical assistance to older customers, “we get a few people who need a lot of assistance getting in and out of the vehicles and into the medical centres” (retail/service operator B5). Dedicated parking spaces outside the medical centre were reserved for taxis and cars dropping people off when they needed assistance. Fourthly, most of the taxi company staff were local people and had established trusted relationships with their older customers. These intrinsic age-friendly features suggested support for ageing in place as they enabled older people without their own transport to continue accessing shops and services locally.

Further, local retail and service operators enabled older peoples' taxi use by facilitating the trip back home after shopping or accessing services:

> *We have customers who regularly come in and say would we ring the taxi company for them and then if it's really cold they'll sit on the chair here and wait and then we'll shepherd them out … it's a good place on the loading zone for a taxi to pull in. (Retail/service operator B15)*

Demand for the local taxi service had increased at well-known busy times of the day. This increased demand centred around before and after school as explained by one of the second-hand store volunteers, "if it's three o'clock there's no taxis available between half past two and four o'clock because of the school runs with them" (service volunteer B12 V2). Further, capacity was frequently reached during summer months when there were more visitors and tourists about. This high demand for taxis had been felt by local older people with one survey respondent noting that "an overworked taxi service makes getting into the township a problem" (survey respondent).

Following many years of lobbying by the local community, Auckland Transport introduced a bus service connecting Warkworth to Auckland in 2018 (McGhie, 2018). The service has been extended to include further connections to some of the local smaller settlements surrounding Warkworth. Although the bus service was viewed positively by the majority of interview participants and survey respondents, few had used the new service to travel around the local area. The consensus was older people lacked experience with bus travel and further refinements were needed to make the system more age-friendly, as explained by one of the walking interview participants, "it's not quite right yet, but you know, I acknowledge they've made a major, major step forward in providing a bus service that's reliable and regular" (Philip, 74). Walking interview participants and survey respondents suggested several ways to improve the service for older users including a service connecting the retirement villages to the town centre, shorter distances to bus stops, an improved age-friendly service to the airport, and extending the service to include more rural communities. Interview participants expressed interest in trying out the bus service but some lacked confidence in how the service worked and would prefer to have someone with them for the first time.

Car parking in the town was identified as a persistent challenge by survey respondents and interview participants. Being able to park close to common destinations was considered important, especially in the winter. The two most common issues with parking were inadequate parking spaces and insufficient time limits as indicated by a survey respondent, "insufficient parking for those who most need it". Further, some participants highlighted the lack of parking close to events for older people who may not qualify for disability parking yet

found it a struggle to walk very far. There was lack of consensus on ideal parking time limits. Parking times were considered too short and restrictive to accomplish everyday tasks. The preference for longer parking times was suggested by survey respondents and walking interview participants:

> *Parking restrictions of 60 mins and lack of parking make it difficult for the elderly to park, walk to the hairdresser and get back within the 60 minutes. Parking should be increased to a minimum of 90 mins or preferably an hour. (Survey respondent)*

> *I think the parking is terrible. It's one hour parking. So, you come in here, have a coffee then think now we'll go and buy a bed. Oh gosh no, we'll have to shift the car and yesterday I was down here and there's the parking guy round giving out tickets to all the parked cars. (Barry, 77)*

Conversely, some retailers and service operators disagreed with long parking periods. For some, the viability of their business depended on constant turnover of customers. Thus, they preferred very short time limits on parking spaces close to their business to enable older people to park close by, complete their transactions and move on to make way for other customers as explained by a retailer, "we need 10-minute parking … if they need longer parking it means the other person behind them is suffering because they don't get the parking" (retailer B10). Other services required one-to-two-hour appointments for their customers and clients. Short parking times therefore did not suit these services. These conflicting perceptions suggested different priorities and needs. Designated free car parks provided by some retailers and service operators were appreciated by older participants especially those with disabilities. Some retailers expressed concerned about the impact of limited parking on trade and the sustainability of their business, "we are into that business where customers need a car park because they come and pay a bill and they want to send a parcel and stuff they need to park somewhere" (retail/service operator B10).

Competing priorities were identified between maintaining green spaces and river frontage and meeting the increased demand for parking spaces. One of the local community aspirations was to maximise the river frontage and enhance green spaces close to the town centre (Warkworth Community Forum, 2017). Existing car parking facilities for the library and other community services currently dominated these scenic spaces, highlighting the need for ongoing community conversations to manage local priorities and aspirations. Survey respondents and interview participants indicated car parking close to the library was inadequate. "I mean there's 10-minute parking outside the library which is a bit unfair because you just can't always choose a book in a few minutes" (Frances, 75). Similarly, the impact of parking restrictions on older people was recognised at the local board level.

> *They [older people] like to visit the library, you know, they still take out the physical books, um that means they need parking close by … I know my dad won't read a book that's any thinner than that [gestures with hands] so it's not something he can struggle home with, a bag of books. So, he needs to use his car to get to the library. (Local board representative B1)*

Retail and service operators monitored parking spaces closely. The new bus service had taken up a lot of the library building frontage; thus, parking for library patrons had been affected. Library staff had protested as suggested by the following comment, "they took away all of our parking, so we did kick up a bit of a fuss and they put some back, but we have lost a couple of spaces" (retail/service provider B3). Survey respondents and walking interview participants experiences suggested varying levels of mobility that could make walking while shopping challenging, "parking is difficult if I have shopping to carry" (survey respondent). Again, many participants looked beyond their own needs for convenient parking and expressed concern for older people with disabilities. Parking that provided shelter from rain and wind was noticeably lacking in the town. Frances indicated this put more pressure on older people with disabilities during wet weather, "you get a rainy day, you'll never find a car park anywhere" (Frances, 75).

The mounting parking challenges in the town highlighted the disconnection between the local council and the local board. Although the local board were acutely aware of the parking difficulties, street parking was controlled and monitored by Auckland Transport (AT), one of the Council Controlled Organisations (CCO). Periodically, an AT parking warden arrived up from Auckland to monitor parking and issue infringement notices as required. Anxious about getting a parking infringement, walking interview participants spoke of having to regularly curtail their activities. The local board understood the need to improve the parking situation for those less mobile. A proposed all day commuter parking facility on the periphery of the town was expected to free up car parks for older people and shoppers in the town centre until an official park and ride facility was established by AT.

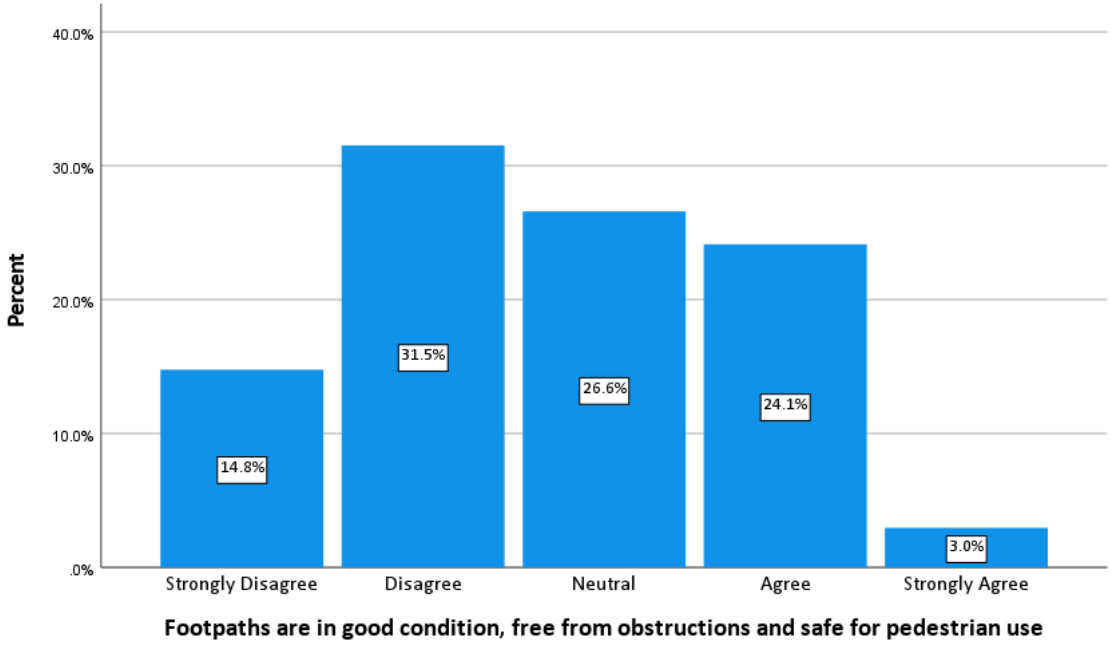
The second loci, *getting around,* focused on usability while moving around the town centre. Environmental features that impacted positively and negatively on *getting around* included footpaths, street crossings, outdoor seating, signage, lighting, and the perception of safety during the day and at night. It was perceived the town was not adequately prepared for the changing mobility needs of an ageing population as indicated by the following comment:

> *You've got an ageing population, you've got two issues, you have to use your car to get around because there's not a lot in the way of public transport or footpaths or safe crossing facilities and yet, as you age sometimes your ability to drive is taken away. (Local board representative B1)*

Improving footpaths was identified as an urgent priority related to *getting around*. The survey respondents were asked to rate footpath quality in Warkworth. From the statement "footpaths are in good condition, free from obstruction and safe for pedestrian use" just over a quarter of respondents agreed (24.1%) or strongly agreed (3%), whereas almost half strongly disagreed (14.8%) or disagreed (31.5%), indicating general dissatisfaction with footpath quality (Figure 12). The multiple written comments added context to the survey scores and suggested priorities for improving footpath quality and usability.

**Figure 12**

*Survey Response on Footpath Quality in Percentages*




It was difficult to ascertain from the survey data whether survey responses pertained to footpaths in the town or on rural roads. Notwithstanding this lack of clarity, both survey respondents and walking interview participants highlighted the impact limited footpaths and lack of footpaths connecting rural roads to the town centre had on *getting there* and *getting around.* The following comment by a survey respondent expressed this concern, "our rural area is poorly served for all residents, particularly older folk with unsealed roads and lack of footpaths". As 44% of survey respondents lived outside of Warkworth in a range of smaller rural places, the lack of footpaths on rural roads increased reliance on private car for transport. The presence of footpaths may offer more mobility options and influence decisions to age in place as exemplified by the following comment, "if we had a footpath, we could stay here with the use of mobility scooters to reach Warkworth" (survey respondent).

In addition to limiting connectivity around the town, lack of footpaths presented a hazard for some. Linda (78) persevered in walking from her home on the outskirts of Warkworth along rural roads despite lack of footpaths. Some sections of these roads were undulating and uneven and had open drains along the side. Other sections had loose gravel at the sides that sloped away steeply. The lack of footpath continuity was widely recognised and expressed, "many streets have footpath on one side only and these alternate block by block, requiring walkers to cross diagonally at intersections" (survey respondent).

Lack of footpath continuity was starkly obvious during the walking interview with Bob (89) as he negotiated his way around Warkworth on his mobility scooter. One of the footpaths stopped abruptly at the corner of the intersection where Bob intended to turn. In anticipation, he moved onto the road before getting to the corner. Although there was a footpath on the other side of the road, its undulating nature deterred Bob from crossing. Additionally, the cut-away sections on the footpath were not lined up appropriately to facilitate safe crossing on his scooter. Once he was around the corner, Bob remained on the road along two residential blocks until the footpath resumed. Bob had mastered going on the road with his scooter and watching out for traffic as he went. He had many years of experience using quad bikes and more latterly, a motorised scooter. Bob's unique situation illuminated the contextual factors embedded in older peoples' transactions in their environment. A transactional perspective provided a way to understand the holistic relationship between the person and their environment where the individual capabilities and environmental attributes are part of the whole experience.

Bob was concerned for older people less confident on mobility scooters or new to this mode of transport. Problematic crossing points impacted on older people's usability in other locations in the town. The importance of designing footpaths and crossings points to meet the needs for all levels of capability was expressed in the following excerpt:

> *Crossing points, I've discovered, some of them have been put in at really awkward angles, for example the one here, on the corner of the RSA, it's on a really awkward angle and if you are on a mobility scooter you can't get square onto it. You have to approach it from an angle. (Local board representative B1)*

Inconsistent quality of footpaths throughout the town was observed and experienced during the walking interviews. Walking interview participants were knowledgeable about specific areas and pointed out numerous examples of uneven, cracked, and unstable footpath surfaces as well as upgraded and reconstructed footpaths. Many perceived a risk of tripping and falling; thus, participants were cautious as they navigated footpaths. Numerous survey respondents

commented on uneven footpaths and many reported having fallen. “Footpaths very broken and uneven, have tripped and fallen several times” (survey respondent). Survey respondents proposed several improvements for footpaths including regular inspections, upgrading existing footpaths, and assessing usability for older people.

The usability of the physical and built environment was experienced differently among the walking interview participants. Everyday transactions occurred within a specific context for each walking interview participant. Imperfections in the footpaths that presented as tripping hazards and barriers to some participants seemed to be barely noticed by others. Nevertheless, walking interview participants consistently expressed concern for older people less capable, indicating awareness of the more challenging aspects of the environment. For some participants, the walking interview heightened their awareness of the physical environment and provided new insights, “well look how narrow this is … there’s weeds that have grown right out across and people in wheelchairs … you don’t think about it when you’re just walking around by yourself” (Bill, 73). The expressions of concern implied empathy for older people with functional challenges. The caring attitude was also evident in survey respondent’s comments, indicating older people in this community were thinking beyond their own current situations when suggesting improvements and priorities for future action. Overall, an attitude of custodianship of the town was evident in the way interview participants and survey respondents identified ways to improve the quality and usability of the physical environment for themselves and others.

Obstructed footpaths inhibited *getting around* the town. Numerous obstructions were observed and highlighted on walking interviews. These included overgrown shrubbery, weeds and tree roots encroaching on footpaths, shop signage boards, café chairs and tables, rubbish wheelie bins, vehicles, and large supermarket trolleys on footpaths. Frances pointed out footpaths crowded with café furniture, “It’s not that wide and of course if you’ve got people with tables and chairs and they’re actually covering the footpath there right by the crossing, aren’t they?” (Frances, 75). While the majority of walking interview participants were capable of avoiding and stepping around footpath obstacles, again many highlighted specific obstacles for older people with disabilities. Supermarket trolleys frequently obstructed footpaths and were encountered several times during the walking interviews, “this makes me so cross, people leaving supermarket trolleys” (Helen, 80).

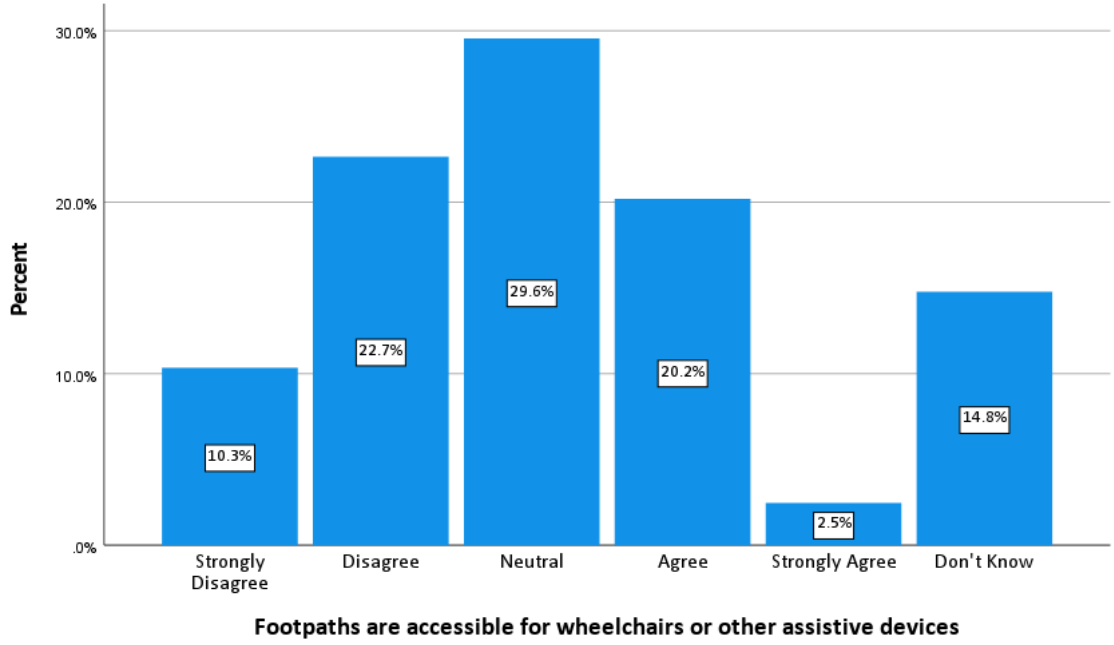
Attention had focused on how the safety of shared footpaths or pathways could be improved. Survey respondents and walking interview participants had experienced alarming encounters with cyclists on footpaths designed for pedestrians. Some expressed concerned about the

capacity of shared pathways to cope with the inevitable increase in e-scooters and e-bikes, “footpaths used by others than pedestrians – bikes, trikes, scooters, walkers, people young and old – need care and respect to all, for everyone’s safety” (survey respondent). Philip (74) had considered purchasing an electric bike but was discouraged by lack of dedicated cycle ways, the attitudes of motorists, and lack of places to park and re-charge cycle batteries.

Results from the survey displayed in Figure 13 showed a third of respondents strongly disagreed (10.3%) or disagreed (22.7%), with the statement “footpaths are accessible for wheelchairs or other assistive devices”. Slightly less than a quarter of respondents strongly agreed (2.5%) or agreed (20.2%). Of the remaining responses, 29.6% were neutral and 14.8% did not know, perhaps indicating the experience of able-bodied pedestrians. Overall, these data suggest a need for improvement in footpath usability. Survey respondents and walking interview participants pointed out the necessity for wider footpaths, more clarity on rules, and etiquette to guide pedestrians and cyclists.

**Figure 13**

*Survey Responses on Footpath Accessibility in Percentages*




Older peoples’ perception of feeling safe was known to be associated with age-friendliness in rural communities (Federal Provincial Territorial Ministers Responsible for Seniors, 2007). Almost all respondents strongly agreed (73.6%) or agreed (25%) with the statement "I feel safe around here during the day". Similarly, the majority of survey respondents strongly agreed (49.5%) or agreed (41.3%) with the statement "I feel safe around here at night". These results suggest respondents felt safe during the day and at night. Comments from survey respondents

indicated a need for better street lighting to increase feelings of security and to reduce the risk of tripping and falling. Suggestions to mitigate risks to personal safety included avoiding secluded areas when walking alone and being very careful and observant of potential hazards. Walking interview participants highlighted recent burglaries in the town; however, most perceived the town was well served by the local police force and a local security company as expressed by Frances (75), "I know that crimes are committed around here. We don't always hear about them. Because of where we live, we have security come through checking everything four times a day, especially at night".

The third loci, *getting in,* encompassed the usability of green spaces, public toilets, public buildings, and business and service buildings. Usability of these places was central to continuing a presence in the community and maintaining social relationships established over time. Usable green spaces to visit have been considered essential for age-friendly communities as they contributed to older people's sense of wellbeing (WHO, 2007). Survey responses to the statement "there are well maintained and safe green spaces for me to visit" indicated overall satisfaction as 32% of participants strongly agreed and 55.8% agreed. However, a more nuanced view was gained from the walking interview participants with respect to the usability of some of the green spaces in the town.

While most of the walking interview participants were positive about the town's green spaces, usability issues related to complex contextual factors. Eva (82) loved the idea of going to the local park situated close to the river. The park covers areas of open space, a pond, a scenic bush walk, and large mature trees. However, the main pathway was too steep for Eva to negotiate on her mobility scooter. On the other hand, as Bob (89) explained, with his powerful scooter and wide wheels he could avoid the steep pathway by going across the grass and up a less steep incline, "when I bought this [scooter], when I wanted one, I said to [wife's name] it's got to be powerful enough to get me around … and the wheels big enough". Marion (78) had also found a way to enjoy the park and avoid the steep path by entering the park from one of the residential streets. This meant only going downhill. Walking interview participants pointed out steep pathways leading down to the river frontage from the main street. Once again, the usability of the green spaces for older people with disabilities was questioned by several walking interview participants.

Public toilets have been identified as a necessary feature of age-friendly communities (WHO, 2007). The usability of public toilets may be particularly important in rural areas as older people typically travel some distance from home to get to the town. Older people may restrict going out when access to a toilet is limited (Doran & Buffel, 2018). Survey respondents were

asked to rate the following statement “public toilets are clean, well-maintained and accessible to people of different physical abilities”. Just over half of the respondents strongly agreed (11.8%) or agreed (45.3%), whereas only 9.9% disagreed and 2% strongly disagreed with the statement. These results were at odds with many of the comments from survey respondents and interview participants. A more nuanced understanding was gained from survey comments and interview participants perceptions.

A major concern was the availability of public toilets in the centre of the town as expressed by a survey respondent, “I feel there are not enough public toilets. It is necessary to utilise those provided by businesses such as petrol stations or bars when walking around the town”. The main public toilet facilities in the town were located at one end of the main street. The other facilities were inconveniently located across the busy intersection as pointed out by another survey respondent. “Other public toilets are a distance away across the very busy Hill Street intersection, with no pedestrian crossing!!!” While some retail and service operators had allowed older customers use of their staff toilets it was not always considered acceptable, “you’d have to walk through the staff room … I feel like that’s our private employee area” (retail/service operator B8).

The main public toilet facility had recently been refurbished. Stainless steel bowls and seats had replaced the ceramic bowls that had been vandalised. A survey respondent expressed dissatisfaction with the new design, “I am unhappy with the new toilets in town, the stainless steel is horrible with no adequate seat, they are not user friendly”. Reservations were expressed about the appropriateness of the new design for older people, “they are not really very comfortable if you are older because they haven’t got seats on them basically” (local board representative B1). Walking interview participants also commented unfavourably on the style of toilet seat, “the loos have got that awful business where there’s a thin sort of round of wood on top of, it’s disgusting” (Diana, 79). There was a perception older peoples’ needs were not being adequately considered when designing public toilets as expressed in the following comment:

> *I think that’s one thing the Auckland Council could possibly get its head around a little bit more, because we do have an ageing demographic and public toilets are quite important. (Local board representative B1)*

Additionally, some survey respondents and walking interview participants were concerned the main public toilets were not well designed for wheelchairs and mobility scooters. In contrast, Bob (89) indicated the separate toilet, dedicated for people with disabilities, was easy to use on his mobility scooter, “the one that I use, the mobility one is excellent”. Bob’s expertise

using a scooter and his positive attitude were factors that may influence his experience. Again, the diversity of experiences highlighted the importance of understanding unique situational and contextual factors consistent with a transactional perspective.

To participate in the community, it was essential for older people to be able to physically get in and out of buildings (WHO, 2007). While almost two-thirds of the survey respondents agreed (53.7%) or strongly agreed (11.3%) with the statement "community buildings and facilities are well-maintained and accessible to people of different physical abilities", walking interview participant's perceptions and actual experiences added more context and explanation on building usability. Some community buildings were observed to have well designed separate wheelchair access; however, access was only available by prior arrangement as pointed out by Eva (82), "here is the town hall, you see, two steps, I have to make an appointment so they can open the door there". While this may meet the standard for building access, having to make prior arrangements for the door to be opened in advance was perceived by Eva to emphasise her dependence.

Equally, walking interview participants pointed out buildings with integrated usability that promoted independence, "you see this is the community rooms for the Bridge Club and they do have a ramp and steps" (Frances, 75). Walking interview participants pointed out the ramp was sufficiently long to be usable for self-propelled wheelchairs. Similarly, Bob (89) pointed out the ramps to the hospice shop in town he could use independently. Interview participants and survey respondents provided many suggestions for improving usability appropriate for all levels of mobility such as more ramps into buildings, more handrails for support, and better wheelchair access into some buildings. These findings suggested that by *being present* participants took an active interest and monitored the physical environment. They were not merely assessing accessibility but more importantly, the usability. This active custodianship extended to the usability of retail and services in the town. Retail and service operators similarly commented on how restricted space in their buildings impacted on usability and disadvantaged older mobility scooter users.

> *We have a few customers with mobility scooters. Most of them don't bring them into the library. They will park them out the front because, you know, our library it hasn't really got big wide comfortable aisles, it's too small now. So no, it's not ideally set up for, certainly not for mobility scooters. (Retail/service operator B3)*

The first sub-theme has captured the pattern of community custodianship participants had for their local town environment. The care and consideration they expressed extended beyond their own usability needs to include those of older people they perceived to need more

support. The next sub-theme encompasses the negotiation and renegotiation participants enacted in everyday transactions in a continually changing environment.

## Continuity and Everyday Inquiries

The everyday transactions of older people in their environment are central to understanding age-friendliness. It was evident survey respondents and walking interview participants were continually negotiating changes in their individual capabilities and in their environment. Subtle changes in individual capabilities and/or changes in the environment had the potential to interrupt the determinate situation. Equally, indeterminate situations may arise from a new awareness of the situation or perceiving the situation in a different way. The walking interviews allowed discussion of participant's experiences and it was possible to witness some of the negotiations they undertook.

The possibility of a future without a car was carefully considered. Being heavily reliant on driving as a main form of transport, many recognised their lives would change without a car. The following excerpt exemplifies how survey respondents and walking interview participants were thinking about future situations, indicating they were continually looking into the future.

> *My husband and I are both reasonably fit and still driving; if we could not, life would be difficult; although the new bus services and online grocery shopping are very good moves for those who are less mobile, and we may need them in future. (Survey respondent)*

Although, as displayed in Table 1, the majority of walking interview participants rated their health as good, most lived with changing physical and/or sensory function. These functional changes included reduced balance, unstable knee joints, lower limb dysfunction, hearing impairment, and shortness of breath on exertion. Functional capabilities were integral to walking interview participant's everyday transactions in the environment and were revealed during walking interviews.

Previous experience acquired from being in the physical environment informed walking interview participant's mobility patterns. For example, those reliant on mobility scooters planned their routes around town to avoid known obstacles. Eva (82) led me around the town on her usual route on her mobility scooter. During the walking interview we encountered an empty supermarket trolley completely obstructing the footpath. In this particular situation, I was able to remove the trolley to allow Eva to pass. However, Eva regularly encountered supermarket trolleys obstructing footpaths and had recently almost tipped over onto the road in her mobility scooter while attempting to avoid a misplaced trolley. This highly disturbing experience had heightened Eva's awareness of abandoned supermarket trolleys obstructing

footpaths. Eva had made a complaint to the supermarket in the hope of improving the situation. In thinking about a solution to the misplaced trolleys, Eva wondered if a coin-operated system she had seen overseas might provide an incentive to return trolleys to the trolley bays, "you have to put a thing on the trolleys where they have to put a dollar in and if they bring it back". The above illustrates how everyday inquiries are undertaken in striving to improve situations.

Complex contextual factors influenced participant's transactions in their environment. It was evident that social, historical, and cultural factors were integral to Eva's everyday experience. Eva and her husband had lived through the Second World War in Europe. The loud sirens, frequently activated to alert local emergency services of incidents and accidents, rekindled historic distress.

> *Now when I go out and the alarm goes off, oh my goodness he [husband] walks to town to see if I am alright … goes so many times and we were used to in the war, in the Second World War, we're still not used to it. (Eva, 82)*

Although Eva was empathetic towards her husband's heightened anxiety and understood it was related to his increasing frailty, she had persevered in making her trips into town for her own sense of well-being and autonomy. Anticipating the hazardous areas of the physical environment, Eva prompted me throughout the walk to stand on a particular side of her scooter and indicated when we should cross the roads.

> *We go now to the other side … and we go to the left … I cannot see the traffic, so I go always on this side … and then I go up here by the round-a-bout and go back here. But you cannot cross the street here also … But if I go on that side, I cannot see the cars coming from there … Because I can go on the other side but there is no footpath to get over the other side … I try everything. (Eva, 82)*

Eva expressed a sense of control and appreciation of keeping safe by following a familiar route, "I never go further because I don't know where to go and I have to be careful". While most of the walking interview participants felt confident walking and were able to respond to footpath obstructions, they pointed out a variety of obstructions and empathised with less mobile older people.

Planning for anticipated indeterminate situations was necessary for continuity of autonomy and agency. Sometimes this involved arranging help at the destination. Bob, reliant on his mobility scooter, was determined to get himself to local appointments. Thoughtful planning and requesting timely assistance enabled him to continue being independent.

> *I take my wheelchair and I fold it up and then I can wheel it beside my scooter until I get up there or I ring [name of service operator] and say come and meet me, and he comes down and meets me and he pushes us up there. (Bob, 89)*

Similarly, Eva was determined to continue getting herself to shops where she could choose the necessary craft supplies for her handcraft projects. Many shops Eva visited had limited space to accommodate mobility scooters, compelling her to shop from the doorways. Although not ideal, the attentive, personal support Eva received from retailers, with whom Eva had established relationships, mitigated some of the challenges she encountered in the physical environment.

Everyday determinate situations could quickly become indeterminate by fluctuating capabilities. Linda had always been physically active but explained a weakness had developed in one of her knees, "I've got a wonky knee and it depends how it is … it's just got, last six months, really difficult. But you see I can walk, I can manage, so you just adapt, you just change" (Linda, 78). Linda was prepared for her knee to give way at any time, "I've always got a walking stick with me, which is in my backpack" (Linda, 78). She talked about how her contemporaries associated mobility devices with old age disability, "I think, blow the looking old, I want to be safe" (Linda, 78). I was able to observe Linda's distinct zig zag way of walking down her steep driveway; a technique developed to accommodate the weakness in her knee. "I've got it all sussed, if it's alright I can go straight up, if not I go diagonal" (Linda, 78). Linda's positive attitude and refusal to allow her physical disability to restrict her activity motivated her to try different ways of getting up and down her steep driveway; thereby, maintaining the determinate situation. Linda constantly modified her walking style in response to how her knee was feeling. The transaction was different every time; therefore, knowledge gained from Linda's transaction with her environment was always tentative. Linda's situation provided a deeper understanding of how knowledge gained in everyday transactions in the constantly changing context could only ever be warranted assertions.

Marion (78) had recently recovered from an acute illness and was intensely aware of taking care as she walked. She alternated by watching her feet and checking what was ahead on the footpath as she walked, "after being sick, I was more mindful of what was happening and where I'm walking … because I have fallen over in various places, I tend to look down to see where I'm walking". Marion's chronic lung condition meant walking uphill exacerbated her shortness of breath. She spoke of an alternative to walking up a particularly steep street, "I cheat, I go so far, go into the car park, press the lift and miss the second part". To moderate the effects of her changing physical capabilities and continue her usual walking routine,

Marion had investigated options for going up the hill and made use of an existing feature in the physical environment. In this way an indeterminate situation was made determinate. In the following quote Marion has alluded to the use of her own thinking processes and actions in undertaking this everyday inquiry. “I think a lot of it is down to being mindful yourself. If there’s something that can be done, so well and good” (Marion, 78). These contextual factors associated with Marion’s health and her past experiences were integral to her transactions in the environment.

Walking interview participants were cognoscente of serious injuries from accidents friends had sustained. Fear of falling and the potentially devastating consequences influenced Jane’s cautious approach in riding her bicycle on local footpaths at times when few people were about.

> *I go on the footpath because I’m scared stiff I’m going to get knocked over, when you get this old, you break a hip, it’s good night nurse within a year usually, so I ride either in the early evening or on Sunday afternoons. (Jane, 75)*

The steep driveway up to Sally’s home was a consideration for the future which Sally drolly pointed out “takes 135 steps to go down and 95 steps to come up” (Sally, 87). Sally constantly monitored the impact of seasonal variations in conditions in her environment and took a cautious approach, “I’m quite wary coming down when it’s been wet and it’s been raining” (Sally, 87). Negotiation of these changing conditions enabled Sally to continue her walking and maintain her connection to the town.

## Shopping and Accessing Services Locally

Shopping and accessing services locally relied on being able to get around the town. The majority of the face-to-face interviews with retailers and service operators were undertaken in their business premises; thus, it was possible to observe and experience the physical spaces used by their customers and clients. These observations were further contextualised by perceptions and experiences of walking interview participants. Most of the business and service operators lived locally; therefore, their perspectives drew on both personal and business experiences of the accessibility and usability of their businesses and services and of the town more generally. Survey respondents and interview participants shopped and accessed services in the town regularly. These activities were central to *being present* in the local community. Shopping locally offered mutual benefits to older people and the local businesses and services they accessed. On one hand, local businesses and services supported older people to age in their community by providing necessary goods and services. On the

other hand, older peoples' patronage supported local business and service sustainability, which in turn, contributed to the economic viability of the town.

It was evident the town centre was an important hub for older people to meet, utilise retail and services, socialise, and share information. Walking interview participants expressed a preference for shopping in person as it provided the opportunity to be out and about in the town. Informal relationships with local business and service operators had been established over the years from being present in the town, "the old ones know you, the chemist, hairdressers, everyone knows me" (Jack, 71). Retailers and service operators also noted older peoples' preference for shopping in person and reflected on their desire to be independent, "you do find that the older demographic do want to come into the store. They actually want to get out and they want to be as independent as they can, for as long as they can" (retail/service operator B9). Furthermore, *being present* as a local person in this community provided informal networking prospects during shopping trips and using services. The large presence of older people in the local community was recognised as explained by Sally (87), "it is already, I feel, aged here. If you look around, you'll see more aged people than most, because its' an old established area".

The social aspects of shopping were considered integral to maintaining the small-town connections. Social connections between retailers and customers were often established and maintained over many years as suggested by this retailer:

> *… some of them I've known an awful long time. We get our regulars coming in often just for a chat and a browse. It's all part of the town network, I think. People come in, the older ones, they go into shops where they know people and have a chat and wander on … it's a bit of a social thing for a lot of them. (Retail/service operator B15)*

Many of the walking interview participants expressed loyalty to retail brands locally owned and operated. Likewise, many of the retail and service staff were local people and had been present for many years so they knew a lot of their customers and had good rapport with them, "there is a special bonding with the customers" (retail/service operator B10). The experience of shopping was enhanced by these relationships formed over many years and the kindness and helpfulness of familiar staff, some of whom were friends.

> *The checkout operators know a lot of the customers because they come in. Some customers will actually stand behind queues to wait to go through specific operators because they like them and things like that. We are part of the community. (Retail/service operator B9)*

Friendliness and the associated rapport between staff and their customers was perceived to be part of an established culture in the town and extended to newcomers and visitors to the town.

> *They [staff] get on very well with them. A lot of them have known them for a very long time. The new people who come to the area are therefore welcomed and feel really accepted because we obviously have staff here who have been here for so long that they know all of these elderly people and they are very accustomed to dealing with elderly people. (Retail/service operator B2)*

Customer service largely exceeded walking interview participant's expectations, "the shops are super good, everybody tries hard to help" (Frances, 75). This high level of satisfaction was corroborated by survey respondents. In response to the survey statement "local business and service staff are courteous and helpful", 39.6% of respondents strongly agreed and 53% agreed. An exception to the high level of retail service satisfaction expressed related to a situation where there was a perceived lack of understanding of the needs of an older person with cognitive impairment.

> *I did witness something one day that I thought they didn't understand that this person had a form of dementia. They should have picked it, you know, he was having trouble paying for something for his wife and I could pick it, but I didn't like to interfere. (Maude, 80)*

Maude's previous experience as a community support worker enabled her to recognise the difficulty this older person was having in expressing himself.

Walking interview participants preferred to shop where they were likely to encounter people they knew. Shopping for groceries at one or other of the local supermarkets in the town was a regular shopping trip and provided impromptu opportunities to socialise. "You'd think that we are the community meeting place. People will come and meet people here" (retail/service operator B9). Staff at one of the supermarkets regularly had to encourage older people to move to the ends of the aisles to continue their conversation to avoid congestion. A cafe at the entrance of this supermarket provided further opportunities for social interaction while shopping.

The local public library, information centre, and Auckland Council Service Centre shared the same building and provided a central hub of services frequently used by older people. This hub, situated near the main street, was highlighted by many walking interview participants as a central focal point in the local community. It was understood that older people typically preferred to physically go and pay their rates bills at the Auckland Council Service Centre.

Further, being able to talk face-to-face about matters related to the council, as a first point of contact, was highly valued. Other retail stores and public services such as the banks, the post shop, and supermarkets were also conveniently located in the main commercial area of the town. The range of essential services provided by the post shop, on behalf of various utilities and banking institutions, enabled older people to access these services locally , “they can do some of their bill payments like phone bills and water bills and their rates and all those things and SKY bills” (retail/service operator B10).

Shopping locally was particularly important to participants who were non-drivers. Bob (89) and his wife had recently moved from a large block of land out of town into one of the retirement apartments in the centre of town. Bob relied on a mobility scooter to mobilise around town. Where before he had relied on his wife to drive him into town, he now found he was able to shop by himself. Bob’s wife expressed her amazement at the change in her husband’s level of independence and local involvement now they were living in the centre of town.

> *For 21 years I took him to the doctor, the dentist, your hearing appointments and for you going shopping for groceries, well you never did that, but now he does all of that on his own. Goes and gets his prescription. (Jane, 75)*

Bob usually encountered people he knew from his long association in various community roles while out and about shopping and doing business around town. Similarly, other participants indicated they had developed their own unique habits that enabled continuation of valued retail and service activity, “what I usually do is I walk into town and if I’m going to the supermarket or the library and I’ve got heavy things then I ring my husband and he comes and gets me” (Frances, 75).

Maude waved out to a minivan full of residents from her retirement village on the regular shopping run and explained, “Thursday’s the day when you go [shopping], they take you, they just go to [supermarket] and I think they’re about an hour or an hour and a half. It’s a good service for those that don’t drive” (Maude, 80). This transport option enabled the retirement village residents to do their regular shopping. One of the retailers described how groups of retirement village residents regularly visited her shop and socialised with each other and with the staff during these excursions.

Most of the walking interview participants had continued to do a lot of their shopping locally. Some shopped out of town when it was convenient to combine shopping with other out of town activities. Although shopping locally was preferred by many participants, affordability was identified as a factor in determining where they shopped, especially for those who had to

be discretionary with their spending. The weekly specials mailer from the supermarkets influenced shopping decisions, “on Monday morning, I look up all the specials in the supermarket” (Frances, 75). Despite awareness of lower prices in bigger centres, Diana (79) indicated a preference for the local shopping experience, “I prefer to shop in Warkworth even if it might be more expensive”. Only a minority of participants had shopped online when shopping for specific products such as clothing and shoes not available locally. More recent online ordering systems such as the supermarket ‘Click and Collect’ service had been considered. Frances (75) wondered if online shopping would increase older people’s sense of isolation. She could see benefits of the supermarket ‘Click and Collect’ scheme but preferred to go shopping for the social experience. One retail operator suggested online shopping was less important for older people and shopping in person provided social advantages, “for most of them ordering online, they just wouldn’t want to go near it. They want to go and shop” (retail/service operator B4).

Although retailers appreciated the continued patronage of older customers, some were concerned the lack of local retail and service opportunities to attract younger people could potentially have a negative impact on the sustainability of their businesses, “we haven’t got the right combination of businesses in Warkworth” (retail/service operator B10). In turn, the sustainability of local businesses was important for older people who relied on a range of local retail and services to support ageing in place. It was perceived younger people were more inclined to shop at the bigger shopping centres and malls in the city or online because local shops lacked the range of goods, “I think the place could do with some more retail shops … with the likes of home wares, somewhere to buy some bedsheets and kitchen goods and things like that” (retail/service operator B6). On the other hand, retail and service operators recognised larger centres also provided retail and entertainment opportunities more attractive to young people.

> *I think for them (young people), it’s part of a social thing of getting out of Warkworth as well … and it’s a treat to go and wander around the malls and have coffees and so on. Whereas some of the older ones just hate that. (Retail/service operator B15)*

Some retailers were optimistic that as the town’s population increased there would be more business opportunities to sustain the town.

> *I think as Warkworth grows, including and having all these people living in the middle of Warkworth, will inevitably have an impact and hopefully a positive one on the sorts of services that are available … a lot of the businesses have traditionally been a lifestyle more than a go get um kind of business. So, you would hope that as people come into Warkworth, a lot of*

> *the things that are needed will be developed as small businesses.*
> *(Retail/service operator B4)*

The proliferation of second-hand goods shops, commonly referred to as 'op shops' [opportunity shops] by the participants, had become a recent trend in the town. The 'op shops' were run mainly by local retired people and provided increased opportunities for older people in the town to volunteer and socialise. Many of the walking interview participants pointed out the 'op shops' as we walked around the town. "I always look in the op shops … there's about five" (Frances, 75). Bill (73) pointed out one of the large second-hand shops where he planned to look for some fishing equipment on his way home. The store attracted a lot of people both local and from out of town. As we stood nearby, the large outside courtyard area in front of the shop was crowded with mostly older people looking around the merchandise and socialising.

## Chapter Summary

While *being present* in the local town centre for shopping, accessing services, and socialising, participants closely monitored the quality and usability of the physical, social, and service environments for themselves and others. Participants' experiences of being present in the town revealed attitudes of custodianship, associated with a deep attachment and care for their town. Dewey's transactional perspective was especially useful in making sense of the everyday inquires participants were undertaking and their negotiation and renegotiation of the constantly changing environment. Data from the multiple sources suggest older people living in the Warkworth area regularly utilised a wide range of retail establishments and services in their local town with reciprocal benefits. Local businesses provided essential goods and services that supported ageing in the community, in turn, older people's patronage was valued by local retail and service operators. Survey respondents and walking interview participants emphasised priorities and opportunities to enhance the physical, social, and service environments for themselves currently, their future selves and other older people ageing in their community.

# Chapter 8. Being Involved

## Introduction

In this chapter, the third theme *being involved* is presented as an age-friendly attribute. The three associated sub-themes represent factors associated with involvement at the local community level. *Participating locally* encompasses the wide scope for participation in this rural community. *Acquiring information* encapsulates the central importance of having access to information to *being involved* in the local community. *Feeling valued and respected* portrays local perceptions and experiences concerning older people being valued, respected, and included in the local community.

## Participating Locally

Survey respondents and walking interview participants identified many ways they could participate in the town "there is something for everyone in this community" (survey respondent). Nearly all survey respondents strongly agreed (46.5%) or agreed (41.1%) with the statement "there is a wide range of activities and groups I can join". Similarly, satisfaction with level of involvement was high. Almost all survey respondents strongly agreed (50.5%) or agreed (42.2%) with the statement "I am involved in my neighbourhood or community in the ways I want to be". Although there was high satisfaction, survey respondents suggested areas for improvement. The main priority identified was increasing social participation opportunities for older people with physical disabilities, cognitive impairment and those experiencing social isolation.

Strong support for a local swimming pool and leisure centre where people of all ages could meet and exercise was identified from survey responses and the walking interviews. Many of the written survey comments focused on the health benefits and the value of water as a medium for the gentle exercises older people were more capable of performing, "I would like a public heated pool for exercise for older people" (survey respondent). Similarly, several walking interview participants indicated their interest in swimming for exercise. Although the need for a public aquatic and leisure centre was identified, it was not justified by the current population modelling. In a recent community assessment report, Auckland Council recognised there would be increased demand for a leisure centre as the population grows, stating, "provision of additional aquatic space may be required in the medium-term to serve Warkworth (and the surrounding area)" (Ennor, 2019, p. 3). The distance to the nearest public swimming pool in Whangaparāoa (37 km) was at the upper limit of the local council's

guidelines. Distance to venues was highlighted by survey respondents and walking interview participants as an important consideration for older people in attending activities.

There were differing perspectives on how established groups were able to support new members. Well known and established groups such as the Bridge Club and the University of the Third Age (U3A) encouraged new membership. Diana (79) explained the Bridge Club provided a supportive environment where new members could learn Bridge from experienced members during dedicated beginner's evenings, "the local club has done quite a lot with having lessons and things and having a night for the beginner people who are slower, someone to help if necessary. It's a great game". Similarly, U3A welcomed new members. Special interest groups evolved within U3A providing a range of learning and knowledge sharing opportunities as explained by Sally.

> *In Warkworth we have groups, you join groups, whatever you are interested in. Like I had a Shakespeare group for a while, I wanted to read Shakespeare. [Husband's name] and I go to a music group, and there's history groups and local history and ancient history, oh all sorts of stuff, current affairs group … it's really good, it keeps your brain going … because you meet in people's houses and one person presents so it means that you've got to do a presentation every now and then and it's really good. (Sally, 87)*

Some established groups needed more members "all groups are always hunting for new members" (survey respondent). However, some participants perceived not all older people had the time or energy to be involved in groups.

The social environment was constantly changing with many groups having started organically from local interest in a bottom-up manner. While some groups had experienced waning membership, other initiatives had flourished. The local board were not directly involved in establishing community groups; however, they indicated interest in supporting local community-led initiatives, "we have a lot of capacity in the community that quite happily run those themselves, whether they be exercise classes or U3A or knitting groups or book clubs" (local board representative B1). The Warkworth Men's Shed had recently been established and had held the official opening on 25 May 2019 ("Men's Shed opens its doors for business," 2019). The following excerpt explains how this initiative had been facilitated by the local board by connecting several local people interested in starting a Men's Shed.

> *I had had approaches from different directions about starting a Men's Shed, I'd had various people and as a result of putting them in touch with each other, it got off the ground … the other thing they asked was did I know of any council buildings or any sheds or anything anywhere and I actually thought of that shed up at the A & P Society [Agricultural and Pastoral] … so*

> *I said "go and talk to the A & P Society" which they did and low and behold they've started. So, I'm really pleased to see it. And for all of that, it hasn't actually cost the local board anything to get them going other than just making the connections and putting them in touch with people and helping them with the venue. (Local board representative B1)*

The Men's Shed movement has been recognised as age-friendly particularly in fostering social participation and increasingly providing skills training, information, and health promotional activities to members (MENZSHED New Zealand, n.d.). A main strength of the Warkworth Men's Shed was the opportunity for local people at a similar life stage to connect and experience the camaraderie of others while gaining a sense of purpose. The following quote illustrates how the Men's Shed provided purposeful occupation and a place to go that was away from home.

> *I'm so passionate about The Men's Shed because that's such a massive need for mainly guys but not solely for guys, but you know they've retired, they've probably moved to a smaller place, they don't have a workshop anymore, they can't keep their tools anywhere and so they sit there under mum's feet. So, mum loses her space, he doesn't have any space so it's actually come to be recognised recently. (Philip, 74)*

Members brought a wide range of life and occupational skills including manual skills, administration, and leadership skills to the Men's Shed. Since the Men's Shed had opened, the Mahurangi Community Trading Post, a second-hand goods store in Warkworth, had donated a substantial amount of funds to the Men's Shed. In return, the Men's Shed had undertaken ongoing work in restoring and adding value to goods donated to the Mahurangi Community Trading Post, and making shelving for the store. This cooperative and reciprocal relationship had been advantageous to the two organisations and to the local community. The local newspaper had recently reported on benefits of these cooperative ventures to the community stating, "this has meant goods can be sold at higher prices, raising more money for the community" ("Trading Post raises $100,000," 2019 p. 11). The Men's Shed had fostered further partnerships in the local community including working with the local library to construct a glazed information noticeboard for outside the library building ("Library provides spot for groups," 2020) and working with local primary school students to design and build little libraries, miniature constructions where books are placed for other children to read ("School 'little library' project boosts reading opportunities," 2019). These collaborative partnerships built on existing strengths in the community and contributed to the age-friendliness with intergenerational involvement, respect and sharing of knowledge and skills at a local level.

Local groups required community-based venues that were fit for purpose. Survey respondents were satisfied with the location of local venues evidenced by the responses to the statement

"activities and events are held in locations that are accessible to me". Three quarters of respondents strongly agreed (24.6%) or agreed (53.2%). Walking interview participants expressed more concern about the size of local community buildings in meeting current and future capacity considering the forecasted growth in population. Maude (80) indicated a group that provided social interaction and activities for older people with disabilities and mild cognitive impairment had struggled to meet the local demand, “we’ve only got a small hall so we have a waiting list of people, we can only cater for so many because otherwise there’s not room for exercising”. Despite the increased capacity provided by the recently renovated and extended local Town Hall, several participants thought a multi-purpose civic centre was needed for the wider community. This idea had been advanced by a local faith-based organisation in planning a meeting space for community groups in their new development, “part of it would be like a community house, which is what Warkworth needs … where people can meet and gather” (retail/service operator B16M).

Cost of hiring local council managed community buildings was identified by some participants. Phillip (74) expressed dissatisfaction with the increased cost of hiring council buildings for local meetings, “they’ve become very expensive because the council has upped its rental rates for most of the public facilities here. Like if you go over three hours, they bill you three hundred dollars for commercial cleaning”. The local council had recognised the potential barrier from hire fees and had indicated willingness to exercise some discretion and flexibility, “if it’s a non-profit organisation we generally halve or waive hire fees” (local board representative B1). Helen explained there were other local venue options, such as the RSA building and the Bowling Club rooms, where larger spaces were available for groups to hire for functions:

> *The bowling clubs got quite a good public area and actually a very good commercial kitchen and you know, if you’re running something, like a dinner for 50 or 60 people, which I do every now and then, that’s actually the only venue in Warkworth that can cope with that number. (Helen, 80)*

Lack of transport to activities and events has been identified as a barrier to older people’s social participation (Neville, Adams, Napier, Shannon, et al., 2018). Informal transport assistance was offered by some organisations to facilitate older peoples’ attendance at regular events. This was recognised as especially important for older people who may be at risk of social isolation and would otherwise be unable to attend local activities and events, “we don’t want to be providing transport for everybody but if it means that somebody can’t come because they don’t have transport well, we’ll help out” (Maude, 80). However, there was a cautious approach to informal transport, “we’ve obviously got to be careful because we are not a transport service and haven’t got P endorsements and all that sort of stuff”

(retail/service operator B11). These findings indicated more transport support may be needed to facilitate local social involvement.

Interview participants understood the value of continuing to be involved in the mainstream community. Maude (80) was living in a local retirement village and had continued to be involved in the wider community, "I'm still involved with outside things, like it would be easy to immerse yourself totally in the [retirement] village but I still like to be part of outside". As one of the service operators noted, having previously lived in the Warkworth area made it easier to continue local community involvement, "a lot of the people coming in here they already belong to the Bridge Club, they already belong to the U3A, they already do this, they already do that and they just continue, there's no change for them" (retail/service operator B4). Becoming involved in local community groups was perceived to be more difficult for older people less connected in the community.

> *… it's not that easy because you might not know anyone who knows any of those places. If you've got a friend who says, "I belong to this, I'll take you along", that's different but if you're on your own then you're having to go through the [information about clubs and groups] up at the library, you have to go through those and then you've got to ring them up and get the times and the days. (Frances, 75)*

Not all participants were actively involved in local groups. *Participating locally* also encompassed the socialising that frequently occurred in a spontaneous way during routine activities. Many participants perceived the town to be a friendly place and being out and about was central to participating in the community. Participating in the town included spending time sitting on public seating in the main street watching people go by.

> *We've got a seat there and a tree … I notice a lot of people sitting especially further down Queens Street … a lot of people sit there, I have once or twice sat there myself watching or they've got a coffee from [café] and a cookie, something like that which is really good. (Mary, 77)*

Jack found sitting outside a local café in the main street was ideal for talking to local people as they passed by. Jack elected to meet me at his favoured café before the walking interview. I observed the casual encounters and rapport he had with local people as we sat outside, and this continued as we walked along the main street.

> *I normally come here [name of café] and have a coffee, first thing or I'll go shopping, go to the bank, um yeah that's about it, oh I go to the op shops, the second-hand shops, have a look. Yeah, most of the time it's just come into town because I'm bored at home, it something, y'know, a bit of company, find a bit of company in town and talk … after 20 years people get to know you. (Jack, 71)*

Jack took an active interest in the town and enjoyed talking to other local people about topical issues and changes in the town. However, not all older people would share Jack's ease in sitting outside a café on their own. The need for local public places where older people felt comfortable spending time and socialising in an informal way was identified. This was considered especially important for those at risk of social isolation and/or new to the area as expressed by one of the survey respondents, "I would like to see an area with a name like 'the chat room' where people who are new to the area, lonely or just wanting a rest could meet up".

Survey respondents, walking interview participants and service operators mostly agreed Warkworth lacked a dedicated community centre where communal social spaces were often found. One of the local faith-based organisations had identified the need for a community space where older people less socially connected or new to the area could gather for informal socialising. They were planning to incorporate such a meeting space into their new building plans.

> *We're hoping in the next two years to build a new church and community centre and part of that we see as becoming a community centre where people can meet and gather because I think in Warkworth there isn't really too many places where, you know, where do you go if you want to just be part of community. I mean there's lots of coffee shops and schools and activity things … but apart from the pub or the RSA there is no other gathering spot. And there's not even a shopping mall where there're food halls or things like that. So, we're hoping that might be able to fill a need, a gap there. (Retail/service operator B16M)*

Social isolation in the older population was recognised by many participants. Having social spaces for older people at risk of social isolation to meet informally was considered important for promoting well-being, "that's where I think a drop-in centre is brilliant because they've got that to look forward to" (retail/service operator B16). Similarly, the library service aspired to creating an inclusive social environment congruent with priorities identified by many participants.

> *… one of the things that would be so lovely to have is kind of like a little living room area where you could have arm chairs and the paper and the magazines and maybe even a coffee machine or something like that where people could come in and just sit and relax and not feel they were in someone's way. (Retail/service operator B3)*

Being one of the few services open over weekends, the public library filled an important social gap as explained by this service operator, "we try to be very much a community hub and we try to get people into the building by programmes and events and any sort of help we can give

… we are open seven days" (retail/service operator B3). Similarly, one of the survey respondents commented on the library's scope in providing learning and support for diverse needs, "hopefully be a catalyst for the socially deprived/lonely who need to feel safe and comfortable about undertaking something new/different" (survey respondent).

Despite the important social space the library provided, there was wide agreement on the lack of physical space within the library building. A survey respondent's comment indicated the library space was no longer adequate, "the library is much too small and impossible in a wheelchair". Likewise, a bigger library space was identified as a priority by many survey respondents and interview participants, "Warkworth library needs to be bigger to accommodate the wide range of services it provides and to make a more pleasant environment" (survey respondent). Library related group activities were often held in the old Masonic Hall. Although close to the library, the old hall was considered cold and draughty in the winter by library staff.

Regular patterns of socialising were considered important for the sense of belonging associated with ageing in the community. Helen felt comfortable going along to one of the local restaurants on her own as a single person. She explained how she usually met someone she knew, and the staff were consistently welcoming.

> *I have no hesitation about going in there by myself for a meal if I'm in Warkworth for something and don't want to go home before I do what I'm going to do, I quite often go in there by myself … because you nearly always see someone you know. Um, I guess it's the attitude of the staff or probably straight out for me, straight out familiarity. (Helen, 80)*

Some participants were pursuing new social connections. Bill (73) had joined a singing group located at one of the local retirement villages. He expressed disappointment that the group dispersed soon after the singing sessions finished with little opportunity to socialise informally. For Bill, the appeal of being part of a group extended beyond interest in the activity to meeting and socialising with people who shared similar interests. In a similar way, the Returned and Services Association (RSA) provided an important social function for older people seeking companionship with their contemporaries. Opportunities for socialising locally were especially important for older people ageing in the community with smaller social networks and no close family support, "I think a lot of them if they didn't come to the club would be fairly isolated. A lot of them don't see their families too often. They've retired up here and they've moved away from their families" (retail/service operator B11).

Voluntary work was another way participants were involved in the local community. Several of the walking interview participants volunteered for more than one organisation and in a variety of roles.

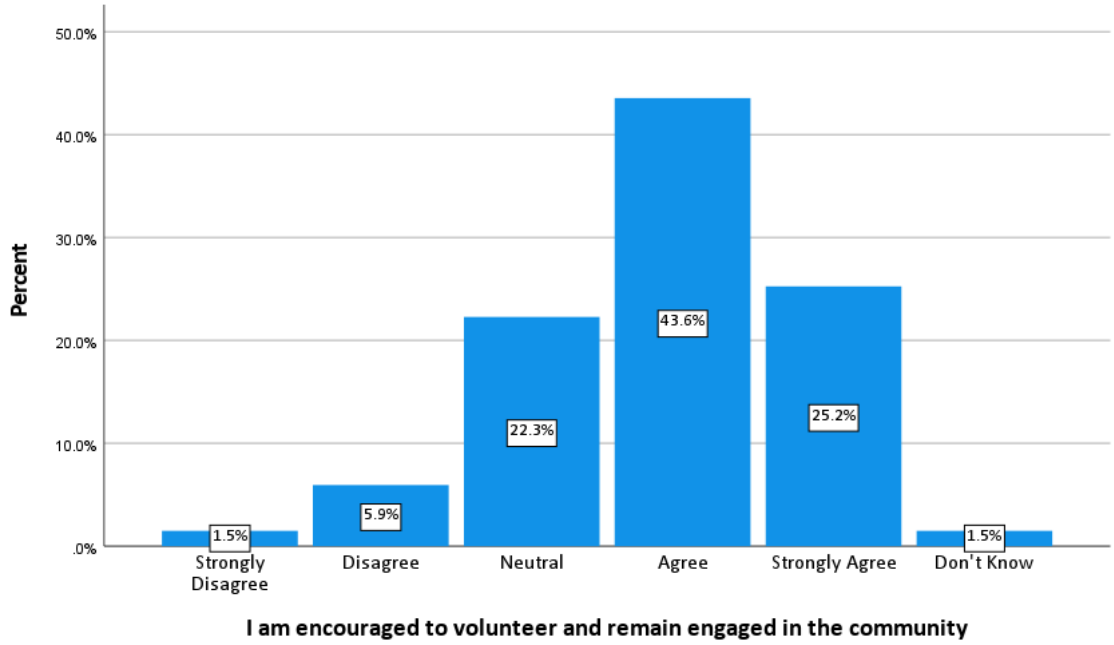
> *I've just ended my term as chairman of the Warkworth Civil Defence Group which I was chairman for seven years but I'm still a member of the group … I'm now into The Men's Shed in a big way … I am on the committee of U3A. (Philip, 74)*

Volunteering was identified as an effective way to meet people especially when new to the local area. "I joined [hospice shop] because we were fairly new to the district, and I wanted to be able to meet people and make myself useful" (service volunteer B12V3). Volunteering was understood to provide meaningful occupation and opportunities to be amongst people. As Eva (82) indicated, some voluntary work was less socially oriented but still provided a sense of purpose. "I make a lot for the children's hospital in Auckland, blankets and so on".

There was an opportunity to improve volunteer opportunities in the town. Although over two-thirds of survey respondents strongly agreed (25.2%) or agreed (43.6%) with the statement "I am encouraged to volunteer and remain engaged in the community", almost a quarter of respondents (22.3%) were neutral (Figure 14). This finding may indicate there was unrealised volunteer capacity in the community and more information about volunteering opportunities may be needed. Written comments from survey respondents indicated it was not always straightforward for newcomers to take up local volunteer roles, "I am new to the community and wish to volunteer but not that easy" (survey respondent). These findings suggest further potential to coordinate local volunteer opportunities and to explore older people's preferences. This might involve understanding prospective volunteer's capabilities and resources to ensure there was a good fit with the volunteer roles.

**Figure 14**

*Survey Response to "I am encouraged to volunteer and remain engaged in the community" by Percentage*




Walking interview participants talked about their capacity to be involved in voluntary work currently as well as in the future. Linda explained she had recently stepped down from a long term voluntary position because of her physical condition and was looking for a more suitable volunteer role, "I will have to relook at stuff I do, reassess what I am physically capable of" (Linda, 78). Survey respondents suggested advertising volunteer roles in the local newspaper as a useful way to recruit older people. The local library team had similarly identified the need to promote local groups and facilitate volunteering opportunities and were planning a community information day.

> *Next month we are having like a clubs and societies and groups day in the hall … and we're going to get all the local people who run things to come along and just tell everyone about what they do. (Retail/service operator B3)*

The information day was advertised across the area in the local media and through the network of groups including on Facebook and community noticeboards. One of the walking interview participants had received information about this event via a group she was involved with and was looking forward to attending to review volunteer opportunities.

Some local services provided volunteer opportunities and coordinated the various roles as explained by one of the service operators, "we've got three vehicles here. People can either book them to take them down themselves or we've got volunteers that'll drive them down for

hospital visits and stuff like that" (retail/service operator B11). Personal circumstances and particular times of the year presented challenges to volunteer capacity as explained by one of the local volunteers.

> *I think we could definitely do with more volunteers … we have a lot of the older volunteers who perhaps like to take overseas holidays during the winter and then we have child minders. The school children need looking after during school holidays so we need to have extra volunteers to cover that and when there's the usual coughs and colds going around it can be rather challenging to find enough volunteers for both the shops and for the sorting. (Service volunteer B12 V4)*

Building volunteer capacity was identified as one of the goals for the local Information Centre. The centre had recently revised the scope to provide more information for local residents. Currently the centre only operated on weekdays; however, the new administration planned to extend opening hours to include weekends once they had increased volunteer capacity of people with knowledge of the local area (Chapman, 2019).

Paid employment was another way older people had maintained their involvement in the local community. While the majority of walking interview participants were retired from the workforce, some like Jane (73), were still working either as paid employees or on their own lifestyle blocks or farms. "I go out to the farm and I'm working on the farm. I've got 30 acres". Being in paid employment offered opportunities to broaden social networks. Helen worked fulltime and found it highly satisfying, "it's wonderful and I like meeting people" (Helen, 80). Many of the local retail and service operators employed older people and recognised the importance of occupation in *being involved* for some older people*,* "the oldest person working with us is in their mid to late 70s … one of the guys, he joined us at the end of last year, he had retired, he said he just needed to get out and do something" (retail/service operator B9). Further, some of the retail and service operators stated they valued the local connections older employees had and their care and empathy in serving older customers, "most of our supervisors are older, more mature people and can deal with it if they [older people] forget their PIN number or whatever at the front" (retail/service operator B2). One of the operators was in the same age category as a lot of her customers and perceived she had aged alongside her customers, "well I'm 70 and I'm still working as hard as I did when I was 50. I'm one of the elderly" (retail/service operator B15).

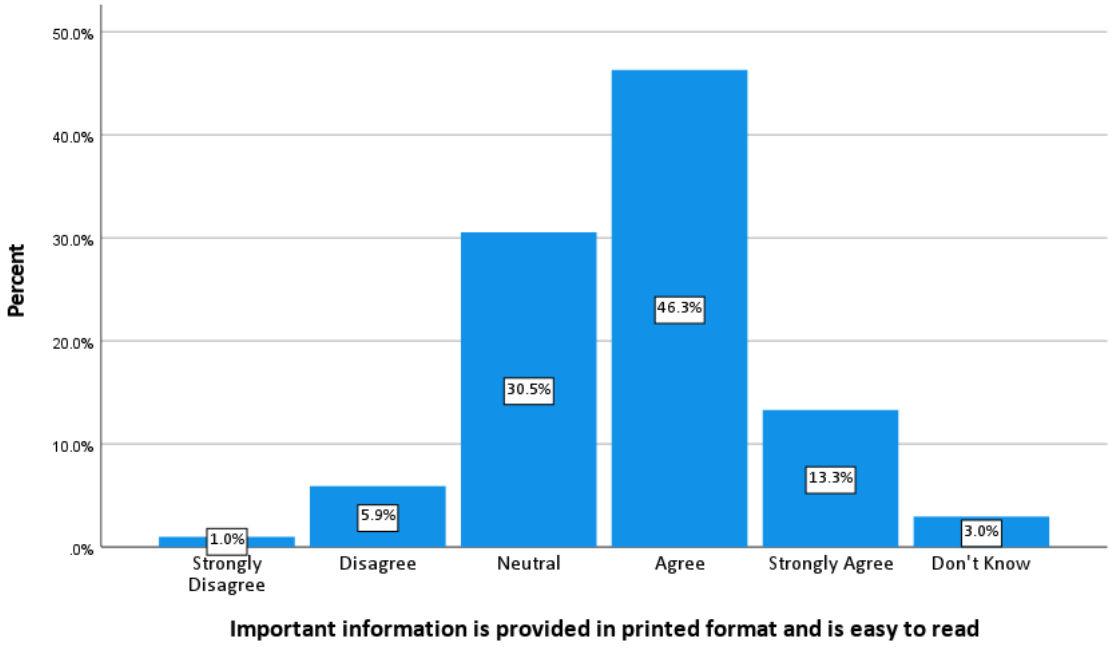
## Acquiring Information

Having access to information in a usable format is an essential feature of age-friendly communities (WHO, 2007). Survey respondents and interview participants considered

*acquiring information* was a priority for remaining connected to the community and continuing to be involved at a local level. Information was received from local groups and organisations in a range of formats including attending meetings, organisation's newsletters, noticeboards, email, social media, and word of mouth. In response to the survey statement "important information is provided in printed format and is easy to read", just over half strongly agreed (13.3%) or agreed (46.3%) indicating there was an opportunity to improve how some community information was delivered and received (Figure 15). Written responses indicated some survey respondents felt disadvantaged in accessing information for various reasons including having low vision, low computer skill levels, and lack of personal computers, "I am computer illiterate and as I have MD [macular degeneration] and use a magnifying glass, I often miss things "(survey respondent). Another survey respondent remarked, "as an 84-year-old who does not own a computer, I feel very disadvantaged. I used to own one, but had so many troubles with connection problems, I found it very stressful".

**Figure 15**

*Survey Response to "Important information is provided in printed format and is easy to read" by Percentage*




There was a strong perception that limited access to technology for some older people was exclusionary. As one of the survey respondents pointed out, "many do not have a computer nor the knowledge. Sometimes it seems to me that people who do not use computers are deliberately penalised". Staff at the local library reported spending a considerable amount of time assisting older patrons to use their online services. This finding was corroborated by a walking interview participant, "if you are not computer savvy, they'll [local library staff] look it

up for you, they'll spend time going through things with you and requesting it for you" (Frances 75). The local SeniorNet service was identified as a well-known education provider for older people to access technology courses.

In response to the survey statement "there is public access to computers and the internet for free or low cost. Help is available if required", almost two-thirds strongly agreed (22.2%) or agreed (41.4%); whereas a third did not know (13.3%) or were neutral (19.2%). Written comments from respondents further qualified these data indicating that learning new computer skills in an appropriate setting was a priority, "I am finding that technology is leaving me behind and would really appreciate places where I can learn with an emphasis that you will not feel slow or foolish, and you will be encouraged to continue" (survey respondent). These findings suggest there was an opportunity to increase public awareness of how to access publically available computers and internet resources. Further, older people may experience barriers to seeking help including the acceptability of asking for help with these resources in public spaces. Survey comments indicated one-on-one informal assistance was sometimes more acceptable to older people as suggested by a survey respondent, "a phone aware person to explain my mobile phone would be helpful. Another survey respondent suggested internet access may not be consistently available in their local area "better internet please!! We have tried everything, but it keeps cutting out".

Survey respondents and walking interview participants were highly aware of the importance of technology in the exchange of local information; albeit, with different perceptions and experiences in using technology. Some participants used electronic devices in a limited way such as for emailing and communicating with their families. Maude (80) had found it difficult to adjust to her upgraded mobile phone, "I'm really at sea with it … I wish I didn't have one that was so elaborate … I don't need everything that's on it. I don't need to receive my emails on the phone". Younger members of the family often assisted with upskilling and troubleshooting problems with technology. Bob (89) had help on hand from one of his sons, "he's a computer guru and he's the one that looks after me all the time if I have something wrong with the computer". Reports of internet scams affected confidence in using technology. Eva (82) had recently been the target of internet crime, and this had been highly stressful for her and her family. Similarly, retail and service operators voiced concern for older peoples' vulnerability to internet crime.

Retail and service operators understood the need to provide a range of information options to ensure the most technologically disadvantaged older people were included.

> *There's quite a spectrum of people who just don't know anything about it [technology] and those who do. In terms of being in touch with technology, again some just don't go near it. The TV or radio is the nearest they'll come. Whereas others are very connected. They skype with their kids overseas, you know, there's a wide spectrum what you get here. But, you know, you have to cater to that lowest common denominator which is the ones who just know nothing. (Retail/service operator B4)*

Thus, to facilitate dissemination of information to older people some service operators indicated they still provided information in printed formats "we email out the newsletter, but we also have paper copies because we know the ones who don't have email" (retail/service operator B4). Similarly, a local club serving older people posted notices on their club noticeboard and had continued to provide printed weekly newsletters in addition to a range of electronic formats, "I've got my Facebook page, I've got a Neighbourly page and I've got a web page" (retail/service operator B11). Some of their members preferred to come into the club and read the range of printed information, "when you come into the main part of the club on the right there, you'll see there's all sorts of publications … and a copy of our paper goes there as well" (retail/service operator B11). However, some retail and service operators had found a growing proportion of their older customers were more comfortable with receiving information electronically; thus, they regularly used social media and email to promote their products and services to their older customers and clients. There was a perception by some retailers that Facebook was widely accessed by older people "we've got a lot of people on Facebook that do follow us and a lot of them are 60 plus, they're getting on there" (retail/service B6).

The local newspaper, published twice a month, was highlighted as a popular source of local news and events, "information about what is going on is in the local rag" (survey respondent). The local newspaper had a section with upcoming events and group meeting dates that was considered particularly useful, "it has the 'What's on' as well so you go through there and see" (Linda 78). The retail and service operators regularly used the local newspaper to advertise and inform local residents. Similarly, the library relied heavily on the local newspaper to involve the community and promote events.

> *The [local newspaper] does a really good job and most people read it. It's got all the good local things in it, so we've got quite strong connections with them and they're quite keen to come down and photograph what we're doing and putting things in the paper about upcoming events for free. (Retail/service operator B3)*

The centrally located information centre was pointed out by many participants during walking interviews and was considered by most to be a reliable source of local information, "we are

lucky to have an information centre, I know the young lady in there, she's very informative, she knows a lot about her community and what is available to us" (Marion 78). Until recently the information centre had been run as a joint venture between the Warkworth business association, One Warkworth, and Matakana Coast Tourism. Matakana Coast Tourism had decided to withdraw from the partnership and the business association had assumed full responsibility for the centre to ensure the viability of this local resource. According to a recent local news article, there had been increased demand for information about local services such as dentists and plumbers. This had prompted the local business association to broaden the range of information available to the local community beyond the more traditional visitor and tourist focus. The article stated, "we believe this region needs and deserves an information hub … running it as an information centre gives us more autonomy and flexibility to scope and deliver services that will meet the needs of locals and visitors alike" (Chapman, 2019 p. 21). The information centre shared the same building as the Auckland Council Service Centre and the Warkworth library, agencies also identified by survey respondents and walking interview participants as valuable sources of information for the community. Centralised information hubs like this have been identified as age-friendly in other communities (Everingham et al., 2009).

Evidence from survey respondents and interview participants suggested the library played a vital role in facilitating access to information in the local community. A new illuminated information noticeboard had recently been installed outside the library. Additionally, the library provided a hardcopy information folder for people to access information about the groups operating in Warkworth. Participants highlighted the important role the library had in providing a central network for information and local innovation, "the library is a real focal point in Warkworth … they're very good at drawing things together and throwing out ideas (Linda 78).

Survey respondents suggested multiple ways to improve how information was provided. Suggestions largely focused on strengthening existing channels of communication, "perhaps a lit-up message board somewhere (near info centre?) - that can have up-to-date information on it focused on centralising information" (survey respondent). Further, some suggested centralised information about local volunteer opportunities, "could [local newspaper] have a wanted column specifying which volunteer organisations need helpers at any given time" (survey respondent). Others were interested in the scope of local organisations, "more newspaper articles on organisations and what they provide" (survey respondent). During the walking interviews, participants also pointed out several information boards they regularly looked at in various locations around the centre of the town.

The Warkworth Area Liaison Group was identified as a central information forum for the local community. The monthly meetings, held at a central location in the town, were attended by individuals, local groups, organisations, community leaders, and local media. The local board chairperson and the local councillor regularly attended the liaison group meetings because of the broad communication network capacity it provided.

> *There's quite a mix of people there and the idea is they are coming on behalf of their organisation and then they go back and inform them about what's happening … if we're doing a project or Auckland Transport or NZTA [New Zealand Transport Agency] are planning to do something that's going to impact a lot of residents in Warkworth, they are the first group I tell them to come and present to because the media also come to that every month as well. So, the media pick up on everything so that's kind of like the funnel … it will get reported on, you'll touch on quite a few different groups and they've got quite a wide mailing list. (Local board representative B1)*

The importance of this group as a forum for the exchange of information was reinforced by two walking interview participants both of whom were associated with local community groups. During the community consultation process for this research project, the opportunity arose for me to attend a monthly Warkworth Area Liaison Group meeting and promote my research project. The meeting included a presentation by an expert on pest control in the local area; updates from the local board chairperson, the local councillor, and a local healthcare facility on local issues of interest to the community; and other general business. The meeting was well attended by individuals and representatives from a range of community groups and included many older people, the majority of whom were involved in local groups.

## Feeling Valued and Respected

Feeling valued and respected was a key factor in *being involved* in the local community. Attitudes and behaviours of the community towards older people influenced the everyday experiences of feeling included and *being involved* in the community. Walking interview participants described regular experiences related to positive attitudes and respect, "most of them, even the young ones, will step off onto the lawns when I come past" (Bob 89). I observed this respectful attitude during the walking interviews as people quickly moved aside to allow us to pass as we walked. Similarly, Marion (78) had experienced respectful attitudes in the community, "it's very respectful, that's why it's nice to be here, because a lot of people are like that". It was suggested by one of the service operators that the same strong community spirit of the town, attractive to people raising their families, provided a similar caring and respectful environment for older people ageing in the community.

> *… concern for the elderly I notice more because I think it's a close-knit community … I think across the board it's probably a better community to be in because its' been a smaller rural community, but I think it might look after their elderly better. (Retail/service operator B4)*

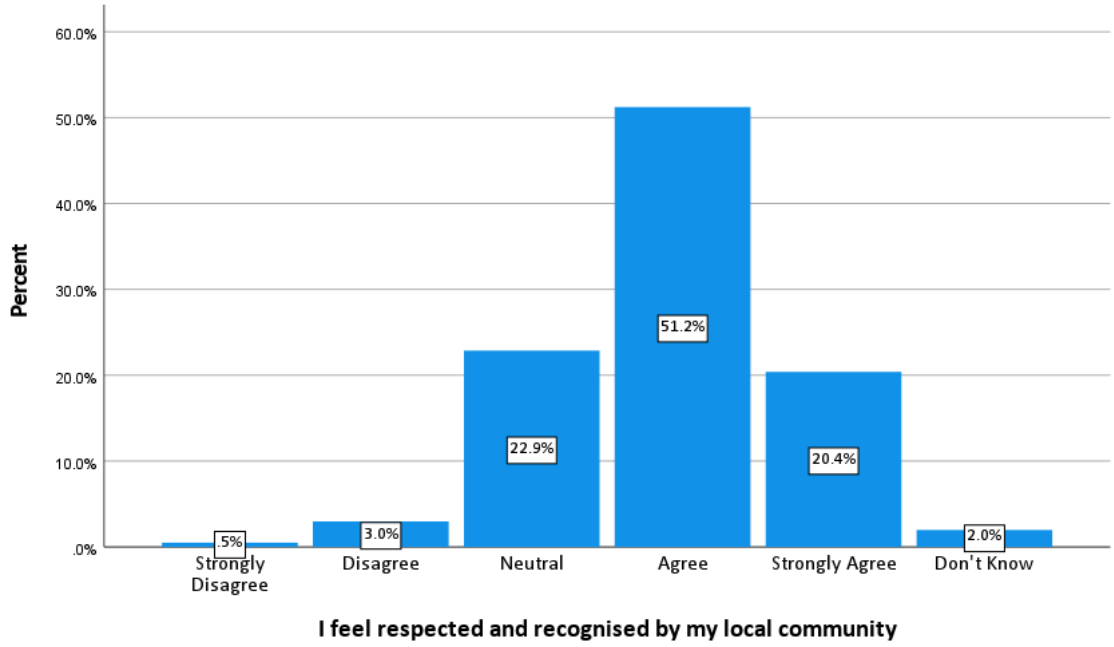
Some of the retail and service operators indicated they carefully selected staff to ensure they had empathy for their older customers and clients, "they're our elders so it's important that we respect and look after them … so it's just having compassion and understanding" (retail/service operator B13). Some walking interview participants associated having a confident self-image with a positive attitude towards ageing, "most of the people that I socialise with are older people anyway; they've got quite good thoughts about older people" (Bill 73). There was a perception by some that ageing was a subjective experience that older people had some control over, "we're as young as we feel" (service volunteer B15 V2). Others perceived respect towards older people to be reciprocal as articulated by the following survey comment, "I have generally found that if you give respect, you will receive respect" (survey respondent).

Almost three quarters of respondents strongly agreed (20.4%) or agreed (51.2%) with the survey statement "I feel respected and recognised by my local community" (Figure 16). However, nearly a quarter of respondents (22.9%) chose the neutral response, perhaps revealing the complexity and multifaceted nature of attitudes towards ageing. One of the retail/service operators had found some younger people displayed a negative attitude towards older people. "I do think people's attitudes need to change, in general. Like a lot of the younger people, I think, can be quite rude and not understanding of the elderly" (retail/service operator B5).

Written comments indicated a need to increase awareness of older people's position in the community, "mostly we become invisible" (survey respondent). In contrast, local volunteers, many of whom were older people, felt respected by being formally recognised for their contributions at a biennial event organised by the local board ("Recognising Rodney Volunteers," 2019). Further, older people in paid employment were valued by retail and service participants for their empathy with other older people and their range of skills. A positive work ethic was considered an additional quality older people brought to the workplace as observed by one of the retail operators, "it used to be called the Protestant Work Ethic" (retail/service B9). The wide variation in perspectives from survey respondents and walking interview participants further highlighted the diverse experiences of feeling respected. These nuanced perspectives highlight how respect for older people is perceived and experienced differently across the community and in various situations.

**Figure 16**

*Survey Response "I feel respected and recognised by my local community" by Percentage*




More generally, there was an awareness of the high percentage of older people living in the town and wider area. However, there was a lack of consensus in how the ageing population was perceived. The local board were very aware of the changing demographic patterns. "We do have an ageing population that are being attracted into town because of some of the other facilities that are being provided" (local board representative B1). Many of the local business operators sensed that an ageing population was already established in Warkworth, "I've always thought of Warkworth as an aged community … when we look out on the street, it's not a young town, to my mind it is already there" (retail/service operator B6). Despite the ageing population in the town and surrounding area, there was a perception from some participants that the local council was not focused on the needs of older people. "So, I don't think the council really understand the growth of elderly in this region and the lack of care and respect shown them" (retail/service operator B2). Similarly, Philip (74), expressed strong feelings about shortcomings in the environment and the impact of on older people with disabilities. He interpreted the lack of attention to the usability of the physical and social environment as being disrespectful towards older people ageing in the community. "I hate injustice and disrespect and that's just what's happening here, and it gets me really, really riled up".

There was a fine line between expressing concern for older people with disabilities and unintentionally 'othering' older people who were frail. This was evident in the language used by survey respondents and interview participants when referring to older people, for example,

'elderly', 'old folk' and 'oldies'. Stereotypical attitudes in some sectors of the community had been identified by the local board when the ageing population was highlighted.

> *There is an attitude that Warkworth's going to become a town full of mobility scooters, Zimmer frames and a lot of negative attitudes towards retired age … they miss the all the positives that they bring … I'm a bit disappointed with some of the attitudes, they're a bit clichéd. (Local board representative B1)*

Having opportunities for people of all ages to gather and be together is known to increase mutual respect between generations. Survey respondents were asked to rate their agreement with the statement "there are community activities and events that bring both younger and older people together". While almost two-thirds strongly agreed (18.7%) or agreed (44.8%) with the statement, written comments identified the need to foster intergenerational opportunities.

> *Some sort of 'drop-in' centre, say once a month to encourage people of all ages to meet and greet, have coffee etc. This could have on-going benefits both for young families and older people happy to have contact with them as well as with their own age groups. (Survey respondent)*

Other suggestions included more recreational facilities where all ages could gather. Further, increasing the use of public spaces for intergenerational entertainment especially in the summer months was suggested by a survey respondent. "More activities at night along the waterfront i.e., weekend food trucks to attract intergeneration groups. Light up the waterfront area to where the children's play area is behind the library so all ages can interact". Engaging with younger people was recognised as a way to facilitate positive intergenerational connections, "you can't just talk to older people because you're old. I like to talk to children and all different age groups" (Marion 78).

There was a perception that intergenerational connections were more accessible for older people with grandchildren living locally, "if somebody's got family, they're much more likely to be involved with intergenerational stuff" (Linda 78). Some walking interview participants highlighted how intergenerational activities, facilitated by local schools or preschools, were especially beneficial for older people without younger families nearby. Visual cues in the environment prompted walking interview participants to talk about the importance of their grandchildren in their lives as we moved around the town, "so here's the playground where we bring the grandchildren … we have quite a bit of fun with them" (Frances 75) and "I've got a grandson who spends a lot of time at our place" (Sally 87).

Intergenerational inclusion and mutual respect across generations within communities is central to the age-friendly model (WHO, 2007). Interview participants connected the importance of intergenerational values to supporting the long term viability and self-sufficiency of the town. An opportunity to increase activities and facilities to encourage younger people to stay and spend time in the local community was identified, "… we do have to watch to make sure we are looking after our young people who don't have a skate park, who don't have facilities. We want them to stay in the weekends" (retail/service operator B13). This opportunity had been identified by the local Lions Group, administered mainly by an older membership. They were focused on supporting activities for younger people.

> *Lions give so much back to the community. So that's an older generation creating things, because it's an older Lions group here and they're doing flying foxes, they're making parks and skate parks for young kids to get them stay and do things in town. (Retail/service operator B13)*

## Chapter Summary

This chapter has presented the theme *being involved* with three sub-themes, *participating locally*, *acquiring information,* and *feeling valued and respected.* Survey respondents and interview participants contributed to the social infrastructure by being present. They socialised informally and spontaneously during everyday activities in the town. Many supported local community events and were involved in a wide range of groups as members and volunteers. Again, there were reciprocal benefits for older people and their local community. A sense of purpose was gained from sharing acquired skills and knowledge and establishing new social networks. Equally, the community's social infrastructure benefitted from volunteered time and skills. For others, socialising was more opportunistic from spontaneous encounters while going about everyday activities. Information supported older people to be involved in this community. To ensure those who lacked technological capacity were not disadvantaged, information was required in a range of modes. *Feeling valued and respected* by their community contributed positively to perceptions and experiences of *being involved*. Attitudes towards older people were described as respectful, although stereotypical images of older people and 'othering' of older people with disabilities were identified. Intrinsic age-friendly features were identified in the existing initiatives geared towards older people. Ways to enhance social participation and improve social infrastructure to include older people less socially connected were identified. Priorities and opportunities for improvement were suggested to extend local community participation, centralise information, and promote positive attitudes towards older people.

# Chapter 9. Being Responsive

## Introduction

In this fourth and final findings chapter the theme *being responsive,* and the two associated sub-themes are presented. Like the previous three findings chapters, this theme draws on the multiple sources of data. As this theme captured the responsiveness of the community, the perceptions and experiences of retail and service operators feature prominently in this theme. Retail and service operators provided valuable insight into how the local business and service sector respond to the needs of older people with a wide range of capabilities, adding an important perspective on the age-friendliness of the local community. The perceptions and experiences of walking interview participants and survey respondents provided a deeper understanding of how older people in this community perceived and experienced responsiveness of the local community. The first sub-theme, *responsive to older people in everyday situations,* captures the everyday informal practices local retail and service operators enacted in serving older people. The second sub-theme *the voice of older people in local decision-making* captures how older people are being heard and included in decision making as part of the local governance.

## Responsive to Older People in Everyday Situations

Few retail and service operators had formulated specific written or formal policies and practices for providing services to older customers and clients; although, they acknowledged a lot of their clientele were older people. One of the retail operations that had a specific policy was owned by a large corporate organisation. They had introduced a weekly discount day for those eligible for the New Zealand Super Gold Card (aged 65 years and over). “We have ‘Gold Card Tuesday’. So, anybody with a Gold Card, if they come shopping on a Tuesday, get five percent off their shopping” (retail/service operator B9). The store management team had noticed the initiative had incentivised some older people to shop on Tuesdays. An advantage of this initiative was staff anticipated an increased number of older shoppers and were prepared to offer extra assistance where needed. Despite lack of formal policies and practices, most businesses had developed informal practices for responding to the everyday situations they encountered when serving older people. Attentiveness to older people’s needs appeared to be based on a culture of care and respect, particularly related to people with disabilities using their service. The awareness and response to customer’s needs as everyday practice was exemplified by this excerpt.

> *A customer said "it's great that you've always got people in the aisles to help us find things when they've been moved and if we can't reach them" … we have staff on the floor all the time monitoring that. (Retail/service operator B2)*

Some of the businesses knew their regular customer's or client's history from their long term association. In anticipation of their needs, they responded by having a flexible and person-centred approach. This was evident in the way service operators incorporated their older customer's specific needs into their service.

> *I find that if someone comes back and we have been seeing them for 15 or 20 years you sort of know how to communicate, you know what their anxieties are, you can remember that history, you know what their mobility issues are or that this lady is 94, she's really mentally sharp but she's tiny and she's going to struggle getting into the chair or this person is uptight and really anxious about driving because they're the caregiver for their spouse … you just instinctively tailor it to people. (Retail/service operator B7)*

Positive attitudes towards older people and willingness to accommodate their mobility requirements was a frequent finding. To compensate for lack of floor area some retailers discreetly moved furniture around to create more space as expressed by the following excerpt:

> *So, for instance, this centre table here, we can just give it a very light touch and it moves right out of the way so a wheelchair can get through and likewise all of these, we can get people to the fitting rooms. (Retail/service operator B15)*

Other retail/service operators had responded to mobility devises by creating optimal internal flow. "You can get a wheelchair and a walker through here and then we just open up the double door there" (retail/service operator B13). Additionally, mats and rugs were sometimes removed to facilitate wheelchair manoeuvrability, "we always make sure we've got access for wheelchairs to get around without rugs" (retail/service operator B13).

Generally, an attitude of trying to accommodate the changing needs of an ageing population was evident as illustrated in the following excerpt:

> *… they can even ride the scooter inside and do the shopping … that's how the retail store should be now days. That people can freely move around in your shop. They should not feel that oh I don't want to go in because there is no space to move myself. (Retail/service operator B10)*

Retail/service operators had recognised some older people with functional impairments found entering their premises challenging; thus, were ready to assist and accommodate a range of mobility needs.

> *We've got an annoying step out the front and another little door bit as well, so we help people up it in wheelchairs and walkers and stuff like that … but yeah there's definitely a step up to get into the shop. (Retail/service operator B6)*

While some retail and service buildings had more space and could accommodate a wider range of mobility requirements, others were unable to accommodate mobility scooters. Some retail and service operators indicated they expected older people on mobility scooters to park outside and walk in. However, two of the walking interview participants, dependent on mobility scooters, had limited mobility and were unable to walk unaided. On the other hand, some retailers had a more flexible approach to managing the use of wheelchairs and scooters. Sometimes customer service extended to serving customers at the entrance of the shop if they could not get in. "I've served people out on the street if they can't come in. We take the shop to them basically and do it that way" (retail/service operator B6). Eva (82) pointed out several retail stores where she regularly experienced this extra level of customer service at the threshold of shops when she was unable to get in with her mobility scooter, "they always come outside to ask me what I need". While recalling this spontaneous act of service, it was evident the personalised attention Eva received, in response to her needs, contributed to her feeling included in the local community.

Although Bob did not expect special attention when he was shopping, staff at his local supermarket usually noticed him on his mobility scooter and attempted to make the experience as easy as possible for him, "I just line up with the other people but there are a couple of lasses in there, especially the one selling lotto tickets, if she sees me she will often call me over and through" (Bob, 89). Similarly, service operators had recognised older people could find queuing during busy periods more difficult. "If there is a queue, we give them a chair to sit down for a little while" (retail/service operator B10). Most of the retail and service operators had seats available, although only a few had chairs strategically placed for everyday incidental use. One retail/service operator had noticed some of her older customers, or sometimes their partners, would sit on the chair she had strategically placed adjacent to the shop counter while they waited. The same retail/service operator had put chairs in the changing rooms to make it easier for older people to undress and dress.

The strategic placement of chairs suggested an age-friendly approach as it served the purpose of making older customers more comfortable and reduced the need to draw attention by having to request a chair. Although having a chair available for older people to sit on in shops was appreciated, the right sort of chair made a big difference as explained by this survey respondent, "shops where they have a chair that oldies can sit, instead of long queue. But of

most importance - one that has arms so oldies can get up and down with ease". The suggestion to have chairs with arms suggests a universal solution to maintaining older people's independence in getting in and out of a chair without drawing attention.

Many retail and service operators responded promptly to older people whom they anticipated might be at risk of tripping and falling, "we often say to people, "mind the step" … if they have a stick, or sometimes we'll actually go and just take their arm … we're just very aware, "mind the step, mind the step"" (retail/service operator B15). Removing the offending small step proved to be a complicated process for the retailer; instead, they had attempted to highlight the step and make it more obvious. "We have put a black strip along to try and make it more noticeable, you know, so the edge is marked but it's just one of those things with this building" (retail/service operator B15). The majority of the retail and service operators were tenants in the Warkworth commercial centre of the town; thus, had little control over the design of the older style buildings.

Informal practices were embedded in the everyday responses to the challenges older people faced. Retailer and service operators anticipated older customer's needs and responded with an extra level of service, "we put their parcel in the car, sometimes we have to hold their hand and put them in the car even … one of the ladies who comes in here we always have to call a cab for her" (retail/service operator B10). The following excerpt illustrates a retailer's response to a situation that extended well beyond the usual and expected retail practice.

> *One couple, once, I'll never forget, they rang [a taxi] and it was coming out of school time, and it was a freezing cold wind, and he was sitting out there without a hat and he was absolutely frozen. She came in and looked around. So, I actually took out a possum hat that was sort of unisex and gave it to him and the taxi for some reason forgot about them and after about three quarters of an hour I went and got my car and took them home. I thought, oh poor people. You know, they were too old to be sitting out in the freezing cold, horrible day. So, we're quite aware of the old folk around. (Retail/service operator B15)*

Clothing retailers recognised trying on clothes was challenging for some older people and responded in a sensitive and caring manner.

> *If elderly people do try on, we sort of hover around to assist … there's the odd one who will try on a pair of trousers or jeans or something and they sit down, we undo their shoes and help them on. (Retail/service operator B15)*

To further facilitate older people trying on clothes, clothing retailers had a relaxed attitude regarding taking clothes home to try on in their own environment, a practice retailers referred to as 'appro'.

> *We offer an appro service so that they can take it home to try it on in their house where it's easier to manoeuvre than in the changing rooms … we're very geared to looking after the older generation. (Retail/service operator B6)*

Further still, retailers responded to the shopping needs of more frail older people who may not be able to physically shop. "We also let people take things for their mothers in rest homes to try, or friends" (retail/service operator B15). One of the local supermarkets offered phone ordering, an option not always available with advances in online shopping. This option was explained as particularly important for older people who may be temporarily unwell or physically unable to get to the store and unprepared for online ordering. "I also have a system, if they cannot use a computer they can ring up and place an order in our office and we'll take that out and deliver it to them for a small cost" (retail/service operator B2). Likewise, the local pharmacy offered a delivery service to their older customers and were in the process of streamlining their prescription services to better suit older customers.

Retailers and service operators responded when older people struggled with electronic processes and required help in person. A local electronic store had extended their service to provide technical assistance to older people who struggled to set up electronic systems in their homes. Service operators had noticed older people preferred person-to-person communication over confusing automated phone services with multiple electronic options to select, "they prefer to ring us because at least they get an answer by a human but when they ring the corporate it is those robots asking them a question; they get confused with what button to press" (retail/service operator B10). Although there was a willingness to assist, there was tension between wanting to be helpful and protecting their customer's electronic security and privacy. Some retail and service operators felt the weight of the trust some older customers placed in them and felt compelled to assist with point-of-sale transactions despite feeling uncomfortable.

> *They forget their PIN numbers and they tell us to do their PIN numbers for them. That's the scary part but we do at least that much because we are not holding their card, but we tell them don't give your number … they do trust but I always see that they have got no choice. (Retail/service operator B10)*

Staff who could quickly respond to unexpected situations in a calm and discreet manner were valued by retail and service operators. "Most of our supervisors are older, more mature people and can deal with it if they forget their PIN number or whatever at the front" (retail/service operator B2). It was not always possible to satisfy customer's needs. Sometimes it was necessary to refer customers to appropriate agencies or family when requested for assistance with internet banking or other processes that would cross legal and ethical boundaries.

> *People come in sometimes and say, "Can you set up my internet banking, I'll give you my password to do it". I said, "No we can't". We try to suggest to them in whatever legal way we can, but we don't do any work for them because it's illegal to know anyone's password. (Retail/service operator B10)*

Although staff were trained to manage these situations, they were often stressful for both older customers and staff. At times staff had to draw on a range of communication skills to deescalate situations, "we get abused" (retail/service operator B10).

Retail and service operators were ready to respond when they noticed older people with sensory impairment. Hearing impairment was often detected from a customer's non-verbal cues.

> *Usually, we become aware of it when we greet them and they don't even turn around or you don't get a response and you realise that they haven't heard you and with the noise behind you too, sometimes it's hard, road noise. But we don't have any special facilities, we just speak a bit louder and go up to them perhaps talk a bit more than across the shop. (Retail/service operator B15)*

In response to an unsatisfactory acoustic environment, one retailer had negotiated with the building owners to improve the environment for older people with a hearing impairment. "We're going to put sound baffles all across the ceiling and over the coffee machine and on the wall where the coffee machine is to take all the noise away and it just absorbs the noise". Likewise, retailers recognised when their older customers had low vision and needed specific assistance. "They wear badges, and we help out where needed … we may have to help them to make the purchase on the EFTPOS" (retail/service operator B6). A local health service operator, with a special interest in low vision, had responded to the need to raise awareness of low vision among the retail and service community. A support group for older people with low vision had been convened to facilitate access to information and resources. This included sharing knowledge between older people and local businesses about the everyday experience of living with low vision. This group was especially important for those with low vision who did not meet the criteria for the Blind Foundation assistance. The aim was to bring retail and service operators and those with low vision together to share information and discover how to better serve people with low vision. "[The librarian] will come along and she'll just go through what audio talking books are available … we are going to get someone from [local electronic store] to come and show them Alexa [virtual assistant] and how that can work" (retail/service operator B7). Sharing information between older people with low vision and local retail and services had potential to raise awareness of low vision and ultimately improve the age-friendliness of retail businesses and services.

Many of the retail and service operators understood some older people were attracted to their services for the opportunity to have social interaction. This need was particularly apparent if their customers were recently bereaved or lived alone. The following excerpt captures how the informal atmosphere provided a welcoming place for older customers who may need someone to talk to.

> *The older people, I think, are a bit more relaxed in our shop so we're not fussed about them coming in and not buying anything. Quite often we get people coming in and just wanting a talk and stuff like that and that's fine, that's part of owning a shop in Warkworth is that relaxed atmosphere where that can happen. So yeah, we have plenty of regulars that pop in just for a natter. (Retail/service operator B6)*

The local library encouraged people to come in by fostering an environment that was welcoming and comfortable. Readiness to respond to a range of situations was integral to their usual practice.

> *We try to be really approachable so that people will come and talk to us about problems. That's another thing, we always keep in mind that sometimes that little conversation you have with someone, they come and plonk themselves down at what we call the help desk and sometimes that's really important in their day … it's a nice warm place to come and it's a change. (Retail/service operator B3)*

The library had incorporated principles of co-design into their practice to further advance their inclusive and responsive approach.

> *I mean the elderly are a large part of our population here, you know, so yeah, a lot of our services we have them in mind. And we try to do co-design. So, we don't just think, oh this is a good idea for a service, let's do that, you know, we would ask people what they want. (Retail/service operator B3)*

The need for wider community support for older people living alone had been identified by Silver Linings, a recently established local group associated with one of the faith-based organisations. The Silver Linings initiative responded to the increasing number of older people, ageing in the community, who lacked support from family. A key consideration for this group was to bridge gaps in existing networks and services with a local response.

> *… they've branded themselves 'Silver Linings' and they've identified this big gap about support services for ageing people and loneliness. So, it's not necessarily going out and providing a whole lot of new services but it's maybe again a little bit of "hey can we provide some networks and crosslinks and identify where there are gaps and then help provide the infrastructure or the networks to support that". (Retail/service operator B16)*

Although associated with a faith-based organisation, the initiative aimed to attract older people from across the whole community. The collaborative approach had enabled the group to work with local businesses and services to empower older people with up-to-date information about relevant issues.

> *So, this group, a couple of ladies in our organisation have done quite a lot of work with Age Concern and we have run several seminars, two or three seminars now where we've got together people, lawyers, accountants for tax returns, a health provider. About four or five different people to come and we ran a seminar with 50-60 people from the community turn up and giving advice and saying that these are some of the things you need to attend to. (Retail/service operator B16)*

The group leading this initiative had been interfacing with the local Age Concern service as part of their collaborative approach. The group had also been influenced by the WHO age-friendly cities and community model and had followed the progress Hamilton City had made in achieving an age-friendly city status. "They've done a lot of homework and research and read a lot … I think they visited Hamilton" (retail/service operator B16). Eventually the group hoped to establish a community facility in Warkworth as a meeting place for older people. "So yes, we just needed to navigate our way through and say what could we do? We're hoping in the next two years to build a new church and community centre" (retail/service operator B16).

Local responsiveness to older people's media requirements was evident. The homebound library service, coordinated by the community engagement librarian, was designed for older people who were unable to physically visit the library due to medical issues or reduced mobility. A group of local volunteers delivered and picked up books from older people; thereby providing a means of keeping older library patrons engaged with the library service and ensuring continuity of their service.

> *Our community engagement person, she has a list of all the people and what sort of books they like, what they've had, whether they liked it or didn't like it and then she chooses books for them. Or they can tell her what they want. Yeah, so that's a service that's growing all the time for us. (Retail/service operator B3)*

The library service regularly assisted older people to create or update their curriculum vitae (CV) as they sought to start a new career or to reconnect with the workforce.

> *… we do a lot of helping people with careers searching and CV's. Young people and older people. People that you'd think wouldn't be looking for jobs wanting CV's and they've never really had a proper CV before and if you apply for a job now you've got to attach your CV and cover letter and, you know, electronically and so they do need help. (Retail/service operator B3)*

In a similar vein, a recent initiative in the local area, had responded to the opportunity to connect employers with people aged 60 years and over interested in joining the workforce. This service had recognised the valuable skills and established work ethic older people were often credited with. Seniors@work had established an online platform and work readiness packs to facilitate matching skills to jobs ("New job seeking site for over 60s targets northern employers," 2019). Similarly, the local SeniorNet organisation constantly updated their training programme to ensure older people were kept up to date with the increasing range of computer and technology applications. They had recently added new groups to cover smart devices and online streaming applications ("New Group for SeniorNet," 2019).

Customer feedback contributed to how retail and service operators responded to local priorities and needs. The majority of retail and service operators indicated they had some form of system for receiving feedback. Retail operations and services owned by or aligned with larger organisations often had centrally administered online customer feedback processes. There was an appreciation of how online feedback could exclude older people who lacked access to the required technology.

> *We get feedback online now … and I'm really aware that that cuts out a lot of people who, you know there are still a lot of people who don't have computers, they don't have email. They're not in that digital world. So, they can fill out a card. (Retail/service operator B3)*

In response to the survey statement, "I am regularly consulted by public, voluntary and commercial services on how to serve me better", 7.5% strongly disagreed, 34.3% disagreed and 33.3% responded that they didn't know. These data suggest many of the respondents may not be aware of or did not use available customer feedback mechanisms. Some retailers had attempted to provide more inclusive and direct approaches to customer feedback, "we have a customer's suggestions [box], they come up to me every day" (retail/service operator B2). The smaller owner operated businesses tended to use more informal systems for getting feedback directly from customers and indicated most informal feedback was typically positive and encouraging. A local café, catering to the new retirement apartments in the centre of the town, had adjusted their business model to align with their customer's informal feedback.

> *They've got to a ripe old age, and they've got opinions, which we love, and they tell us what they like and don't like and so we tune our nightly menu … we tune what's in the cabinet and we've changed the menu three times in nine months to get it right and to change direction. This is the best so far. Instant success. (Retail/service operator B13)*

The service had continued to evolve with feedback, “they wanted meals delivered to the rooms … so this month we’ve just implemented service delivery to the rooms” (retail/service operator B13). Meal portions had been scaled down to meet their older customer’s needs. Further, attention had been given to ensure their toilet facilities were usable and appropriate. “We spent a lot of time getting the toilets 100 percent and things like that” (retail/service operator B13). Since their business model was unique, there was a sense of breaking new ground and treading carefully in monitoring and evaluating their service, “it’s different to a normal café. It’s part of that aged care, making sure that they’re aware that we are meeting their needs with the right meals but also not stepping over a line to go into someone’s home” (retail/service operator B13). After receiving feedback from customers, it was important to this operator to acknowledge the raised issue and report back. “I’ll go back to them and say this is what we’ve done about it. Always tell them what we’ve done” (retail/service operator B13). This responsive style of customer service extended to ensuring staff knew their regular customers requirements and had an empathetic attitude towards older people, “we’ve hand-picked the people … people that get on well with them, know their coffees off by heart” (retail/service operator B13).

The local RSA management team’s practice of constantly monitoring the club’s priorities and needs at the grassroots level was a strength of the club. “We’re always scanning and looking across the way we do business just to make sure that we’re meeting the needs of the club” (retail/service operator B11). Because their member’s feedback was central to future planning, individual member’s preferences in how they offered feedback were accommodated.

> *There’s a whole, you know, thousand people that are members of the club that we look to for feedback … everyone’s got an opinion. Yeah it depends who it is. Some people like to charge in and demand they sit with me up here [in the office]. Some people prefer to talk down there where other people can’t see them. Some people like to send in letters the old-fashioned way. I’ve got emails. Some people will just pass messages through the bar staff and some people go directly to the committees. (Retail/service operator B11)*

Core services offered to RSA members, such as transport to hospital appointments, were closely monitored to manage fluctuating demand, “It could be that we need to add another car to the fleet of hospital stuff at some stage or buy a little bus. Some days it’s quite busy” (retail/service operator B11). Likewise, the local taxi company had responded to increased demand from older people needing transport to hospital appointments and had been gradually increasing their fleet “we get a lot of people wanting to go to the hospitals for hospital appointments … we are slowly expanding … they’ve put on a few more vehicles” (retail/service operator B5).

## The Voice of Older People in Local Decision-making

The second sub-theme encompassed survey respondents and walking interview participant's perceptions of being heard and responded to at a local community level. There has been global recognition that strong leadership at a local level was vital for communities to thrive and for age-friendly programmes to be sustainable (Brasher & Winterton, 2016; Lui et al., 2009; Menec et al., 2014). Survey respondents and interview participants identified disconnection between the local community and the local council. The restructured Auckland Council, locally referred to as the 'super city', was perceived by many walking interview participants and survey respondents to have disadvantaged Warkworth and the surrounding smaller communities. The main reasons for discontent related to the large and complex bureaucratic structure and the perceived lack of interest the council had for Warkworth. "We need independence from the 'super city'. It has been a disaster for communities such as Warkworth as Auckland Council is simply not interested in the area" (survey respondent). Further still, walking interview participants and survey respondents expressed dissatisfaction with processes for communicating with Auckland Council. Although local people could report issues at the council service centre in the town, they were usually referred to an Auckland Council phone line to follow a centralised reporting process. This was perceived as impersonal as the following excerpt illustrates.

> *I liked it better before we were part of Auckland … I felt that when we were not part of Auckland, we could actually speak to people about the things that are going on in Warkworth whereas we're divorced from it being here. (Bill 73)*

Further still, there was a perception that local decision making had become removed from local control following the formation of the larger Auckland Council. There was a preference for the more inclusive, local decision-making approach they had been accustomed to.

> *… very few of them [Auckland Council officials] are actually prepared to venture north through the tunnels and come and stand here, spend some time here for half a day, a day, talk to the locals, actually communicate with and actually being prepared to listen and understand what people are saying and then take that back and respond to that and that is just not happening. (Philip 74)*

In addition to the impersonal and remote system for reporting, it was perceived the council took too long to respond and follow up on reported issues.

> *… we have a footpath outside our place which is broken … my wife rang about three years ago, but nothing's been done. I should probably be*

> *ringing and talking to somebody. But I find it harder on a phone, whereas I can talk to people face-to-face. (Bill 73)*

Feedback from the council on the progress of reported issues was considered inconsistent. “I would like some response, let me know what is going to happen. I want a response; I want the feedback” (Marion 78).

Decisions made remotely by the Council Controlled Organisations were sometimes inappropriate for the specific needs of older people at the local level. During the recent introduction of the new bus service, connecting Warkworth and surrounding areas to Auckland, local people were encouraged to sign up for electronic transport cards. Despite specific request by the local board for a more appropriate arrangement, the council transport agency had expected older people to stand in a queue at the local council service centre. “They queued up and some of them just couldn’t wait … they can’t sit or stand that long, for two and a half hours which is what they were having to wait for, it’s too long” (local board representative B1).

Survey respondents and walking interview participants attributed the lack of progress on redesigning the notorious Hills Street intersection to the complex and compartmentalised responsibilities of local and central government. Hills Street intersection forms the junction of multiple local roads and the main state highway. The intersection provides the only access to communities and coastline east of the town. The complexity associated with the large number of roads converging into this intersection and the resulting congestion had contributed to its reputation for being one of the worst intersections in New Zealand. It was widely perceived that the lack of progress was a result of shifting responsibility between local and central government. At the local council level, Auckland Transport, one of the Council Controlled Organisations, was responsible for the construction and maintenance of local footpaths and roads. At the central government level, New Zealand Transport Agency (NZTA) was responsible for constructing and maintaining state motorways and national roads, “…to me a lot of the issue is that it’s very siloed. Auckland Transport - there are a number of different groups doing different things, the same with Auckland Council” (Philip 74). There was a perceived lack of response to multiple approaches to AT and NZTA over many years to address the intersection. “The footpaths are in a terrible state of repair. Auckland Council has no interest in spending money in this area [Hill Street intersection]” (survey respondent). General confusion regarding which council agency was responsible for various aspects of local infrastructure contributed to dissatisfaction and feelings of disempowerment.

During the walking interview, Philip (74) pointed out many of the contentious issues relating to the intersection. Philip had been involved in the local 'Fix Hills Street Now' group. This group had worked hard to gather local information to inform AT and NZTA. Philip explained this information had included traffic flow analyses undertaken by retired traffic engineers and was based on "the real issues on the ground from people who know what they are talking about" (Philip 74). At one stage a community advisory group had been convened comprising of representatives from AT, NZTA, a group of local people and the elected Member of Parliament; however, the outcome had been unsatisfactory. "Many of the people that I am involved with, we feel like we are bashing our heads against a brick wall. Nobody wants to listen to us and it's just disrespectful" (Philip 74). Many of the walking interview participants were resigned to the current AT and NZTA position that redesigning the intersection would not be undertaken until construction of the new state highway was completed in 2022. "The current story is nothing is going to be done here until the motorway is complete" (Philip 74).

Response from the local council to complaints about footpath quality was another contentious local issue. Several walking interview participants relayed a recent incident where a local older person had tripped over an uneven footpath and sustained substantial injuries. Local media had taken an interest in this incident and the subsequent community reaction ("Outrage over dangerous footpaths," 2019). Auckland Transport had moved swiftly to reconstruct the culpable footpath following the incident. "They were never fixed until a lady, one of our good customers, fell and fractured her face, skull and broke her glasses just out here. Suddenly the council was out here" (retail/service operator B2). There was concern that a response had only eventuated because someone was seriously injured "we have had problems in Warkworth with the footpaths where it's been raised with council and raised and raised again and in the end AT [Auckland Transport] have attended to it only after someone has fallen and badly hurt themselves" (retail/service operator B4). Some further remedial work on uneven and broken footpaths, previously identified by the community, was undertaken following this incident in a response led by the local councillor. However, the work commissioned by AT was limited to grinding and filling of 'trip lips' in footpaths. Criticism from the local community was levelled at AT for neglecting to address the poor-quality footpaths in Warkworth and the length of time it had taken to respond to concerns that had been raised ("Outrage over dangerous footpaths," 2019). Meeting minutes recorded from the Rodney Local Board Transport Infrastructure and Environment committee meeting on 20 June stated that AT was unable to fund a complete audit of Warkworth's footpaths from the current annual budget. During walking interviews many of the participants stopped to inspect recently repaired footpaths and 'trip lips' that had been filled with bitumen. Some participants were concerned these minor repairs were a

temporary ‘quick fix’ and were crumbling around the edges causing further unevenness and an ongoing trip hazard.

> *And this is classically what they do. They either get a grinder and they grind away or they do this [bitumen fill] and a year down the track it’s all peeled away. It’s really cheapskate stuff and this is a classic example of what’s gone on with the footpaths. (Philip 74)*

At a more local level, the large geographical area and dispersed population was a significant challenge for the local board. “We have this huge area with a huge network of roads and other infrastructure, but we only have four percent of the population to rate to be able to pay for the upkeep of all of that” (local board representative B1). While Warkworth was the largest town in the local board area, several other towns and rural communities competed for funds to maintain local infrastructure. Despite these challenges, several walking interview participants indicated the local board leadership was strong and responsive to local needs. The perception of the local board’s advocacy role in how they followed up on issues lodged with the council was generally positive, “thank heavens for [local board chair] being around because she says, “if you give me a reference number, I’ll chase it through” and she does … she’s excellent at that … but there’s only a limit to what she can do” (Philip 74). Again, there was the perception that the local board and the local council had competing agendas.

A major function of the local board was to communicate with the local community. One of the five outcomes in the local board’s 2017 strategic plan indicated a firm commitment to empowering communities to have a say in what happens in their local area, “communities are influential and empowered” (Auckland Council, 2017, p. 19). Attending meetings and consulting with community groups was an effective way for the local board to access the ‘grassroots’ of the local community. “I’d like to think we do this quite well because we still go out to old fashioned, community meetings and personally I would go out to a meeting probably two or three nights a week” (local board representative B1). The local board were cognisant of older people’s preference for in person meetings. “They do like the hall meeting … and a lot of them are very active as well … on behalf of the local board, I do my best to communicate with all of those groups” (local board representative B1). Further, the contribution older people made to decision making was highlighted “when I look at the numbers of feedback I get and who are making submissions, on the whole they are 65 plus easily” (local board representative B1). There was a perception that retired people had the advantage of more time to attend meetings and voice their concerns:

> *… they’ve got more time for community involvement … it comes with some criticism as well from people outside of that group who will say that the only*

> *people who have got time to go to those meetings are retired people. (Local board representative B1)*

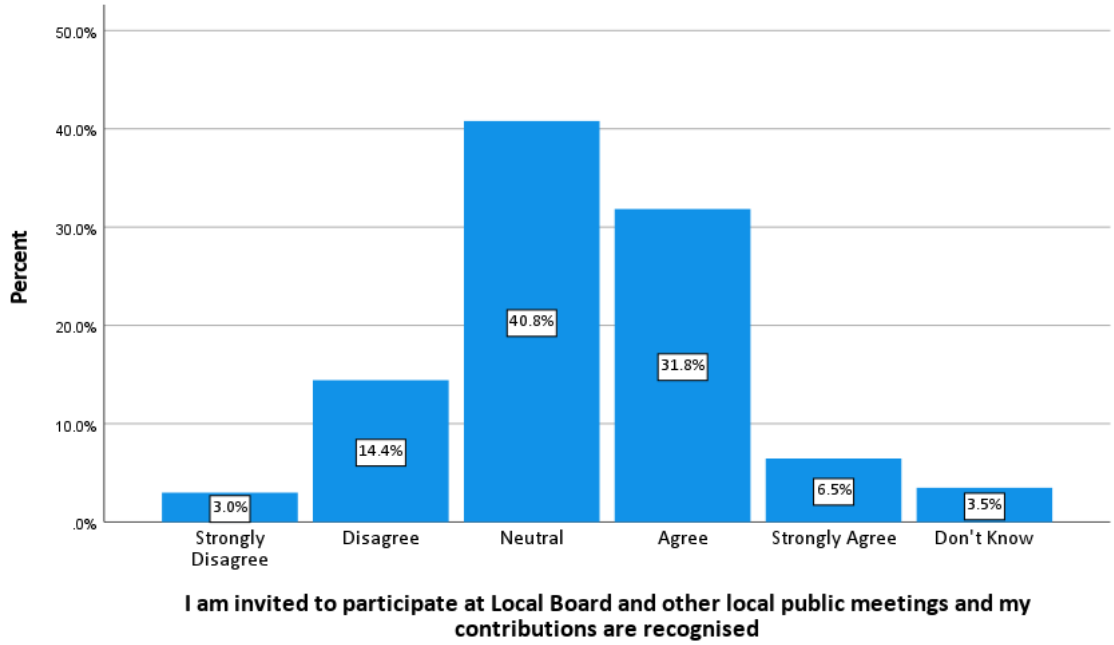
On the other hand, there was concern that actively engaged older people were at risk of being over-burdened by civic responsibility, "… and you've got another group of people that say that it's too much and that it's weighted towards them because they're the people who have the time" (local board representative B1).

Survey respondents and walking interview participants were motivated to contribute to civic matters; however, there was some dissatisfaction that the local board meetings were sometimes held 27 kilometres away in a larger urban town outside of the local board area. This was considered a disadvantage for some older people. In response to the survey statement "I am invited to participate at local board and other local public meetings and my contributions are recognised", only 31.8% agreed and 6.5% strongly agreed. Conversely, 14.4% disagreed and 3% strongly disagreed with the statement (Figure 17). Survey respondents expressed uncertainty about the meeting process and how to participate at meetings as articulated by this survey respondent. "I need to find out when and where local board meet, do the public have speaking rights. Would it mean a trip to Orewa?"

These comments suggested convening formal local board meetings in another town may deter some local older people from attending meetings. Further, some survey respondents not only expressed feelings of disempowerment from formal processes and guidelines for having their say at the local board meetings, but also questioned if their concerns were being heard. "From my experience, regarding local board meetings, most of us that attend are concerned we are not listened to, unless we have been given the guidelines to follow, if not, we are ignored" (survey respondent). Others felt local decisions had already been made and public meetings were just a tokenistic approach to consultation. "When attending public meetings often feel that decisions have already been made" (survey respondent).

**Figure 17**

*Survey Response to Inclusion in Local Board and Public Meetings in Percentages*




On the positive side, there was a perception that the high percentage of older people living in the community represented a stronger and empowered voice for older people.

> *It's good that there are so many retired people in Warkworth because they have more of a voice. I think they're fairly empowered … most of the older people I know they've got opinions and they are not afraid to let people know about them, generally. (Retail/service operator B3)*

In response to local community issues, the local board's advocacy role was evident in their ambition to make the town centre more pedestrian friendly. The needs of the older population had been considered in thinking about how older people might use the town as it became more populated.

> *… if we have our able-bodied population using more public transport and walking and cycling that will free up the town centres so that our older people can get a park outside the bank, can get a park outside the chemist. (Local Board representative B1)*

Auckland Council had also been receptive to feedback about the problematic parking in the town centre during the Warkworth Structure Plan consultation process. While existing parking issues fell outside the scope of the structure plan, Auckland Council identified a parking study in the town centre, aimed at investigating and resolving parking issues, was an area of important future work (Auckland Council, 2019).

The local board continues to foster partnerships with local Māori when planning local community projects. The commitment to partnership was evident during the planning stage of local projects; local iwi was invited to collaborate in the design and planning decisions.

> *They [iwi] are often first in mind when I hear about a local project and even if someone comes to me, say from the community, with an idea for a local, something they would like to do, maybe on the river front or the park, I say "have you had a chat to Ngāti Manuhuri or have you had a chat to iwi" because, you know they love to get involved in these things. I think we're doing that as well as we can at the moment. I'm very positive about the relationships that we've got there. (Local board representative B1)*

A recent example of iwi partnership related to the plan to redesign the outdoor space between the library and the Old Masonic Hall. "They [iwi] are helping us with some design. So, we will put some nice design and some naming, and they're fully involved" (local board representative B1). Additionally, assistance was available to the local board through their Strategic Broker when consulting with ethnic groups in the local community. The 2020 draft of the Rodney Local Board Plan emphasises a commitment to working with local Māori and responding to Māori aspirations (Auckland Council, 2020b). These findings are of significance to New Zealand's commitment to bi-culturalism and more specifically, as explained in chapter one, the age-friendly model New Zealand has adopted (Age-friendly Aotearoa New Zealand) embraces bi-culturalism.

## Chapter Summary

This chapter has presented the final theme *being responsive.* Consistent with the research question "what are the age-friendly attributes of Warkworth?" the analysis had a strengths-based approach in examining the responsiveness of the community towards older people ageing in this community. Few business operators had instigated formal policies and practices to guide service to their older customers and clients. Notwithstanding, most businesses responded to the everyday identified needs of older people they served in a caring and considerate manner. Challenges in the environment were typically mitigated by the friendly and engaged customer service that frequently went well beyond what was expected. Geographical and organisational disconnection between the local community and the local council had disempowered local participation in some civic matters. Decision making closer to the local community was identified as a priority. Commitment to work in partnership with local iwi and other cultural groups was evident. As people aged 65 years and over made up over a quarter of the population of this community, there were opportunities to strengthen the voice of older people. The next and final chapter provides a discussion of the findings, recommendations to the local community, local council and central government, implications

for future research, the original contribution this study makes to knowledge and practice, and finally, limitations of the study.

# Chapter 10. Discussion

## Introduction

The focus of this study was the age-friendly attributes of Warkworth, a rural town in New Zealand. New Zealand has followed global strategic direction in supporting older people's right to age in place in communities of their choice. To ensure ageing in place goals are achievable, environments need to be enabling and inclusive. Consequently, central government in New Zealand is committed to promoting age-friendly environments. Rural areas are ageing faster than urban centres, driven by structural ageing, ageing in place, and rural migration trends. However, little is known about the age-friendliness of rural communities in New Zealand.

Warkworth was considered an ideal place to undertake this case study. It is a small rural service town with a high percentage of people aged 65 years and over compared to the whole of New Zealand. The town is expected to undergo rapid development and population growth over the next two decades. Further, interest in progressing age-friendly research was expressed by the local community. The theoretical proposition underpinning this study was inclusion of older people is contingent on feeling valued and having opportunities to fully participate in liveable communities (Winterton, Clune et al., 2014).

The WHO age-friendly cities and communities model was utilised as the conceptual framework to guide the study. Dewey's pragmatic perspective provided the philosophical and theoretical foundation for the case study. A central line of reasoning in this thesis has been the use of Dewey's transactional perspective which has enabled a deep, rich, and holistic understanding of age-friendliness as the relationship between older people and the places where they live. The aim of the study was to provide an empirical knowledge platform to communities, and local and central government in New Zealand to inform strategies for implementing age-friendly initiatives. The research questions this study aimed to address were:

- What are the age-friendly attributes of Warkworth?
- What are the priorities and opportunities for improving the age-friendliness of Warkworth?

The chapter starts with a summary of the findings. Then the first research question is addressed by presenting and critically examining the identified age-friendly attributes of Warkworth in the context of relevant evidence to establish how they resonate with, challenge, and contribute to the extant age-friendly literature. Following this, the second research question is addressed. The recommendations for policy and practice were informed by the

priorities and opportunities for improving the age-friendliness of Warkworth identified in the findings and are presented and discussed in context of the physical, social, and service environments. To follow are the implications for future research. Next, the original contribution to New Zealand policy, practice and research is explained. This is followed by the contribution to the international age-friendly and rural ageing literature. Then the philosophical, theoretical, and methodological strengths and contributions are discussed. Finally, the identified limitations of the study are presented.

## Summary of Findings

The findings presented in chapters six to nine under four main themes, *being established, being present, being involved* and *being responsive* captured the community strengths and attributes of Warkworth contributing to age-friendliness. These themes are summarised in the following section.

The first theme was *being established.* The first sub-theme *historical identity* captured the rich history of the town and its contribution to the strong sense of community. The second sub-theme *local attachment* embraced the strong feeling of belonging and pride. This underpinned the attitude of care and stewardship in preserving the town's history, caring for their environment, and vision for the future of their town. The third sub-theme *preparing to change* encompassed the acute awareness and anticipation of the changes Warkworth was undergoing with associated concern for how the ongoing development of the town was being managed. Ensuring local infrastructure could meet current and future demand was identified as an important priority. The dynamic relationships participants currently had with their town were embedded in the historical identity and provided a firm foundation for embracing the future changes the town was undergoing. *Being established* represented a strong community attribute that may act as a buffer for older people facing indeterminate situations in their ongoing transactions with their environment. Participants talked about stewardship of their community in preserving the past, improving the environment, and preparing for change. *Being established* illuminated this valuable contribution participants made to their community.

The second theme *being present* captured perceptions and everyday experiences of shopping, accessing services, and socialising. While *being present* in their local town centre, the older participants closely monitored the quality of the environment for themselves, their future selves, and other older people in their community. Consequently, by *being present* older people contributed to their community by placing themselves in a custodian role at the centre of their constantly changing environment. The first sub-theme, *usability: getting there, getting around and getting in* encompassed participants' experiences and perspectives of the usability

of the physical environment from their own unique perspectives. The second sub-theme *continuity and everyday inquiries* encompassed the negotiation and renegotiation of the continually changing relationships they had with their environment in everyday transactions. The third sub-theme *shopping and accessing services locally* captured the mutual benefits of shopping locally to older people and the business sector. Priorities for improvement of the usability of the town related to footpath quality, traffic congestion, car parking, and features of the built environment. Opportunities for improvement included more housing options for older people wanting to stay in the community but to downsize, improvement to local transport options, and enhancing the connectivity of the town for all modes of transport.

The third theme *being involved* with three sub-themes *participating locally*, *acquiring information,* and *feeling valued and respected* captured the strong contribution participants made to the social infrastructure embedded in this community. It was evident many of the participants were actively involved across a wide range of groups in volunteering roles and membership. Participation in groups or volunteering provided a sense of purpose and opportunities to gain new skills and knowledge, to socialise, and to make a positive contribution to the community. Groups such as the Men's Shed had formed organically, driven from the grassroots in response to perceived needs in the local community. Cooperative collaborations had developed to the mutual benefit of the groups involved and the wider community where synergies between groups existed. The rise in second-hand stores provided informal gathering places and provided a range of social opportunities for volunteers and customers. For many participants, social participation was intrinsic to the informal, impromptu socialising during everyday activities. *Acquiring information* was vital to *being involved* in the local community. Lack of technological capacity disadvantaged some; thus, the need to have local information available in a range of formats was identified. *Feeling valued and respected* was highly relevant to *being involved* in the local community. Attitudes towards older people were generally perceived as respectful, although 'othering' of older people with disabilities and stereotypical images of older people were identified. Older people with disabilities, those less socially connected and newcomers to the area found it more difficult to participate. A dedicated place to gather, inclusive of less socially connected older people in the local community, was identified as a priority.

The fourth theme *being responsive* and the sub-themes *responsive to older people in everyday situations* and *the voice of older people in local decision-making* encompassed both existing strengths and priorities to improve local responsiveness to older people. Retail and service operators were responsive to the everyday situations in their transactions with older people. A culture of care and kindness, rather than formal age-friendly policies, guided their responses to

older customers and clients. *The voice of older people in local decision-making* captured the civic involvement of participants in the local community and their experiences of being heard and being acknowledged. Older people made up over a quarter of the local population and were highly represented at meetings when they were held in the town. Older people had a strong voice in the local community and a sustained interest in participating in a wide range of local civic matters. Although dissatisfaction with the local council was widespread, there was strong evidence of the local board's advocacy role within the local community. The following section presents a discussion of age-friendly attributes of Warkworth identified from the findings.

## The Age-friendly Attributes of Warkworth

The age-friendly model has been predominantly directed from the top-down as a global policy response to population ageing. The age-friendly movement is driven by the ideology of supporting older people to age actively in familiar communities. Therefore, communities should be inclusive of older people and support choices about ageing in their community. While top-down support is essential; equally, the success and sustainability of age-friendly programmes relies on partnerships with older people at a local level, commonly referred to as a bottom-up approach. Managing the relationship between top-down and bottom-up has been identified as essential for the sustainability of age-friendly programmes in rural communities. The purpose of this study was to provide foundational knowledge by privileging grassroots perceptions and experiences of the community; important for bottom-up collaboration and to inform an age-friendly programme in Warkworth. This study has explored the grassroots perceptions and experiences of older people, and business and service operators on the age-friendliness of the local community. This was achieved by collecting data from multiple sources including directly engaging with older people who have experience of their town and the business operators who serve them. In the following section, the first research question is addressed: what are the age-friendly attributes of Warkworth? The findings are discussed in relation to gerontology and age-friendly literature under the following headings:

- Being established: A strong sense of community;
- Being present: Older people as custodians of their local environment;
- Being involved: Strong social networks and involvement in the community; and
- Being responsive: A community responsive to older people.

## Being Established: A Strong Sense of Community

Being an established community with a strong rural identity was considered an age-friendly attribute. Participants outward expressions of pride and strong attachment were underpinned by the rich rural history and culture of the area. This suggests the rural identity of the Warkworth area has accrued incrementally over a long time. Memories of the river in earlier times were revived as we strolled along the wide boardwalk; participants reminisced on how the river was once a crucial part of the rural transport network and the life blood of the town. Previous research has identified the connection between a sense of community, enhanced by accumulated memories and embeddedness in the local history, and place attachment (Burholt et al., 2014; Peace et al., 2006; Wiles et al., 2009). There is a small but growing body of knowledge on the relationships older people have with their rural communities (John & Gunter, 2016; Menec, Bell, et al., 2015; Walsh et al., 2020; Winterton & Warburton, 2012). A strong sense of community was highly ranked as a factor in helping rural communities to become more age-friendly (Menec, Bell, et al., 2015). Similarly, John and Gunter (2016) found a strong sense of community was an attribute of age-friendly communities in their multi-site case study. Furthermore, a strong sense of community has been linked to rural age-friendly programme sustainability (McCrillis et al., 2021). While acknowledging the heterogeneity of ageing experiences, it is proposed that the strong sense of community identified in this rural community represents a foundational condition for age-friendliness.

The experiences of ageing in this changing rural community were diverse, underscoring the highly contextual nature of situations. More recent newcomers were establishing social networks and settling into the town, whereas long-term residents were more embedded in the local community. The highly contextual experiences of ageing found in the current study have been identified in other rural studies on ageing (Keating et al., 2013). Over time the context changes, older people were known to continually negotiate their relationship with their place with integration and re-integration in a continually changing world (Cutchin, 2004). Moreover, the relationships of attachment to a place people form are known to increase with age and may provide a sense of security and stability for people as they enter and move through older adulthood (Wiles et al., 2009; Wiles & Jayasinha, 2013). Place attachment is thought to provide a buffer against changes that occur with the ageing process and changes in the environment (Cutchin, 2003; Wiles et al., 2009) and may influence decisions to age in place (Wiles et al., 2017; Winterton & Warburton, 2011). The current findings underscore the importance of being an established rural community to age-friendliness and should be a source of strength for older people ageing in place during the development and changes the town is undergoing.

The current study found genuine care and concern for the town's environment both natural and built were outward expressions of the strong sense of community. Knowledge of the town's history and individual curiosities influenced the way participants conveyed their care for the town and river; thus, care and concern were expressed in different ways. Participants with long term connections to the area, in particular, monitored the condition of the Mahurangi River. Participants had followed the progress of the river restoration. They compared the current condition of the river to their memories of how it used to be. Attention was given to the way the river had formed and how the bush had regenerated on the riverbank. Other ways of caring for the environment were expressed by monitoring the state of the green spaces, gardens, and the general presentation of the town. These different ways older people expressed their care for the environment related to historical interests and accumulated expertise. Similar findings indicated older people's interest in conservation issues may stem from previous employment and continue into their retirement years (Yarker et al., 2020). The participants in this study enthusiastically shared their knowledge and expertise regarding their local town. These findings highlight the importance of understanding the motivations behind expressions of care and concern and valuing these contributions to improving the environment.

The attitudes of responsibility and commitment to improving the environment found in the current study have received little attention in the rural ageing literature. Few studies have investigated the care older people have for their environment in rural communities especially in relation to ageing in the community and age-friendliness. Although a positive association between pro-environmental attitudes and behaviours, and place attachment in rural communities has been identified in environmental studies, they were not specifically focused on older people (Junot et al., 2018; Walker & Ryan, 2008). Older people's care for the environment was explored in a study of older Australian's experiences of living along the coastal fringe in Queensland (Warburton & Gooch, 2007). These authors identified a type of environmental stewardship similar to the current findings, where older people were motivated to provide a better environment for themselves and future generations. Warburton and Gooch (2007) viewed environmental stewardship within Erikson's psychological theory of generativity in later life. From Dewey's pragmatic perspective, environmental stewardship can be understood as going beyond individual psychology to a communal response to the environment. Dewey's incorporation of social morality and ethics illuminates the communal motivation participants expressed to create a better place in which to live for themselves and others.

The establishment of the Mahurangi River Restoration Trust is an example of a more formal and communal expression of environmental stewardship. Groups like this were typically formed when communities strongly expressed a need to protect, preserve or effect change in the environment. In the current study, the motivation was to restore the river to a more healthy and usable state to improve the sustainability of the town. Community stewardship on this scale can have a unifying effect and enhance the sense of community and rural identity for the wider community, including older people ageing in place. As such, communal expressions of environmental stewardship should be recognised as important for age-friendliness in rural communities.

Other terms have been utilised to describe care older people have for their community environment identified from the current findings. In a recent study, Yarker et al. (2020) offered a convincing argument for the concept of 'a stewardship of place' as an explanation of the care older people have for their environment when ageing in rural places. These authors' notion of stewardship recognised the interrelationship between the need for continuity of the self and the continuity of the environment (Yarker et al., 2020). Wiles and Jayasinha (2013) used the term activism to describe a type of care for place that is similar to environmental stewardship. They found some older people were alert and watchful for incremental changes in their environment while others were more actively and passionately involved in power struggles to effect change (Wiles & Jayasinha, 2013). Dewey's pragmatic perspective provided insight into community stewardship as the co-constitutive and continually negotiated and renegotiated nature of transactional relationships between people and their environment. Further, older peoples' care for the place and motivation to improve the environment resonates strongly with the principles of continual improvement integral to the age-friendly model.

Motivation participants in the current study expressed towards continually improving the environment for the future contributes to the literature within geographical gerontology. This emerging discipline has a central focus on the relationship older people have with their community environment. Further, geographical gerontology offers an explanation on how history and culture inform the present and future relationships older people have with the places where they live (Skinner et al., 2018). Cutchin (2007) explains this relational perspective by drawing on Dewey's notion of transactions between people and their environment. To illustrate this continuity, Cutchin proposed that "places and landscapes are laden with past habits that provide the matter for current habits, but as with individual habits themselves, places and landscapes are also continually in the making" (Cutchin, 2007, p. 57). Dewey's notion of habits, infused with sociocultural context, provided an insightful lens to view the

taken for granted activities central to the transactional relationship between people and their environment found in the current study.

Cultural events in Warkworth had developed into longstanding traditions over many years and were a source of local pride. Local cultural events had evolved organically and creatively in response to increased cultural diversity in the town. Cultural groups presented and celebrated their culture. Additionally, there was evidence of intergenerational collaboration in local events. People of all age groups connected and celebrated at the local level, raising the profile of older people in the community. For example, reporting the competitive event for users of mobility scooters on the front page of the local newspaper promoted a positive image of older people participating competitively in their community. Involving older people with diverse capabilities in local cultural events may counter some of the stereotypical depictions of ageing as decline and encourage inclusion of older people in the community.

Other studies have identified the positive influence older people have on the cultural life of small rural communities (Walsh et al., 2012). Process evaluation studies of age-friendly programmes in rural Canada found promotional events were used to successfully raise awareness of the age-friendly concept (Menec et al., 2014). In addition to contributing to the rural identity and community spirit, the annual events in Warkworth fostered social inclusion across generations and provided opportunities to raise awareness of older people living in the Warkworth community including older people with diverse capabilities. The current findings contribute new insights into the role of community events in establishing, building, and maintaining a sense of community as well as promoting inclusion and age-friendliness in rural communities.

## Being Present: Older People as Custodians of Their Local Environment

The everyday presence of older people attending activities, shopping, and accessing services in the town centre contribute to age-friendliness in this rural community in several ways. Firstly, participants monitored the quality and usability of the physical environment for themselves and others in a custodianship mode. Secondly, many of the participants shopped and accessed services locally; thereby, contributing to the sustainability of local businesses by stimulating demand for necessary goods and services to support ageing in the community. Thirdly, participants simultaneously contributed to and benefited from socialising informally while being present in the town centre shopping and attending to their everyday activities.

A high proportion of older people in rural communities was found to contribute to age-friendliness in the Canadian context (Menec, Bell, et al., 2015). Additionally, a large and

growing concentration of older people has been identified as a precondition for successful age-friendly programmes (Fitzgerald & Caro, 2014). The mutually beneficial and co-constitutive relationships between the retirement population and the commercial sector supported ageing in rural communities. A higher percentage of older people was associated with opportunities to increase services and products catering to older people. In turn, this increased employment opportunities in providing services to older people, attracting younger people and return migrants (Menec, Bell, et al., 2015). Moreover, when older people were no longer able to drive to out of town places, they relied more heavily on local retail and services (Bromley & Thomas, 1995).

Being present and monitoring the quality of the environment suggests older people in Warkworth are providing real time community surveillance while undertaking everyday activities in their environment. The importance of getting out and about and maintaining a presence in their familiar community was identified in other rural community studies in New Zealand (Neville, Adams, Napier, Shannon, et al., 2018; Wiles et al., 2012) and globally (Novek & Menec, 2014; Weil, 2017; Winterton & Warburton, 2012). It has previously been observed that people who regularly walked in their local environment became "custodians of their neighbourhoods" and in walking "people become part of the terrain" (Oldenburg, 1999, p. xiv). In walking around, older people were noticing and experiencing small changes in their environment that had implications for maintaining their independence (Grant et al., 2010). Contributing in this way can bring about incremental changes that improve the environment and foster sustainability of rural communities (Skinner et al., 2021). Dewey's theory of inquiry explains the custodianship identified in these findings. Dewey contended people undertake everyday common sense inquires as a result of their transactions in their environment. These everyday inquiries around the town constitute a strong community resource similar to the stewardship activities discussed earlier in this chapter. This concerned citizenship contributes to rural age-friendliness and leans towards continual improvement imbedded in the age-friendly model.

Contextual factors related to liveability were identified by walking alongside participants in the present study. As well as the quality of the physical environment, these factors included, individual capabilities, psychological factors, prior experience, socioeconomic factors, and historical and cultural influences. The concept of liveability is similar to usability and extends the relational perspective as a person-centred approach in studying the relationships between people and places in their transactions in the environment (Heatwole Shank & Cutchin, 2016). Imperfections in the environment, inconsequential to the general population, were amplified for older people with functional loss; having so much more at stake heightened the fear of

falling (Handler, 2014; Kellaher et al., 2004). The participants had their own unique set of capabilities implicit in the transactions in their environment. Experience gained from negotiating the physical environment with a range of disabilities contributed to their vast expertise in their local environment. For example, lining up mobility scooter wheels at a particular angle to account for slopes and knowing the safest place to cross on a particular road. The walking interview technique enabled a closer view of these experiences of ageing and revealed the unique, contextual features within transactions.

While participants were shopping and accessing services in the town centre, they sought out places where they were likely to meet people such as the supermarket, local shops, or outdoor cafes. The two supermarkets located centrally in the town provided social spaces for their older customers to gather and interact. By creating opportunities for spontaneous social encounters, these retailers were enriching the social environment. Supermarkets have been identified as the most important and most utilised service by older people (Lowen et al., 2015). Where large supermarkets have been constructed away from town centres, older people missed opportunities for spontaneous encounters at a local level. This adversely affected older peoples' feelings of community attachment and well-being (Beech & Murray, 2013).

Business operators in the current study recognised the social benefits to older customers from taking time to partake in casual conversations. For some business operators, who felt they had aged alongside their customers, the benefits of local relationships, formed over many years, were reciprocal. Although not identified specifically as age-friendly by business operators, some identified friendliness towards customers as a small-town attribute. Gardner (2011) identified similar casual conversations as "relationships of service" (p. 267) and argued their importance for social inclusion was often overlooked. Similarly, Stewart et al. (2015) conceived the term 'civic socialising' to capture older peoples' spontaneous socialising in local neighbourhood shops and reasoned it was essential for continuation of everyday engagement in the community. Overall, connections older people formed in public places contributed to the feeling of belonging to the community (Gardner, 2014). The present findings suggest impromptu socialising, while being present in the town shopping and utilising services, improved the social environment, a key age-friendly domain. These insights extend what is known about the role of centrally located retail and services, regularly utilised by older people, to rural age-friendliness.

## Being Involved: Strong Social Networks and Involvement in the Community

The current findings suggest general satisfaction with the level of involvement in the local community. Both interview participants and survey respondents were involved in a wide range

of activities and groups. Many of the local groups were administered and sustained by older people skilled in business administration and leadership. This finding builds on existing knowledge from rural communities in Australia and Ireland where volunteering and involvement of older people in their communities has been identified as contributing to community sustainability (Davis et al., 2012; Walsh & O'Shea, 2008; Winterton, Warburton, Clune, et al., 2014). Furthermore, involvement in social activities is associated with older people feeling more connected to their communities (Davis et al., 2012).

New groups had been established as local population and needs changed with in-migration. For example, the local Men's Shed, initiated by a group of older people, fulfilled a longing some retired people had to continue using their skills in a meaningful and purposeful way. This finding indicates the aspirations of older people were constantly changing. With increases in longevity, retirement has increasingly moved beyond being a time of passively receiving services to more active contributions from older people (Walsh & O'Shea, 2008). For example, senior citizen groups in some rural communities have lost membership whereas other groups have flourished (Winterton et al., 2018). The expanded scope of the U3A group in Warkworth supports the educational focus and the perception of personal growth from sharing and receiving knowledge. New U3A sub-groups had evolved organically as members pursued topics of interest.

In a similar vein, the second-hand goods stores (op-shops) recently established in the town provided several benefits to the social environment and age-friendliness of the town. Firstly, the stores were predominantly governed and staffed by local older people, providing opportunities to contribute a wide range of skills. Secondly, many of the participants enjoyed visiting these stores, socialising with people of all ages as they browsed and shopped. Thirdly, profits were directed to the local economy and other local charitable groups; thus, stimulating goodwill in the community. Finally, synergies between groups and the co-operative sharing of skills and resources had been recognised. For example, the links developed between one of the 'op-shops' and the recently established local Men's Shed. In some rural communities second-hand goods stores have substituted for senior centres by providing community hubs where older people gathered and exchanged goods and information (Davis et al., 2012; Winterton, Warburton, Martin, et al., 2014). These findings contribute to knowledge on the social role of 'op-shops' in rural communities.

The present study found the local library, the council service centre, the information centre, and the public toilet facilities all shared the same building and formed a natural hub of services participants frequently visited. This natural hub provides important social infrastructure for the

town and therefore aligns with the age-friendly model. There are several reasons for this contention. Firstly, the hub of services is close to the centre of the town, the river, and other service and retail destinations; places where participants regularly walked. Secondly, these services collectively provide a wide range of information utilised by older people in the town. Thirdly, the street frontage of the hub provides shelter from weather and is very close to the new regional bus service terminal. Lastly, the library provides regular activities for older people, is open over weekends, and has staff who are empathetic to the needs of their older patrons. A recently unveiled plan sought to create a space to connect the library to the river; thus, contributing an outdoor social space for intergenerational use. While the study found Warkworth currently lacked a dedicated community building space, this natural hub and the planned improvements could strengthen the social infrastructure for the town.

Lack of dedicated community centre was identified in the current study. The findings suggest a community centre would be beneficial for social participation especially for more socially isolated older people and to provide a place for intergenerational use. Gathering places such as community centres have been referred to as social infrastructure (Klinenberg, 2018). While social infrastructure may include street corners, cafes, outdoor seating, and libraries, it extends beyond bricks and mortar to a culture of inclusiveness and intergenerational goodwill (Yarker, 2019). Klinenberg (2018) recommended communities should give more attention to designing social infrastructure as a way of ameliorating social isolation. Similarly, Yarker (2019) argued social infrastructure should be included in community asset mapping as part of age-friendly assessments.

The current findings suggest retirement was not viewed as a time for passively receiving services in this community. Instead, older people in this study were motivated to continually create opportunities for themselves and other people by providing services within their community. While these findings build on experiences from other rural communities (Winterton, Warburton, Clune, et al., 2014), they highlighted the agency of older people and the ongoing contribution they were making to the age-friendliness of their town. Thus, the importance of building on existing place-based community strengths when implementing age-friendly programmes was again highlighted.

## Being Responsive: A Community Responsive to Older People

Retail and service operators regularly exceeded the service expectations of participants when providing essential goods and services in the community. Equally, the loyal patronage of older people was highly valued by retail and service operators interviewed. The increasing population of older people ageing in the community inspired informal age-friendly practices in

their everyday transactions with older people. This study found attention was given to recruiting staff with empathy for older customers and increasingly, older customer's needs were being incorporated into staff training. These findings build on previous age-friendly studies in rural Canada where local community responsiveness to the needs of older people was linked to a high percentage of people aged 65 years and over (Menec, Hutton, et al., 2015).

As explained earlier in this chapter, business operators understood the social benefits of casual conversations and impromptu encounters with their regular older customers. Business operators were accustomed to balancing multiple relationships across professional and personal boundaries where longstanding friendships overlapped with formal service relationships. The blurring of boundaries between formal and informal relationships has been identified in other rural studies where multiple roles overlapped in rural communities (Walsh et al., 2014). Although these interrelationships could also be found in urban settings, this effect was typically accentuated in these small, close-knit rural communities (Walsh et al., 2014). Consequently, the relationships formed between older people and business and service operators in the town contributed to the social inclusion of older people, an important aspect of age-friendliness.

Business operators were attentive towards older people with a wide range of needs associated with common disabilities including, impaired mobility, shortness of breath, and cognitive and sensory impairments. Their responses to these everyday situations again reflected practices that typically extended beyond expectation. This included noticing when a comfortable seat was required, offering physical assistance, facilitating the use of unfamiliar technology, providing shelter from cold weather, calling taxis to take older people home, and in some situations, providing personal transportation. These findings were similar to those of Walsh et al. (2014) where local informal practices and support networks in rural Ireland were found to enhance social inclusion and integration of older people; thereby counteracting the exclusionary effects of rural decline and withdrawal of formal services. The flexibility and responsiveness of business and service operators towards older customers in the current study was considered to address several dimensions of age-friendliness; namely, social participation, social inclusion and respect, and information and communication. It will be prudent to understand these existing strengths and incorporate them into future age-friendly programmes.

The findings from this study suggest older people in Warkworth are regularly involved in civic matters and are motivated to have a say about issues in their local community. The local board

representative had noticed older people were highly visible at local meetings and had responded to older people's preference for in-person meetings as means of public engagement. An effective relationship had developed between the incumbent local board chair and older people in the local community. Confidence and trust had been established by the attention given to some of the local priorities and the advocacy role of following up on local issues lodged through the Auckland Council reporting system.

The findings suggest there were established local board processes for engaging with local Māori and evidence of partnerships in specific community projects. While writing up the findings of this study, the local iwi, Ngāti Manuhiri, relocated their headquarters into the former Courthouse, an historic building in the main street of the town. The outside of the building has been renovated to reflect their cultural heritage, strengthening Māori cultural presence in the town. New Zealand, through the Office for Seniors, has promoted a uniquely New Zealand age-friendly model by emphasising diversity and culture as more fully inclusive of the country's bi-cultural approach. Engaging collaboratively and in partnership with local Māori and other local ethnic groups has been identified as essential to the success of age-friendly programmes in the New Zealand context (Neville et al., 2021). Although the perceptions and experiences of Māori older people and other ethnic groups were not specifically identified in the current study, the findings suggest there was political will to work in partnership with local iwi and other cultural groups in line with the spirit of the Aotearoa New Zealand Age-friendly model.

## Recommendations for Policy and Practice to Improve the Age-friendliness of Warkworth

The second research question for the study was: what are the priorities and opportunities for improving the age-friendliness of Warkworth? A key imperative of the WHO age-friendly cities and communities model is to promote continual improvement in the environment for older people ageing in their communities. Consistent with this imperative and the strengths-based approach of this study, the following section incorporates the priorities and opportunities in the discussion of recommendations for policy and practice to the local community, the local board, the local council, and central government in New Zealand. This approach is consistent with acknowledging the community's existing strengths and age-friendly practices when implementing a future age-friendly programme. The recommendations are presented and discussed in context of the physical, social, and service environments consistent with the age-friendly framework.

# Physical Environment

## Placing Older People at the Centre of Age-friendly Assessments

The findings from the present study suggest older people were ideally suited to be active partners in developing effective strategies to improve usability in their local environment. Older people should be empowered to assess the age-friendliness of their own local communities. Walking alongside older people in this study was an effective way to gain a deep insight into their actual experiences of their environment. Honouring older peoples' experience will be crucial in co-designing age-friendly initiatives that will meet the needs of the oldest citizens in Warkworth and other rural communities. Older people have vast experience from being present in the local environment during everyday transactions. The walking interview technique was used to co-construct knowledge of age-friendliness in a deprived neighbourhood in Copenhagen. The findings suggested walking interviews empowered older people and highlighted their diversity (Carroll et al., 2020). Recording digital images on smart devices and using principals of citizen science are also effective in engaging older people in evaluating their environment (Tuckett et al., 2018). However, walking alongside talking with older people as they negotiated the physical environment was inclusive and collaborative, providing highly contextual usability data in real time.

The term usability, utilised to explain the participants' experiences in the physical environment, more accurately reflected the person-centred experience of participants and the transactional perspective utilised in this study (Heatwole Shank, 2016; Iwarsson & Stahl, 2003). Accessibility can be studied objectively using a set of predetermined standards; whereas discovering the usability of environmental features requires the contribution of the users' actual experiences that take place in their sociocultural context (Iwarsson & Stahl, 2003; Iwarsson et al., 2013). Recent literature has identified multiple limitations of using generic checklists in assessing the age-friendliness of communities. The use of checklists tends to compartmentalise the age-friendly domains rather than reveal the interrelatedness of features (Handler, 2014). For example, the quality of the physical environment has an impact of older peoples' social participation. Further, checklists failed to account for the place-based complexity and diversity of rural people and places (Buckner et al., 2017) and negated the bottom-up approach where older people were central in assessing and evaluating age-friendliness (Buffel et al., 2012; Plouffe et al., 2016).

## Preserving the Town Centre

The current, historical town centre of Warkworth should be maintained as the commercial centre of the town. Warkworth's town centre has been the central focus of the town

throughout its long history. The Warkworth Structure Plan reflects the importance of the current town centre to the town's rural identity and sense of community. Although older peoples' specific needs were not directly addressed in the Warkworth Structure Plan, retaining the town centre as the 'beating heart' of the town is consistent with an age-friendly approach. The local board's intention to preserve and upgrade the town centre should enhance the physical, social, and service environments in Warkworth for older people ageing in the community.

The importance of retaining established town centres in small towns undergoing rapid population growth has been identified in the Canadian context (Hanna et al., 2009). Older people were particularly impacted by lack of social connection when commercial centres were moved to the periphery of towns. In addition to the essential infrastructure, having familiar landmarks, buildings, and places in the town was identified as vital to a sense of local community identity (Smith & Cartlidge, 2011). As Warkworth develops, large retail corporations may be attracted to the town. The current study found some of the more mobile participants had not considered the economic impact on the historical town centre from large format destination retail and commercial zones. Moreover, limited consideration was given to the physical and social impact on non-drivers who relied on walking or public transport to access local retail amenities. Accordingly, awareness should be raised in the wider local community about the importance of a usable, connected, and commercially viable town centre to a diverse older population ageing in the community.

## Managing the Infrastructure Demands of a Growing Town

Greater collaboration between the local community, local policy makers, planners, and developers will be required to design infrastructure suitable for an ageing population. Older peoples' perspectives are rarely included in these planning processes. Co-design with older people would ensure their needs were considered and would build on the strong sense of community found in this study. Lack of cross-sector collaboration and central government support have challenged the sustainability of rural age-friendly programmes (Russell et al., 2019; Colibaba et al., 2020). Participants in the current study understood the town was poised to undergo rapid development and population growth. There was tension between acceptance of a changing environment and concerns about how future infrastructure would be managed. Population change is known to disrupt the attachment and sense of security older people ageing in the community experienced (Cross, 2015; Walker & Ryan, 2008). On the other hand, rural retirement migration was found to contribute positively to the social sustainability of rural towns (Stockdale & MacLeod, 2013; Winterton et al., 2018). Although a strong sense of

community identity is known to buffer older people from changes in their community (Cutchin, 2003; Smith & Cartlidge, 2011; Walsh et al., 2020; Wiles et al., 2017), it will be important for policy makers to understand the infrastructure demands from growth and migration and the impact on older people ageing in this community.

## Range of Housing Options

A range of suitable housing options close to essential services and amenities will be essential to enable older people the choice of remaining in Warkworth as they age. Identifying the housing aspirations of older people ageing in this community should be a priority in planning for the future development of Warkworth. Including older people in the planning stage would ensure the community is prepared to meet the housing demands of the rapidly ageing population expected in the Warkworth area. The findings identified a perception that current housing stock was unsuitable for older people downsizing from larger family homes. Additionally, older participants wondered how they would fare as their support needs increased, indicating there was a need for assisted living and social housing options. Other rural communities have also identified lack of social housing or assisted living to support older people to age in place (Morris & Halseth, 2019). Having a range of housing options is considered a core feature of age-friendly communities as it offers the possibility of staying in familiar communities (Fitzgerald & Caro, 2014; WHO, 2007). Again, a collaborative approach between the public and private sectors was typically required to design age-friendly housing options (Russell et al., 2019). As well as having suitable options for downsizing, housing should ideally be near services. While the quality of participant's homes was not a central focus of this study, the connectivity between their residential location and the town centre was relevant to their continued presence in the town.

The proposed mix of new housing types intended in the Warkworth Structure Plan goes some way to recommend a range of housing tenure categories for this growing town. However, as is typically found in urban design plans, the needs of an ageing population were not specifically recognised in the Warkworth plan. Housing options recommended in the age-friendly communities' model include lifelong housing with universal design (Pynoos et al., 2009), smaller dwellings suitable for one to two people, social housing, and assisted living options (WHO, 2007). Although drawing on the housing experiences of other countries with more advanced ageing populations may be useful, the range of housing options incorporated into future planning should reflect the needs of local older people. There is an opportunity to design housing suitable for older people during the anticipated growth in Warkworth over the

next two to three decades. However, policy makers and planners should consider location and connectivity to services older people regularly use, including health care services.

The proliferation in retirement villages in well-resourced countries including New Zealand has been powered by ageing in place policies, ageing populations, and lack of affordable alternative housing options suitable for older people (Peri et al., 2020). Policy makers and town planners in New Zealand are inclined to view retirement villages as a solution to older people's housing requirements (Lupus et al., 2013). While retirement villages appeal to some older people as a type of housing when making decisions about where to live as they get older (Crisp et al., 2013; Grant, 2007), the current study found mixed perceptions of retirement villages as a housing option. These findings suggest this type of segregated housing for older people may not be meeting the housing aspirations of all older people in Warkworth. Similarly, housing options for older people ageing in the community has been identified as a national research priority in New Zealand (Doolan-Noble et al., 2019).

The retirement village located in the main street of the Warkworth provided distinct age-friendly features. Participants living in this central retirement village felt connected to the town and valued being within walking distance to bus stops, services, and amenities. Retirement villages tend to be built in peripheral areas of towns or in suburban areas of cities due to the availability of land and zoning conditions. This may exclude some older people from participating in mainstream society and affect intergenerational relationships. However, building retirement accommodation, as part of more intensified housing in central locations, is still relatively uncommon in New Zealand (Lupis et al., 2013). Advantages from being close to essential services and intergenerational connections experienced by participants in the current study contribute new insight to rural ageing literature. Moreover, centrally located housing options for older people was congruent with age-friendly principles and should be promoted.

## Designing Usable Transport Systems with Older People

Designing public transportation networks required coordination across local government organisations. Ideally, policy makers and planners should include older people ageing in the community in co-designing local transport systems. This study found older people already had a custodial relationship with their environment, gathering valuable local knowledge and experience during their regular transactions in the environment. Further, it was essential to consider the transport needs of a rapidly ageing population to counteract the heavy reliance older people have on private vehicle use. It will be important to explore locally sustainable age-friendly options including shared walkways, electric cycles, and mobility scooters to support the mobility of older people ageing in the community (Shergold et al., 2012). Further,

local government should engage with older people in developing innovative and responsive local transport services that build on existing strengths and resources. For example, extending existing volunteer driving schemes such as those facilitated by the RSA and the hospice.

Usable transport systems are vital to enable older people with a range of capabilities to remain in their communities when driving is no longer an option. Lack of transportation options in rural areas has been identified as a barrier to older people's engagement in rural communities globally and in New Zealand (Neville, Adams, Napier, Shannon, et al., 2018; Ryser & Halseth, 2012). The findings from this study suggest the public transport options were more oriented towards younger people and those who commuted to the nearest urban centre. Flexible and on demand door-to-door transport was typically more congruent with older people's needs (Hagan, 2019; Shergold et al., 2012) and has been identified as age-friendly in other rural communities (Novek & Menec, 2014). Although the new bus service connecting Warkworth and some of the surrounding communities to Auckland was acknowledged to be an advancement in transportation options for the community, participants raised concerns regarding the usability of the bus service for older people. Having to connect and change buses several times to get into the city or to the airport was considered unsatisfactory and consequently few had used the bus service. Volunteer travel companions, to accompany older people as they adjusted to new modes of transport, should be considered as a local age-friendly initiative to ameliorate apprehension and lack of confidence in using public transport.

Short range travel was common for older people in rural communities as they tended to spend more time in their local community (Shergold et al., 2012). In the present study, the majority of walking interview participants relied heavily on private vehicles to shop and access services. Getting up and down the hills and across busy intersections required private transport for most participants. While many were able to walk around the town centre, they typically drove to get there. Although the local taxi service was found to have several age-friendly features for non-drivers including a door-to-door service and familiar drivers trained to assist more frail older people, there was an opportunity to increase their capacity during busy times. Participants in this study who regularly used a private vehicle had considered transport options beyond driving. While public transport was not an immediate priority for the majority of participants, other forms of sustainable travel such as electric cycles and mobility scooters had been considered. It will be important to consider the specific transport needs of people ageing in this community with respect to connectivity and the topography of the town.

### Develop Car Parking Capacity Suitable for Older People

Designing a comprehensive car parking plan, incorporating both council-controlled car parking and private car parking was an urgent priority for the town in meeting the needs of an ageing population. The findings of this study identified older people had diverse mobility needs with heavy reliance on driving; thus, older peoples' shopping and activity patterns should be considered when designing parking systems. Lack of consensus between business operators and older participants on parking time limits reflected the diverse needs of the community. Some businesses relied on a high turnover of customers and therefore favoured shorter time limits. Conversely, short term parking limits were often unsuitable for older people hoping to complete multiple activities. These discrepancies illuminated the complexity of designing car parking to suit disparate needs. This complexity was further complicated by the differences in how street parking controlled by the council and private business car parking facilities were administered. Street parking was subjected to tight controls and hefty infringements notices, whereas private car parking was less rigidly patrolled by local businesses.

The local board was aware of the increasing car parking pressure in the town and understood older people often needed to park close to destinations. Commuter traffic had progressively occupied valuable central town parking spaces. Plans were underway to establish a park and ride facility away from the centre of the town to free up car parks in the town, increasingly occupied all day by commuter traffic. This initiative had potential to improve older peoples' access to shops and services in the town; thus, advancing the age-friendliness of the town.

## Social Environment

### A Dedicated Community Centre

Findings from this study identified a dedicated community centre for people of all ages was a priority for the town. Participants recognised social isolation was a growing issue in the town as many older people were living alone in the mainstream community without close family. Moreover, newcomers to the community looked for a community centre as a place to meet people. Community centres are known to provide informal gathering places for older people and are especially beneficial for older people less socially connected or are newcomers to a community. Further, dedicated community centres with facilities that were inclusive of older people was congruent with age-friendly principles. Multipurpose community centres may be more acceptable to older people as stigma associated with senior centres has been found to deter some older people (Bell & Menec, 2015). For similar reasons, senior citizens groups have had declining membership (Winterton et al., 2018). While there were community spaces that groups could hire on a casual basis, such as the recently renovated town hall and the RSA, a

more permanent community facility where older people could ‘pop-in’ and meet people informally was envisaged. One of the faith-based organisations in the town aspired to incorporate a community space in their planned new development. This organisation had highlighted the imperative for a dedicated meeting and socialising space that was open to the wider community irrespective of peoples’ faith-based affiliations.

Although community centres provide opportunities for social connection, recent research reflects interest in recreating public ‘third places’ in communities where people of all ages can meet informally and socialise (Goosen & Cilliers, 2020). Globally, suburban sprawl and sociocultural trends have contributed to the reduction in the traditional ‘third places’ where people typically met on neutral ground such as local public houses and town squares. ‘Third places’ are thought to be important for preventing social isolation and there is a move towards integrating more ‘third places’ into contemporary town planning. A distinguishing feature of ‘third places’ is the social opportunity it offers people to meet close to home and on neutral ground (Goosen & Cilliers, 2020; Kiddle, 2019; Oldenburg, 1999). There was an opportunity in Warkworth to improve the availability of places where older people could meet in the town centre. Further, there was an opportunity to increase the use of social media spaces as a form of online social participation and communication among older people in Warkworth. The findings from the current study suggest the use of online media is increasing among older people. The impact of COVID-19 stay at home messaging is likely to have accelerated online social participation.

## A Centralised Information Hub

The local information centre in the main street had recently been rebranded and given a renewed scope to better serve local needs. There was an opportunity to further develop the information centre into a centralised information hub by building on the existing information services located in the same building. For example, the library provided information technology assistance to older people and the Auckland Council Service Centre provided an extensive range of information on services available locally and in the greater Auckland area. Centralised information hubs have been identified as age-friendly because they become a ‘one-stop shop’ for the relevant and up to date information older people need to remain connected to their community (Everingham et al., 2009). Currently, information older people in the town required was fragmented. For example, health care information required negotiatating through multiple agencies that operate remotely from the local community. Although an integrated information system would be ideal, it would require collaboration across government agencies and require political will across levels of government. However,

there was an opportunity to provide a local information service administering a centralised hub of local information. This would improve the age-friendliness of Warkworth and support ageing in the community.

## Service Environment

### Local Health Care Services

Increasing pressure on health care services was anticipated considering the proposed population growth in the Warkworth area. Participants were concerned about the capacity of existing public health infrastructure. A purpose built private surgical hospital in Warkworth had available capacity for an increased range of publically funded surgical procedures. However, a lack of will at the regional and central level inhibited local solutions between private and public health services. Centralised health policy in New Zealand meant the co-ordination of health care was controlled remotely from the community by central government and District Health Boards. This disconnection was problematic for a small rural community, such as Warkworth, in planning for future health care service provision. This lack of collaboration in planning local health care services has been found in other rural communities (Bolin et al., 2015). There was an opportunity for a more inclusive and collaborative approach to health care planning at the local level. This would entail collaboration across the public and private sector and between levels of government; consistent with an age-friendly programme approach. This would enable greater utilisation of existing local health care capacity and the delivery of planned health care services closer to the community.

### A More Localised and Collaborative Form of Governance

Local government should build on the existing local strengths and facilitate engagement with older people in a more innovative, localised response to age-friendliness in Warkworth. The identified strengths of community stewardship and custodianship suggest older people in this community could contribute to decision making in a more structured and official capacity at a local, civic level. The participation of older people in local decision making reflects the principles underpinning the age-friendly model (Buffel & Phillipson, 2018; Everingham et al., 2012; WHO, 2007). However, collaborative relationships between local government and local communities need to be carefully cultivated (Everingham et al., 2012). Considerable skills and investment are required to advance and maintain collaborative relationships.

The findings from this study reflect widespread dissatisfaction with the effects of the restructured Auckland Council. Participants perceived Auckland Council and the associated Council Controlled Organisations were overly bureaucratic and multiple siloes interfered with

the democratic approach to local matters. For example, participants were constantly lobbying to get action on local priorities raised with the council. They perceived decisions were made remotely in a detached manner from the local community. The centralised reporting system was viewed as impersonal and inefficient, leaving participants wondering if they had been heard. Participants felt disadvantaged in being part of a large rural geographical area with a dispersed population. Several towns and many small settlements competed for insufficient resources. There was a perception that priorities such as road and footpath maintenance had been neglected and the council only responded when adverse events occurred. Participants understood the complexity of local issues such as transport networks in the town but believed older people's expertise was underutilised. Instead, older people had felt side-lined and disempowered. Participants identified an opportunity to improve how the local council and the associated Council Controlled Organisations communicated with the local community.

Timely response to issues reported to the local council was identified as a priority. Moreover, decisions made by policymakers and other stakeholders that impacted on older people ageing in place in rural communities should be made more collaboratively and closer to the places where action and experience takes place. Viewing this from Dewey's pragmatic perspective, the democratic process was richer for having the voice of ordinary people sharing experiences at the local community level (Wills & Lake, 2020). In supporting a bottom-up approach to future age-friendly initiatives in Warkworth, Age-friendly Auckland should establish community collaborations early on. Where age-friendly programmes were centralised in large jurisdictions such as Auckland Council, there was a risk of programming filtered down rather than including rural communities at the outset.

This section of the discussion has presented multiple recommendations for improving age-friendliness arising from the priorities and opportunities found in this study. While this case study found Warkworth has pre-existing age-friendly attributes, it was evident the community was largely unfamiliar with the WHO age-friendly concept. Raising awareness of population ageing and the needs of older people ageing in the community has been identified as essential to the successful implementation of age-friendly programmes (Menec et al., 2014). During recruitment for this study information about the WHO age-friendly concept was shared with participants along with the study's purpose and aim; thus, some awareness would have been raised in this community in undertaking research. It will be important for Auckland Council to work with the local board in raising the wider community's awareness of the age-friendly concept in light of launching the Age-friendly Auckland programme. The following section discusses the implications of this study for future research.

## Implications for Future Research

Rural communities in New Zealand and globally are rapidly changing due to structural ageing trends. This single case study was an in-depth inquiry focused on one small rural town in New Zealand. The town was purposefully selected because of the high percentage of older people and the rapid growth trajectory. These findings are specific to Warkworth and highly contextual; thus, the findings are not intended for generalisation to other communities. Communities are encouraged to undertake local assessments. Notwithstanding the inability to generalise, the findings may be useful to compare in studies of other rural communities with similar population profiles looking towards improving age-friendliness.

Future age-friendly research in Warkworth and other communities should include older people as co-researchers. Age-friendly studies are ideally conducted using co-research principles where older people work in partnership with academic researchers in all phases of the research process (Buffel, 2018; Fudge et al., 2007). A pragmatic approach to social inquiry supports research designs such as participatory action research and citizen science (Wills & Lake, 2020). The findings from this study will be presented to the community and should provide an empirical platform for future participatory research. Raising awareness of the age-friendly model would ideally build on existing strengths and established age-friendly attributes of the community identified in the present study.

In undertaking future age-friendly research projects in Warkworth, it would be essential to identify and involve key local leaders and older people who would ‘champion’ the age-friendly model. The current study found existing groups were already co-ordinating information and activity in the town. Evidence suggests communities have more success in implementing age-friendly programmes when they have well organised human resources such as steering committees at the local level (Menec et al., 2014). Additionally, effective local leadership was essential to the sustainability of age-friendly initiatives. Local age-friendly ‘champions’ were often skilled at leading funding applications and keeping up momentum (Russell et al., 2019). This translates to empowering older people at the ‘grassroots’ of communities to be at the forefront of age-friendly programmes. Thus, it was crucial to have older people who were respected in the local community and were able to form effective local partnerships.

Future age-friendly research should advance Dewey’s pragmatic perspective as an epistemological lens to view the relationship between older people and the environment. Case study methodology has potential to provide highly nuanced understanding of ageing in the community by triangulating multiple sources of data. As identified in the present study, interviewing while walking alongside participants was an effective method for collecting data

about ‘person in the environment’ transactions to inform age-friendly initiatives. Collecting highly contextual data in real time with this participatory method empowered older people. A recent scoping review of methods used to study relationships between older people and their neighbourhoods identified emerging interest in combining mobile qualitative interview techniques with mobile technologies such as Global Information Systems (GIS), Global Positioning Systems (GPS), electronic mapping and photo-voice (Hand et al., 2017). Case study methodology would support the integration of innovative mobile technologies with other sources of data.

## The Original Contribution

This section of the chapter begins by presenting the original contribution this study makes to policy, practice, and age-friendly literature in New Zealand. Following this the original contribution the study makes to rurality, rural ageing, and rural age-friendly literature at the international level is explained. This is followed by the philosophical, theoretical, and methodological contributions.

### Contribution to New Zealand Policy, Practice, and Research

Unique features justified the selection of Warkworth as a rural town for this case study. Firstly, it is home to a much higher percentage of people aged 65 years and over compared to the total population of New Zealand. Secondly, the town of Warkworth is poised to undergo rapid development and population growth. The Warkworth Structure Plan provides the blueprint to transform Warkworth from a small rural service town into a large satellite town. Although population growth is expected to occur in a staged manner over the next 20–30 years, this growth has already begun to have an impact on the local community. Thirdly, feedback from the Warkworth community, following an earlier research project on the engagement of older people in Warkworth, provided a mandate to advance age-friendly research in this community.

This place-based study makes an original contribution to New Zealand age-friendly policy, practice, and research by providing empirical evidence of the age-friendly attributes of Warkworth. This study was undertaken at a time when the concept of age-friendliness has received little attention in most communities in New Zealand. While the New Zealand government has made the commitment to support communities to work towards becoming age-friendly, most of the progress has occurred in larger urban centres. The study was undertaken prior to the introduction of an age-friendly programme; therefore, the findings will be useful as an empirical foundation for a future age-friendly programme in Warkworth. The findings will also contribute to age-friendly policy and practice at central and local government

level. Most significantly, the attributes, and priorities and specific recommendations will be useful to the community for sustaining and improving the age-friendliness of Warkworth during the next two to three decades of rapid population growth.

## Contribution to International Literature

As explained in chapter one, definitions of rurality have recently been scrutinised and challenged. Most definitions have relied on geographic and demographic factors with little regard for the strengths and opportunities provided by an ageing population. Recent literature has highlighted the importance of studying the unique characteristics and resources of rural communities in a climate of continual rural change (Buffel & Phillipson, 2018; Keating et al., 2013; Russell et al., 2019). The current findings address this call for more nuanced understanding of diverse rural communities. This study contributes in-depth evidence from a rural community undergoing rapid population growth from a small traditionally farming community to a large satellite town. While declining resource towns and the impact on older people have been the focus of some rural studies (Ryser & Halseth, 2012; Ryser et al., 2021; Wiersma & Koster, 2013), less is known about ageing in rural towns undergoing rapid growth.

To understand rural ageing, the situational uniqueness is central to the experiences of those ageing in dynamic, highly contextual rural communities with distinct combinations of attributes and challenges (Rowles & Cutchin, 2021). Thus, a locally based, bottom-up approach is warranted when developing and implementing age-friendly programmes in rural communities. This study contributes place-based findings from New Zealand to the rural gerontology literature by building on what is known about the contribution local older people make to age-friendliness in diverse rural places. Review of the extant literature found studies of rural age-friendliness were undertaken in communities with existing programmes. Recent evidence suggests understanding pre-existing strengths and local conditions may improve sustainability of rural age-friendly programmes (Russell et al., 2019). This study is unique in providing evidence on rural age-friendliness prior to implementation of an official age-friendly programme.

This study contributes the findings from a strengths-based approach to the study of rural age-friendliness. While the WHO age-friendly model was used as the conceptual basis for this exploratory case study, the analysis was predominantly inductive and abductive, open to discovery of unique age-friendly attributes. This study found the unique strengths and age-friendly attributes of Warkworth have developed slowly and incrementally over time. From this perspective ageing in the community is assumed to be an adaptive process where ongoing transactions occur in a co-constitutive way amongst people and their places (Cutchin, 2003). A

strengths-based approach transcends the assumption of decline and loss associated with ageing and instead older people are assumed to be resourceful and agentic. Further, it goes beyond environmental press associated with ageing to viewing communities as dynamic and resourceful. Community strengths are known to mediate and moderate experiences of ageing in the community (Scharlach & Diaz Moore, 2016).

## The Philosophical Position

Dewey's pragmatic perspective was the philosophical foundation for the case study methodology where the focus was on the particularity of a local rural community. A pragmatic perspective is commonly used as a philosophical foundation to justify using multiple methods within the same study. This justification centres on using whatever research methods are deemed most suitable to address the research questions. This premise is based on Dewey philosophical position that humans are innately motivated to improve the world; thus, the central purpose of research involving people, their social world and their places should be to make the world a better place to live in.

This study has contributed to theoretical development of the age-friendly model by applying Dewey's pragmatic perspective beyond the more usual philosophical foundation. This perspective provided a deeper and richer understanding of the age-friendly model. Dewey viewed the world as unfinished and unfinishable and stressed the importance of continuity and striving to improve places where people live. The notions of continuity and improvement resonate strongly with the continuous improvement process integral to the age-friendly model. Further, Deweyan pragmatism provided the foundation for the transactional perspective.

## The Theoretical Perspective

A further contribution to rural ageing and age-friendly knowledge was the application of a transactional perspective grounded in geographical gerontology. This approach builds on age-friendly studies that have been predicated on perspectives from the ecological theory of ageing situated within environmental gerontology. The person-environment fit model has been useful in explaining the interaction between the ageing person and their environment (Lawton & Nahemow, 1973). More recently, it has been argued that the person-environment fit model is overly dualistic and reductionist; whereas the central context of situations should be the focus (Heatwole Shank & Cutchin, 2016; Schwarz, 2012). Further critique of environmental gerontology has centred on the limited application of the person-environment fit model beyond the home and care environments. Geographical gerontologists have

proposed a more relational viewpoint, proposing a transactional perspective is more holistic and contextual in explaining the relationship between an ageing person and their environment in the community setting (Cutchin, 2018; Dewey & Bentley, 1949). Geographical gerontology is concerned with places where older people live as they grow older including rural places. Experts in this field propose the recent 'relational turn' in this specialty places a greater emphasis on the "active relationships between people and places in daily life" (Cutchin, 2018, p. 216). This was an effective theoretical perspective to underpin this place-based age-friendly case study. Dewey's transactional perspective provided a deeper understanding of the real-world transactions, the "organism-in-the-environment-as-a whole" (Dewey & Bentley, 1949, p. 109) within their holistic context.

## The Methodological Strengths

The single exploratory case study methodology utilised for this study allowed an in-depth inquiry from multiple perspectives (Yin, 2018). A key strength of utilising a single case study methodology was gaining multiple perspectives by triangulating data from multiple sources to provide an in-depth, nuanced, and holistic understanding of the 'case'; the age-friendly attributes of Warkworth. While case study methodology has been used effectively in some age-friendly studies, this study provided a unique contribution by combining the transactional experiences of older people, a cross-sectional survey of older people, and the perspectives of local retail and service operators in a single case study. The findings from this study provide a highly contextualised 'snapshot' from multiple perspectives of the age-friendly attributes of a rural town.

Age-friendly studies have predominantly favoured checklists of age-friendly features when undertaking assessments of age-friendliness. The checklist approach has been overly reliant on generic age-friendly features, failing to account for existing strengths of communities and typically generating data lacking in richness and depth. Instead, walking interviews provided a means of collecting rich, in-depth, and highly contextual data focused on the relationship between older people and their environment. The walking interview participants were living with a wide range of functional and sensory capabilities. Further, they experienced the social and service environment in different ways allowing convergence of diverse perspectives and priorities.

The perspectives of local retail and service operators provided a rich understanding of how older people, particularly those with physical disabilities and cognitive impairment, were served. In addition to providing perspectives on the age-friendliness of their businesses and services, they provided insights on the age-friendliness of the town from their own perspective

as local community residents. The quantitative and qualitative data gathered from a survey provided breadth of data from 210 people aged 65 years and over about age-friendliness of their town. Relevant documents provided contextual information as well as a being a source of data triangulated to address the 'case'.

This study has contributed to knowledge and practice on the use of mobile interviewing techniques. Few studies have used the walking interview method in rural places. This method promoted the active participation and inclusion of the older participants, consistent with the bottom-up approach integral to the WHO age-friendly model. Walking interviews have rarely been utilised in studies with older participants (Carroll et al., 2020; Gardner, 2011). Fewer still have utilised walking interviews to explore age-friendliness (Carroll et al., 2020). This may be due to the time involved in the careful preparation and the attention to safety walking interviews require. Notwithstanding, this method was highly effective in allowing direct observation and discussion of the participant's experiences to elicit nuanced insight into the usability of the environment in real time. This in-depth understanding would not have been possible by merely completing a checklist of features typically used to assess the accessibility of the town centre independently of participants. Furthermore, the depth of knowing would not have been discoverable in sit down, face-to-face interviews.

## Limitations of the Study

Several limitations were identified from reflecting on the research process and findings of this study. Firstly, the WHO age-friendly framework, used as the conceptual model for this study, is relatively new to the New Zealand context; therefore, is not widely understood at a local community level. During the consultation stage for this study, it was evident that few people in the case study community were familiar with the age-friendly concept. Moreover, there was some resistance to the concept and referring to people aged 65 years and over as older people. Resistance to age-friendly terminology and being labelled according to specific age cohorts has been found in other rural communities in New Zealand and globally (Ayalon, 2020; Waimakariri District Council, 2019). In exploring age-friendliness in this study, the age of 65 years and over was used to reflect the age when people become eligible for New Zealand Superannuation payments. However, 65 years and over has increasingly become recognised as an arbitrary age and one where the boundaries have become blurred. Blurring of boundaries between the case and the context is both predictable and accepted as an integral aspect of case study research (Yin, 2018). Despite lack of local awareness of the age-friendly concept and blurred boundaries around defining older adulthood, participants in this study provided numerous accounts and insights of age-friendliness integral to the Warkworth community.

Secondly, participatory research is considered the gold standard for age-friendly research at the community level (Buffel, 2018). However, undertaking co-research effectively required resources considered to be beyond feasibility for this case study, undertaken to fulfil the requirements for a postgraduate qualification by a single researcher. Further, there are recognised risks associated with unrealistic expectations, potential power imbalances and ethical issues that could be challenging for a sole researcher (Baldwin et al., 2018; Buffel, 2018). Notwithstanding this limitation, consultation undertaken with older people and other stakeholders from the community contributed to the design of the study. Additionally, walking interview participants were actively involved in planning their walking routes. The interviews were unstructured and responsive to environmental cues and individual participant's experiences.

Thirdly, data were collected at a single point in time representing a mere snapshot of person-environment transactions in this community. Following data collection, I was aware of constant change in the environment. Footpaths were repaired, improvements were made to the Hills Street intersection, and work commenced on the outdoor space between the library and the old Masonic Hall. Moreover, the COVID-19 pandemic dramatically changed the social environment. Although unable to capture the ongoing transactions between participants and their changing environment, the findings from this study suggest older people in this community were continually undertaking everyday inquiries, adapting their habits, and effecting change in their environment in response to their ongoing transactions in the environment.

Fourthly, the walking interview participants all identified as European ethnicity. While this predominance of European ethnicity reflects the current demographics of the population aged 65 years and over in the Warkworth area, the perspectives and experiences of older people from other ethnicities is missing from this study. Consultation with local iwi identified interest in the findings of the study; however, iwi was unable to be actively involved in recruiting Māori participants at the time of recruitment for the study. Attempts made to include older people from other ethnicities were unsuccessful. This may reflect the reluctance of older Pacific people, living with family in the community, to participate in research where their immigration status may be unknown. Finally, due to safety and other considerations older people with cognitive impairment were excluded from participating in walking interviews and may have been unable to complete the survey independently. Thus, the experiences and perceptions of older people with cognitive impairment were not included in this study.

## Chapter Summary and Concluding Statement

In this chapter, I have provided a summary of the main findings and addressed the two research questions. Recommendations to advance the age-friendliness of Warkworth were discussed. The findings should provide an empirical knowledge platform to local and central government in New Zealand and other similar communities to inform strategies for implementing age-friendly initiatives. The implications for future research were presented. I have explained the original contributions to New Zealand and international rural ageing and age-friendly knowledge and practice. Further, I have discussed the knowledge contributions from the philosophical, theoretical, and methodological approaches. Finally, the limitations of the study were acknowledged.

Warkworth has a large percentage of older people ageing in the community. The town is on the cusp of major population growth. Although not yet following a formal age-friendly programme, older people in the Warkworth community are making a significant bottom-up contribution to the age-friendliness of the town across a range of environmental domains. Four themes captured the age-friendly attributes of Warkworth: *being established, being present, being involved* and *being responsive*. The findings identified older participants had strong stewardship and custodianship relationships with their environment at the 'grassroots'. They cared deeply and were committed to making the town a better place now and for the future for themselves, other older people ageing in the community, and future generations. It will be important for national and regional age-friendly programmes to understand these existing and significant contributions. Regional age-friendly programmes should actively foster engagement with older people in all aspects of future age-friendly development. Further, older people in rural communities should be actively engaged in age-friendly planning from the early stages. Age-friendly principles should be promoted and embedded in all planning processes to ensure the future development of Warkworth provides a liveable and age-friendly environment for its oldest citizens ageing in the community.

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# Appendices

## Appendix A: Ethics Approval Letter


**Auckland University of Technology Ethics Committee (AUTEC)**

Auckland University of Technology
D-88, Private Bag 92006, Auckland 1142, NZ
T: +64 9 921 9999 ext. 8316
E: ethics@aut.ac.nz
www.aut.ac.nz/researchethics

16 November 2018

Stephen Neville
Faculty of Health and Environmental Sciences

Dear Stephen

Re Ethics Application: **18/418 The age-friendly readiness of Warkworth, a rural community in New Zealand**

Thank you for providing evidence as requested, which satisfies the points raised by the Auckland University of Technology Ethics Committee (AUTEC).

Your ethics application has been approved for three years until 16 November 2021.

**Standard Conditions of Approval**

1. A progress report is due annually on the anniversary of the approval date, using form EA2, which is available online through http://www.aut.ac.nz/research/researchethics.
2. A final report is due at the expiration of the approval period, or, upon completion of project, using form EA3, which is available online through http://www.aut.ac.nz/research/researchethics.
3. Any amendments to the project must be approved by AUTEC prior to being implemented. Amendments can be requested using the EA2 form: http://www.aut.ac.nz/research/researchethics.
4. Any serious or unexpected adverse events must be reported to AUTEC Secretariat as a matter of priority.
5. Any unforeseen events that might affect continued ethical acceptability of the project should also be reported to the AUTEC Secretariat as a matter of priority.

Please quote the application number and title on all future correspondence related to this project.

AUTEC grants ethical approval only. If you require management approval for access for your research from another institution or organisation, then you are responsible for obtaining it. You are reminded that it is your responsibility to ensure that the spelling and grammar of documents being provided to participants or external organisations is of a high standard.

For any enquiries, please contact ethics@aut.ac.nz

Yours sincerely,

Kate O'Connor
Executive Manager
**Auckland University of Technology Ethics Committee**

Cc: sara14@xtra.co.nz; Lynne Taylor

Appendix B: Advertising Poster for Age-friendly Community Survey


## Warkworth Age-friendly Research

# Survey

**Are you 65 years or over?**

**Live in Warkworth or surrounding smaller communities or rural areas?**

**You are invited to share your experiences and ideas about the age-friendliness of Warkworth**

**Complete the 10-15 minute survey and place it in the drop box provided or**

**Go online to:**

https://aut.au1.qualtrics.com/jfe/form/SV_9U19CT4yMlKf3AV

**There is more information on the front page of the survey**

**Go in the draw for $100 grocery voucher**

**The findings will be available for the Warkworth community**

*Approved by the Auckland University of Technology Ethics Committee on 16th November 2018 AUTEC Reference number 18/418.*

# Appendix C: Age-friendly Community Survey

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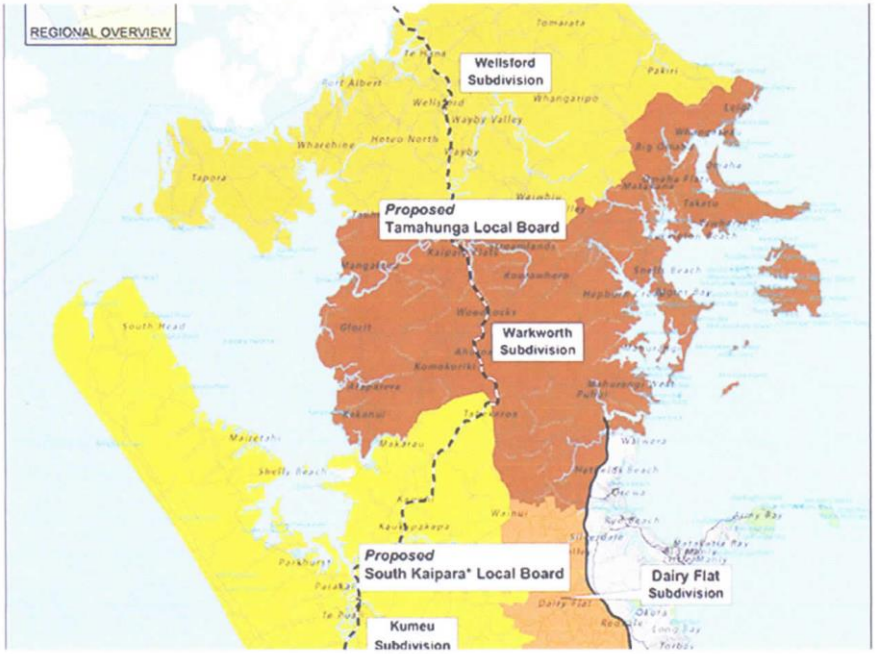
## Your eligibility to participate

Please circle **YES** or **NO** for the following questions:

1. Are you aged 65 years or over? **YES** **NO**

2. Do you live in the Warkworth area and use the Warkworth services on a regular basis? **YES** **NO**

**(That is anywhere in the greater Warkworth area - brown area on the map)**




*(Map reproduced with permission from Rodney Local Board)*

3. Do you live in a private residence, including retirement units? **YES** **NO**

4. Are you able to complete the survey in English, unassisted or assisted? **YES** **NO**

*If you answered **YES** to all four questions, you are eligible to complete the survey. Please go to the next page.*

*If you answered **NO** to any of the questions, unfortunately you are not eligible to complete the survey. Thank you for your interest. Please consider passing this survey on to someone you think may be eligible.*

---

*Please place your completed survey in the box provided when you have answered all the questions*

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**Please place the completed survey in the drop box provided when you have answered all the questions. Drop boxes for the survey are located at the libraries in Warkworth, Snells Beach, Leigh and Point Wells and Warkworth RSA.**

# Age-friendly Community Survey

---

What area do you live in? (e.g. Warkworth township, Snells Beach, Point Wells, Leigh, Matakana, ...). Please state below:

| |
|---|
| |

Please tick one answer:

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
|---|---|---|---|---|---|---|
| I enjoy living around here | ○ | ○ | ○ | ○ | ○ | ○ |
| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
| I think of this as a desirable place to live | ○ | ○ | ○ | ○ | ○ | ○ |
| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
| I feel safe around here during the day | ○ | ○ | ○ | ○ | ○ | ○ |
| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
| I feel safe around here at night | ○ | ○ | ○ | ○ | ○ | ○ |
| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
| I am involved in my neighbourhood or community in the ways I want to be | ○ | ○ | ○ | ○ | ○ | ○ |

Please tick one answer:

| | Excellent | Very Good | Good | Fair | Poor |
|---|---|---|---|---|---|
| How would you rate the Warkworth area as a place for you to live as you age? | ○ | ○ | ○ | ○ | ○ |

*Please place your completed survey in the box provided when you have answered all the questions*

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## Outdoor Spaces and Buildings

**From your experience of Warkworth, how would you rate the following?**

Please tick one answer:

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
|---|---|---|---|---|---|---|
| There are well-maintained and safe green spaces for me to visit | ○ | ○ | ○ | ○ | ○ | ○ |
| Benches or other seating are available along footpaths and in green spaces | ○ | ○ | ○ | ○ | ○ | ○ |
| Footpaths are in good condition, free from obstructions and are safe for pedestrian use | ○ | ○ | ○ | ○ | ○ | ○ |
| Footpaths are accessible for wheelchairs or other assistive mobility devices | ○ | ○ | ○ | ○ | ○ | ○ |
| There is adequate street lighting | ○ | ○ | ○ | ○ | ○ | ○ |
| The street and community buildings/facilities signage is adequate | ○ | ○ | ○ | ○ | ○ | ○ |
| Community buildings and facilities are well-maintained and are accessible to people of different physical abilities | ○ | ○ | ○ | ○ | ○ | ○ |
| Public toilets are clean, well-maintained and are accessible to people of different physical abilities | ○ | ○ | ○ | ○ | ○ | ○ |

Please provide examples below of where improvements are needed in relation to any of the above

*Please place your completed survey in the box provided when you have answered all the questions*

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## Respect, Social Participation and Inclusion

**From your experience of Warkworth, how would you rate the following?**

Please tick one answer:

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
|---|---|---|---|---|---|---|
| I am regularly consulted by public, voluntary and commercial services on how to serve me better | ○ | ○ | ○ | ○ | ○ | ○ |
| I am invited to participate at Local Board and other local public meetings and my contributions are recognised | ○ | ○ | ○ | ○ | ○ | ○ |
| Local business and service staff are courteous and helpful | ○ | ○ | ○ | ○ | ○ | ○ |
| There is a wide range of activities or groups I can join (exercise, art, music, gardening, hobbies etc) | ○ | ○ | ○ | ○ | ○ | ○ |
| There are community activities and events that bring both younger and older people together | ○ | ○ | ○ | ○ | ○ | ○ |
| Activities and events are held in locations that are accessible to me | ○ | ○ | ○ | ○ | ○ | ○ |
| Important information is provided in printed format and is easy to read | ○ | ○ | ○ | ○ | ○ | ○ |
| There is public access to computers and the Internet for free or low cost. Help is available if required. | ○ | ○ | ○ | ○ | ○ | ○ |

*Please place your completed survey in the box provided when you have answered all the questions*

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**From your experience of Warkworth, how would you rate the following? (continued)**

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree | Don't Know |
|---|---|---|---|---|---|---|
| I am encouraged to volunteer and remain engaged in the community | ○ | ○ | ○ | ○ | ○ | ○ |
| I feel respected and recognised by my local community | ○ | ○ | ○ | ○ | ○ | ○ |

Please provide examples of where improvements are needed in relation to any of the above

Are there any additional activities that you would like access to?

What would make your neighbourhood/community more age-friendly for you?

The usefulness of the survey will be improved by adding a broad demographic profile.
**Please circle one option:**

**Age group** 65-69 70-74 75-79 80-84 85-89 90-94 95-99 100+

**Gender** Male Female Gender diverse

**Ethnicity** European/Pakeha NZer Māori Pacific Peoples Asian
Middle Eastern/Latin American/African other _____

**Residence location** Live in the Warkworth town-ship Live outside the Warkworth town-ship

**Years resident in Warkworth area** up to 4 yrs 5-10 yrs 11-20 yrs 21 plus years

*Please place your completed survey in the box provided when you have answered all the questions*

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# Enter the prize draw

Thank you for your time. Submit your survey by dropping it in the box provided.

*Complete your details on this separate page if you would like to enter the $100 supermarket voucher draw.*

Yes, I would like to go into the draw for the $100 grocery voucher

Name: _____

Preferred contact:

Telephone number: _____

Email address: _____

**Your name and contact details will not be matched to your survey responses**

An Administration Officer from Auckland University of Technology who is not involved in this study will remove this page immediately and store it in a separate secure box.

*Please place your completed survey in the box provided when you have answered all the questions*

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# You are invited to take part in a walking interview

- I need volunteers to participate in a walking interview around Warkworth so I can experience first-hand with you what Warkworth it is like to get about.
- If you are 65 years and over, live in the Warkworth area and use Warkworth for business and services, work, shopping and/or other activities I would like to invite you to participate in this further part of this research project.
- The interview would be for approximately up to one hour and you would choose the route.
- The walk would be somewhere in Warkworth where you usually go.
- You would be welcome to bring someone with you.
- You could walk independently or use a walking frame, stick or mobility scooter.
- During the walk we will discuss features of the environment that make Warkworth more or less liveable or age-friendly.
- This will be an informal conversational style interview.

A Koha ($20 supermarket voucher) will be provided as an acknowledgement of your contribution to the project.

If you are interested in finding out more about this walking interview, take this page and please contact me.

***Researcher contact details: Sara Napier***

***Mobile: 0220697937***

***Email: sara14@xtra.co.nz***

*Please place your completed survey in the box provided when you have answered all the questions*

# Appendix D: Walking Interview Schedule

General questions

- How do you find living in Warkworth? (or place where participant lives)
- What makes it a good place to live in?
- What would make it better?

If living out of Warkworth

- How often do you come into Warkworth?
- How do you usually travel into Warkworth?
- What is it like driving? Walking? Using public transport? Cycling?

Living in Warkworth

- What is your usual transport?
- What is it like driving? Walking? Using public transport? Cycling?

Can you tell me some of the things you do in Warkworth?

- Work?
- Groups belong to?
- Activities?
- Shopping
- Volunteering
- Socialising

Outdoor spaces and buildings

- Thinking about the physical environment in Warkworth, what features are important for you in getting about?
- What is it like walking around Warkworth? In different seasons?
- Footpaths –width, evenness, state of repair
- Roads?
- What is it like crossing the roads?
- How easy is it to get in and out of buildings in Warkworth? Doors, access
- How do you find interiors of shops, businesses in Warkworth? Are they easy or difficult to get around? With wheelchairs? Mobility aids?
- What would make it easier for you and other people who may have disabilities?
- Public toilets? Where they and what they are like? What could improve?
- What do you think about the signage around Warkworth?
- Parking? What is it like parking in Warkworth? What are some of the problems?
- How safe do you feel in Warkworth? During the day/at night?
- Green spaces?
- Public meeting places?

Respect and social inclusion

- Tell me how you feel about your community?
- In what ways are you included and consulted over local issues/plans?
- How are older people treated/acknowledged in Warkworth or in your community?

Social participation

- How easy is it to participate in activities you are interested in?
- What events cater to older people?
- What opportunities are there for all generations to be together

- From your knowledge what might be some of the barriers for older people to participate in Warkworth – prompts – mobility, affordability, social isolation
- Can you suggest what might improve older peoples' participation

Communication and information

- How do you find out what is happening in Warkworth? Your community?
- What are effective ways to communicate information to you and other people you know
- What could be improved?

Employment and/or voluntary work

- What is your occupation? If working tell me about that?
- Do you do any voluntary work?
- Tell me about that?
- What opportunities are there for older people to volunteer?
- What can make it more difficult to get volunteers or to be a volunteer?

Services

- How well catered to is Warkworth for services?
- Are businesses and services in Warkworth in tune with your needs and requirements?
- Do you have concerns about the infrastructure in Warkworth?
- How do you feel about the development going on?
- In what ways does it affect you?

Health services?

# Appendix E: Face-to-face Interview Schedule

**Introductory questions:**

To begin with can you tell me about your business/service?
Are you the owner or operator of the business/service?
How long have you been running your business/service?
What is your core business/services?
Can you talk about your role in this business/service?
How are policies and procedures developed? National level/local level

**Attitudes about older customers:**

How prepared is your organisation for the growing population of older people in Warkworth?
Does your business attract older people as customers?
In what ways?
What are your thoughts about older people as your customers?
What policies does your business have on attracting and serving older people as customers?
How do you see older people as customers in relation to your business/ service?

- Beneficial
- Or not

If you have staff, how do they relate to and serve older customers?

**Special considerations for older customers if the business is a shop or physical location**

Do you have any special considerations that makes it easier for older customers to get to and inside your business /service premises?
Prompts:

- Designated car parking nearby
- Motorised scooter parking nearby
- Physical accessibility – open doors, automatic doors, handrails besides steps, ramps

Do you have any special considerations that makes it easier for older customers to get around once they are inside your business / service premises?

- Effective and even lighting
- Reduced trip hazards
- Wide aisles for wheelchairs and mobility aids
- Seating
- Products within reach
- Toilet facilities

Special considerations for older people with cognitive impairment, sensory loss and physical disabilities?

- Signage – clear, good contrast
- Background music - low or absent

What training do your staff receive to prepare them for special considerations that older customers may need?

- Respectful attitudes
- Cultural sensitivity
- Dementia awareness and staff education on serving customers with cognitive impairment
- Valuing their custom

**Communicating with clients**

How do older customers prefer to contact you?

- By landline or mobile phone
- Texting
- By email

How do older customers prefer you to contact them?

- By landline or mobile phone
- Texting
- By email

**Special considerations for older customers if the business / service does not have a physical premises i.e. mobile services, trades**

What special considerations do you have for older customers?

- Arranging services to suit their needs – times

How do you advertise your products and services to older customers?

- Advertising – written, electronic formats

How do you find out what products and services are most useful for or desired by older customers

- Feedback from customers

How important do you think it is for older customers to value your products and services?

- Now
- In the future

Have you heard of the WHO Age-friendly framework?

**Questions for Local Board members and Auckland Council Planners**

Can you talk about you role and how this relates to Warkworth?
How prepared do you think Warkworth is for coping with a rapidly ageing population?

- Infrastructure
- Attitudes of the community

What feedback have you had from older people living in the Warkworth area about their needs/requirements?
What do you know about the age-friendly communities' framework?
How do you see the involvement of older people in the Warkworth community now and in the future?

# Appendix F: Walking Interview Protocol

Discuss the interview in advance with participants so they know what to expect. This may take place by phone call or meeting as arranged with participants. The meeting may take place on a day prior to the walking interview or immediately before the walking interview (this forms part of the informed consent process).

**Outline the research project and the purpose of the walking interviews**

- The purpose of the walking interview is to experience with you what it is like for you being out and about in the environment of Warkworth.
- The interview will be informal and loosely structured. There will be some questions based on topics about the outside environment, buildings and other features in the environment. I will also ask you some questions about groups you belong to and what sort of activities and other things you do in Warkworth. I will also ask you to explain certain features as we come across them and I hope you can point out features that make being out and about easier or more difficult.

**Discuss how to choose a route – participant-led**

- We can start the walking interview from your home or from anywhere in Warkworth you choose. It is important that you feel comfortable with where we go. This might be somewhere you usually go as part of being out and about.
- What is your usual level of ability? (Discuss mobility and if using mobility aids or motorised chair/scooter)
- You may decide to postpone or cancel the walking interview at any time. For example if you find you don't feel well on the day or if there is any change in your health.

**Use of a recording device**

- Do you have any objection to the interview being recorded? I will be carrying a small, hand-held recording device that can pick up both of our voices. We can pause or turn it off at any time during the interview if you wish.

**Discuss confidentiality**

- It is possible that we will run into acquaintances or friends of yours who may want to stop and talk. It is important for maintaining confidentiality that we pause or stop recording until we have gained verbal consent if the interview is to continue with others.
- You can bring someone else along on the walking interview if you wish.
- Your name and other people's names will not be used in reporting of the research.

**Timing**

- I can fit in around your schedule and would like you to pick the day and time that suits you best.
- I expect the walking interview to be approximately one hour but this will depend on you, we can make it shorter if you want.
- We will need to be aware of the weather forecast. I will use a weather app and we can plan around the weather.

**Questions?**

- Do you have any questions? Of course you can ask me any questions any time up until and during the interview as we go along.

**At the end of the walking interview**

De-briefing to find out how the experience of the walking interview was for the participant. This ideally would take place immediately following the interview. Find a quiet and private place to sit.

- How did you find the walking interview?
- Are there any other features of the Warkworth environment that we haven't seen today that make it easier or more difficult to be out and about?
- Was there anything else you can think of that could be useful for this research project?

Conclude the walking interview, thank the participant and give the grocery voucher in recognition of their time.

# Appendix G: Participant Information Sheet for Age-friendly Survey

AUT
TE WĀNANGA ARONUI O TĀMAKI MAKAU RAU

## Participant Information Sheet

### Warkworth Age-friendly Community Survey Print Version

**Date Information Sheet Produced:**

18 October 2018

**Project Title**

The age-friendly readiness of Warkworth, a rural community in New Zealand

**An Invitation**

Hello my name is Sara Napier and I am currently conducting a research project as part of a doctoral (PhD) degree at Auckland University of Technology (AUT). This project will be supervised by Professor Stephen Neville (AUT), Dr Jeffery Adams (Massey University) and Dr Lynne Taylor (AUT). I invite you to complete this short survey on the age-friendliness of Warkworth. Your participation is entirely voluntary. I thank you for considering this opportunity. I have no conflict of interest in this project or its outcomes.

**What is the purpose of this research?**

I want to know your views and experiences of living in the Warkworth area and what needs to improve to make it more age-friendly. This information will make an important contribution to this project's aim to investigate the age-friendly readiness of Warkworth. Warkworth has been identified by Auckland Council as an area of rapid population growth. This growth will generate need for improved infrastructure. Over 26% of Warkworth's population is aged 65 years and over (compared with Auckland 11.5%) and this will increase with ageing population trends. Age-friendly communities are safe, accessible and inclusive places that facilitate people of all ages and all levels of capabilities to fully participate and contribute in all areas of community life. Very little is known about how prepared rural communities in New Zealand are for an ageing population.

The government, through the Office for Seniors, is committed to developing age-friendly communities. New Zealand has recently become an affiliated member of the World Health Organization Global Network of Age-friendly Cities and Communities. The findings from this project will be available for the Warkworth community, the local board and central government in implementing an age-friendly programme.

**How was I identified and why am I being invited to participate in this research?**

You are reading this information sheet because you have collected the survey at one of the Warkworth community facilities or through a group you belong to. You are invited to complete the survey if you are aged 65 years or over, currently resident in the Warkworth area, live in a private residence as an owner or a tenant, including privately owned retirement units and are able to complete the survey in English, unassisted or assisted.

**What will happen in this research?**

The survey is attached to this information sheet if you choose to complete it. The first four questions will establish your eligibility to participate. If you answer "YES" to all four of these questions, carry on to complete the survey. Please answer all questions. Once completed, please put your completed survey in the sealed drop box provided. If you choose to take the survey away and complete it, there will be drop boxes conveniently located at the libraries in Warkworth, Snells Beach, Leigh and Point Wells and RSA Warkworth. Your responses will be anonymous. The data from the surveys will be analysed and will form one of the sources of data for this research project.

On a separate page at the end of this survey, you are invited to enter a prize draw for a $100 grocery voucher by entering your contact details on this page. To ensure your identity is protected, an

Administration Officer at Auckland University of Technology who is not part of the research team will remove this page from the survey. Your contact details will be stored in a secure location until a winner has been drawn. The winner will be contacted directly after the survey has closed.

**What are the discomforts and risks?**

There are no anticipated discomforts or risks in completing this survey. You privacy will be protected.

**What are the benefits?**

You and others may benefit from sharing your views and experiences of the Warkworth environment. It is likely this information will be used to inform an age-friendly programme in Warkworth. Additionally, this research project will assist me in obtaining my Doctor in Philosophy qualification.

**What are the costs of participating in this research?**

There are no costs to participating in this survey other than about 10 - 15 minutes of your time.

**What opportunity do I have to consider this invitation?**

You have until 31 May 2019 to submit your survey responses.

**Will I receive feedback on the results of this research?**

The overall findings from the research will be available to the Warkworth community.

**What do I do if I have concerns about this research?**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Professor Stephen Neville, email sneville@aut.ac.nz, Ph: 09 9219379

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEC, Kate O'Connor, *ethics@aut.ac.nz*, 921 9999 ext 6038.

**Whom do I contact for further information about this research?**

Please keep this Information Sheet and a copy of the Consent Form for your future reference. You are also able to contact the researcher as follows:

***Researcher contact details:*** Sara Napier, sara14@xtra.co.nz Mobile: 0220697937

Age Concern North Shore are acknowledged for their design of the original survey tool

***Approved by the Auckland University of Technology Ethics Committee on 16th November 2018***
***AUTEC Reference number 18/418.***

*Please place your completed survey in the box provided when you have answered all the questions*

# Appendix H: Participant Information Sheet for Walking Interview


## Participant Information Sheet

### Age-friendly walking/go-along interview

**Date Information Sheet Produced:**

31 October 2018

**Project Title**

The age-friendly readiness of Warkworth, a rural community in New Zealand

**An Invitation**

Hello my name is Sara Napier and I am currently conducting a research project as part of a doctoral (PhD) degree at Auckland University of Technology (AUT). This project will be supervised by Professor Stephen Neville (AUT), Dr Jeffery Adams (Massey University) and Dr Lynne Taylor (AUT). I invite you to participate in a walking interview in Warkworth. You may have completed a survey on age-friendliness already and this part of a project will provide more in-depth information on the age-friendliness of Warkworth. Your participation is entirely voluntary. I thank you for considering this opportunity. I have no conflict of interest in this project or its outcomes.

**What is this research about?**

I want to know what it is like for you when you go about your usual business and activities in Warkworth. These walking interviews will identify factors that can enhance or be barriers to age-friendliness and will make an important contribution to investigating the age-friendly readiness of Warkworth.

**Why undertake this research?**

Warkworth has been identified by Auckland Council as an area of rapid population growth generating the need for improved infrastructure. Over 26% of Warkworth's population is aged 65 years and over (compared with Auckland 11.5%) and this will increase with ageing population trends. Age-friendly communities are safe, accessible and inclusive places that facilitate people of all ages and all levels of capabilities to fully participate and contribute in all areas of community life. Very little is known about how prepared rural communities in New Zealand are for an ageing population.

The government, through the Office for Seniors, is committed to developing age-friendly communities and has recently become an affiliated member of the World Health Organization Global Network of Age-friendly Cities and Communities. The findings from this project will benefit people ageing in Warkworth and other similar communities. The findings will be available for the Warkworth community, the local board and central government in implementing an age-friendly programme. This research will form part of my PhD thesis and be written up for journal articles and conference papers.

**How was I identified and why am I being invited to participate in this research?**

You may have completed the age-friendly survey and contacted me in response to my invitation to participate or from local advertising or word of mouth. You are eligible to participate if you are aged 65 years and over, live in the Warkworth area and use Warkworth for business and services, work, shopping or other activities. You will be able to get about either walking independently or using a walking aid or a mobility scooter. You are willing to participate in a walking interview for up to 60 minutes. You would not be eligible if you are unwell or have recently sustained injury that could make it unsafe for you to participate.

**How do I agree to participate in this research?**

You will be asked to complete the consent form provided to you. Your participation in this research is entirely voluntary and whether or not you choose to participate will neither advantage nor disadvantage you. You are able to withdraw from the study at any time. If you choose to withdraw from the study,

then you will be offered the choice between having any data that is identifiable as belonging to you removed or allowing it to continue to be used. However, once the findings have been produced, removal of your data may not be possible.

**What will happen in this research?**

If you are reading this information sheet you will have contacted me and expressed interest in participating. You will have requested further information and will have met all the eligibility criteria. The first step will be to arrange a meeting to discuss the research project, gain your consent by signing the consent form and planning the walking interview. You are welcome to have someone with you at this meeting and on the walking interview if you wish. This meeting can take place ahead of time or just prior to the walking interview either at your home or at a location of your choice. This might be at a quiet spot in a café or another convenient public meeting space in Warkworth. Before the walk I would like to complete with you a short demographic questionnaire including your age and living situation. The walk can start from your home or at a location in Warkworth. It will be entirely up to you where we go on the walk. It may be an outing or activities that you usually undertake or you may wish to show me around a particular part of Warkworth. Weather forecasts and conditions will be considered when planning the walk and we can postpone and reschedule if the weather is unfavourable.

During the walk (or using a mobility scooter if this is your usual mode of mobility) we will discuss features of the environment as we encounter them. I will also have some topics that we can discuss related to the environment and your experiences and views. With your permission the walking interview will be audio recorded using a small digital audio recorder. At any time during the walking interview we can pause or stop the audio recording. This may be necessary if we encounter someone who wishes to chat with us or for any reason you wish to stop the recording. We can then restart the recording. At the end of the interview we can have a brief discussion about how the walking interview went and this will give you an opportunity to provide any further information you think would be useful for this research project.

**What are the discomforts and risks?**

Your safety and comfort is paramount. If your health status changes or you are unwell on the day of the walking interview we can discuss postponing or we can cancel the interview. In any situation where you are physically moving around there is always a risk of unexpected events. Care will be taken to reduce any risks identified. In the event of an unexpected event requiring assistance, I will carry a mobile phone to enable communication with emergency services if required. It is not anticipated that you will experience any discomfort from the interview topics and it is my intention that the interview will be informal and conversational. It is possible that discussing issues relating to your views and experiences living in Warkworth may raise concerns.

**How will these discomforts and risks be alleviated?**

I will be observing for any risks to your safety and/or discomfort or concerns related to the interview topics. If after the interview you would like to talk to someone about any issues or concerns that have arisen for you, you may wish to contact Age Concern Rodney (09 426 0916) or Citizens Advice Bureau Wellsford/ Warkworth (09 423 7333 or 0800 367 222).

**What are the benefits?**

You and others in your community may benefit from sharing your views and experiences of the Warkworth environment. It is likely this information will be used to inform an age-friendly programme in Warkworth. Additionally, this research project will assist me in obtaining my Doctor in Philosophy qualification.

**How will my privacy be protected?**

Maintaining your confidentiality is of great importance to me. All information collected during this research project will be confidential. To protect your privacy your real name will not be used anywhere. Instead an anonymous identification code or pseudonym will be used to label any information relating to you such as the transcribed information from the audio recorded interview and in any reports or articles produced. Access to any information that links your personal details to the identification code will be restricted to myself and the project supervisor, Professor Stephen Neville. All research materials

will be kept in a locked metal filing cabinet or on a password protected computer and destroyed after six years.

**What are the costs of participating in this research?**

There will be no financial cost to you in participating in this walking interview. A Koha ($20 supermarket voucher) will be offered to you as an acknowledgement of your participation.

**What opportunity do I have to consider this invitation?**

Please take time to consider participating in this research project and feel free to discuss it with your family or others. I am available (researcher contact details at the bottom of this sheet) to answer any questions you may have. Please contact me to let me know if you are able to participate within the next 2 weeks and I will arrange to meet with you to complete the informed consent process and plan the walking interview with you.

**Will I receive feedback on the results of this research?**

At the conclusion of the research project a summary of the findings will be available. You can request a copy to be posted or emailed to you. Findings for the research project will be presented to the Warkworth community.

**What do I do if I have concerns about this research?**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Professor Stephen Neville, sneville@aut.ac.nz Ph: 09 9219379

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEC, Kate O'Connor, *ethics@aut.ac.nz* , 921 9999 ext 6038.

**Whom do I contact for further information about this research?**

Please keep this Information Sheet and a copy of the Consent Form for your future reference. You are also able to contact the researcher as follows:

***Researcher contact details:*** Sara Napier, sara14@xtra.co.nz Mobile: 0220697937

***Approved by the Auckland University of Technology Ethics Committee on 16 November 2018, AUTEC Reference number 18/418.***

# Appendix I: Participant Information Sheet for Face-to-face Interview


## Participant Information Sheet

### Face-to-face individual interviews

**Date Information Sheet Produced:**

1 November 2018

**Project Title**

The age-friendly readiness of Warkworth, a rural community in New Zealand

**An Invitation**

Hello my name is Sara Napier and I am currently conducting a research project as part of a doctoral (PhD) degree at Auckland University of Technology (AUT). This project will be supervised by Professor Stephen Neville (AUT), Dr Jeffery Adams (Massey University) and Dr Lynne Taylor (AUT). I invite you to participate in this research project. Your participation is entirely voluntary. I thank you for considering this opportunity. I have no conflict of interest in this project or its outcomes.

**What is the purpose of this research?**

This research project aims to investigate how age-friendly ready Warkworth is. Warkworth has been identified by Auckland Council as an area of rapid population growth generating the need for improved infrastructure. Over 26% of Warkworth's population is aged 65 years and over (compared with Auckland 11.5%) and this will increase with ageing population trends. Age-friendly communities are safe, accessible and inclusive places that facilitate people of all ages and all levels of capabilities to fully participate and contribute in all areas of community life. The government, through the Office for Seniors, is committed to developing age-friendly communities and has recently become an affiliated member of the World Health Organization Global Network of Age-friendly Cities and Communities. Very little is known about how prepared rural communities in New Zealand are for an ageing population. As part of this research project I am particularly interested in finding out how the attitudes, practices and resources of Warkworth businesses, organisations and local government acknowledge and serve the ageing population.

The findings from this project will be useful for businesses, services and local government in planning for an expanding ageing population and will make an important contribution in addressing the main research question of how age-friendly ready is Warkworth? The findings will be available for the Warkworth community, the local board and central government in implementing an age-friendly programme. This research will form part of my PhD thesis and will be written up for journal articles and conference papers.

**How was I identified and why am I being invited to participate in this research?**

You were identified from publically available information or you have responded to an invitation to participate through One Warkworth Business Association or another organisation in Warkworth. You are eligible to participate if you own, operate or manage a business or service in Warkworth or you are a local board or government representative.

**How do I agree to participate in this research?**

Contact the researcher using the information at the bottom of this sheet if you agree to participate in the project. Your consent, as per the attached consent form, will be sought before your interview commences.

Your participation in this research is entirely voluntary and whether or not you choose to participate will neither advantage nor disadvantage you. You may decline to answer any questions and/or you may withdraw at any time. If you choose to withdraw from the study, then you will be offered the choice between having any data that is identifiable as belonging to you removed or allowing it to continue to be used. However, once the findings have been produced, removal of your data may not be possible.

**What will happen in this research?**

If you choose to participate, I will arrange a time and place with you for an individual interview that will take approximately 30 - 45 minutes. The interview will be conversational in style, with questions aimed to elicit your views about how your organisation currently acknowledges and serves the ageing population with respect to attitudes, practices and resources. Interviews will be audio-taped and transcribed to assist with accurate data

collection and analysis. At the end of your interview, you will be offered the opportunity to receive a copy of your interview transcript. You will have up to a week after you receive the transcript to advise me of any additional or amended information. If I do not hear from you I will assume that you do not require any changes to the transcript and I will use the transcript as it is. The collated interview data will supplement analysis of data from an age-friendly survey and walking interviews undertaken with older people in Warkworth.

**What are the discomforts and risks and how will thay be alleviated?**

The interview questions will relate to your views and your organisation. It is unlikely you will experience any personal or professional discomfort related to the topics discussed. You may choose not to answer particular questions, or discontinue the interview at any time. This will be your choice. It is not anticipated that there will be any risks involved in your participation in this research project. Your views will be respected as your own opinions and I am fully committed to ensuring full confidentiality.

**What are the benefits?**

You may experience some benefit from sharing your views and innovative ideas about your business or service practices and from knowing that you have contributed to information that is likely to be used to inform an age-friendly programme in Warkworth. Additionally, this research project will assist me in obtaining my Doctor in Philosophy qualification.

**How will my privacy be protected?**

Maintaining your confidentiality is of great importance to me. All information collected during this research project will be confidential. To protect your privacy I will not use your name or the name of your business, service or position title when reporting the research. Instead an anonymous identification code or pseudonym will be used to label any information relating to you such as the transcribed information from the audio recorded interview and in any reports or articles produced. Access to any information that links your personal details to the identification code will be restricted to myself and the project supervisor, Professor Stephen Neville. All research materials will be kept in a locked metal filing cabinet or on a password protected computer and destroyed after five years.

**What are the costs of participating in this research?**

The cost to you, and/or your business or service is your time. I expect you will contribute approximately 45 minutes for your interview.

**What opportunity do I have to consider this invitation?**

Please take time to consider participating in this research project. I am available (researcher contact details at the bottom of this sheet) to answer any questions you may have. Please contact me to let me know if you are able to participate within the next 2 weeks and I will arrange an interview time with you. If I do not hear from you I will contact you once to follow up on this invitation.

**Will I receive feedback on the results of this research?**

At the conclusion of the research project a summary of the findings will be available. You can request a copy to be posted or emailed to you. Findings for the research project will be presented to the Warkworth community.

**What do I do if I have concerns about this research?**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Professor Stephen Neville, sneville@aut.ac.nz Ph: 09 9219379

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEC, Kate O'Connor, *ethics@aut.ac.nz* , 921 9999 ext 6038.

**Whom do I contact for further information about this research?**

Please keep this Information Sheet and a copy of the Consent Form for your future reference. You are also able to contact the researcher as follows:

***Researcher contact details:*** Sara Napier, sara14@xtra.co.nz Mobile: 0220697937

*Approved by the Auckland University of Technology Ethics Committee on 16 November 2018*
*AUTEC Reference number 18/418*

# Appendix J: Consent form for Walking Interview


## Consent Form

### Age-friendly walking interview

*Project title:* ***The age-friendly readiness of Warkworth, a rural community in New Zealand***

*Project Supervisor:* ***Professor Stephen Neville***

*Researcher:* ***Sara Napier***

- ○ I have read and understood the information provided about this research project in the Information Sheet dated 31 October 2018.
- ○ I have had an opportunity to ask questions and to have them answered.
- ○ I understand that notes may be taken during the interview and that they will also be audio-taped and transcribed.
- ○ I understand that taking part in this study is voluntary (my choice) and that I may withdraw from the study at any time without being disadvantaged in any way.
- ○ I understand that if I withdraw from the study then I will be offered the choice between having any data that is identifiable as belonging to me removed or allowing it to continue to be used. However, once the findings have been produced, removal of my data may not be possible.
- ○ I agree to take part in this research.
- ○ I wish to receive a summary of the research findings (please tick one): Yes○ No○

Participant's signature: .....

Participant's name: .....

Participant's Contact Details (if appropriate):

.....

.....

.....

.....

Date:

***Approved by the Auckland University of Technology Ethics Committee on 16 November 2018.***
***AUTEC Reference number 18/418***

*Note: The Participant should retain a copy of this form.*

# Appendix K: Consent Form for Face-to-face Interview


## Consent Form

### Face-to-face individual interviews

*Project title:* ***The age-friendly readiness of Warkworth, a rural community in New Zealand***

*Project Supervisor:* ***Professor Stephen Neville***

*Researcher:* ***Sara Napier***

- ○ I have read and understood the information provided about this research project in the Information Sheet dated 31 October 2018.
- ○ I have had an opportunity to ask questions and to have them answered.
- ○ I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- ○ I understand that I have up to a week after my interview to advise the interviewer about any corrections or additions to my data.
- ○ I understand that taking part in this study is voluntary (my choice) and that I may withdraw from the study at any time without being disadvantaged in any way.
- ○ I understand that if I withdraw from the study then I will be offered the choice between having any data that is identifiable as belonging to me removed or allowing it to continue to be used. However, once the findings have been produced, removal of my data may not be possible.
- ○ I agree to take part in this research.
- ○ I wish to receive a summary of the research findings (please tick one): Yes○ No○

Participant's signature: .....

Participant's name: .....

Participant's Contact Details (if appropriate):

.....

.....

.....

.....

Date:

***Approved by the Auckland University of Technology Ethics Committee on 16 November 2018***
***AUTEC Reference number 18/418***

*Note: The Participant should retain a copy of this form.*

# Appendix L: Summary of Survey Question Results

## Descriptive Statistics

| | N | Minimum | Maximum | Mean | Std. Deviation | Skewness | | Kurtosis | |
|---|---|---|---|---|---|---|---|---|---|
| | Statistic | Statistic | Statistic | Statistic | Statistic | Statistic | Std. Error | Statistic | Std. Error |
| I enjoy living around here | 208 | 1 | 5 | 4.71 | .584 | -2.636 | .169 | 9.699 | .336 |
| I think of this as a desirable place to live | 207 | 1 | 5 | 4.67 | .573 | -2.187 | .169 | 7.770 | .337 |
| I feel safe around here during the day | 208 | 1 | 5 | 4.71 | .532 | -2.462 | .169 | 10.646 | .336 |
| I feel safe around here at night | 208 | 1 | 6 | 4.43 | .719 | -1.085 | .169 | 2.433 | .336 |
| I am involved in my neighbourhood or community in the ways I want to be | 206 | 1 | 5 | 4.40 | .718 | -1.414 | .169 | 3.050 | .337 |
| There are well maintained and safe green spaces for me to visit | 206 | 1 | 6 | 4.17 | .773 | -1.127 | .169 | 2.670 | .337 |
| Benches or seating are available along footpaths and in green spaces | 203 | 1 | 6 | 4.00 | .853 | -.589 | .171 | 1.851 | .340 |
| Footpaths are in good condition, free from obstructions and safe for pedestrian use | 203 | 1 | 5 | 2.69 | 1.084 | .079 | .171 | -.923 | .340 |
| Footpaths are accessible for wheelchairs or other assistive devices | 203 | 1 | 6 | 3.26 | 1.488 | .491 | .171 | -.535 | .340 |
| There is adequate street lighting | 204 | 1 | 6 | 3.74 | .903 | -.099 | .170 | .777 | .339 |
| The street and community buildings/facilities signage is adequate | 201 | 1 | 6 | 3.77 | .700 | -.525 | .172 | 1.994 | .341 |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Community buildings and facilities are well-maintained and accessible to people of different physical abilities | 203 | 1 | 6 | 3.89 | .984 | .031 | .171 | .450 | .340 |
| Public toilets are clean, well-maintained and accessible to people of different physical abilities | 203 | 1 | 6 | 3.76 | 1.074 | -.037 | .171 | .207 | .340 |
| I am regularly consulted by public, voluntary and commercial services on how to serve me better | 201 | 1 | 6 | 2.85 | 1.096 | .656 | .172 | .526 | .341 |
| I am invited to participate at Local Board and other local public meetings and my contributions are recognised | 201 | 1 | 6 | 3.35 | 1.019 | .261 | .172 | .463 | .341 |
| Local business and service staff are courteous and helpful | 202 | 2 | 6 | 4.33 | .626 | -.384 | .171 | .140 | .341 |
| There is a wide range of activities and groups I can join (exercise, art, music, gardening, hobbies etc.) | 202 | 1 | 6 | 4.39 | .785 | -.988 | .171 | 1.889 | .341 |
| There are community activities and events that bring both younger and older people together | 203 | 1 | 6 | 3.88 | .988 | -.133 | .171 | .184 | .340 |
| Activities and events are held in locations that are accessible to me | 203 | 1 | 6 | 4.05 | .863 | -.478 | .171 | .871 | .340 |
| Important information is provided in printed format and is easy to read | 203 | 1 | 6 | 3.74 | .904 | -.027 | .171 | .512 | .340 |
| There is public access to computers and the internet for free or low cost. Help is available if required. | 203 | 1 | 6 | 4.21 | 1.056 | -.092 | .171 | -.038 | .340 |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| I am encouraged to volunteer and remain engaged in the community | 202 | 1 | 6 | 3.90 | .948 | -.532 | .171 | .310 | .341 |
| I feel respected and recognised by my local community | 201 | 1 | 6 | 3.94 | .822 | -.215 | .172 | .552 | .341 |
| Valid N (list wise) | 178 | | | | | | | | |