

**RETIRED ACADEMICS' REASONS FOR  
WORK, VOLUNTEERING, AND RECREATION**

by

**ALARD A. MALEK**

Bachelor of Arts, University of British Columbia, 1974

**A THESIS SUBMITTED IN PARTIAL FULFILLMENT OF  
THE REQUIREMENTS FOR THE DEGREE OF  
MASTER OF ARTS**

in

**THE FACULTY OF GRADUATE STUDIES  
DEPARTMENT OF ADMINISTRATIVE, ADULT AND HIGHER EDUCATION  
AND  
DEPARTMENT OF COUNSELLING PSYCHOLOGY**

We accept this thesis as conforming  
to the required standard

**THE UNIVERSITY OF BRITISH COLUMBIA**

September, 1992

© Alard A. Malek, 1992

In presenting this thesis in partial fulfillment of the requirements for an advanced degree at The University of British Columbia, I agree that the Library shall make it freely available for reference and study. I further agree that permission for extensive copying of this thesis for scholarly purposes may be granted by the Head of my Department or by his or her representatives. It is understood that copying or publication of this thesis for financial gain shall not be allowed without my written permission.

Administrative, Adult and Higher Education

The University of British Columbia  
2075 Wesbrook Place  
Vancouver, Canada  
V6T 1W5

Date: September 11, 1992

## **ABSTRACT**

Emeriti's activity patterns and reasons for activity demonstrated that retirement is a highly variable experience. Retirement theories, such as activity and continuity theory, present retirees as members of a population of elderly which has distant from the mainstream of life. Activity and continuity theory reflect the underlying assumptions inherent in institutionalized retirement; i.e., growing older results in decreased biological and cognitive capacity, invariant and declining activity patterns, and disinterest in a varied pattern of activities. The results of this study demonstrated that the assumptions inherent in the institution of retirement are false.

The purpose of this study was to examine the relationships among emeriti's patterns of work, volunteering, and recreation, their reasons for activity, and the kind of retirement. Emeriti (n=187) from the University of British Columbia and Simon Fraser University were sampled with a mailed questionnaire. The influence of the timing of retirement and whether people wanted to retire or not was tested in relation to their reasons for activities. Activity levels in work, volunteering, and recreation were tested in relation to reasons for activity.

Emeriti's activity patterns were variable. Although emeriti were most active in recreation, they participated in work and volunteering. Respondents made clear distinctions between work and non-work activities. Some activities, e.g., performing research, writing, providing skills and expertise to individuals, and serving one's community, were evident in work, volunteering, and recreation.

The timing of retirement and whether people wanted to retire or not influenced peoples reasons for activities. Earlier retirement was related to opportunities for new activities and freedom from obligations. Later retirement was associated with monetary

gain and continuation of career. People who wanted to retire attached greater importance to doing what they had been unable to do during their working career and freedom from obligation. People who did not want to retire attached greater importance to ongoing career activities and monetary gain. It was concluded that the timing of retirement and wanting to retire or not reflected the different meanings which people attach to work and non-work activities.

Activity levels in work, volunteering, and recreation influenced the profile of reasons emeriti had for their activities. Greater levels of work activity revealed reasons which emphasized monetary gain, professional involvement, and ongoing career activities. Greater levels of volunteering activity revealed reasons which emphasized contribution to the welfare of society and the community. Greater levels of recreation activity emphasized social and community contribution and personal fulfillment. It was concluded that different activities provide different kinds of rewards. Substituting recreation or volunteering for work is therefore problematic because individuals may not be able to receive the same satisfactions from recreation or volunteering.

In conclusion, the study demonstrated that retirement is a highly variable experience and is better represented by a variable model of aging. Theories of retirement, social policies, and programs should be updated to reflect current scientific knowledge about aging and the variation of behavior among older adults. This would reduce barriers imposed by retirement and provide benefits to both society and the individual. Society would benefit by retaining better access to the resources available from retirees. Retired individuals would benefit because they would retain fuller access to the opportunities available in society.

## TABLE OF CONTENTS

	<u>Page</u>
ABSTRACT OF THESIS.....	ii
TABLE OF CONTENTS.....	iv
LIST OF FIGURES .....	vii
LIST OF TABLES .....	viii
LIST OF APPENDICES .....	ix
ACKNOWLEDGMENTS.....	x
 CHAPTER ONE: INTRODUCTION.....	 1
Retirement, a Double-edged Sword.....	1
The Challenges of Current Research.....	2
Paradoxes .....	3
An Alternative Research Proposal.....	4
Purpose of the Research.....	6
Problem Statement .....	8
Objectives of the Study .....	8
Research Questions .....	8
Hypotheses.....	9
Rationale for the Investigation .....	10
Definition of Terms .....	10
Limitations .....	12
 CHAPTER TWO: REVIEW OF THE LITERATURE.....	 13
Historical Development of Retirement.....	13
Theoretical Overview of Retirement.....	15
Activity Theory .....	19
Continuity Theory.....	20
Research on Aging .....	22
Early Research: A Decremental Model of Aging.....	22
Current Research: A Variable Model of Aging.....	23
Retirement Patterns: The emphasis is on why, not why not .....	24
Work: Towards a definition.....	26
Reasons for Work.....	28
Volunteering: A paucity of explanatory research .....	29
Leisure: Towards a definition.....	31

Recreation: Not quite leisure .....	32
Reasons for Leisure .....	32
Emeriti: Activity Patterns and Reasons for Activities .....	34
Summation of the Literature Review .....	36
<b>CHAPTER THREE: METHODOLOGY .....</b>	<b>39</b>
Population: Sampling Strategy .....	37
Mailing Lists: Differing Records .....	40
Letters of Transmission .....	41
Maximizing Responses .....	42
Return Rate .....	43
Research Instrument .....	44
Activities .....	44
Reasons for Activity .....	45
Demographics: Personal information .....	48
Reliability and Validity of Data Collection .....	48
Instrument Development: Activities .....	49
Reasons .....	49
Analysis .....	50
Reliability of Measures .....	54
Model of Relationships Between Reasons and Activities .....	54
Summary .....	56
<b>CHAPTER FOUR: RESULTS .....</b>	<b>57</b>
Introduction .....	57
Descriptive Overview .....	57
Activities .....	61
Activity Domains: Work, Volunteering, and Recreation .....	66
Reasons for Activity .....	66
Gender .....	69
Age .....	69
Timing of Retirement .....	71
Wanting to Retire or Not .....	71
Consider "Retired" .....	71
General Satisfaction .....	72
The Profile of Reasons for Work, Volunteering, and Recreation .....	72
Work .....	72
Volunteering .....	74
Recreation .....	74
Research Questions .....	75
Hypotheses .....	78
Summary of the Findings .....	80
<b>CHAPTER FIVE: DISCUSSION .....</b>	<b>85</b>
Retirement as an Ambiguous Concept .....	87

Retirement as an Outdated Institution .....	87
Activities and Definitions of Work, Volunteering, and Recreation.....	89
Reasons for Activities.....	90
Timing of Retirement .....	91
Wanting to Retire or Not .....	92
Profile of Reasons for Work, Volunteering, and Recreation.....	92
Limitations of Activity and Continuity Theory.....	94
Recommendations for Future Retirement Theory .....	96
Recommendations for Additional Research .....	97
Limitations .....	99
Conclusions.....	100
Recommendations for Retirement Planning.....	101
Academics.....	101
Administrators .....	102
References.....	104

## LIST OF FIGURES

<u>Figure</u>	<u>Page</u>
1 Interactions between activities, reasons, descriptive circumstances, and conditions of retirement.....	55
2 Pattern of activities .....	69



## LIST OF TABLES

<u>Table</u>	<u>Page</u>
1 Questionnaire Return Rate.....	43
2 Summary of Findings for the Thirty-seven Reasons for work, volunteering, and recreation .....	45
3 Activity Means for Work, Volunteering, and recreation.....	50
4 Mean Scale Scores for Work, Volunteering, and Recreation by Gender .....	51
5 Mean Scores for Thirty-seven Reasons for Activities.....	53
6 Academic Discipline of Emeriti .....	58
7 Academic Rank .....	59
8 Timing of Retirement .....	59
9 Measure of Satisfaction.....	60
10 Percentage of Time Spent in Various Work Activities Before and After Retirement by Gender .....	62
11 Differences Among the 32 Activities when Defined as Work, Volunteering, and Recreation .....	64
12 Inter-relationships Among Each of the 32 Activities as Work, as Volunteering, and as Recreation with the Domains of Work, Volunteering, and Recreation .....	65
13 Activities Defined as Work by Gender, Age, Timing of Retirement, Wanted to Retire, Considered Self Retired, and General Satisfaction .....	66
14 Ranking of Thirty-seven Reasons for Activities.....	70
15 Reasons by Gender, Age, Timing of Retirement, Wanted to Retire or Not, Consider Self "Retired," and General Satisfaction .....	72
16 Reasons for Work, Volunteering, and Recreation by Gender .....	75

## LIST OF APPENDICES

<u>Appendix</u>	<u>Page</u>
A Letters of Transmission to Emeriti from the University of British Columbian and Simon Fraser University.....	110
B Follow-up Letter of Transmission.....	113
C Questionnaire .....	115
D Activities Defined as Volunteering by Gender, Age, Timing of Retirement, Wanted to Retire, Considered Self Retired, and General Satisfaction .....	124
E Activities Defined as Recreation by Gender, Age, Timing of Retirement, Wanted to Retire, Considered Self Retired, and General Satisfaction .....	125

## **ACKNOWLEDGEMENTS**

The process of preparing this thesis has been a long and adventurous undertaking. I am greatly indebted to the members of my thesis committee, Dr. James Thornton, Dr. John Collins, Dr. Norman Amundsen, and Dr. James Birren for their unwavering support and guidance in completing this thesis.

Dr. James Thornton, the head of my thesis committee, spent many hours helping me refine and express my ideas. When I felt lost he restored my faith in my abilities and gave me the courage to continue. His scholarly wisdom and kind words were always timely and welcome. He has become more than an instructor, he has become a close friend.

Dr. John Collins shared his knowledge and experience about conducting research. His masterful insights, clarity of language, and subtle humor helped me maintain control over the thesis. Without his dedicated help I may have spent the next 5 to 10 years exploring the rich data which surfaced in the study. This thesis, however, might never have been completed.

Dr. Norman Amundsen had the wonderful ability to provide the right questions at the opportune moment. His penetrating questions awakened me to possibilities I had not previously considered.

Dr. James Birren was the external member of the thesis committee. I greatly appreciate his comments which went beyond the substance of this study and directed me towards the social and economic realities of retirement policies.

Finally, I would like to thank the senior scholars who participated in this study. I appreciated the many letters and words of encouragement. Your comments provided a sense of vitality and enthusiasm while performing the research. Thank-you.

## **CHAPTER ONE**

### **Introduction**

#### **Retirement, a Double-edged Sword**

Retirement is a recent phenomenon in Canadian history. Prior to 1900, according to Osgood (1982), people did not retire. Only one person in five over the age of sixty-five did not work: people worked throughout life or until illness prevented them from working. By 1970 the circumstances of the older adult had changed considerably. Four out of five people over the age of sixty-five no longer worked (Osgood, 1982). Pensions and social policies enabled most older adults to leave the work place earlier in life without facing undue economic hardships. Retirement had become an accepted stage of human life and it is now portrayed as the reward people receive after several decades of work. Retirement, at an individual level, entitles the retiree to freedom from the obligations of work, the opportunity to pursue personal interests, and a chance to enjoy leisure.

Retirement, when elevated to the status of a social institution, however, promotes the view that the older adult is no longer able to work as productively as younger members of society. Due to declining health and obsolescence of older workers' knowledge and skills, elderly individuals are expected to step aside for the younger generation and disengage from the role of worker (Cummings and Henry, 1961). Policies such as compulsory retirement reinforce this process and curtail people's ability to direct their future by controlling the timing of retirement (Walker, 1983). The energy and productivity displayed by people immediately before retirement is overlooked. The institution of retirement supports a decremental model of aging and positions the elderly as a needy populace which is unable to contribute fully to society — a populace requiring the care

and sympathy of society. Consequently, some of the reward of increased free time is stripped by a concomitant decline in social worth and status.

### Challenges to the Institution of Retirement

Current research does not support a decremental model of aging implicit in the institution of retirement; instead it supports a variable model of aging (Birren and Stacey, 1988). The elderly are not a homogeneous group: variability of physiological capacity, intellectual proficiency, and sociability is a more accurate characterization of aging adults. Although some suffer ill health, many are healthy and vigorous. Declines in physiological self regulation and capacity occur, but the changes are often minimal (Birren and Stacey, 1988). Creativity and crystalline intelligence may be maintained and continue to develop in late life (Schaie, 1983). Personality remains fairly constant throughout life: old age does not equate to psychological dysfunction or a distinct and uniform elderly personality. For most people, personality — like health, intellect, and capacity — is similar to what it was during mid-life (Maas, 1984).

Variation amongst the elderly is also evident in their retirement patterns, attitudes, and behavior. People may retire early, at a compulsory age, or not at all. Osgood (1982) and Ruhm (1989) found that given adequate financial resources, most people retire as soon as possible. Retirement may be welcomed or resented, although most retirees are satisfied with retirement (Mass, 1984; Palmore, 1981; Palmore et al. 1984). Retirees may engage in work, volunteering, and recreation. Those who work during retirement, frequently maintain levels of productivity which are similar to pre-retirement levels of production (Birren, 1990; Doering, Rhodes, & Schuster, 1983). Contrary to the view that retirees are nonproductive, many retirees are productive and contribute much to society.

### Paradoxes

The current findings challenge the veracity of the institution of retirement while revealing several paradoxes. These are:

1. Although some retirees display reduced levels of activity after retirement, others remain active and involve themselves in work, volunteering, and recreation.
2. When people retire, they retire from work, not from life.
3. Although older adults generally maintain high levels of biological and cognitive functioning and the potential for continued work, they retire at retirement age or sooner when financially possible. Continued employment does not result from high levels of human capacity. For many individuals work may have been a dissatisfying experience (Rothman, 1989).
4. The social institution of retirement can deter many from working. Some individuals, however, secure additional work after the compulsory retirement age even though they do not require the money.

How can these these seeming contradictions be explained?

Two central theories have been used to explain retirement behavior: activity theory (Friedman and Havighurst, 1954) and continuity theory (Atchley, 1976, 1989). Activity theory postulates that the activity of work gives function and meaning to life (Friedmann & Havighurst, 1954). Adaptation to retirement is facilitated by finding substitute activities for work which provide the same meanings as work provided prior to retirement. Substitute activities — e.g., volunteering or recreation — become prescriptions for satisfaction during retirement. Research about activity theory, however, is inconclusive. In some instances activity theory is supported and in other instances it is not (Lemon, Bengston and Peterson, 1972).

Continuity theory posits that people who are active during retirement were most likely active prior to retirement (Atchley, 1976, 1989). Retirement satisfaction is not dependent on replacement activities, but a continuation of established behavior patterns and social relations. Pursuing familiar activities (e.g. hobbies) and maintaining long term social relations with friends and associates results in healthy adaptation to retirement. Continuity theory, however, does not account for life satisfaction amongst those individuals who make major changes in life style after retirement by abandoning established routines. Nor does continuity theory explain how people adapt to uncontrollable and unfamiliar events in life, such as the death of a spouse.

Activity theory and continuity theory have both strengths and weaknesses. Each provides a theoretical explanation for the behavior of retired adults while suffering from contradictory research findings or restrictive theorizations about human behavior. One possible explanation for the shortcomings of these theories is that they are generalized social explanations of aging adults' behavior. Human behavior is oversimplified and people become passive recipients of cultural and social forces. Substitute activity or repetition of cherished behavior patterns predict satisfaction and adaptation to retirement. Individuals' ability to control their destiny is underrated. Consequently these theories lack the flexibility necessary to account for the variability of behavior amongst people as they transit into retirement.

#### An Alternative Research Proposal

People are not merely passive recipients of their environment. Although we live in a social world we experience it as individuals. People may create meaning out of experience and use activities to express that meaning (Becker, 1972). People's capacity to

reflect on their past and make changes in their life is well documented (Frankl, 1955, 1966, 1967; Yalom, 1980). Consequently, examining people's retirement behavior from the perspective of the individual may help fill some of the gaps left by activity and continuity theory because individual variation is recognized.

One way of embracing the individual's perspective is to allow people to define their activities and identify the important reasons for their pattern of activities. Social, psychological, and cultural forces are included by this approach and are accepted as an integral part of the way people perceive their environment. People's reasons for their pattern of activity are recognized as manifestations of their beliefs and values about living. Looking at people's reasons for what they do acknowledges the contextual quality of people's behavior because definitions of activities are not externally imposed.

Work, volunteering, and recreation are important activities which retired adults pursue. These activities have been positively related to life satisfaction and well-being during retirement (Palmore, 1981; Palmore et al. 1984; Tinsley, Teaff, Colbs, & Kaufman, 1985, 1987). People express various reasons for participating in work, volunteering, and recreation. Research suggests these reasons may be similar for work, volunteering, and recreation. For example, Friedman and Havighurst (1954) found creativity was an explanation for work, whereas Tinsley et al. (1985) found creativity was a reason for recreation.

Little research has been done, however, which examines people's reasons for these activities in relation to their overall pattern of activities in late life. A scan of the electronic databases (Psychological Abstracts, Social Science Abstracts, Current Index of Journals in Education, Research in Education, and the Canadian Education Index) demonstrated that most research investigates only one activity group, e.g. work or volunteering or recreation,



and then probes for explanations to this behavior. The individual activity group becomes a determinant of a set of explanations which have been separated from a larger schema of activities without carefully examining how other activities may influence retirement behavior. Reasons for one activity group may in reality relate to a constellation of activities in the overall pattern of an individual's behavior, not simply the selected activity group. Segmenting people's reasons may result in limited explanations about people's activities which do not reflect the complexity of human behavior. Consequently, a study which investigates the reasons people give for their pattern of activities during retirement provides an opportunity to study behavior as part of the complex matrix of human life.

#### Purpose of the Research

This study investigated 32 activities and 37 reasons for activities during retirement. The timing of retirement (early, mandatory, or late) and whether or not people wanted to retire were tested to determine their influence on the 37 reasons for activities. Activities were grouped into three domains: work, volunteering, and recreation. The importance retirees attached to each of the 37 reasons was tested in relation to how active they were in work, volunteering, and recreation. Profiles of reasons for work, volunteering, and recreation emerged. These profiles were tested for the influence of the timing of retirement and whether or not people wanted to retire. The profiles of reasons portray how important each of the 37 reasons are in relation to retirees activity levels in work, volunteering and recreation.

Examining people's reasons for activities in relation to their patterns of activity provided an opportunity to investigate retirement behavior as part of a complex whole. This approach emphasized an interactive perspective for analyzing retirement behavior.

Research began with the premise that common reasons existed for people's activities (i.e. work, volunteering, and recreation) during retirement. Instead of merely investigating a one-way link between an activity and the reasons for that activity, retirees' reasons for activities were examined to show the consistency of reasons regardless of the activity patterns of retired people.

The variability of human activity during retirement was investigated. Although work, volunteering, and recreation can be socially defined, individuals may have their own definitions for these activities. People may use these activities differently because of personal circumstances, e.g. health, finances, kind of retirement, satisfaction, access to opportunities, etc.. Retirement may eliminate the obligatory nature of work because of pensions or adequate investment earnings. Work might become a form of leisure when it is no longer required to pay for the necessities of life. If the reasons for work, volunteering and recreation are similar, an argument suggesting broader definitions for leisure and work during retirement may be generated.

The study consisted of retirees from the University of British Columbia and Simon Fraser University who had been granted the status of emeritus. Retired academics are relatively active retirees (Dorfman, 1981) and Cole (in Birren, 1990) noted that there are minimal decreases in their productivity as they age. Because of adequate pensions and investments most emeriti do not need to work, yet some continue to work as consultants, educators, or in related disciplines. They may volunteer their services to community agencies or professional groups. Recreation, for some, may involve the pursuit of research interests. Their retirement patterns exemplify the paradoxes in retirement patterns noted earlier in this study and therefore this population provides an ideal sample to investigate patterns of activity during retirement.

### Problem Statement

Are there a relationships among retired academics' patterns of work, volunteering, and recreation; their reasons for their activities; and the kind of the retirement event (i.e., the timing of retirement and whether or not people wanted to retire)? By examining these relationships the following objectives were addressed:

1. To provide evidence which illustrates the variability model of the aging adult by demonstrating the variability of patterns of work, volunteering, and recreation amongst emeriti.
2. To determine whether the 32 activities are similar for work, volunteering, and recreation.
3. To demonstrate whether the kind of retirement event ( determined by the timing of retirement and whether or not individuals wanted to retire) influences the activity patterns and reasons for activity for emeriti.
4. To discuss activity and continuity theory with the aim of reducing some of the discrepancies found in these approaches.
5. To show that emeriti participate in the activities of work, volunteering, and recreation as a form of leisure.

### Research Questions

To facilitate the purpose and objectives of this study the following questions are asked:

1. Do emeriti concurrently pursue a variety of work, volunteering and recreation activities during retirement?

2. Are the activities defining work, volunteering, and recreation for emeriti similar?
3. How active are emeriti in the three activity domains: work, volunteering and recreation?
4. Does the timing of retirement ( early retirement, mandatory retirement, and late retirement) influence the reasons emeriti have for activities?
5. Does wanting to retire or not wanting to retire influence the reasons emeriti have for activities?
6. What profile of reasons do emeriti present for their pattern of work, volunteering, and recreation?

### Hypotheses

The following hypotheses (tested in the null form) guided this study:

1. The patterns of activities which define work, volunteering, and recreation for emeriti are different.
2. The reasons emeriti give for their activities are associated with the timing of retirement ( early, mandatory, or late retirement) or whether or not they wanted to retire.
3. The reasons emeriti provide for their activities are associated with how active they are in work, volunteering, and recreation.
4. The profile of reasons emeriti present for work, volunteering, and recreation are leisure oriented.

### Rationale for the Investigation

Examining emeriti's reasons for their activities in relation to their pattern of work, volunteering and recreation provides an opportunity to challenge the institution of retirement. For most Canadians work has defined what they do with their lives. Understanding the changing issues surrounding work brought on by retirement is fundamental to expanding our comprehension about our population aging. Identifying people's reasons for behavior in retirement may provide knowledge which is useful for designing work and volunteering environments and educational and counselling programs. These environments and programs could better reflect competent older adults' interests thereby encouraging them to contribute their knowledge and skill to society. Finally, a variable model of the aging adult is supported by providing information which helps explain and demonstrate patterns of work, volunteering, and recreation amongst older adults.

All of these reasons should promote a more representative image of older people and their ongoing contributions to society while addressing the theoretical weaknesses of activity and continuity theory. Additional information about people's reasons for what they do may fill some of the gaps and discrepancies of activity and continuity theory and suggest a more individualized approach to people's behavior in late life. This perspective may lend further support to eradicating the inequities inherent in the institution of retirement.

### Definition of Terms

For the purpose of this study, the following definitions are used:

**Academic:** An individual whose university career was that of tenured professor (assistant, associate, or full) or senior instructor, and who was employed full time at a recognized university is defined as an academic.

**Emeritus:** An academic who, upon retirement from the university where he or she was employed, is granted the status of emeritus according to the policies of that institution.

**Retirement:** Emeriti who classify themselves as retired and who receive a pension or other retirement income, are defined as being in retirement.

**Early Retirement:** Academics who retired from the university prior to the mandatory retirement age of 65, are defined as having retired early.

**Mandatory Retirement:** Academics who were compelled to retire from the university as a result of attaining retirement age are defined as mandatorily retired. The retirement age for university faculty in the Province of British Columbia is 65 years.

**Late retirement:** Academics who retired from the university after the mandatory retirement age of 65, are defined as having retired late.

**Work:** Work is any activity which an individual defines as work. Individuals may or may not be paid for this activity by someone or some organization.

**Volunteering:** Volunteering is any activity which an individual defines as volunteering.

**Leisure:** Leisure is the relatively free, discretionary time which individuals have after attending to the necessities which are required to sustain life. Activities which are pursued during leisure are done without obligation and have the purpose of providing personal satisfaction, enjoyment, and development. Work volunteering and recreation can all be conceived as leisure depending on the retiree's perspective.

### Limitations

This investigation has three important limitations. To date no author of retirement theory has rendered his or her theory in testable form therefore the study was unable to directly test theory. Discussions about theory were based on the implications of the research findings. Second, the activities of work, volunteering, and recreation do not exhaust the range of possible activities which people may pursue (e.g., spiritual activities), nor do the reasons represent all of the possible reasons which people may have for their activities. Finally, the sample was not representative of all retired adults within the general population. These elderly scholars are amongst the most highly educated members of society. Their level of knowledge and expertise may give them access to opportunities and resources which are unavailable to many other retirees.

This study was not intended to deliver a comprehensive theory which explains the behavior of all retirees. Instead, an interactive approach for examining retirement behavior was developed. This perspective emphasized the interaction between reasons and activities and urged that explanations of people's behavior be examined in the context of general behavior rather than in isolated categories of behavior. Researching an academic population provided an opportunity for assessing the plausibility of this alternative approach.

## **CHAPTER TWO**

### **Literature Review**

This chapter reviews the relevant literature about retirement and human behavior as a means of establishing a basis for exploring the reasons emeriti have for their activities. A brief history and theoretical overview of retirement is presented to provide a conceptual background for the study. Activity theory and continuity theory are introduced separately because they form the basis for conceptual discussion later in the study. Research on aging is presented as a means of supporting a variable model of aging. Retirement patterns are examined to demonstrate the differential nature of retirement. The concepts of work, volunteering, and leisure are explored as a means of providing clarity of definition about these activities and elucidating the research which investigated people's reasons for each of these activities. Research about the sample population is provided. The final section of the chapter summarizes and synthesizes the literature review.

#### **Historical Development of Retirement**

Several historical events help explain the development of retirement as a socially sanctioned phenomenon. The advent of the industrial era and the use of scientific knowledge changed the way people lived. Due to advances in health care and medicine, the average life span of people gradually increased from 47 years in 1900, to 70 years by 1970 (Osgood, 1982). Along with changes in transportation and communication, the distribution of goods, social organization, and people's health, the nature of the work place, productivity, and the utilization of labor changed to meet the demands of the industrial world.

Goods were produced en masse and most workers became part of the production process. Knowledge and skill was de-emphasized and labor became the primary



commodity (Marx, 1967). It was believed that as people aged their productive capacity declined — both physically and intellectually — because the human body could no longer meet the demands of industrial work. In part this was true because physical labor was often debilitating and detrimental to health (Osgood, 1982). The older adult was removed from the work place so that more energetic and knowledgeable younger workers could maintain the productive process.

As a means of dealing with an increasing elderly population, government and private corporations implemented the use of pension and social security to ease the older adult out of the work place. For example, the Canada Pension Plan and Quebec Pension Plan were enacted in 1965 and Canadians began making contributions to these mandatory plans in 1966 (Denton, 1980). Benefits from pension plans enabled the older adult to withdraw from work without facing undue economic hardship. This trend was supported by unions because it provided for the welfare of their members in later life. Employers could replace elderly and less productive workers with more profitable younger workers. Younger workers were able to enter the productive process and earn a living.

In summation, the emergence of retirement can be attributed to at least three historical factors: 1) increases in health enabled people to live long enough to retire; 2) changes in the means of production and the economy, along with a concomitant perception that older adults were less productive than younger adults, made the older worker a less desirable employee; and 3) pensions and social policies came into existence which provided for the support of older adults. These three factors were part of an intricate historical process which involved both the individual and society.

### Theoretical Overview of Retirement

Retirement can be viewed in several ways: 1) as an event, which includes the rituals and activities undertaken by an individual in preparation for disengagement from work, e.g. celebrations, the receiving of gifts, and financial planning; 2) as the acquisition of the social role of retiree; and 3) as a process whereby the role of worker is discarded and the individual adapts to the role of retiree (Atchley, 1976). The events and changes which accompany retirement are inter-related. Not only must retirees confront personal feelings about change, they may need to accommodate changes in the way society treats them. On the one hand they are granted special privileges (e.g. freedom from work) and on the other hand stigmas about the worth of older people are incurred (Malek, 1989). Consequently, retirement is a highly complex process requiring continuous adaptation by the individual to society and ongoing adaption by society to the individual.

Atchley (1977) theorized that successful adaptation to retirement is accompanied by five stages in the person's life. The stages, which are part of the normal process of aging, are sequential and require the individual to make personal adjustments in role and social activity. A pre-retirement stage describes the movement from work to the period immediately following work. This stage includes a remote phase, a near phase, and a honeymoon phase. A disenchantment stage results in a sense of loss for some people because of decreased income, altered social networks, and changes in family. A reorientation stage occurs when the person uses past experience and personal resources to create new directions in life. People may contemplate alternate employment or seek recreational activities as a way of enriching life. During the subsequent stability stage alternatives are developed and incorporated into life. Individuals might begin a new career

at this time. Finally, the termination stage, brought on by illness or disability, ultimately results in death.

Howard, Marshall, Rehnitz, Cunningham and Donner (1982) and Ekerdt and Bosse (1985) supported Atchley's view that retirement requires continuous adaptation because people may experience a series of life change events. Personal relationships established in the work place diminish and the individual must make adjustments to societal perceptions about his role as retiree. Personal income decreases while free time increases and the potential for declining health may coincide with constrained activity (Howard, Marshall, Rehnitz, Cunningham and Donner, 1982). Although people may experience an initial sense of euphoria they may also experience a sense of let down during the second year of retirement (Ekerdt and Bosse, 1985).

Atchley's stages of retirement, however, provide a limited perspective because of internal incongruity and their absolute quality. Retirement is viewed as the completion of the transition from the role of worker to the role of retiree. Paradoxically, in stage four a person may begin an alternate career as a way of adapting to retirement. It doesn't make sense to take on the role of worker as way of leaving the role of worker? Additionally, the sequential pattern of the stages provides a predefined process which is not followed by all people. For example, because police officers and military personnel may retire relatively early in life, they can enter a second career. Retirement does not mean the end of the worker role; it provides an opportunity for career succession (Cooper & Force, 1985). Consequently, retirement may be better defined as a highly differential experience (George, Fillenbaum, and Palmore, 1984).

Schlossberg (1981) identified retirement as one of many transitions which people may experience in life. Her transition model is a flexible one which incorporates the

variability of people's responses to events such as retirement. How people adapt to change depends on several factors: previous experience with a similar transition, health, timing (e.g. whether retirement is on time or off time), interpersonal support systems, and readiness to change (Schlossberg, 1981). Adaptation to the change results in qualitative changes within the individual. Positive adaptation can result in personal growth, whereas negative adaptation may result in deterioration.

Schlossberg's (1981) transition model stresses the variability of people's response to change. Responses are influenced by the dynamic interplay between the individual's external world and personal resources. For example, people may respond differently to mandatory retirement. Some individuals might readily adapt to a retirement role because they have tired of their work. Others may begin a new career because they have the resources and personal desire to begin new ventures. Another group may resent mandatory retirement because they don't want to retire and lack the personal resources to begin an alternate career. Schlossberg's (1981) model, however, suffered from some important weaknesses when investigating retirement.

Schlossberg's (1981) model is not a theory; it is primarily meant as tool for counselling people undergoing a transition. Her model provides an approach to helping people adapt to changes brought about by events in their world. Schlossberg (1981), like Atchley (1977), however, sees events as being neutral occurrences and does not consider that some events might be artificially created as a means of serving special interests in society. Her emphasis on adaptation becomes a way of reinforcing the status quo when events are socially construed; in some instances this could be maladaptive because resolution of the problem is misdirected. For example, retirement may victimize some people by forcing them out of the work environment because of outdated social policies.

Although the social policy requires revision, it is the retiree who is expected to make personal revisions.

Phillipson (1982, 1983), Graebner (1984), and Estes (1979, 1983) advocated that concepts such as old age and retirement are socially constructed phenomena which help maintain the political economy of capitalism. Retirement was developed in response to the demands of the industrial era. Graebner (1984) suggests managers and employers of the late nineteenth century and early twentieth century, who were proponents of Taylorism, sought ways of removing older workers from the work force.

Removal of the older worker from the work force increased control over the means of production by developing “a young flexible labor force .... unfettered by craft traditions and dysfunctional work routines” (Graebner, 1984, p. 184). A youth bias was evident because the younger worker was viewed as more profitable. The implication was that older workers were inefficient burdens and should be removed from the work force. Inefficiency was attributed to physiological decline rather than power struggles between guilds and capitalism (Graebner, 1984).

The political and economic basis of this process are apparent when changes in public policies occur which move the older worker in and out of the work place. In 1950, British Parliament, for example, moved to raise the retirement age due to shortages in the labor force following World War II (Phillipson, 1983). New myths such as the trauma of retirement came into being. Keeping people working was presented as beneficial to their well being and a means of promoting longevity. Once the labor shortages were overcome and a labor surplus occurred by the onset of the world wide recession in the early 1980's, policies such as early retirement were introduced to remove the older worker from the work force. Retirement, from the perspective of a socially constructed phenomenon, has been

one of the most successful methods, presented as politically neutral, of reducing surplus labor in the economy (Phillipson, 1983).

### Activity Theory

Activity theory has permeated the gerontological literature for the past several decades. The essence of this theory is that there is a positive relationship between activity and life satisfaction (Lemon, Bengston and Peterson, 1972). Activities are viewed as a way of supporting one's social roles which in turn reinforce self concept. Positive adaptation to old age is facilitated through social role participation (Havighurst and Albrecht, 1953). Role loss, due to the cessation of activity, leads to a reduction in life satisfaction. The greater the role loss, the greater the decline in life satisfaction.

Friedmann and Havighurst (1954) suggested that one way of regaining lost life satisfaction brought on by a major role loss, e.g. retirement, is to find a substitute activity which provides the same satisfactions. Volunteering, for example, might provide the same satisfactions as work because role supports are re-established. Lemon et al. (1972) reviewed several investigations subsequent to Friedman and Havighurst (1954) and found mixed support for activity theory. They attributed a lack of clear theoretical formulation to these diverse results.

Clarification of theory, along with better operationalization of concepts, however, did not produce consistent and confirming findings about the validity of activity theory. Lemon et al. (1972) found weak positive associations between informal activities (e.g. time with friends) and life satisfaction. Solitary activities (e.g. watching television) and formal activities (e.g. voluntary associations) were negatively related to life satisfaction. Longino and Kart (1982) replicated the work of Lemon et al. (1972) and found similar results.

They concluded that it was not the activity which was important but the kind of interpersonal relations which occurred during the activity which were crucial.

In addition to the conceptual weaknesses which plague much of the activity research, sampling strategies in many studies are not representative of the general population of elderly. Friedmann and Havighurst (1954) used a sample population comprised of employees from a manufacturing firm for their study. Knapp (1977) investigated 51 residents from a care facility and noted that even though the study supported activity theory, his population was too small and not representative. Lemon et al. (1972) and Longino and Kart (1982) studied middle and upper middle class individuals who lived in retirement communities. The studies suffered from a middle class bias and the problem of self selection. People may have moved to the retirement community because they sought refuge from the cares of everyday life (Lemon et al., 1972).

### Continuity Theory

Continuity Theory identifies the importance of a relatively stable, ongoing pattern of role behavior that a person has established in life (Atchley, 1976). Unlike activity theory, which advocates a homeostatic or equilibrium model of aging, continuity theory advocates an evolutionary model of aging (Atchley, 1989). Aging produces changes which cannot be completely offset and therefore people cannot return to a prior state. People incorporate past knowledge and experience as a way of adapting to changes brought on by normal aging. Individuals use concepts established in the past to conceive of their future and structure their choices in response to these changes.

Atchley (1989) postulated that people are both “predisposed to and motivated towards inner psychological continuity as well as outward continuity of social behavior and circumstances” (p. 183). Adaptation to retirement is achieved when individuals can

maintain internal structures (i.e. internal continuity) and external structures (i.e. external continuity) in life. Internal continuity refers to the persistence of the inner structures of self and identity. External continuity refers to the use of familiar skills to do familiar things in the company of familiar people.

Maintaining both inner and outer structures enables the individual to receive the “satisfactions resulting from exercising mastery and the value of experience and practice in minimizing the deleterious effects of physical and psychological aging” ( Atchley, 1989, p. 188). Inner structures can be maintained through ongoing activities such as participation in professional organizations, social organizations, and associations with friends and relatives. These activities can provide interpersonal feedback which helps maintain the individual’s sense of identity and self. Outer structures can be maintained by the aforementioned activities and the exercise of skills and abilities, e.g. hobbies and recreation. These outer structures enable the individual to maintain a viable connection to the external world.

Research demonstrating the validity of continuity theory is generally supportive. Maas (1984) studied the development of a group of middle class adults over a thirty year period. He found that as people aged they displayed the same personality traits as were evident in mid life. For example, people who are disinterested in family during their forties are disinterested in family during their sixties. Chambre (1984) investigated the volunteering behavior of older adults and concluded that the volunteering behavior of older adults supported continuity theory. Older volunteers had been younger volunteers. Fox (1981-82) reported that on a global level continuity theory seems to apply in most instances; however, continuity theory suffers from a lack of conceptual clarity and an absence of rigorous objective analysis.



Fox (1984) observed that once continuity was broken into discrete components of behavior, continuity did not always prevail. Simpson and McKinney (Fox, 1984), for example, demonstrated that carrying over a particular work style into retirement could lead to increased feelings of job deprivation “when the style which is carried over into retirement cannot be divorced from the institutional context of the work role (p. 107).” Seelback and Sauer (Fox, 1984) reported that an opposite relationship between expectations of filial responsibility and morale among aging parents may exist. These findings suggest that attempts to maintain certain beliefs and behaviors appropriate to an earlier stage in life may be counteradaptive.

As a rejoinder to Fox (1984), Atchley (1989) argued that continuity theory applied to normal aging. However, Atchley does not adequately define normal aging. He refers to the deleterious consequences of aging and suggests that normal aging is a decremental invariant process. As demonstrated in parts of this literature review, a variable model may be a better characterization of the aging adult. People may interpret events differently. Loss of the worker role may be welcomed when work is an unpleasant experience. Retirement may signal an opportunity for some people to discard a past career and begin a new one. Aging can produce experiences which are novel and little in the repertoire of the individual’s history aids adaptation, e.g. the death of a spouse. Even though people maintain identities and behavior patterns in late life, there is more personal growth and change in old age than is suggested by continuity theory.

### Research on Aging

Early discoveries about the aging adult were shaped by a bioscientific model. Aging was described as “deteriorative and decremental” (Comfort, 1956) or a time of inevitable decline (Handler, 1960). Cummings and Henry (1961) suggested that older

adults and society mutually withdraw from each other. As a result of progressive physical decline, the older adult gradually withdraws from society in preparation of death.

Botwinick (1977) postulated that after the age of sixty, people's intellectual abilities decline. These studies promoted an ironclad and invariant model of aging which defined the older adult as an increasingly dependent individual who must be cared for by society.

A review of more recent studies indicates that the outcome of aging does not support an invariant model of the aging adult. People neither age at the same rate nor do they age in the same way. While biological decrements occur in aging individuals, the rate of decline and its impact on the human organism's ability for self regulation is variable. These biological changes do not result in immediate and long term incapacity and the aging person can maintain levels of biological functioning which are similar to those experienced during the middle years of life (Birren and Stacey, 1988). Terminal decline and the attendant incapacitation as described in the studies of Comfort (1956) and Handler (1960) are unlikely to occur until a person's last two years of life and this terminal phase is qualitatively different than the prior period (Birren and Stacey, 1988).

Similar positive findings have been made about the intellectual and cognitive ability of the older adult. Early studies which revealed significant losses in intellect and cognitive ability were flawed; the studies were generally cross sectional and did not account for cohort differences (Palmore 1981). Schaie (1983), using a longitudinal study, found some pattern of intellectual loss with age, but the differences in intellectual ability from younger to older adulthood were small. Older adults experienced more difficulty learning new and unfamiliar material than younger adults; differences became negligible when the subject matter was meaningful (Schaie, 1983). Learning and additional education in middle adulthood seems to mitigate intellectual decline in old age (Schaie, 1983; Willis, 1985).

Decreases in intellectual ability, as suggested by Lachman and Leff (1989), may actually be expressions of the elderly's loss of faith in their ability to function intellectually.

Studies about human personality do not support an invariant model of the aging adult. Maas (1984) found human capacity and personality was highly variable; age was not a determining factor. Although people had different personalities, their personalities did not change because of age. Those who experienced good psychological health when they were younger, experienced good psychological health in old age. Aging does not lead to a homogeneous personality which is shared by all people after a certain age.

Contemporary knowledge reveals a variable model of the aging adult. Although some people experience declines during their later years, other people are healthy, intellectually proficient, and socially active in late life. Age graded social policies, such as mandatory retirement at a uniform age, are not supported by the current research; instead they reinforce a rigid and decremental model of the older adult. The reality that some people have the physical and intellectual capacity and desire to continue their involvement in society through work, volunteering, and other activities is ignored. Consequently, retirees are prohibited from being full participants in society and society may be deprived of the valuable contributions they might offer.

### Retirement Patterns

The complexity of the retirement process influences people's decision about when to retire. Walker and Price (1976) reported that several factors affect the retirement decision: economic necessity, fear of inflation, work ethic, job satisfaction, fear of death (i.e. retirement may signal death), and the perception that retirement reduces life satisfaction. Hayward and Hardy (1985) found retirement was influenced by health,

pension coverage, union membership, wages, compulsory retirement regulations, tenure, and certain background factors.

Examining the retirement patterns of the elderly reveals variation in the timing of retirement in spite of retirement policies and retirement legislation. Most people retire as soon as possible from the work place (Osgood, 1982, Ruhm, 1989). Options such as early retirement are taken by many people when there is sufficient money to meet their economic and material wants (Hayward & Hardy, 1985; Ruhm, 1989; Walker & Price, 1976) because work is dissatisfying (Rothman, 1987). Work dissatisfaction, and the individual's perception of inability to keep up with the demands of work or changes in work technology may result in early retirement (Walker & Price, 1976).

Declining health encourages some people to retire early (George, 1980; Hayward & Hardy, 1985; Palmore, 1981; Ruhm 1989). People with lower socioeconomic status and less education retire sooner than those of higher socioeconomic status and higher levels of education (Palmore, 1981; Ruhm, 1989). Hayward and Hardy (1985) indicated that the determinants of early retirement vary substantially across occupational contexts and that the impact of individual and job characteristics relevant to the early retirement decision are shaped by the nature of work.

The above research on the retirement patterns emphasizes the correlates of retirement; the focus is on why people retire. Information gained from these studies has been valuable for the design of health and pension policies for the elderly. However, the opposite side of the question — why some people continue to work — has been de-emphasized. Some people continue working after retirement (Doering, Rhodes, and Schuster, 1983), just as they continue with other activities, i.e. recreation and volunteering. For example, scholars are one of the most active post retirement groups (Dorfman, 1981).

Investigating the past activity patterns of people, such as scholars, may give valuable insights into the ongoing development of the older adult.

### Work

People have various definitions of work. For some, work is a necessary evil which provides a way of earning a living. Others feel it is the purpose to life (Calvinistic view) and that work connects people to a higher state of being (Pahl, 1988). Although work occupies a major portion of people's adult lives, a single, all encompassing definition of work does not seem to exist. Definitions of work are governed by by at least three factors: the historical era, social relationships, and individual perspective.

The time in history is a strong mediator of the definition of work. During the industrial age work was viewed in terms of the labor one had to sell. Skill, personal satisfaction, and creativity were unimportant. Workers did not control the means of production and work was primarily for material gain (Marx, 1967; Parker, 1976; Pahl, 1988.). Capitalists controlled the means of production and the worker exercised limited control over his work life. The structure of work controlled the nature of social relations (Pahl, 1988).

As western societies moved into the technological era, the power relationship between the worker and the owners of production changed. Skill and knowledge became the distinguishing traits of the contemporary worker (Osgood, 1982); worth was no longer measured in terms of labor and time because expertise was not readily replaced. Technology resulted in a growing middle class and a shorter work week. Work offered more than material gains, it afforded opportunities for self expression and personal development (Parker, 1983).

In addition to defining work by its historical context, work can be defined at the sociological level. Friedmann and Havighurst (1954) postulated that work could be viewed as having a hierarchy of meanings and they identified five levels in this hierarchy. The lowest level was generally held by unskilled workers: for them work was merely a means of earning a living. At the highest level - middle class professionals - public service was stressed. The definition of work was determined by one's occupational status within society.

Pahl (1988) elaborates on this earlier perspective by defining work as "an activity in terms of the social relations in which it is embedded" (p. 744). The definition of what constitutes work is socially constructed. The same activity may be defined as work or leisure depending on its context. For example, reading a journal article strictly for pleasure in one's spare time might be construed as recreation. If the article is subsequently re-read and used towards a professional publication, reading can become work. Although the activity of reading is the same, its meaning changes because the context under which it occurs is different.

The sociological perspective, however, doesn't adequately recognize the individual's definition of work. Marino (1985-86) found that activities that were viewed as work by some people were viewed as leisure by others (e.g. gardening, shopping, meetings). Women may view some activities differently than men. Cooking may be viewed as recreation by a husband whereas his wife considers cooking as housework.

It is evident from the aforementioned that several definitions of work are possible. Definitions of work may be socially prescribed and individuals may ascribe to personal definitions of work. In this investigation people's own definitions of work will prevail.

### Reasons for work

Freidman and Havighurst (1954) investigated the function and meaning of work for working adults over 55 years. They discovered that older adults worked for economic and extra-economic reasons. The economic reasons for work were maintaining a minimum sustenance level of existence and achieving a higher level or group standard. The extra-economic reasons referred to the regulation of time, recognition and definition of role, physical surroundings of the work place, interpersonal relations, life purpose, creativity, new experiences and service to others. Many of the findings in this early study have been supported by subsequent research.

Grossin (1986) demonstrated that the regulation of time was an important reason for work. Bolton (1980) and Ruhm (1989) reported that people from lower economic positions in society may continue working when they do not receive enough money from pensions, social security or other sources to cover basic expenses or expenses beyond the necessities which provide for a comfortable existence. Interpersonal experiences and opportunities to spend time with friends, colleagues, and peers were found to provide a valuable explanation of work behavior (Dorfman, 1981; Palmore, 1980; and Ruhm, 1989).

Bronte (1990), interviewed 100 adults over the age of 65 who continued to be productive and creative in late life. She examined how longevity influences career patterns and work life. She discovered that long career adults were frequently involved in occupations (e.g. academia) which allowed them to make changes when work became redundant and they were feeling stagnant. This ability afforded an opportunity for renewal and change in work thereby enabling the individual to avoid stagnation. Many of her subjects continued working merely for enjoyment. She concluded that age segregation as

an explanation of people's behavior was limiting and that judgements about people's ability to perform tasks should be based on current performance and capacity.

Brook and Brook (1989) examined the relationship between work and non-work activities amongst a group of professional and skilled tradespeople. They determined that people are motivated by intrinsic and extrinsic factors related to work satisfaction. Intrinsic values referred to challenge, variety, chance to use abilities and skills, leadership and responsibility. Extrinsic factors were related to payment, physical working conditions and physical activity. They concluded, as had Bolton (1980) and Schaie (1983), that job satisfaction is associated with the chance to use one's abilities and skills and receiving recognition for work done.

A secondary finding of Brook and Brook (1989) was that professionals made a clear distinction between paid work activities versus unpaid non-work activities. Little spillover exists between the two kinds of activities. Consequently, they suggested that non-work activities should not be viewed as providing compensations for deprivations and inadequacies experienced at work. The authors stated that there was no significant relationship between age and sex, nor to the number of work activities. Brook and Brook (1989), however, studied (n=81) working adults 21 to 71 years of age. They did not investigate the variable of retirement and the possible influence of financial security due to pensions and investment income.

### Volunteering

The literature on volunteering offers a multitude of subjects. The topics include its economic value, the training of volunteers, different voluntary organizations, and volunteer recruitment, etc. The list seems endless. Research is often prescriptive and implies how voluntary activities may be beneficial to the older person (Babic, 1976; Baines, 1986;



Einstein, 1973; Grady & Kastetler, 1970; Pritchard & Tomb, 1981; Schwartz, 1978). The importance of volunteering by older adults has been recognized in both the private and public sector; programs have been implemented to encourage and facilitate the involvement of the older adult. Chambre (1984) concluded that voluntary behavior amongst the elderly can be seen as having two major functions: “to provide individuals with meaningful leisure activities and to provide organizations with experienced and reliable workers at no cost (p. 292).”

Research about causal explanations of voluntary behavior, however, is limited. Volunteering is included as a form of recreation in some studies. Consequently it is difficult to assess whether the explanations for volunteering behavior are contaminated by a recreational emphasis. Chambré (1984) proffered that volunteering may fulfill a number of needs, for example, an opportunity for altruism, a chance to acquire new experiences and skills, or a situation to gain political influence. Schwartz (1978) suggested volunteering may enable the elderly to deal with the role loss by allowing them to share skills and life experiences, re-establish structure in life, find new purpose, and promote self worth and dignity. Schwartz implied that volunteering has a positive effect on well-being because it can provide compensation for role losses due to retirement and changes in family structure. Volunteering, as suggested by activity theory, could replace the meaning which was lost when other activities were left behind.

Research which verifies the substitutional value of volunteering is limited and provides little support for this compensation theory. Chambre (1984) performed a secondary analysis of data from the 1974 Americans Volunteer Survey and found an insignificant relationship between activity theory and volunteering in later life. Instead, her results were suggestive of continuity theory. People who were active volunteers prior to

retirement were active volunteers subsequent to retirement. Role loss, such as retirement from work, did not change the volunteering patterns of those who had not previously volunteered.

### Leisure

Leisure as a concept defies precise definition. Leisure, like work, has a multitude of meanings and is often defined in opposition to work (Neumeyer and Neumeyer, 1949; Parker, 1983). The difficulty with defining leisure this way is that a clear definition of work must be available before leisure can be defined. As noted previously, definitions of work are problematic because they are dependent on context and individual perspective (Pahl, 1981). Similarly, leisure is also dependent on its context and individual perspective. For example, Thomas Edison is purported to have said he never worked a day in his life and yet he spent long hours in his laboratories developing his inventions. For Edison work was leisure, but in the context of society, he worked very hard.

Neumeyer and Neumeyer (1949) defined leisure as free time after the practical necessities of life have been met. Leisure was viewed as time “that is relatively free from obligatory pursuits (Neumeyer and Neumeyer, 1949, p. 19). Brightbill (1963) followed a similar line of reasoning and suggested leisure has a qualitative dimension because it refers to the use of time which is discretionary and without obligation. Adding this qualitative dimension, however, does not completely eliminate the definitional ambiguity of leisure because assessing the absence of compulsion to participate in an activity is problematic. Activities which are considered leisure-time behavior might be a response to social pressures or powerful inner drives (Gist and Fava, 1964), and therefore may not be discretionary behavior.

Regardless of the difficulty of attributing free choice to leisure behavior as argued by Gist and Fava (1964), the present study adopts the view that leisure is discretionary time which is free from obligatory pursuits required to fulfill the necessities of life. The subjects in the present study receive a pension or financial subsidies which mitigate the economic necessity of work. Just as Pahl (1981) defined work as “an activity in terms of the social relations in which it is embedded,” leisure is also embedded in its social relations. If work is no longer required, then work may be viewed as a discretionary way of filling in time. What was previously viewed as work may become leisure.

### Recreation

Recreation and leisure are two terms which are often used interchangeably. Curtis (1979) refers to recreation as activities which are voluntarily entered. These activities have a reward structure which does not include monetary gain or career advancement. Personal pleasure, satisfaction, and enjoyment are the primary goals of recreation. Recreation includes play, games, sports, relaxation, pastimes, amusements, art forms, hobbies and avocations (Neumeyer and Neumeyer, 1949). These activities are pursued outside of people’s obligatory time. Consequently, recreation is almost synonymous with leisure. However, the emphasis in leisure is on the time element, whereas recreation refers to the way leisure is spent (Neumeyer and Neumeyer, 1949).

### Reasons for Leisure

The benefits of leisure activity during retirement and old age have been described by various authors. Palmore (1974) found older adults who exercised more frequently were physiologically healthier, less likely to receive hospital care or operations, and rated their health four times higher than less active individuals. Donald and Havighurst (1959) felt leisure activities promoted life satisfaction by replacing meaning and purpose lost due to

retirement. Kelly and Steinkamp (1985, 1987) found that higher levels of life satisfaction were related to social activity and travel. Tinsley et al. (1985) reported that increased participation in leisure activities was positively correlated to psychological benefits and life satisfaction. Purcell and Keller (1989) reviewed the literature about leisure participation amongst the elderly and concluded that leisure is beneficial to life satisfaction and personal well being. The above studies, amongst others, not only describe the benefits of leisure, but point out reasons older adults may have for leisure.

Donald and Havighurst (1959) reported various subjective meanings which older adults attached to their favorite leisure activities. These meanings indicate various reasons older adults may have for participating in leisure activity: being with friends, a chance to achieve something, creativity, change from work, and new experiences. Purcell and Keller (1989) reported that, although the exact nature of the relationship was unclear, reciprocity and control are inter-related characteristics of some leisure activities. The kind of leisure activity was not important so long as it promoted a sense of “personal responsibility and control” and afforded opportunities for companionship, and intellectual stimulation. (Purcell and Keller, 1989, p.24).

Thornton and Collins (1986) performed an exploratory study of older adults’ patterns of leisure and physical activities and the reasons and attitudes provided by older adults for their activities. They found that activity levels declined with age, but not sharply. Five central reasons for leisure activities were offered: being with friends, improving one’s bodily condition, enjoyment, clearing one’s thinking, and challenging one’s limits. Thornton and Collins (1986) note, however, that their sample is one of convenience and that the respondents are not representative of cohorts of elderly. Consequently, generality of their findings to other populations should be made with some caution.

Tinsley et al. (1985, 1987) investigated the benefits of leisure activities reported by older persons. These researchers developed a taxonomy of psychological benefits derived from leisure which identified six reasons for leisure participation: companionship, compensation, temporary disengagement, comfortable solitude, expressive solitude, and expressive service. These benefits seem consistent with the “meanings” cited by Donald and Havighurst (1959) and some of the reasons postulated by Thornton and Collins (1986). For example, companionship equates to contact with friends (Donald and Havighurst 1959; Thornton and Collins, 1986), compensation is similar to change from work and new experiences (Donald and Havighurst, 1959) or challenging one’s limits (Thornton and Collins, 1986), and expressive solitude parallels creativity and achievement (Donald and Havighurst 1959).

Tinsley et al. (1985, 1987) remarked that their research sample was a nonprobability sample which was comprised of three different subgroups. Reported results in each study were in reference to the same total population and it is not clear from either study whether these results apply differently amongst the three groups. Furthermore, their nonprobability sample was not representative of the general population because of the participant screening strategies employed.

#### Emeriti: Activity Patterns and Reasons for Activities.

Evidence that emeriti are active, healthy, maintain competence, and have valued services to offer during retirement has been well documented and the reader is directed to the special edition of Gerontology and Geriatrics Education, 11(1/2), 1990 for greater detail about these areas. Research examining the activity patterns and reasons emeriti have for these patterns of activity during retirement and the kind of retirement, however, is limited.

The works of Dorfman (1981), Dorfman, Conner, Ward, and Tompkins (1984), and Kaye and Monk (1984) address some of the central issues and therefore are of especial interest.

Dorfman (1981) studied the correlates of professional activity in retirement amongst emeriti (n=113) from a major state university. She demonstrated that there was “consistency between level of professional activity during the pre-retirement career and level of professional activity in retirement” (p. 158). Emeriti who remained within the community were more likely to remain involved in professional activities than those who left the university community. The most active emeriti had the most professional affiliations and contacts before and after retirement. They tended to associate with former students and colleagues from within and outside their departments.

Dorfman (1981) recommended that future studies at other institutions of higher learning be conducted to assess the generalizability of her findings. Her sample size was small and it was not possible to know what the effects of different types of institutions would have on these findings.

Dorfman et al. (1984) compared the reactions of professors to retirement from three universities. The researchers found that most professors across types of institutions planned for retirement although they felt their university did not provide enough support with planning. Retired faculty supported a mandatory retirement age and most retired at this time. Retired faculty enjoyed the flexibility and freedom of retirement; however, they did not enjoy the loss of their professional role and association with their students and colleagues. Research university faculty missed their work and enjoyed spending time in professional activities more than retired faculty from other types of institutions. These gains and losses would seem to indicate potential reasons retired academics might have for activities during retirement.

Dorfman et al. (1984) urged that further studies of this kind be made because their findings are limited due to the limited number of samples. Comparative in-depth case studies of retired professors from different institutions could help identify and explain the differences among institutions.

Kaye and Monk (1984) investigated the pre- and post-retirement experiences of 373 emeriti. Their findings indicate that women retired earlier than men. Women worked an average of 24.7 years whereas men worked an average of 30 years. Traditional sex roles appeared to influence both attitudes towards retirement preparation-assistance and choice of post-retirement activities. Women were more likely to pursue social and recreational activities while men occupied themselves with work oriented pursuits. The findings of Kaye and Monk (1984) suggest that any analysis of activity patterns and reasons for activities during retirement should include the variable of gender.

#### Summation of the Literature Review

Retirement is a recent phenomenon in Canadian history. Its development can be attributed to improvements in health and increased longevity, changes in the means of production and distribution of goods and services, and the advent of social policies and programs which have enabled the older worker to leave the work place without facing undue economic hardship. At an individual level retirement has freed the individual from the obligations of work while allowing him or her to enjoy leisure. As an institution, retirement has provided a politically neutral method of reconstituting the work force. Older workers are removed from the productive process and replaced with younger, more productive employees.

Retirement, however, is a double-edged sword: it frees people from the necessity of work, while robbing them of their right to choose when to retire. At an individual level

adaptation to retirement is advocated. Atchley (1977) views adaptation as a process whereby the individual moves through five distinct stages while giving up the role of worker. Schlossberg (1982) presents retirement as one of many transitions an individual may experience and adaptation to retirement is influenced by a variety of factors. Neither Schlossberg (1982) nor Atchley (1977), however, question the veracity of the institution of retirement. The question, adaptation to what, is never asked and the other side of the sword, retirement as an institution which may reduce retirees' social status and self worth goes unchallenged.

Phillipson (1983) and Graebner (1984) examine retirement as a socially constructed institution. According to these theorist's retirement is a tool used to promote the interests of capitalism. The rights of the individual to choose the timing of retirement are wrested away to ensure the profits of the capitalist. Proof of this process is evident in the changes in work policies following World War II and the recession of the early 1980's. Regardless of the correctness of the social construction argument, the institution of retirement seems to curtail people's ability to determine the timing of retirement. Retirement, however, refers primarily to the cessation of work and not everyone stops working, nor does activity stop in other areas of life. Some retirees begin new careers and find alternate work. Others participate in volunteering and leisure pursuits. How can these contradictions in retirement behavior be explained?

Two central theories have been used to explain retirement behavior: activity theory and continuity theory. These theories focus on how people adapt to retirement and loss of the worker role: either by finding substitute activities or maintaining past behavioral patterns. Support for these theories is weak. Research findings are contradictory, too generalized, and fail to account for variability in human behavior and experience. Some of



the difficulty with these theories is that they ascribe to an invariant model of aging which is not supported by recent research. (See, for example, Palmore, 1981; Willis, 1985.)

Current research supports a variable model of aging and demonstrates that the capacities of the older adult, both physically and intellectually, are similar to what they were in the middle years of life. Contrary to the image of frailty and incompetence portrayed by the institution of retirement (Malek, 1989), energy and intellect remains robust in old age for many adults. Many elderly remain active and participate in work, volunteering, and recreation. Emeriti are a particularly robust group which exemplifies the capabilities of older adults and reveals some of the variability of retirement patterns amongst older adults. The recent findings suggest broader research which includes the overall activity patterns of retired adults. Investigating what pattern of activities and what reasons older adults have for pursuing their activities may enable the development of a more comprehensive model of aging while filling in some of the gaps left by activity and continuity theory.

Three central activities were examined in the literature: work, volunteering, and recreation. Studies of these activities are problematic for various reasons. First, little is known about the overall patterns of these activities in late life. Second, consistent definitions of work, volunteering and recreation are problematic because their definitions are contingent upon social context and individual perception. Finally, the relationship between people's activities and their reasons for activities has generally been investigated in relationship to individual categories of activity. The literature suggests that reasons for work, volunteering, and leisure may be similar.

## **CHAPTER THREE**

### **Methodology**

An ex post facto research methodology was used in this investigation. Prior research had demonstrated that the timing of retirement and wanting to retire or not were associated with behavior and attitude during retirement. Knowledge about these relationships was limited and this study proposed to further that knowledge. A questionnaire was developed to measure the relationships between patterns of activity, reasons for activity, timing of retirement, and wanting to retire or not wanting to retire. The questionnaire was mailed to a population of 385 emeriti. Returned questionnaires were analyzed with SPSSX. Instruments were developed to measure relationships. Data was analyzed and figures and tables were created to demonstrate the findings in the study.

#### **Population: Sampling strategy**

The population (n=385) was comprised of emeriti from the University of British Columbia and Simon Fraser University. This population was chosen because it was convenient and because previous research revealed that emeriti's activity patterns may be influenced by good health, higher levels of education, occupational status (George, 1980) and ongoing professional activity (Dorfman, 1981) following retirement. The variability of their behavior patterns allowed for testing of the research hypotheses. The population is sample of convenience and little research had been done which examined people's behavior in relation to overall patterns of activities. The results of the study provided support for additional studies of this kind.

A mailed questionnaire was used to survey the sample population. The subjects received only one request to complete the research instrument. Follow-up requests were

not made because of financial limitations. A single mailing was not viewed as problematic. Borg and Gall (1989) demonstrated that high return rates were likely for this population. Additionally, single mailings were a way of reducing sample bias because initial non-respondents who replied to a follow-up requests might be prejudiced (Fowler, 1984). Questionnaires were mailed to U.B.C. emeriti during the last week of March 1992 and questionnaires were forwarded to S.F.U. emeriti shortly after mid-April 1992.

#### Mailing Lists: Differing Records

Mailing lists for emeriti were requested from the University of British Columbia, Simon Fraser University, and the University of Victoria. The three universities utilized different record keeping methods of their emeriti and therefore availability of this information varied amongst the institutions. A comprehensive mailing list was provided for U.B.C. emeriti (n=356) by the U.B.C. Alumni Association. The Alumni Association has an active and well organized emeriti division and an up-to-date mailing list is maintained. They required a formal request, an outline of the study, written assurance that the mailing list would not be used for commercial purposes, and a guarantee that the study was approved by the U.B.C. Ethics Committee before providing a mailing list.

Simon Fraser University did not have an emeriti association and locating a mailing list required various interdepartmental inquiries. The Vice President's Office was eventually identified as the division responsible for these records. Simon Fraser required a formal request which included an outline of the study and assurance of confidentiality. The university did not provide a mailing list. Instead, the questionnaires were delivered to S.F.U. for mailing to their emeriti (n=29).

The University of Victoria did not keep official records of emeriti. After several telephone calls, some letters, and interdepartmental redirections of responsibility, no records were acquired. A university representative stated that although he felt the project was highly worthwhile, he was unable to allocate the employees necessary to find the records. He explained that information of this kind was in several locations and could be out-of-date. Emeriti might have moved or died since retirement. The representative stated the university might be interested in this kind of study at a future time. As questionnaires were already being returned by emeriti from the other two universities, no further efforts were made to secure a mailing list from the University of Victoria.

#### Letters of Transmission

Three different letters of transmission were used in the study. Two were the initial contact letters (Appendix A) and the third was for the follow up study (Appendix B). Different initial contact letters were used because of varying policies at U.B.C. and S.F.U. Although the body of each letter was the same, the salutation and method which allowed emeriti to acquire a summary of the study varied. U.B.C. emeriti received self addressed letters. They were asked to check a box at the bottom of the letter of transmission and return it with the questionnaire for a summary of the study. S.F.U. emeriti received a generic form letter. Instead of checking a box on the letter of transmission, they were asked to provide their name and address on a card enclosed in the contact package for a summary of the study. The remaining letter was for a selection of respondents who agreed to retake the questionnaire a few weeks after completing the questionnaire the first time.

### Maximizing Responses

Maximizing responses to the survey was achieved by using strategies which encouraged replies and avoided pitfalls which could produce a lack of response. Dillan (1978) reported that people were more likely to reply to survey which minimized the respondent's cost in time and money, maximized rewards for responding, and established trust that the rewards would be delivered. The study eliminated direct financial costs to the respondent by providing postage paid return envelopes for the completed questionnaires. Time costs for completing the questionnaire were approximately 20 to 25 minutes. This was within the time parameters suggested by Borg and Gall (1989) for promoting responses. The reward offered for completing the questionnaire was a summary of the study and the knowledge that the findings of the study pertained to the respondent. Trust that the reward would be delivered was promoted by notifying the individual that responses were confidential and that the individual was under no obligation to complete the questionnaire.

In addition to utilizing Dillman's (1978) suggestions for encouraging responses, Fowler's (1984) concepts were utilized to reduce the reasons people have for not responding. Fowler (1984) suggested that people do not respond to mail surveys for three reasons: 1.) the respondent was unable to respond because of illness, language competency, and reading and writing level, 2.) those asked to provide the data refused to, and 3.) the questionnaire did not reach the respondents. Reduction of these obstacles was accomplished by pilot testing the questionnaire to ensure comprehension and readability, contacting only emeriti and not a general population, and endeavoring to use accurate and current mailing records.

### Return Rate

A total of 221 people from a mailing list of 385 returned questionnaires. One hundred and eighty-seven (n=187) questionnaires were suitable for statistical analysis. The remaining 34 returns were not used for a variety of reasons (see Table 1). Some of the responses indicate that the total number of emeriti (n=385) on the mailing list requires revision: one person had died, 4 emeriti were retired administrators who had never been faculty, 2 people were not emeriti (one was a thirty-five year old faculty member and the other person had never been connected with the university), and 6 questionnaires were returned because of the wrong address. Consequently the percentages for responses should be revised upwards, but it is unclear as to how high because it is likely that additional inaccuracies exist.

TABLE 1  
QUESTIONNAIRE RETURN RATE

<u>Response</u>	<u>Number</u>	<u>Percent</u>
1. Properly completed questionnaires and used in study.....	187	49.0
2. Improperly filled out questionnaires.....	13	3.4
3. Returned because of wrong address.....	6	1.5
4. Not emeriti or retired faculty.....	4	1.0
5. Refused to fill out anymore questionnaires.....	3	.8
6. Shouldn't be on mailing list .....	2	.5
7. Received after data was analyzed .....	3	.8
8. Poor Health, too personal, or deceased .....	3	.8
9. Did not reply.....	164	42.6
Total number of questionnaires mailed.....	385	100.0

### Research Instrument

A questionnaire was designed specifically for this study because no questionnaires were located which measured people's profiles of reasons nor to their overall patterns of activities (Appendix C). The questionnaire was divided into three sections. The first section measured how often people participated in activities they perceived as work, as volunteering, or as recreation. The second section asked people to report how important each of thirty-seven reasons was in relation to their overall pattern of activities. The final section asked for demographic and personal information which would aid in the analysis of data in the first two sections.

### Activities

The first section of the questionnaire measured how emeriti portioned out their time in three domains: work, volunteering, and recreation. A list of thirty-two generic activities was developed in a pilot study of individuals (n=6), similar to the university retirees to identify activities they considered work, volunteering, and recreation. In addition, some of the general activities were borrowed from the study by Thornton and Collins (1986). Respondents were asked to indicate how often (Never, Yearly, Quarterly, Monthly, Weekly, and Daily) they participated in each of thirty-two generic activities as work, volunteering, and recreation. Past research pointed out that people can have different definitions of activities (Marino-Schorn, 1985-86) and that they may define the same activity differently depending on circumstance (Pahl, 1988). By allowing the respondents to report how they viewed their activities they provided their own definitions of work, volunteering, and recreation.

### Reasons for Activity

The second section of the questionnaire measured how important was each of thirty-seven reasons in explaining a respondent's patterns of activities. Respondents were asked to rate importance using the following scale points: Not at all, Somewhat important, Moderately important, Highly important, and Critically important. The thirty-seven reasons were extracted from the findings of the research about work, volunteering, and recreation referred to in the literature review. Initial comparisons indicated that the elderly may have similar reasons for participating work, volunteering, or recreation. Table 2 summarizes the findings which were used to develop the thirty-seven reasons.

TABLE 2

### SUMMARY OF FINDINGS FOR THE THIRTY-SEVEN REASONS FOR WORK, VOLUNTEERING AND RECREATION

---

#### Work

- Provide money to meet basic expenses, e.g. food, shelter, health care, clothing (Freidman & Havighurst, 1954; Ruhm, 1989; Bolton, 1980).
- Don't receive enough money from pensions, social security, or other sources to cover expenses beyond the basics, i.e. comfortable existence or augment income (Bolton, 1980; Ruhm, 1989).
- An opportunity to do a job well (Bolton, 1980; Brook & Brook, 1989).
- Opportunities to spend time with friends, colleges, and peers (Bolton, 1980; Freidman & Havighurst, 1954; Palmore, 1981; Dorfman, 1981).
- Opportunity to be creative, gives purpose to my life, to be of service to others and society (Freidman & Havighurst, 1954).



- Opportunity to use skills, challenge, leadership and responsibility (Brook & Brook, 1989).
- To enjoy myself, provides me with ongoing and/or new experiences, opportunities for change and renewal, avoid stagnation (Bronte, 1990).
- Helps regulate my time (Freidman & Havighurst, 1954; Grossin, 1986).
- Affords an opportunity for ongoing professional involvement. To exercise choice and control in life, absence of obligation (Dorfman, 1981; Brodsky, 1983-84).
- Physical activity (Brook & Brook, 1989).
- Sense of obligation to society (Harpez, 1985).
- Enjoyment of the physical surroundings of the work place (Friedman & Havighurst, 1954).
- Enables the individual to be creative (Donald and Havighurst, 1959).

#### Volunteering

- An opportunity for altruism (contribute to society, welfare of next generation, and mentoring), a chance to acquire new experiences and skills, or a situation to gain political influence (Chambre, 1984).
- Takes the place of work (Chambre, 1984).
- Affords an opportunity for ongoing professional involvement (Dorfman, 1984).
- To re-establish structure in life, to share skills and life experiences (contribute to society and welfare of next generation), find new purpose, and promote self worth and dignity (Scwartz, 1978).

#### Recreation

- Change from work and new experiences, enables the individual to be creative (Donald and Havighurst, 1959).
- Opportunity for learning and personal development, to participate in cultural activities (Tinsley et al., 1985, 1987).
- To remain professionally involved. (Dorfman, 1981).
- Life satisfaction, challenge seeking, concern with recognition and reward, to do well at what I do, and family focus (Steinkamp & Kelly, "1985").

- To enjoy a sense of solitude and peace; balance physical, social, and emotional needs; to promote my well being and fitness; to share experiences with people I feel close to (Thornton and Collins, 1986).

#### Unclassified Reasons

- To compensate for what I lost after retirement (Freidman & Havighurst, 1954).
  - To continue work after retirement, to continue with career interests I had prior to retirement (Atchley, 1976).
  - To create meaning in my life.
- 

#### Demographics: Personal Information

The third section of the questionnaire sought background information about the subjects' age, gender, socioeconomic status, health, marital status, occupation level, academic speciality, general satisfaction, happiness, and the kind of retirement event. George (1980), Osgood (1982), and Ruhm (1989) identify much of the research identifies the importance of these variables in relationship to retirement. The questions relating to satisfaction and happiness were taken from the General Social Survey: Health and Social Support Questionnaire Ages 55 and Over (Statistics Canada, 1985).

The kinds of retirement are: 1) early, mandatory, and late retirement and 2) wanting to retire or not wanting to retire. Palmore, Fillenbaum, and George (1984) revealed that some of the consequences of retirement (i.e. finances and health) were associated with the timing of retirement and whether or not the individual wanted to retire. Schlossberg (1981) reported that people's ability to make transitions in life and adapt to change, was influenced by the timing and the desirability of the transitional event. People who experienced desired and on time change events in life were more apt to adapt successfully to these changes.

These two studies suggest that these variables may moderate retirement behavior. The degree of influence is uncertain, however, as too little work has been done which examines the outcome of these variables (Palmore, Fillenbaum, and George, 1984).

#### Validity and Reliability of Data Collection

Validity and reliability of the research procedures are promoted by the sampling methods. All of the 385 identified emeriti were sent a copy of the questionnaire to reduce sampling bias. Steps were taken to ensure internal and external validity. Internal validity was promoted because the questionnaire items were based on the findings of previous research and replication of findings was evident. For example, the reason, "to earn money for basic expenses" was an explanation which had been reported by Friedman and Havighurst (1954), Bolton (1980), and Ruhm (1989) (see Table 2). In addition, distribution of the instrument was via the mail and therefore extraneous factors, such as the influence of the researcher, were consistent. External validity is high because the results are specific to the group and generalizing to other populations was not intended.

Reliability was fostered because of the consistency of the research methods. All subjects received an identical questionnaire, covering letter, and return envelope. Research instruments were mailed at approximately the same time. Answers to the questionnaire were forced choice answers. This reduced conflicts about the respondent's meaning while ensuring consistency of coding for subsequent statistical analysis.

A pilot test was completed by a comparable group of subjects (n=7). Results of the pilot test were used to revise wording and terminology, validate the usefulness of the thirty-two activities and the thirty-seven reasons, and establish consensus that the questionnaire was a reasonable way of investigating the problem.

### Instrument Development

Four scales were created to make the concepts in the study measurable: a work scale, a volunteering scale, a recreation scale, and a reason scale. Responses for activities and reasons were converted into unipolar scales. A six point frequency scale ranging from 1 to 6 was used for activities. Activity responses were scaled as follows: Never=1, Yearly=2, Quarterly=3, Monthly=4, Weekly=5, and Daily=6. Responses to each of the 32 generic activities provided scale scores for work, volunteering, and recreation. Activity scores for each of the 32 activities were summed and averaged to provide scale scores for work, volunteering and recreation (see Table 3). The mean work score was 1.91 with a standard deviation of .75 and a range of 1 to 4.13. The mean volunteering score was 1.74 with a standard deviation of .72 and a range of 1 to 4.25. The mean recreation score was 3.04 with a standard deviation of .57 and a range of 1.44 to 4.56. Scale scores for work, volunteering, and recreation were tested for gender (see Table 4), the timing of retirement and wanting to retire or not wanting to retire.

### Reasons

A five point importance scale, ranging from 1 to 5, was used to measure the importance of the reasons section on the questionnaire (Table 5). The reasons were scored as follows: Not at all=1, Somewhat=2, Moderately=3, Highly=4, and Critically=5. The importance of each of the 37 reasons was used to measure gender, the timing of retirement, and wanting to retire or not.

TABLE 3  
ACTIVITY MEANS FOR WORK, VOLUNTEERING, AND RECREATION

<u>Activity</u>	<u>Work</u>	<u>Volunteering</u>	<u>Recreation</u>
1. gardening	2.06	1.39	4.02
2. watching films or movies	1.23	1.18	4.43
3. household maintenance	3.43	1.64	3.26
4. visiting friends & relatives	1.43	1.86	4.59
5. chairing meetings	1.52	1.84	1.28
6. cooking	2.62	1.70	3.58
7. entertaining	1.45	1.65	4.17
8. attending entertainment events	1.24	1.54	3.98
9. attending religious services	1.16	1.47	2.07
10. travelling	1.74	1.51	2.94
11. using a computer	2.56	1.65	2.70
12. taking pictures (photography)	1.31	1.20	2.96
13. teaching	2.03	1.83	1.50
14. provide skills & expertise to organiz....	1.94	2.82	1.84
15. writing	3.22	2.22	3.37
16. reading	3.45	2.05	5.69
17. serving community agencies	1.39	2.48	1.68
18. leading seminars	1.34	1.36	1.16
19. visiting clients	1.57	1.34	1.14
20. repairing things	2.05	1.44	3.11
21. provide skills & expertise to ind....	2.41	2.71	2.49
22. getting physical exercise	2.08	1.43	5.48
23. managing projects	1.76	1.68	1.60
24. performing research	2.57	1.72	2.51
25. participating in sports	1.03	1.15	2.80
26. doing arts and crafts	1.24	1.34	2.37
27. meeting with people	2.64	2.89	4.74
28. mentoring	1.56	1.80	1.62
29. problem solving	2.66	2.32	3.61
30. playing games	1.09	1.30	3.20
31. watching television	1.36	1.26	5.67
32. public speaking	1.66	1.83	1.45
Scale Score Means	1.91	1.74	3.04
Range	1.03 - 3.45	1.15 - 2.89	1.14 - 5.69
Coefficient Alpha	.89	.92	.83
Test Retest	.96	.99	.70

Scale scores were calculated when: Never=1; Yearly=2; Quarterly=3; Monthly=4; Weekly=5; Daily=6.

TABLE 4  
MEAN SCALE SCORES FOR WORK, VOLUNTEERING, AND RECREATION  
BY GENDER

<u>Activity</u>	<u>Work</u>		<u>Volunteering</u>		<u>Recreation</u>	
	Men	Women	Men	Women	Men	Women
1. gardening	2.02	2.14	1.34	1.52	3.85	4.57
2. watching films or movies	1.25	1.17	1.18	1.17	4.45	4.33
3. household maintenance	3.03	4.65	1.71	1.33	3.48	2.65
4. visiting friends & relatives	1.37	1.62	1.82	2.00	4.45	5.05
5. charring meetings	1.56	1.40	1.82	1.91	1.28	1.27
6. cooking	2.22	3.86	1.69	1.71	3.47	3.98
7. entertaining	1.45	1.49	1.64	1.61	4.09	4.44
8. attending entertainment events	1.24	1.26	1.58	1.45	3.84	4.43
9. attending religious services	1.17	1.11	1.53	1.26	1.89	2.67
10. travelling	1.86	1.41	1.58	1.31	2.91	3.05
11. using a computer	2.61	2.46	1.53	2.05	2.71	2.61
12. taking pictures (photography)	1.35	1.19	1.20	1.23	3.01	2.84
13. teaching	2.16	1.64	1.82	1.82	1.49	1.54
14. provide skills & expertise to orgs.	2.06	1.52	2.70	3.19	1.71	2.26
15. writing	3.36	2.72	2.15	2.44	3.28	3.64
16. reading	3.55	3.11	1.99	2.27	5.65	5.77
17. provide service to com. agencies	1.42	1.25	2.44	2.59	1.59	1.95
18. leading seminars	1.40	1.18	1.34	1.43	1.16	1.14
19. visiting clients	1.75	1.05	1.33	1.39	1.16	1.07
20. repairing things	2.00	2.21	1.49	1.28	3.05	2.16
21. provide skills & expertise to ind.	2.57	1.84	2.61	3.02	2.30	3.05
22. getting physical exercise	2.08	2.02	1.40	1.54	5.49	5.41
23. managing projects	1.74	1.66	1.63	1.84	1.48	1.98
24. performing research	2.66	2.27	1.67	1.86	2.56	2.29
25. participating in sports	1.04	1.00	1.16	1.03	2.86	2.52
26. doing arts and crafts	1.18	1.42	1.30	1.47	2.10	3.30
27. meeting with people	2.84	1.98	2.86	3.02	4.51	5.52
28. mentoring	1.60	1.42	1.61	2.39	1.49	2.02
29. problem solving	2.69	2.50	2.24	2.57	3.60	3.60
30. playing games	1.11	1.00	1.25	1.49	3.22	3.12
31. watching television	1.39	1.28	1.24	1.35	5.64	5.80
32. public speaking	1.76	1.35	1.89	1.66	1.45	1.44
<u>Mean Scores</u>	<u>1.93</u>	<u>1.84</u>	<u>1.71</u>	<u>1.84</u>	<u>2.99</u>	<u>3.18</u>

Key

Scale scores were calculated when: Never=1; Yearly=2; Quarterly=3; Monthly=4; Weekly=5; Daily=6.

## Analysis

Returned questionnaires were scanned to check for completeness, compliance with the instructions, and any other data which the respondent supplied (e.g. additional comments, letters, etc.). Response to the 7 satisfaction questions from the General Social Survey: Health and Social Support Questionnaire Ages 55 and Over (Statistics Canada, 1985) were converted into a four point Likert scale ranging from 2 for “Very dissatisfied” to 5 for “Very satisfied.” (No opinion responses were disregarded) Demographic and personal information was converted to numbers to facilitate statistical computations (e.g. gender: male=1, female=2). Scale scores were created for activities and reasons. Responses were entered into a computerized data file. Respondents letters and comments were kept in original form. Some of this information was used to interpret the statistical findings.

SPSSX was used to analyze the data. Mean scores were calculated for work, volunteering, and recreation; each of the thirty-seven reasons for activity; demographic and personal information (e.g. age); the 7 satisfaction measures; and for before and after retirement activities. The 7 measures of satisfaction were combined to provide a general measure of satisfaction. These calculations were used to facilitate descriptive analysis and correlations between activities and reasons.

Relationships between the variables in study were tested using Pearson Correlations. Probability levels were set at  $<.05$  and  $<.001$ . Correlations were measured between of each of the thirty-seven reasons and the mean scale scores for work, volunteering, and recreation. Reasons were ranked according to the highest correlations for work . This rank order was maintained throughout the study. Additional procedures

TABLE 5  
MEAN SCORES FOR THIRTY-SEVEN REASONS FOR ACTIVITIES

<u>Reasons</u>	<u>Mean</u>	<u>Std. Dev.</u>
1. To use my skills.	3.52	.88
2. To give my life purpose.	3.66	1.03
3. To earn money for basic expenses, e.g. food, shelter and clothing.	1.66	1.03
4. To fulfill my obligations to society.	2.87	.97
5. To spend time with friends, colleagues, and peers.	3.37	.94
6. To express my creativity.	3.19	1.14
7. To avoid stagnating.	3.55	1.12
8. To have new experiences.	3.35	.95
9. To structure my time.	2.55	1.04
10. To remain professionally involved.	2.97	1.14
11. To keep myself active.	3.68	.93
12. To exercise choice and control in my life.	3.54	1.07
13. To enjoy freedom from obligation.	2.65	1.32
14. To continue work after retirement.	2.55	1.32
15. To do well at what I do.	3.50	1.04
16. To augment my income.	1.72	1.00
17. To experience comfortable surroundings.	2.76	1.18
18. To learn about things.	3.67	.87
19. To experience challenge.	3.36	.99
20. To promote the welfare of my family.	2.78	1.29
21. To keep doing what I've always done.	2.51	1.89
22. To compensate for what I lost from work after retirement.	1.91	1.08
23. To contribute to the welfare of the next generation.	2.79	1.05
24. To enjoy myself.	3.71	.80
25. To keep in tune with my personal being.	3.02	1.30
26. To experience changes.	2.73	1.07
27. To compete with others.	1.56	.85
28. To contribute to society.	2.90	.97
29. To continue with career interests I had prior to retirement.	2.87	1.21
30. To participate in cultural activities.	3.00	1.11
31. To keep up to date.	3.38	1.00
32. To create meaning in my life.	3.19	1.22
33. To do things I was unable to do during my working career.	2.67	1.19
34. To promote my well being and fitness.	3.45	.95
35. To balance my physical, social, and emotional.	3.30	1.11
36. To enjoy a sense of solitude and peace.	2.75	1.28
37. To share experiences with people I feel close to.	3.26	.99

Key

Mean score for each of the thirty-seven reasons based on scale score when:

Not at all=1; Somewhat= 2; Moderately=3; Highly=4; and Critically=5.

Range for each reason is from 1 to 5.      Test Retest=.96



tested differences of age, gender, marital status, academic rank, academic specialty, before and after retirement work, and satisfaction in retirement behavior.

### Reliability of Measures

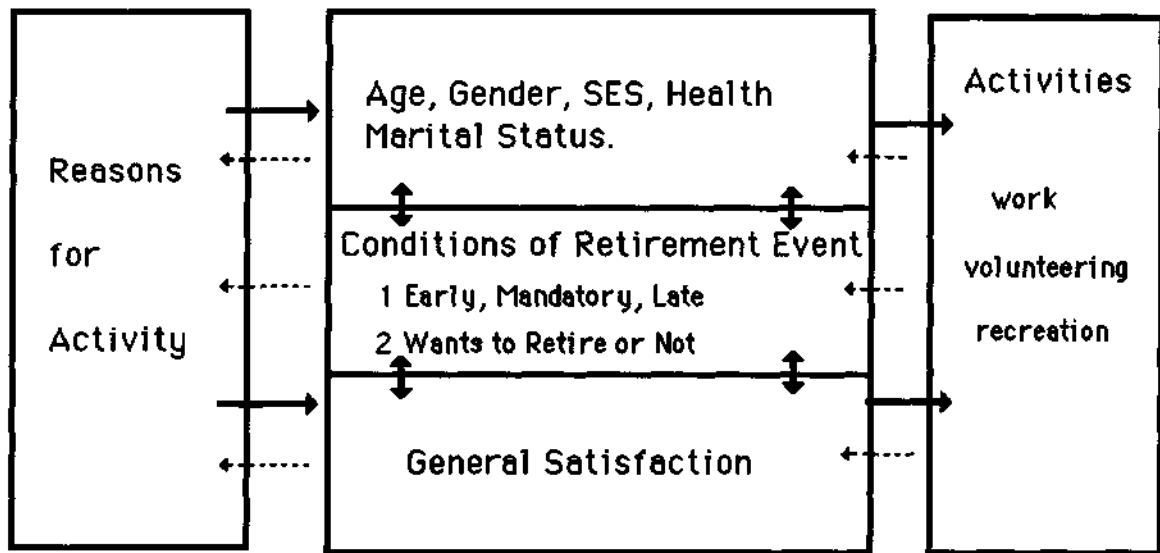
Reliability coefficients were measured for all 3 activities and for the list of 37 reasons. Coefficient alphas are as follows: Section A - work=.89, volunteering=.92, recreation=.83; and Section B - reasons=.90. Finally, a 6-week test retest analysis was conducted to determine scale score reliability of the research instrument over time and this yielded the following test retest scores: work=.96, volunteering=.99, recreation=.70 and reasons=.96.

### Model of Relationships Between Reasons and Activities

A model of the interactive relationships between people's reason for activities and their pattern of activities is provided in Figure 1. This model represents the rationale in this study, i.e. that people begin with common reasons for activities, however, the intervening affects of retirement influence work, volunteering and recreational activities. Interactions occur in various directions. Reasons can relate to the conditions of retirement and general satisfaction. For example, women may have different reasons than men for work and therefore they may react differently to an opportunity for early retirement. Health may associate with general satisfaction and this may influence a persons ability to satisfy personal reasons for activity. A healthy individual may value keeping active; participating in sports makes the person feel more satisfied with life. An unhealthy individual may also value keeping active; participating in sports is no longer possible and therefore the person may feel less satisfied with life. In either example a person's reasons for behavior remain the same; however, the person's behavior is influenced by of the preceding interactions.

FIGURE 1

INTERACTIONS BETWEEN ACTIVITIES, REASONS, DESCRIPTIVE  
VARIABLES, AND MODERATING VARIABLES



Limitations

The limitations of this study are varied. First, the study refers only to emeriti from two universities; it does not include people from other educational institutions or most of the rest of life. Second, the study is cross sectional. The findings may only be applicable to this cohort of emeriti. Third, respondents' comments about past activity and personal history were retrospective and therefore may be influenced by the passage of time. Reasons may change with time and experience and the research instrument did not account for these changes. The study was limited to information available from the research

instrument and any corroborative information which the subjects might have provided by other research methods was not available.

### Summary

A research instrument was designed and mailed to emeriti (n=385) from the University of British Columbia and Simon Fraser University. This instrument measured the activity patterns, reasons for activity, and personal and demographic information about the subjects. The data provided a relative measures of how much time emeriti occupied in work, volunteering, and recreation. Scale scores for each of these domains were tested for correlations with the importance of the thirty-seven reasons which emeriti provided and were used to demonstrate the reasons emeriti have for their pattern of activities. The influence of moderating variables and demographic variables was measured. Tables were created and the identified reasons were highlighted. A profile of reasons emerged from the selected independent variables in the study. These profiles of reasons provided a basis for testing the hypothesis.

## **CHAPTER FOUR**

### **Results**

#### **Introduction**

The findings of the study are presented in five sections. First is a descriptive overview of the sample. The sample is described according to age, gender, marital status, academic specialty, academic rank, retirement patterns, whether people wanted to retire, whether people consider themselves “retired,” and life satisfaction. Before and after retirement work activities are examined. Second is an analysis of activities and the domains of activity (i.e work, volunteering, and recreation). Findings are used to answer whether: (1) emeriti concurrently pursue a variety of work, volunteering, and recreation activities; (2) the activities defining work, volunteering and recreation for emeriti are similar; and (3) how active emeriti are in work, volunteering, and recreation. Third is an examination of emeriti’s reasons for activities and whether they were influenced by age, gender, timing of retirement, whether people wanted to retire, and whether emeriti considered themselves “retired.” Fourth, the importance emeriti attach to their reasons for activity is examined in relation to how active they are in work, volunteering, and recreation. The final section of the chapter is a summary of the findings. The research questions are answered and the hypotheses are tested.

#### **Descriptive Overview**

The sample (n=187) of emeriti was comprised of 141 men, 44 women, and 2 individuals who did not identify their gender. The average age was 70.1 years, ranging from 57 to 87 years. Men’s average age was 70.4 years and women’s average age was

69.1 years. Sixty-four percent (n=120) of the respondents were married, 11% (n=20) were widowed, 17% (n=31) were never married, and 5% (n=9) were divorced.

Emeriti came from a variety of academic disciplines (Table 6). Sixty percent (n=112) of the emeriti held the rank of full professor, 21% (n=40) were associate professors, 7.5% (n=4) were assistant professors, and 2.5% (n=4) were senior instructors (Table 7). Retirement patterns are varied. Fifty-seven percent (n=107) retired at the mandatory retirement age, 32% (n=60) retired early, and 9% (n=17) retired late (Table 8). Seventy-one percent (n=125) of emeriti wanted to retire and 29% (n=50) did not want to retire. Self reports about health, housing, finances, family relations, friendships, life as a whole, and happiness indicate that emeriti are satisfied with life (Table 9). Although emeriti were retired according to university policy, 28% (n=51) did not consider themselves "retired" while 66% (n=124) considered themselves "retired." Sixty-seven percent wanted to retire (n=125) and 27% (n=50) did not want to retire. As one man noted on the questionnaire, "I may be retired from work but I'm not retired from life."

TABLE 6  
ACADEMIC DISCIPLINE OF EMERITI

<u>Field</u>	<u>N</u>	<u>Percent</u>	<u>Field</u>	<u>N</u>	<u>Percent</u>
Sciences	24	13.0	Forestry	2	1.0
Arts & Hum.	51	27.0	Ag. Science	1	.5
Law	4	2.0	Commerce	8	4.0
Medicine	28	15.0	Engineering	1	.5
Dentistry	4	2.0	Pharmacy	3	1.5
Education	29	16.0	<u>Other</u>	<u>29</u>	<u>16.0</u>
No Response	3	1.5	Total	187	100.0

Percentages are calculated to the nearest .5 percent.

TABLE 7

ACADEMIC RANK

<u>Rank</u>	<u>MEN</u>		<u>WOMEN</u>	
	<u>N</u>	<u>%</u>	<u>N</u>	<u>%</u>
Full professor	100	70.9	12	27.3
Associate professor	28	19.9	12	27.3
Assistant professor	6	4.3	3	6.8
Senior instructor	1	.7	2	4.5
Other	6	4.3	9	20.5
No Response	<u>0</u>	<u>0.0</u>	<u>6</u>	<u>13.8</u>
Total	141	100.0	44	100.0

Pearson Correlation for gender is  $r = -.42$ ,  $p < .001$

TABLE 8

TIMING OF RETIREMENT

<u>Timing</u>	<u>Men</u>	<u>(%)</u>	<u>Women</u>	<u>(%)</u>
Early	38	26.5	19	43.2
Mandatory	88	61.5	21	47.7
Late	13	9.4	4	9.1
No Response	<u>4</u>	<u>2.7</u>	<u>0</u>	<u>0.0</u>
Total	143	100	44	100

Pearson Correlation for gender is  $r = -.15$ ,  $p < .05$ .

TABLE 9

MEASURES OF SATISFACTION

<u>Variable</u>	<u>TOTAL (n=187)</u>				<u>MEN (n=141)</u>				<u>WOMEN (n=44)</u>			
	<u>Mean</u>	(Std dev)	<u>Min</u>	<u>Max</u>	<u>Mean</u>	(Std dev)	<u>Min</u>	<u>Max</u>	<u>Mean</u>	(Std dev)	<u>Min</u>	<u>Max</u>
Age	70.12	(5.66)	57	87	70.36	(5.504)	59	87	69.09	(6.088)	57	84
Health	4.20	(.90)	1	5	4.19	(.93)	1	5	4.25	(.84)	2	5
Finances	4.28	(.76)	1	5	4.27	(.75)	1	5	4.36	(.78)	2	5
Housing	4.75	(.62)	1	5	4.75	(.62)	1	5	4.73	(.62)	2	5
Family relations	4.54	(.62)	1	5	4.54	(.71)	1	5	4.57	(.79)	1	5
Friendships	4.41	(.72)	1	5	4.36	(.85)	1	5	4.57	(.76)	1	5
Life as a whole	4.40	(.78)	1	5	4.35	(.84)	1	5	4.57	(.50)	4	5
Happiness	4.37	(.71)	1	5	4.30	(.76)	1	5	4.57	(.50)	4	5

Means of Satisfaction Measures: Total = 4.42

Men = 4.39

Women = 4.52

Key

The satisfaction measures of health, finances, housing, family relations, life as a whole, and self description are taken from Section C, questions 1 to 7, of the research instrument. The mean for each category was derived by scoring the selected response with the following numerical equivalent:

Very Satisfied = 5, Somewhat Satisfied = 4, Somewhat Dissatisfied = 3, Very Dissatisfied = 2, No Opinion = 1

Emeriti occupied their professional time differently before and after retirement (Table 10). Prior to retirement they spent 44 % of their time in teaching, 25% in research, 10% in consulting, 8 % in public and community service, and 15% in the “other” category. Following retirement they decreased time in teaching (8%) and research (21%). They occupied more time in consulting (11%), public and community service (15%), and the “other” category (39%).

### Activities

Emeriti concurrently pursued a variety of work, volunteering, and recreation activities during retirement. Table 3 (Chapter 3, p. 50) provides scale scores of how often emeriti participated in each of 32 activities which define work, volunteering, and recreation. None of the scale scores for the 187 emeriti is “1” and therefore they participated in activities as work, as volunteering, and as recreation.

The activities which emeriti defined work, volunteering and recreation are different (Table 3). Emeriti participated in work activities from once per month to once every 3 months; in volunteering activities from once every 3 months to once a year; and in recreation activities from daily to once a month.

The activities most often associated with work are: reading (3.45), household maintenance (3.43), writing (3.22), problem solving (2.66), meeting with people (2.64), cooking (2.62), performing research (2.57), using a computer (2.56), getting physical exercise (2.08), and gardening (2.06). The activities which were least often seen as work are: participating in sports (1.03), attending religious services (1.16), doing arts and crafts (1.24), and playing games (1.36).



TABLE 10

PERCENTAGE OF TIME SPENT IN VARIOUS WORK ACTIVITIESBEFORE AND AFTER RETIREMENTBY GENDER

<u>Total (n=187)</u>					<u>Men (n=141)</u>				<u>Women (n=44)</u>			
	Mean (Std Dev)	Min	Max	N	Mean (Std Dev)	Min	Max	N	Mean (Std Dev)	Min	Max	N
<u>Work Activities Before</u>												
Teaching	43.51 (23.98)	0	99	184	42.11 (23.09)	0	99	139	47.91 (26.89)	0	99	43
Research	24.61 (20.07)	0	90	184	27.02 (20.82)	0	90	139	16.74 (15.66)	0	60	43
Consulting	9.58 (16.51)	0	99	184	10.58 (17.11)	0	99	139	6.55 (14.62)	0	85	43
Pub. & com. service	7.66 (8.42)	0	50	184	7.25 (7.72)	0	50	139	8.63 (10.34)	0	50	43
Other	14.63 (22.71)	0	99	184	12.99 (20.52)	0	90	139	20.26 (28.46)	0	99	43
<u>Work Activities After</u>												
Teaching	8.11 (17.81)	0	99	178	7.87 (16.90)	0	99	135	9.07 (20.77)	0	99	42
Research	21.19 (27.02)	0	99	178	21.86 (26.99)	0	99	135	18.86 (27.60)	0	99	42
Consulting	10.99 (21.26)	0	99	178	13.01 (23.67)	0	99	135	4.756 (8.03)	0	40	42
Pub. & com. service	14.64 (18.88)	0	99	178	13.19 (16.90)	0	90	135	19.20 (24.04)	0	99	42
Other	39.19 (35.01)	0	99	178	39.88 (35.07)	0	99	135	36.76 (35.53)	0	99	42

The activities most often associated with volunteering are: meeting with people (2.89), providing skills and expertise to organizations (2.82), providing skills and expertise to individuals (2.71), problem solving (2.32), writing (2.22), reading (2.05), visiting friends and relatives (1.86), chairing meetings (1.84), teaching (1.83), and public speaking (1.83). The activities which were least often seen as volunteering are: participating in sports (1.15), watching films and movies (1.18), watching television (1.26), and visiting clients (1.34).

The activities most often associated with recreation are: reading (5.69), watching television (5.67), getting physical exercise (5.48), meeting with people (4.74), visiting friends and relatives (4.59), watching films and movies (4.43), gardening (4.02), cooking (4.17), gardening (4.02), attending entertainment events (3.98) and problem solving (3.16). The activities which were least often seen as recreation are: visiting clients (1.14), leading seminars (1.16), chairing meetings (1.28), and public speaking (1.45).

Differences among the the 32 activities and whether emeriti defined them as work, as volunteering, or as recreation were demonstrated using Hotellings T-square and Pearson Correlations. Multivariate analysis of variance for repeated measures for the activities as work, as volunteering and as recreation demonstrated differences for work and volunteering (763.77), volunteering and recreation (9728.58), and work and recreation (17119.70) (Table 11).

Testing each of the 32 activity scores (Table 12) as work, as volunteering, and as recreation with the scale scores for work, volunteering, and recreation demonstrated the following: (1) activities when defined as work related to work and volunteering but not recreation; (2) activities when defined as volunteering related to volunteering and work and

recreation; and (3) activities when defined as recreation related to recreation and to volunteering but not work.

TABLE 11  
DIFFERENCES AMONG THE 32 ACTIVITIES  
WHEN DEFINED AS WORK, VOLUNTEERING, AND RECREATION

<u>Activities</u>	<u>R</u>	<u>T<sup>2</sup></u>	<u>F</u>	<u>P</u>
Work & Volunteering	.24	763.77	6.79	.000
Volunteering & Recreation	.46	9728.58	84.40	.000
Recreation & Work	-.02	17119.70	153.08	.000

The 32 activities when defined as work, as volunteering, and as recreation were influenced by gender, age, timing of retirement, whether people wanted to retire or not, whether people considered themselves retired, and general satisfaction. Although it is beyond to scope of this study to provide a detailed analysis, some of the differences in relation to work (Table 13) are presented to highlight importance of future research in these areas. Appendices D and E provide additional information about volunteering and recreation which compliment these tentative remarks.

Gender, age, and whether people consider themselves “retired” demonstrated the greatest number of differences when activities were defined as work (Table 13). Women were more likely to define household maintenance and cooking as work than men. Men

TABLE 12

INTER-RELATIONSHIPS AMONG EACH OF THE 32 ACTIVITIES AS WORK, AS VOLUNTEERING,  
AND AS RECREATION WITH THE DOMAINS OF WORK, VOLUNTEERING, AND RECREATION

Activities	<u>Work</u>			<u>Volunteering</u>			<u>Recreation</u>		
	Work	Volunteering	Recreation	Work	Volunteering	Recreation	Work	Volunteering	Recreation
1. gardening	.40**	.12*	.02	.09	.43**	.25**	-.11	.05	.45**
2. watching films or movies	.37**	.23**	.23**	.19*	.44**	.20*	.04	.04	.09
3. household maintenance	.32**	.17**	-.08	.14*	.53**	.26**	-.08	-.00	.48**
4. visiting friends and relatives	.36**	.28**	.14*	.17*	.49**	.24**	-.10	.08	.37**
5. chairing meetings	.43**	.24**	.05	.01	.57**	.27**	.01	.23*	.21*
6. cooking	.27**	.02	-.19**	.24**	.52**	.22*	-.12*	.04	.39**
7. entertaining	.57**	.26**	-.11	.15*	.52**	.22*	-.06	-.01	.40**
8. attending entertainment events	.41**	.25**	.16**	.26*	.64**	.32**	-.08	.13	.29**
9. attending religious services	.30**	.03	-.01	.14*	.42**	.13*	.07	.21*	.30**
10. travelling	.57**	.20**	.09	.17*	.59**	.27**	.04	.24*	.44**
11. using a computer	.49**	-.02	.00	.02	.46**	.25**	-.01	.05	.34**
12. taking pictures (photography)	.40**	.03	.01	.19*	.54**	.25**	-.01	.14*	.37**
13. teaching	.45**	.16*	.09	.04	.46**	.14*	.18*	.42**	.45**
14. provide skills & expertise organiz.	.49**	.10	.01	-.05	.60**	.22*	-.01	.43**	.53**
15. writing	.73**	.04	-.04	.12	.62**	.31**	.04	.18*	.51**
16. reading	.76**	.09	-.08	.09	.70**	.26**	-.13*	.08	.34**
17. serving community agencies	.35**	.23**	.08	-.05	.55**	.21*	-.02	.50**	.48**
18. leading seminars	.38**	.14*	.10	.09	.51**	.24**	.10	.26**	.38**
19. visiting clients	.48**	-.01	-.03	.19*	.40**	.16*	.12	.29**	.27**
20. repairing things	.49**	.19**	-.03	.22	.42**	.25**	-.02	.05	.46**
21. provide skills & expertise to ind.	.71**	.20**	.12	.18*	.70**	.27**	.03	.33**	.57**
22. getting physical exercise	.56**	.23**	-.05	.13*	.58**	.18*	-.08	-.01	.36**
23. managing projects	.55**	.09	.05	.04	.56**	.22*	.05	.29**	.46**
24. performing research	.63**	.02	-.07	.13*	.60**	.20*	.13*	.23*	.41**
25. participating in sports	.18**	-.07	-.14*	.07	.32**	.19*	-.06	.02	.22*
26. doing arts and crafts	.33**	.12	.11	.23*	.54**	.34**	.07	.35**	.47**
27. meeting with people	.71**	.13*	.05	.17*	.74**	.22*	.02	.17*	.48**
28. mentoring	.51**	.05	.09	.11*	.54**	.22*	.26**	.36**	.42**
29. problem solving	.74**	.10	.05	.18*	.74**	.35**	.15*	.23*	.61**
30. playing games	.20*	.00	-.05	.16*	.43**	.35**	.00	.15*	.37**
31. watching television	.48**	.09	-.08	.32**	.49**	.15*	-.06	.11	.16*
32. public speaking.	.62**	.24**	.07	.10	.57**	.26**	-.04	.29**	.41***

\*p<.05; \*\* p< .001

TABLE 13  
ACTIVITIES DEFINED AS WORK  
BY GENDER, AGE, TIMING OF RETIREMENT, WANTED TO RETIRE,  
CONSIDERED SELF RETIRED, AND GENERAL SATISFACTION

Activity	Gender	Age	Timing	Want	Retired	Life
1. gardening	.03	-.06	.02	-.01	.04	.04
2. watching films or movies	-.04	.07	.07	.01	.12*	.05
3. household maintenance	.30**	.11	-.05	-.01	.00	.01
4. visiting friends and relatives	.09	.21	.05	.00	-.02	-.06
5. chairing meetings	-.07	-.15*	.03	.02	.13*	.09
6. cooking	.31**	.09	.01	.00	-.04	-.05
7. entertaining	.02	.01	-.05	.01	.11	-.05
8. attending entertainment events	.01	.14*	.06	.06	.02	.05
9. attending religious services	-.03	.07	-.03	.12*	-.06	-.14*
10. travelling	-.17*	-.15*	.00	.07	.22**	.10
11. using a computer	-.03	-.28**	-.05	.02	.24**	-.01
12. taking pictures	-.07	-.18*	-.13*	.00	.16*	-.02
13. teaching	-.14*	-.15*	.19*	.16*	.33**	-.07
14. skills & expertise to orgs..	-.15*	-.18*	.03	-.02	.26	.04
15. writing	-.13*	-.11	.07	.12	.39**	-.09
16. reading	-.08	-.18	.03	.10	.23**	-.08
17. serving community agencies	-.08	.02	-.07	-.07	.10	-.04
18. leading seminars	-.11	-.14*	.00	.08	.21*	.16*
19. visiting clients	-.21*	-.17*	.01	.08	.31**	.05
20. repairing things	.06	-.02	-.14*	-.05	.07	-.09
21. skills & expertise to inds.	-.17*	-.17*	.01	.06	.44**	-.09
22. getting physical exercise	-.01	.12	-.01	.04	.23**	-.15*
23. managing projects	-.03	-.23*	-.12*	.03	.27**	.07
24. performing research	-.08	-.17	.03	.04	.41**	-.04
25. participating in sports	-.04	-.05	-.09	-.04	.08	.02
26. doing arts & crafts	.10	.01	-.05	-.13	.08	-.01
27. meeting with people	-.18*	-.19*	.03	.15	.37**	.04
28. mentoring	-.06	-.18	-.02	.05	.36**	.06
29. problem solving	-.04	-.17	-.09	.05	.40**	.02
30. playing games	-.08	-.09	-.12*	-.02	.20*	-.12
31. watching television	-.04	.04	.08	.12	.13*	-.08
32. public speaking	-.16*	-.12	.07	.09	.21*	.10

**Key**

\*p<.05; \*\*p<.001.

**Gender** (-r=male, +r=female). **Age** (-r=younger, +r=older). **Timing** (-r=earlier retirement, +r=later retirement). **Wanted** (-r=wanted to retire, +r=did not want to retire). **Retired** (-r=considers self retired, +r= does not consider self retired). **Life** (-r=lower general satisfaction, +r=higher general satisfaction).

were more likely than women to define the following activities as work: visiting clients, meeting with people, providing skills and expertise to individuals, travelling, public speaking, providing skills and expertise to organizations, teaching, and writing. Younger respondents were more likely to define 14 of the 32 activities as work, these are: using a computer, providing skills and expertise to organizations, reading, managing projects, taking pictures, problem solving, providing skills and expertise to individuals, mentoring, performing research, teaching, visiting clients, travelling, and leading seminars. Older respondents were more likely to define 2 activities as work, i.e., visiting friends and relatives and attending entertainment events. Emeriti who did not consider themselves “retired” were more likely to define 20 of the 32 activities as work, for example: providing skills and expertise to organizations, performing research, problem solving, writing, meeting with people, and mentoring. . Alternatively, emeriti who considered themselves “retired” were less likely to define any of the 32 activities as work. The differences highlighted by gender, age, and whether people considered themselves “retired” highlight many interesting avenues for future research.

The timing of retirement, whether people wanted to retire or not, and general satisfaction did not influence the definition of as many of the 32 activities when defined as work (Table 13). Earlier retirement related to 4 activities, these are: repairing things, taking pictures, managing projects, and playing games. Later retirement related to providing skills and expertise to organizations. Whether people wanted to retire or not related to 2 activities. Respondents who did not want to retire were more likely to define teaching and attending religious services as work. General satisfaction was associated with 3 of the activities. People with lower general satisfaction scores were more likely to define getting

exercise and attending religious services as work. Emeriti with higher general satisfaction scores were more likely to define leading seminars as work.

#### Activity Domains: Work, Volunteering, and Recreation

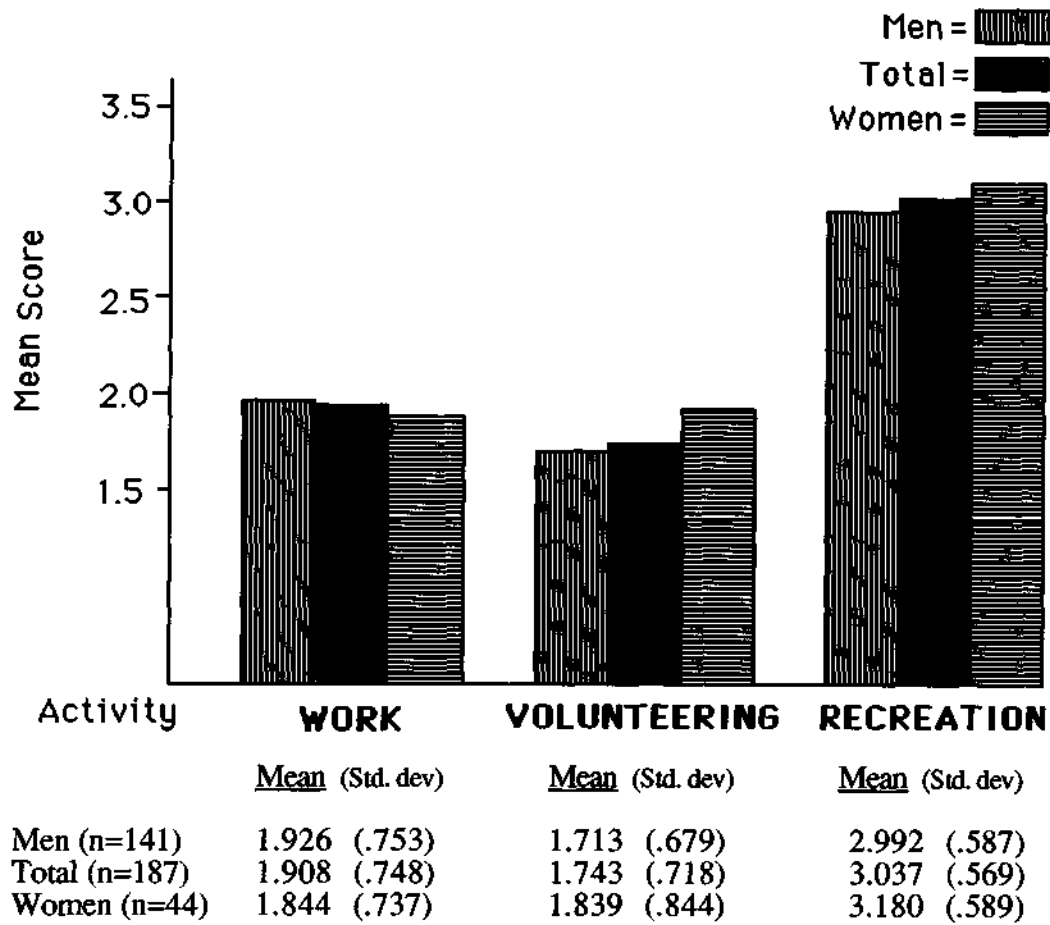
Emeriti's pattern of activities for work, volunteering and recreation demonstrated that they were most active in recreation (3.04) and less active in work (1.91) and recreation (1.74) (Figure 2). Activity levels in work related to volunteering ( $r=.25$ ,  $p<.001$ ) and activity levels in volunteering related to recreation ( $r=.44$ ,  $p<.001$ ). Activity levels in work and recreation were unrelated. Work and recreation are distinct activities and the amount of activity in one does not influence amount of activity in the other.

#### Reasons for Activity

The 37 reasons for activity were ranked according to the importance emeriti attached to each of the reasons (Table 14). The mean importance ratings given to each of the reasons ranged from "somewhat important" (2.00) to "critically important" (5.00). The most important reasons for activities are: to enjoy oneself (3.71), to keep oneself active (3.68), to learn about things (3.67), to give one's life purpose (3.66), to avoid stagnating (3.55), to exercise choice and control in one's life (3.54), to use one's skills (3.52), to do well at what I do (3.50), to promote one's well being and fitness (3.45), and to keep up to date (3.38). The least important reasons for activities are: to compete with others (1.56), to earn money for basic expenses, e.g. food, shelter, and clothing (1.66), to augment one's income (1.72), and to compensate for what I lost from work after retirement (1.91).

Interactions were tested between the 37 reasons for activity and gender, age, timing of retirement, whether people wanted to retire, whether people considered themselves "retired," and general satisfaction. Differences were discovered for gender, age, timing

FIGURE 2  
PATTERN OF ACTIVITIES



**Key**

Mean score for work, volunteering, and recreation is the mean of the thirty-two activities reported as work, volunteering, and recreation in section A of the questionnaire, when:

Never=1; Yearly=2; Quarterly=3; Monthly=4; Weekly=5; Daily=6



**TABLE 14**  
**RANKING OF THIRTY-SEVEN REASONS FOR ACTIVITIES**

<b><u>Reasons</u></b>	<b><u>Mean</u></b>	<b><u>Std. Dev.</u></b>
1. To enjoy myself. (24)	3.71	.80
2. To keep myself active. (11)	3.68	.93
3. To learn about things. (18)	3.67	.87
4. To give my life purpose. (2)	3.66	1.03
5. To avoid stagnating. (7)	3.55	1.12
6. To exercise choice and control in my life.	3.54	1.07
7. To use my skills. (1)	3.52	.88
8. To do well at what I do. (15)	3.50	1.04
9. To promote my well being and fitness.	3.45	.95
10. To keep up to date. (31)	3.38	1.00
11. To spend time with friends, colleagues, and peers. (5)	3.37	.94
12. To experience challenge. (19)	3.36	.99
13. To have new experiences. (8)	3.35	.95
14. To balance my physical, social, and emotional. (35)	3.30	1.11
15. To share experiences with people I feel close to. (37)	3.26	.99
16. To express my creativity. (6)	3.19	1.14
17. To create meaning in my life.	3.19	1.22
18. To keep in tune with my personal being. (25)	3.02	1.30
19. To participate in cultural activities. (30)	3.00	1.11
20. To remain professionally involved. (10)	2.97	1.14
21. To contribute to society. (28)	2.90	.97
22. To fulfill my obligations to society. (4)	2.87	.97
23. To contribute to the welfare of the next generation. (23)	2.79	1.05
24. To promote the welfare of my family. (20)	2.78	1.29
25. To enjoy a sense of solitude and peace. (36)	2.75	1.28
26. To experience changes. (26)	2.73	1.07
27. To do things I was unable to do during my working career. (33)	2.67	1.19
28. To continue with career interests I had prior to retirement. (29)	2.87	1.21
29. To experience comfortable surroundings. (17)	2.76	1.18
30. To enjoy freedom from obligation. (13)	2.65	1.32
31. To structure my time. (9)	2.55	1.04
32. To continue work after retirement. (14)	2.55	1.32
33. To keep doing what I've always done. (21)	2.51	1.89
34. To compensate for what I lost from work after retirement. (22)	1.91	1.08
35. To augment my income. (16)	1.72	1.00
36. To earn money for basic expenses, e.g. food, shelter and clothing. (3)	1.66	1.03
37. To compete with others. (27)	1.56	.85

**Key**

Mean score for each of the thirty-seven reasons based on scale score when:

Not at all=1; Somewhat= 2; Moderately=3; Highly=4; and Critically=5.

Range for each reason is from 1 to 5. Number in brackets ( ) after each reason refers to item on questionnaire.

of retirement, whether people wanted to retire or not, whether people considered themselves “retired,” and general satisfaction (Table 15).

**Gender.** Differences were found between men and women for 21 reasons for activities (Table 15). Four reasons were more important explanations for activities for men and 17 reasons were more important reasons for activities for women. The reasons for men are: to earn money for basic expenses ( $r=-.24, p<.001$ ), to augment one's income ( $r=-.20, p<.05$ ), to continue with career interests ( $r=-.19, p<.05$ ), and to continue work after retirement ( $r=-.14, p<.05$ ). The reasons for women are: to spend time with friends, colleagues, and peers ( $r=.28, p<.001$ ), to participate in cultural activities ( $r=.27, p<.001$ ), to do things one was unable to do during one's working career ( $r=.24, p<.001$ ), to have new experiences ( $r=.22, p<.001$ ), to experience changes ( $r=.19, p<.05$ ), to keep in tune with one's personal being" ( $r=.18, p<.05$ ), to keep up to date" ( $r=.18, p<.05$ ), to balance one's physical, social, and emotional needs ( $r=.18, p<.05$ ), to share experiences with people I feel close to" ( $r=.18, p<.05$ ), to structure one's time" ( $r=.16, p<.05$ ), to exercise choice and control in one's life ( $r=.16, p<.05$ ), to create meaning in one's life ( $r=.16, p<.05$ ), to keep oneself active ( $r=.15, p<.05$ ); 14), to do well at what I do ( $r=.14, p<.05$ ), to experience comfortable surroundings ( $r=.14, p<.05$ ), to enjoy oneself ( $r=.14, p<.05$ ), and to contribute to society ( $r=.12, p<.05$ ). Based on these findings gender exerted an influence on the reasons emeriti have for their activities.

**Age.** Age differences were found for 6 reasons for activity (Table 15). Younger respondents emphasized different reasons than people who were older. Five reasons were more important to younger people: to augment one's income ( $r=-.25, p<.001$ ); to earn money for basic expenses ( $r=-.23, p<.001$ ); to share experiences with people I feels close to ( $r=-.17, p<.05$ ); to do things one was unable to do during one's working career

TABLE 15  
REASONS BY GENDER, AGE,  
TIMING OF RETIREMENT, WANTED TO RETIRE OR NOT,  
CONSIDER SELF "RETIRED," AND GENERAL SATISFACTION

<u>Reasons</u>	<u>Gender</u>	<u>Age</u>	<u>Timing</u>	<u>Wants</u>	<u>"Retired"</u>	<u>Life *</u>
1. To enjoy myself.	.14*	-.14*	.00	-.04	.09	.13*
2. To keep myself active.	.15*	.21*	.08	.00	-.02	.01
3. To learn about things.	.02	.10	.07	.08	.14*	.02
4. To give my life purpose.	.12	-.04	-.06	.03	.02	.17*
5. To avoid stagnating.	.08	.08	.09	.04	.07	-.02
6. To exercise choice and control in my life.	.16*	.03	-.07	-.05	.05	.02
7. To use my skills.	-.04	-.12	-.01	.20*	.20*	.09
8. To do well at what I do.	.14*	.03	-.01	.05	.22*	.02
9. To promote my well being and fitness.	.11	.04	-.17*	.09	-.14*	.12
10. To keep up to date.	.18*	-.01	.01	.12	.17*	.05
11. To spend time with friends, colleagues, peers.	.28**	-.01	-.05	-.04	.00	.15*
12. To experience challenge.	.06	.09	.11	.08	.18*	.16*
13. To have new experiences.	.22**	-.08	-.07	-.01	.18*	.13*
14. To balance physical, social, and emotional.	.18*	.01	-.09	-.05	-.07	.13*
15. To share experiences with people close to.	.18*	-.17*	-.10	-.04	.04	.01
16. To express my creativity.	-.01	-.03	.03	-.07	.14*	.03
17. To create meaning in my life.	.16*	.04	-.05	.01	.04	.05
18. To keep in tune with my personal being.	.18*	-.02	-.08	-.03	.01	-.05
19. To participate in cultural activities.	.27**	-.02	-.15*	.05	-.02	.15*
20. To remain professionally involved.	-.11	.06	.19*	.13*	.27**	.02
21. To contribute to society.	.12*	.12	.05	.07	.02	.13*
22. To fulfill my obligations to society.	.06	.01	.03	.00	.00	-.03
23. To contribute to welfare of next generation.	.05	.12	.09	-.03	-.07	.11
24. To promote the welfare of my family.	-.10	-.07	.01	.10	-.03	-.03
25. To enjoy a sense of solitude and peace.	.12	-.04	-.16*	-.14*	-.03	-.01
26. To experience changes.	.19*	-.07	-.15	.00	.06	.09
27. To do things I was unable during career.	.24**	-.15*	-.25**	-.26**	-.06	.09
28. To continue career interests.	-.19*	.03	.15*	.11	.20*	-.01
29. To experience comfortable surroundings.	.14*	-.05	-.10	.01	.09	.01
30. To enjoy freedom from obligation.	-.05	-.09	-.19*	-.15*	.02	.04
31. To structure my time.	.16*	.06	.04	.05	-.02	.15*
32. To continue work after retirement.	-.14*	.04	.24*	.19*	.24**	.01
33. To keep doing what I've always done.	-.05	.09	.13*	.14*	.16	-.02
34. To compensate for losses from work.	-.07	.14	.07	.10	.04	-.07
35. To augment my income.	-.20*	-.25**	.04	.03	.36**	-.08
36. To earn money basic expenses.	-.24**	-.23**	.01	.05	.42**	-.07
37. To compete with others.	-.03	-.06	-.08	-.03	.10	.08

Key

\*p<.05; \*\*p<.001

\* Life refers to general satisfaction.

( $r=-.15$ ,  $p<.05$ ); and to enjoy oneself ( $r=-.14$ ,  $p<.05$ ). Older people identified one reason, to keep oneself active ( $r=.21$ ,  $p<.05$ ).

Timing of retirement. The timing of retirement influenced 9 reasons (Table 15). Earlier retirement interacted with 5 reasons: to do things I was unable to do during one's working career ( $r=-.25$ ,  $p<.001$ ), to enjoy freedom from obligation ( $r=-.19$ ,  $p<.05$ ), to promote one's well being and fitness ( $r=-.17$ ,  $p<.05$ ), to enjoy a sense of solitude and peace ( $r=-.16$ ,  $p<.05$ ), and to participate in cultural activities" ( $r=-.15$ ,  $p<.05$ ). Later retirement interacted with 4 reasons: to continue work after retirement ( $r=.24$ ,  $p<.001$ ); to remain professionally involved ( $r=.19$ ,  $p<.05$ ); to continue career interests ( $r=.15$ ,  $p<.001$ ); and to keep doing what one has always done ( $r=.13$ ,  $p<.05$ ).

Wanting to retire or not. Whether people wanted to retire or not influenced 7 reasons (Table 15). Three reasons were associated with wanting to retire: to do things one was unable to do during one's working career ( $r=-.24$ ,  $p<.001$ ); to enjoy freedom from obligation ( $r=-.15$ ,  $p<.05$ ); and to enjoy a sense of solitude and peace ( $r=-.14$ ,  $p<.05$ ). Four reasons were associated with not wanting to retire: to use one's skills ( $r=.20$ ,  $p<.05$ ); to continue work after retirement ( $r=.19$ ,  $p<.05$ ); to keep doing what I've always done ( $r=.14$ ,  $p<.05$ ); and to remain professionally involved ( $r=.13$ ,  $p<.05$ ).

Consider Retired. Whether people considered themselves "retired" or not related to 13 reasons (Table 15). Respondents who did not consider themselves "retired" emphasized 12 reasons: to earn money for basic expenses ( $r=.42$ ,  $p<.001$ ); to augment one's income ( $r=.36$ ,  $p<.001$ ); to remain professionally involved ( $r=.27$ ,  $p<.001$ ); to continue work after retirement ( $r=.24$ ,  $p<.001$ ); to do well at what one does ( $r=.22$ ,  $p<.05$ ), to use one's skills ( $r=.20$ ,  $p<.05$ ); to continue career interests ( $r=.20$ ,  $p<.05$ ); to have new experiences ( $r=.18$ ,  $p<.05$ ); to experience challenge ( $r=.18$ ,  $p<.05$ ), to keep up

to date ( $r=.17, p<.05$ ); to learn about things ( $r=.14, p<.05$ ); and to express one's creativity ( $r=.14, p<.05$ ). Only one reason was related to people who considered themselves retired: to promote one's well being and fitness ( $r=.14, p<.05$ ). People's self-definition of retirement played an important role in their reasons for activities.

**General Satisfaction.** General satisfaction was related to 9 of the 37 reasons for activity (Table 15). People who were more satisfied with life attached greater importance to the following reasons: to give one's life purpose ( $r=.17, p<.05$ ); to experience challenge ( $r=.16, p<.05$ ); to spend time with friends, colleagues and peers ( $r=.15, p<.05$ ); to participate in cultural activities ( $r=.15, p<.05$ ); to structure one's time ( $r=.15, p<.05$ ), to enjoy oneself ( $r=.13, p<.05$ ); to have new experiences ( $r=.13, p<.05$ ); to balance one's physical, social, and emotional needs ( $r=.13, p<.05$ ); and to remain professionally involved ( $r=.13, p<.05$ ). None of the reasons related to people who were less satisfied.

### **The Profile of Reasons for Work, Volunteering, and Recreation**

Interactions between emeriti's reasons for activity and how active they were in the domains of work, volunteering, and recreation demonstrated that the amount of activity influenced the profile reasons. Emeriti who were proportionately more active in work, volunteering, and recreation attached greater importance to 14 reasons for work, 5 reasons for volunteering, and 14 reasons for recreation (Table. 16).

**Work.** Emeriti who were proportionately more active in work attached greater importance to the following reasons (Table 16): to augment one's income ( $r=.43, p<.001$ ); to earn money for basic expenses ( $r=.42, p<.001$ ); to continue work after retirement ( $r=.35, p<.001$ ); to remain professionally involved ( $r=.34, p<.001$ ); to keep doing things one has always done ( $r=.31, p<.001$ ); to continue pre-retirement interests ( $r=.30, p<.001$ );

TABLE 16

## REASONS FOR WORK, VOLUNTEERING, AND RECREATION BY GENDER

Reasons	Total (n=187)		Male (n=141)		Female (n=44)	
	Work	Volunteering Recreation	Work	Volunteering Recreation	Work	Volunteering Recreation
1. Augment my income (16).	.43**	.05	.43**	.02	.46*	.22
2. Earn money, basic expenses (3).	.42**	.02	.45**	.03	.35*	.09
3. Continue work after retirement (14).	.35**	.03	.42**	-.05	.07	.11
4. Remain professionally involved (10).	.34**	.12*	.39**	.07	.13	.27*
5. Keep doing things always done (21).	.31**	-.03	.37**	-.05	.07	.03
6. Continue pre-retire career interest(29).	.30**	.11	.33**	.04	.19	.35*
7. Use skills (1).	.21*	.06	.31**	.10	.14	-.02
8. Express creativity (6).	.22*	-.00	.23*	-.01	.12	.00
9. Experience challenge (19).	.18*	.10	.22*	.06	.11	.11
10. To do well. (15).	.18*	-.02	.24*	.02	.07	-.19
11. Comfortable physical surround (17).	.13*	-.07	.08	-.05	.03	.00
12. Compete with others (27).	.13*	-.06	.17*	-.07	-.01	-.00
13. Have new experiences (8).	.12*	.06	.16*	.04	.04	.09
14. Welfare of next generation (23).	.09	.32**	.09	.30**	.11	.37*
15. Contribute to society (28).	-.00	.27**	-.00	.25*	.06	.28*
16. Fulfill social obligations (4).	.13*	.27**	.17*	.25*	.13	.32*
17. Enjoy freedom from obligation (13).	.02	-.22*	-.04	-.26*	.23	-.10
18. Balance phys, soc, & emotion needs (35).	-.07	.11	-.09	.08	.02	.13
19. Promote well being & fitness (34).	-.10	.07	-.11	.08	-.11	.02
20. Share experiences with people (37).	.09	.06	.09	.04	.07	.04
21. Experience changes (26).	.00	.02	-.07	-.07	.22	.16
22. Keep in tune with self (25).	-.02	.03	-.06	.06	.12	.11
23. Keep active (11).	-.05	.01	-.02	-.02	.15*	.06
24. Participate in cultural activities (30)	-.01	.04	-.04	.03	.18	-.05
25. Choice and control in life (12).	.06	.04	.08	.04	.03	-.01
26. Give life purpose (2).	.07	.11	.17*	.12	.14	.08
27. Spend time with friends, colleagues (5).	-.06	.04	.07	.02	-.50**	.02
28. Avoid stagnating (7).	.03	-.12	.11	-.07	-.35*	-.27*
29. Enjoyment (24).	.08	-.09	.05	-.14	.01	.12
30. Unable to do during working career (33).	-.02	-.02	-.04	-.02	.09	-.13
31. Create meaning in my life (32).	-.01	-.05	-.01	-.06	-.07	-.10
32. Structure my time (9).	-.01	-.00	-.02	-.01	.09	-.03
33. Learn about things (18).	.12	-.01	.07	-.06	.20	.12
34. Promote welfare of family (20).	.05	.00	.09	.06	.07	.15
35. Compensate for losses from work (22).	-.01	.02	-.01	-.04	-.06	.21
36. Keep up to date (31).	.10	.02	.11	-.04	.19	.17
37. Enjoy sense of solitude and peace (36).	.04	.02	-.02	.09	.20	.15

\* p&lt;.05; \*\* p&lt;.001

Number in brackets ( ) after each reason corresponds to the question on sampling instrument.

to express one's creativity ( $r=.22, p<.001$ ); to use one's skills ( $r=.21, p<.05$ ); to experience challenge ( $r=.18, p<.05$ ); to do well ( $r=.18, p<.05$ ); to experience comfortable physical surroundings ( $r=.13, p<.05$ ); to compete with others ( $r=.13, p<.05$ ); to fulfill one's social obligations ( $r=.13, p<.05$ ); and to have new experiences ( $r=.12, p<.05$ ). People who are proportionately more active in work attach greater importance to material and career related reasons.

**Volunteering.** Emeriti who were proportionately more active in volunteering attached greater importance to the following reasons (Table 16): to contribute to the welfare of the next generation ( $r=.32, p<.001$ ); to contribute to society ( $r=.27, p<.001$ ); to fulfill one's social obligations ( $r=.27, p<.05$ ); to enjoy freedom from obligation ( $r= -.22, p<.05$ ); and to remain professionally involved ( $r=.12, p<.05$ ). Reasons for volunteering emphasize social contributions and personal freedom.

**Recreation.** Emeriti who were proportionately more active in recreation attached greater importance to following reasons (Table 16): to contribute to the welfare of the next generation ( $r=.30, p<.001$ ); to contribute to society ( $r=.29$ ); to balance one's physical, social and emotional needs ( $r=.23, p<.05$ ); to have new experiences ( $r=.21, p<.05$ ); to promote one's well being and fitness ( $r=.21, p<.05$ ); to share experiences with people ( $r=.20, p<.05$ ); to experience changes ( $r=.18, p<.05$ ); to keep active ( $r=.18$ ); to fulfill one's social obligations ( $r=.16$ ); to keep in tune with one's personal being ( $r=.15, p<.05$ ); to participate in cultural activities ( $r=.15, p<.05$ ); to spend time with friends, colleagues, and peers ( $r=.14, p<.05$ ); and to give life purpose ( $r=.14, p<.05$ ). Reasons for recreation refer to social contribution and personal fulfillment.

### Research Questions

Six research questions were asked in this study. These questions provided a basis for testing the research hypotheses, meeting the research objectives, and addressing the problem statement. Based on the findings the answers to the six questions are as follows:

Question # 1. Do emeriti concurrently pursue a variety of work, volunteering and recreation activities during retirement?

Based on the activity scores for the 32 activities when defined as work, as volunteering, and as recreation emeriti concurrently pursue a variety of work, volunteering, and recreation activities. At least once every three months they were involved in work activities: reading, writing, and household maintenance. At least once every three months they were active volunteers providing skills and expertise to organizations and individuals and meeting with people. They participated daily in recreational activities such as reading, watching television, and getting exercise.

Question # 2. Are the activities defining work, volunteering, and recreation for emeriti similar?

The activities defining work, volunteering, and recreation are not similar. Although emeriti are active in some of the same activities for work, volunteering, and recreation (reading, writing, and research) their activity scores (Table 3) demonstrate that they were more active in activities which define recreation than in activities which define work and volunteering. Multivariate analysis of variance for repeated measures for work, volunteering, and recreation (Table 11) and Pearson Correlation measures for each of the 32 activities as work, as volunteering, and as recreation (Table 12) confirmed that the activities defining work, volunteering, and recreation are different.



Question # 3. How active are emeriti in the three activity domains: work, volunteering and recreation?

Emeriti are most active in recreation and less active in work and volunteering (Figure 2). They may work once every three months by meeting with people and providing their skills and expertise to people and organizations. As volunteers they are involved in problem solving, meeting with people and providing their expertise every three months. Their daily recreation includes watching television, getting exercise, and reading. Activity levels for work and recreation were related to volunteering. Work and recreation were not related to each other. It would seem that people who are more active in work or recreation are more active in volunteering. Activity levels in work and recreation did not affect each other.

Question # 4. Does the timing of retirement (early retirement, mandatory retirement, and late retirement) influence the reasons emeriti have for their activities?

The timing of retirement does influence the reasons emeriti have for their activities (Table 15). Four reasons were associated with later retirement. People who retired later indicated that to remain professionally involved, to continue working, to keep doing what they had always done, and to maintain career interests were more important reasons. Earlier retirees identified reasons outside of work and career. They attached greater importance to doing what they had been unable to do during their working career, enjoying a sense of solitude and peace, promoting their well being and fitness, participating in cultural activities, and enjoying freedom from obligation.

Question # 5. Does wanting to retire or not wanting to retire influence the reasons emeriti have for activities?

Wanting to retire or not influenced the reasons emeriti have for their activities (Table 15). Emeriti who did not want to retire attached greater importance to 4 reasons. These reasons emphasized maintaining past behaviors: to use one's skills, to remain professionally involved, to continue work after retirement, and to keep doing what one has always done. Emeriti who wanted to retire attached greater importance to 3 reasons. These reasons stressed interests other than work and career: to do the things one was unable to do during one's working career, to enjoy freedom from obligation, and to enjoy a sense of solitude and peace.

Question # 6. What profile of reasons do emeriti present for their pattern of work, volunteering, and recreation?

Table 16 depicts emeriti's profile of reasons for their pattern of work, volunteering, and recreation. As emeriti became more active in activities they define as work, volunteering, and recreation they attached greater importance to a variety of reasons for activity. Augmenting one's income, earning money for basic expenses, continuing with work, and remaining professionally involved are amongst the reasons to which greater importance is attached as emeriti become more active in work. Promoting the welfare of the next generation, social contribution, and fulfilling social obligations are among the important reasons for volunteering. Recreation provides a combination of reasons which emphasize social contribution, promoting the welfare of the next generation, having new experiences, balancing physical, social and emotional needs, and sharing experiences with people.

## Hypotheses

Four hypotheses (tested in the null form) were tested in this study. Based on the finding of this investigation these hypotheses were tested as follows:

Hypothesis 1. The pattern of activities which define work, volunteering, and recreation for emeriti are indistinguishable.

The null hypothesis was rejected. The activities which define work, volunteering, and recreation are different. Work, volunteering, and recreation are distinguishable. Gardening, watching television, visiting friends and relatives, and entertaining do not define work; they define recreation. Household maintenance and performing research do not define volunteering; they define work (Table 3). Multivariate analysis of variance for repeated measures demonstrated that work, volunteering, and recreation are different (Table 11). Differences were also supported with correlations for each of the 32 activities with work, volunteering, and recreation (Table 12).

Hypothesis 2. The reasons emeriti give for their activities are not associated with the timing of retirement ( early, mandatory, or late retirement) or whether or not they wanted to retire.

Th null hypothesis was rejected. The reasons emeriti give for their activities were influenced by the timing of retirement and whether or not people wanted to retire (Table 15). Early retirement was associated with doing things people were unable to do during their career, freedom from obligation, and promoting well being and fitness. Later retirement was associated with continuing work, remaining professionally involved, and maintaining career interests. Early retirees wanted to discontinue working while late retirees wanted to continue working. People who did not want to retire emphasized continuing with career interests, remaining professionally involved, and using their skills.

People who wanted to retire emphasized doing things they were unable to do previously, enjoying solitude and peace, and freedom from obligations. The timing of retirement and wanting to retire or not related to whether people wanted to remain in their careers.

Hypothesis 3. The reasons emeriti provide for their activities are not associated with how active they are in work, volunteering, and recreation.

The null hypothesis was rejected. As emeriti occupied proportionately more time in work, volunteering, and recreation they attached greater importance to different reasons for activities (Table 16). Emeriti who are proportionately more active in work attach greater importance to augmenting income, earning money, professional involvement, career maintenance, and expressing creativity. Emeriti who were proportionately more active in volunteering attached greater importance to contributing to society, fulfilling social obligations, and promoting the welfare of the next generation. People who were proportionately more active in recreation attached greater importance to promoting the welfare of the next generation, contributing to society, promoting their physical and emotional well being, experiencing changes and exercising choice and control in their lives. The most important reasons for work related to material and career interests, the most important reasons for volunteering related to social involvement, and the most important reasons for recreation related to social involvement and satisfying personal interests.

Hypothesis 4. The profile of reasons emeriti present for work, volunteering, and recreation are not leisure oriented.

This hypothesis was supported. Originally it had been speculated that emeriti's reasons for work, volunteering, and recreation might be similar. If the reasons had been similar an argument refuting the hypothesis seemed feasible. Examining the the profile of reasons for work, volunteering, and recreation indicates that as emeriti increased their

activity in work, volunteering, and recreation, they attached greater importance to different reasons (Table 16). Reasons for work stressed financial gain and maintenance of career and professional interests. Reasons for volunteering emphasized social contribution. Reasons for recreation emphasized social contribution and personal fulfillment. Only one reason, “to fulfill one's social obligations,” applied simultaneously to work, volunteering, and recreation and this was a less important reason for work.

Analysis of the 32 activities which emeriti defined as work, volunteering, and recreation provides additional evidence that emeriti's reasons for work, volunteering, and recreation were not leisure oriented. Emeriti made clear distinctions between activities which define work and recreation although there was some overlap with volunteering (Tables 11 & 12). Definitions for work and recreation are influenced by social context and individual definition (Pahl, 1988). People's reasons for activities are linked to the meanings of their activities; if the reasons had been similar then the activities which defined work, volunteering, and recreation should have been similar.

### Summary of the findings

Emeriti are generally satisfied with life. Their average age was 70.1 years. They came from a variety of academic disciplines and 60% held the rank of full professor. Retirement patterns varied and most (58%) retired at the mandatory age. Emeriti participated in the 32 activities as work, as volunteering, and as recreation. Different activities defined their pattern of activities. Emeriti were more active in recreation than they were in work and volunteering. Emeriti attached differing importance to each of 37 reasons for activity. The most important reasons referred to personal enjoyment, keeping active,

learning, life purpose, avoiding stagnation, choice and control, using skills, doing well, fitness and well being and keeping up to date.

The 37 reasons for activity were tested by age, gender, timing of retirement, wanting to retire or not, whether people considered themselves “retired,” and general satisfaction. Differences were discovered. Younger respondents attached greater importance to earning money, sharing experiences with close associates, and enjoyment. Early retirees attached greater importance to doing things they were unable to do during their career, freedom from obligation, and well being and fitness. Later retirement related to maintaining career and ongoing professional involvement. People who wanted to retire attached greater importance to doing things they were unable to do during their career, freedom from obligation, and enjoying solitude and peace. People who did not want to retire attached greater importance to maintaining career, using skills, and continuing work. Individuals who did not consider themselves “retired” attached greater importance to earning money, maintaining career, professional involvement, using skills, and learning. People who wanted to retire attached greater importance to well being and fitness. Respondents who were more satisfied with life attached greater importance to life purpose, challenge, freedom from obligation, new experiences, cultural activities, and enjoyment.

The 37 reasons for activities were examined to determine a profile of reasons for the domains of work, volunteering, and recreation. Emeriti attached greater importance to different reasons for work, volunteering, and recreation. The most important reasons for work were earning money, augmenting income, professional involvement, and maintaining career and work. The most important reasons for volunteering were social contribution, promoting the welfare of the next generation, and fulfilling social obligations. The most important reasons for recreation were contributing to the welfare of the next generation,

social contribution, emotional and physical well being, and sharing experiences with people.

The data were used to test the “hypotheses of no effect.” The first null hypothesis was refuted. Emeriti made clear distinctions among activities they defined as work, as volunteering and as recreation. The second null hypothesis was refuted. The timing of retirement and whether or not emeriti wanted to retire influenced the reasons emeriti had for activity. The third null hypothesis was rejected. A relationship did exist between how active emeriti were in work, volunteering, and recreation and their reasons for activity. The fourth hypothesis was supported. The profile of reasons emeriti present for work, volunteering and recreation were not leisure oriented. There were different reasons for work and recreation.

## **CHAPTER FIVE**

### **Discussion**

This study investigated the relationship between retired academics' patterns of work, volunteering, and recreation; their reasons for activities; and the kind of retirement event (i.e. the timing of retirement and whether or not people wanted to retire). An interactive perspective was utilized. Patterns of activity were examined as a complex whole. Reasons for activity were tested for the influence of the timing of retirement and whether or not people wanted to retire. Previous research indicated that the timing of retirement and wanting to retire or not influenced the retirement experience; research was sparse and the influence of the kind of retirement event was unclear. The importance which people attached to their reasons for activity was tested in relationship to how active they were in work, volunteering, and recreation. This provided a profile of reasons (Table 14) which demonstrated how people's reasons interacted with their patterns of work, volunteering, and recreation.

The sample (n=187) was comprised of professors emeriti from the University of British Columbia and Simon Fraser University. They were surveyed using a mailed questionnaire which was specifically designed for this study (Appendix C). The questionnaire was used to determine emeriti's activity patterns, their reasons for activities, the timing of retirement, whether or not they wanted to retire, whether they considered themselves "retired," and provides demographic and personal information about gender, age, general satisfaction, marital status, academic rank, and academic speciality. This information was analyzed using SPSSX. Findings were used to test the four hypotheses.



Three hypotheses which guided the study were confirmed and one hypothesis was not supported. The first hypothesis stated that the patterns of activities which define work, volunteering, and recreation are all different. The pattern of activities which defined work, volunteering, and recreation were different (Tables 11 & 12). The second hypothesis stated that the reasons emeriti give for their activities are associated with the timing of retirement (early, mandatory, or late) or whether or not emeriti wanted to retire. The reasons which emeriti presented for their activities (Table 15) were influenced by the timing of retirement and whether or not emeriti wanted to retire. The third hypothesis stated that the reasons emeriti provide for their activities are associated with how active they are in work, volunteering, and recreation. As emeriti became proportionately more active in work, volunteering, and recreation they attached greater importance to different reasons. The fourth hypothesis stated that the reasons emeriti have for work, volunteering, and recreation are leisure oriented. Emeriti did not have similar reasons for work, volunteering, and recreation.

There are several possible explanations for the findings about the research hypotheses. First, retirement is an ambiguous concept which fails to account for human diversity. Second, institutionalized retirement is outdated and therefore explanations about retirement behavior are based on inaccurate knowledge. Third, too little is known about definitions of work, volunteering, and recreation in late life. People's definitions may change over time or be influenced by other factors. Fourth, activity and continuity theory which formed the conceptual underpinnings of this study are too general and fail to account for the diversity of human behavior.

### Retirement as an Ambiguous Concept

Atchley (1976) noted that retirement is a process whereby the individual relinquishes the role of worker and assumes the role of retiree. This explanation is fraught with the same definitional ambiguities which Pahl (1988) identified between leisure and work. Defining leisure in opposition to work requires a clear definition of work. Similarly defining the role of retiree in opposition to the role of worker requires a clear definition of the role of worker.

Atchley (1976) suggested that in the role of worker the individual works; in the role of retiree the individual no longer works. Respondents in this study worked in varying amounts and one might therefore question whether they are retired. It might be further argued that the amount of work performed or the absence of the necessity to work distinguishes retiree from the worker. These arguments are of little value. Younger adults can work varying amounts of time without being retired. Necessity is highly subjective; one person's wealth is another's poverty. Retirement as a concept fails to account for these ambiguities and presents a narrow view of retirees as people who do not participate in work, a view reflected in the research hypotheses. The activities of the respondents in this study were diverse and involved the non-retirement behavior of work.

### Retirement as an Outdated Institution

Retirement was an outcome of the industrial era and the belief that as people age they became less productive. Decreased productivity was considered a normal result of physical decline associated with aging (Cummings and Henry, 1961). Retirement, along with the benefits of pensions, provided a politically neutral method of removing older workers from the work force while enabling younger and more productive workers to enter

the work place. Older workers were afforded the opportunity to relinquish the responsibilities of the work and enjoy leisure. Industry was able to reconstitute its labor supply and increase its profits.

The advent of retirement during the middle of the twentieth century reflected the realities of work during the industrial era. Factory work was often physically debilitating and beyond age 60 work could have been too physically taxing (Osgood, 1982). Generalized retirement policies served the welfare of many older adults who worked in factories. The industrial era, however, has evolved into a technological era. Skill and knowledge are more valuable assets for the work place. Physical debilitation caused by work is less evident. Current research demonstrates that older adults are vital and have the potential for ongoing productivity. Nonetheless, institutionalized retirement continues to support an outdated and decremental model of the older adult established in the industrial era.

The outdated beliefs contained in the institutionalized retirement reveal an explanation for the failure of the first hypothesis in this study. The decremental model of the aging adult inherent in the institution of retirement does not account for the diversity of behavior amongst the respondents in the study. Respondents in the study were a highly variable group who participated in a multitude of activities. Although emeriti were most active in recreation, they participated in work and volunteering. Retired academics made clear distinctions between their work and non-work activities. Retirement did not result in uniform rates of activity amongst the sample.

### Activities and Definitions of Work, Volunteering, and Recreation

Emeriti concurrently pursued a variety of work, volunteering and recreation activities during retirement (Table 3). The activities which defined work, volunteering and recreation were distinct from each other. Emeriti participated in recreational activities from once per day to at least once per month. They were less active in work and volunteering. They participated in work once per month to once every 3 months. They engaged in volunteering once every three months to once per year. There was no relationship between activity levels in work and recreation. Work and volunteering were related as were recreation and volunteering. Respondents who were active in work or recreation are therefore more likely to be active in volunteering.

Table 12 indicates that 5 of the 32 activities which defined work and volunteering also defined recreation and volunteering: serving community agencies, writing, meeting with people, chairing meetings, and providing one's skills and expertise to individuals. The relationships between these activities could suggest that some respondents participate in volunteering and recreation as substitute activities for work. This would endorse activity theory. Alternatively, volunteering may only be symptomatic of people who are highly active in other areas of life. Volunteering would therefore provide little support for activity theory; instead, it may reflect continuity theory.

These 5 activities raise an important question. Do people's definitions of work, volunteering, and recreation change over time? For example, do activities which were once considered work become recreation and alternatively, do activities which were once recreation become work? Although one can merely speculate on the basis of the present study, this question introduces two interesting possibilities. First, if definitions change over time then activity and continuity theory could either gain support or become more

controversial. Second, do definitional changes of work activities obscure the contributions provided by older adults to society.

Activity and continuity theory would be supported when an activity is pursued under a new definition because it may provide the same satisfactions and be part of an ongoing pattern in life. However, what happens when an work activity which was dissatisfying in the past becomes satisfying in the present as a recreational activity? Activity theory falters because the individual does not receive the same satisfactions from the activity. Continuity theory is not supported because the definitional change would not reflect internal continuity.

Most importantly, if definitions change over time what might this say about the contributions older adults provide to society. Older adults who contribute skills and expertise to individuals or who provide service to the community as a form of recreation instead of as work, contribute to society regardless if the contribution is defined as work or recreation. But are these contributions perceived differently by society? What are the economic and social benefits of contributions which are provided as recreational activities and how might these be acknowledged?

#### Reasons for Activities:

Emeriti's reasons for activity were examined for the influence of the timing of retirement, whether people wanted to retire or not, how active they were in work, volunteering and recreation, and whether emeriti's profile of reasons for work, volunteering, and recreation was leisure oriented. It was found that the timing of retirement, whether people wanted to retire or not, and how active they were in work, volunteering, and recreation influenced their reasons for their activities. The profile of

reasons emeriti presented for work, volunteering and recreation was not leisure oriented. These findings suggest limitations in activity and continuity theory which formed the conceptual underpinnings of this study.

Caution is recommended when examining the following findings about activity theory and continuity theory. The reasons discussed in relation to the timing of retirement and whether people wanted to retire or not provide only partial evidence about the veracity of the theories. More complete evidence would require that the reasons be linked to the activities which emeriti performed before and after retirement. For example, “to remain professionally involved” was an important reason for activity among people who did not want to retire. This reason does not mean that they are involved in work, volunteering, or recreational activities during retirement which would enable them to satisfy this reason.

Timing of Retirement. The findings for the timing of retirement both support and refute continuity theory and activity theory. Emeriti who retired later attached greater importance to 4 reasons for activity: to continue work after retirement, to remain professionally involved, to continue career interests, and to keep doing what one has always done (Table 15). These reasons seem to support continuity theory because the respondents attached greater importance to maintaining an ongoing pattern of role behavior. These reasons may also lend support to activity theory because it is plausible that people who retired later may use volunteering and recreation activities as substitutional activities to regain what was lost from their profession and work.

The reasons for earlier retirement are more controversial. Three of the reasons suggest the limitations of continuity and activity theory while 2 reasons may or may not support either theory. The 3 reasons which highlight the limitations are: to do things one was unable to do during one’s working career, to enjoy freedom from obligation, and to

enjoy a sense of solitude and peace. These reasons could suggest discontinuation of behavior patterns and disinterest in finding substitutes for past roles. Retirement afforded an opportunity to get away from the restrictions and obligations of career and pursue new endeavors. The remaining 2 reasons, “to promote one’s well being and fitness” and “to participate in cultural activities” neither support nor refute activity or continuity theory. There is no way of knowing whether these reasons refer to the continuation or substitution of activities because this study is cross sectional.

Wanting to Retire or Not. Wanting to retire or not influenced 7 reasons for activity. Four reasons were associated with not wanting to retire: to use one’s skills, to continue work after retirement, to keep doing what one has always done, and to remain professionally involved. These reasons seem to support continuity theory because they refer to the maintenance of established behavior patterns. It is also possible that these reasons support activity theory because using one’s skills and remaining professionally involved could be accomplished with activities other than work, i.e., volunteering and recreation. Respondents who wanted to retire identified reasons which do not seem to support continuity or activity theory: to do things one was unable to during one’s working career, to enjoy freedom from obligation, and to enjoy a sense of solitude and peace. These reasons suggest the respondents attached greater importance to disengaging from work and career.

Profile of Reasons for Work, Volunteering, and Recreation. As emeriti became proportionately more active in work, volunteering, and recreation they attached greater importance to 14 reasons for work, 5 reasons for volunteering, and 14 reasons for recreation (Table 16). The reasons for work and volunteering and recreation were distinct. This indicated limited endorsement for the concept that the reasons emeriti had for work,

volunteering and recreation were leisure oriented. Emeriti discriminated between work and non-work activities.

The strongest associations with work were: to augment one's income, to earn money for basic expenses, to continue work after retirement, to remain professionally involved, to keep doing the things one has always done, and to continue with pre-retirement interests. These reasons endorse continuity theory because they refer to maintaining patterns of work and career which were interrupted by retirement. Only 1 of the 6 reasons supports activity theory: to remain professionally involved. This reason was also associated with volunteering and recreation which could have provided a substitute activity for ongoing professional involvement during retirement.

The reasons which emeriti attached greater importance to as they became proportionately more active in volunteering and recreation neither support nor contradict activity and continuity theory. People do not retire from volunteering and recreation as they do from work. A limitation of this cross sectional study is that it is difficult to assess whether emeriti were involved in volunteering and recreation prior to retirement. Without knowing their past activities it is difficult to state whether the reasons suggest continuity or activity theory.

Interestingly, some of the reasons which emeriti had for volunteering and recreation were reasons which were found for work in other studies. Three of these reasons are: to contribute to society (Friedman and Havighurst, 1954); to fulfill social obligations (Harpez, 1985); and to remain professionally involved (Dorfman, 1981; Brodsky, 1983-84). One might speculate that volunteering and recreation provide substitute activities which enable people to satisfy these reasons because work is no longer available. This would support activity theory. Support is controversial because only one reason, "to fulfill my social



obligations,” was evident for emeriti who were more active in work. It seems logical that the other two reasons could have surfaced for work but they did not.

### Limitations of Activity and Continuity Theory

Activity and continuity theory formed the conceptual underpinnings of this study. The theories provided limited support for research hypotheses. The lack of support can be attributed to limitations inherent in each theory.

Activity theory provide limited support the hypotheses because it did not account for variability, continuity of behavior, changing definitions, and possible disengagement behavior by some respondents. Activity theory suggests that people adapt to retirement by finding substitute activities which provide the same satisfactions as were derived from work (Friedman and Havighurst, 1954). Emeriti’s activities were diverse and although they may have regained lost work satisfactions through volunteering and recreation, some of the respondents continued to work after retirement. Work may provide satisfactions which are unavailable through recreation or volunteering, for example, earning money, augmenting one’s income, and maintaining a career. Continuity theory may better reflect the behavior of these emeriti because established patterns of work enable them to achieve personal satisfaction. Activity theory also fails to account for respondents whose reasons for activity indicated withdrawal from work activities. Respondents whose reasons for activity emphasized solitude and peace and freedom from obligation may have been uninterested in finding substitute activities for work. Work may have been dissatisfying and these respondents did not seek activities which lead to further dissatisfaction.

Continuity theory postulates that people adapt to retirement by maintaining established relationships and patterns of behavior. The findings of this study provided

some support for continuity theory. For example, emeriti who were proportionately more active in work attached greater importance to maintaining career and professional patterns. On the other hand, some respondents' reasons for activity accented change and withdrawal behavior. Early retirees and emeriti who wanted to retire attached greater importance to doing things they were unable to do during their working career. This may reflect a desire for change from established routines. Additionally, early retirees and emeriti who wanted to retire attached greater importance to enjoying freedom from obligation and enjoying a sense of solitude and peace. This could suggest discontinuity from established routines and patterns of behavior.

How might some of the discrepancies of activity and continuity theory be resolved? Possibly other retirement theories provide resolution. For example, disengagement theory may help explain withdrawal behavior from work as suggested by respondents who attached greater importance to enjoying freedom from obligation and enjoying a sense of solitude and peace.

Disengagement theory postulates that retirement is a necessary manifestation of the withdrawal of the individual from society (Cummings and Henry, 1961). Gradual physical decline brought on by aging leads to the gradual withdrawal of the individual from social activity in preparation for death. Individuals realize that they are no longer able to maintain pace with their work and therefore retire. Paramount to this theory is the idea that disengagement is mutual; society disengages from the individual while the individual withdraws from society (Crawford, 1970).

Disengagement theory may explain the suggestions of withdrawal implicit in the reasons for activity which some of the respondents emphasized. Alternatively, respondents who enjoy freedom from obligation and a sense of solitude and peace may have disliked

work and wanted to escape to other endeavors (Rothman, 1989). These same respondents also attached greater importance to doing things which they were unable to do during their working career. Disengagement theory could resolve some of the shortcomings of activity and continuity theory; however, disengagement theory creates its own problems because it does not adequately address continuity or variability of behavior.

### Recommendations for Future Retirement Theory

Activity and continuity theory surfaced at about the time that retirement became a social institution. These retirement theories, like institutionalized retirement, were influenced by the bioscientific models of aging prevalent in the first half of the twentieth century. Each theory offers singular explanations about adaptation to retirement which apply to all people. Retirement is synonymous to a decremental model of aging where all people age the same way and at the same rate. Current research demonstrates biological capacity and cognitive ability during old age are highly variable (Birren and Stacey, 1988). Many older adults are highly productive in their later years (Bronte, 1990). Activity and continuity theory do not reflect current knowledge about people's abilities and productivity. Nor do these theories reflect the diversity of behavior and activity revealed in this study.

A more representative theory of retirement would reflect the diversity of behavior and ability evident in late life. The variable model of aging (Birren and Stacey, 1988) and Schlossberg's (1981) transition model provide a rudimentary conceptual framework for such a theory. The variable model of aging demonstrates the diversity of capacity during late life while the transition model allows for the variety of change events, interpersonal interactions, and life circumstances which require adaptation throughout life. A more representative theory could selectively integrate valuable elements of these models with the

other theories, e.g. activity and continuity theory. Integrating various models and theories human of behavior to provide a more comprehensive theory of retirement could prove a substantial undertaking, particularly because a theory which acknowledges capacity and diversity during retirement could challenge the basis of the institution of retirement.

#### Recommendations for Additional Research

Investigating emeriti's reasons for work, volunteering and recreation revealed additional areas which are of interest for future research. Ancillary findings in this study indicate that gender, whether people considered themselves retired or not, and possible shifts in activity patterns during retirement are of especial interest.

Differences between men and women surfaced during this study. Table 15 indicates that women attached greater importance to interpersonal and personal reasons for activity, for example: spending time with friends, colleagues, and peers; participating in cultural activities; having new experiences; and keeping in tune with one's personal being. Men attached greater importance to earning money; augmenting one's income; and continuing with career interests. Table 16 suggests that differences may exist which relate to activity levels in work, volunteering, and recreation. Men who were proportionately more active in work attached greater importance to maintaining career and professional interests, expressing creativity, experiencing challenge, and competition. Women attached greater importance to reasons for not working, for example: spending time with friends, colleagues, and peers; avoiding stagnating; and gaining purpose in life. Although further analysis is required to verify the veracity of these differences, three questions about gender differences arise. First, what do the differences between men's and women's reasons for activity reveal about the retirement experience for men and women? Second, what do these

differences reveal about the activity patterns of men and women during retirement? Finally, do the reasons which men and women have for activity reveal differences about pre-retirement career experiences?

Whether people consider themselves retired or not was related to 13 reasons for activity (Table 15) and 21 activities when defined as work (Table 13). Respondents who did not consider themselves retired attached greater importance to reasons which emphasized earning money and career maintenance. These individuals also attached greater importance to all 21 of the 32 activities when defined as work, for example: providing skills and expertise to individuals, performing research, problem solving, and meeting with people. In addition, these respondents are almost as active in work as they are in recreation. Future research could explore the differences between people who consider themselves retired and those who do not. Whether people consider themselves retired or not may provide information about their sense of productivity and contribution to society during retirement.

Possible shifts in activity patterns were observed while examining the pattern of activities which defined work, volunteering, and recreation. Activities which defined work (e.g. writing and performing research) were also prevalent in recreation. It would be interesting to know if these activities migrated from work to recreation following retirement. This could demonstrate that although retirement may lead to increased levels of activity in recreation, some of the increased recreation activity is work activity redefined as recreation.

### Limitations

The limitations of this study were varied. The study was cross-sectional and therefore it was not possible to know pre-retirement activity patterns and whether reasons for activity remained constant over time. This limitation required that many of the conclusions about activity and continuity theory were somewhat speculative. It was not possible to ascertain to what extent activities shifted from work to volunteering following retirement. Such information could have indicated the extent of the ongoing productivity and contributions which emeriti gave society. Other limitations of the study concern the questionnaire and the method of data collection.

Meticulous care was taken to develop the questionnaire. Questions were based on previous research and pilot testing. Measures of reliability and test-retest results indicated the questionnaire was highly reliable for the sample. Nonetheless, comments on the questionnaire by some respondents indicated that they had difficulty classifying the 32 activities as either work, volunteering, or recreation. These respondents subsequently defined an activity as either work, volunteering, or recreation. They did not record that they participated differently in an activity as work, as volunteering, or as recreation. One might question whether their responses were a result of misinterpretation or a genuine reflection of how they participated in their activities.

Respondents provided many written comments and suggestions on the questionnaire. Several letters describing their interest in the study were received. One individual sent a recent publication of his along with the completed questionnaire. The message that these respondents conveyed was that they remained active and engaged in the world. Regrettably it was not feasible to include all of this information in the study because the original research design had not allowed for this information. The emeriti's comments

and letters portrayed a sense of vitality which was difficult to convey in a quantitative analysis.

### Conclusions

Emeriti in the present study demonstrated that their activities during retirement are diversified. They were most active in recreation although they participated in work and volunteering. Emeriti distinguished between activities which they defined as work, volunteering, and recreation. Their activity patterns and reasons for activity reflect a variable model of aging. This is inconsistent with the models of aging represented in activity and continuity theory. These theories do not free us from a decremental perspective on aging and potentially limit older adults into social roles which are perceived as less contributive during retirement. Various activities which emeriti performed were socially productive. They continued to write, perform research, provide skills and assistance to individuals and organizations, and provide community service regardless if the activities were defined as work, volunteering, or recreation. Based on the findings in this study it is recommended that alternate theories which reflect the realities and potentials of retirement be developed.

Examination of the kind of retirement event demonstrated that the timing of retirement and whether people wanted to retire or not was associated with their reasons for activities during retirement. It would be presumptuous to suggest that the differences in reasons for activity are a result of the kind of retirement event. The effect of the timing of retirement and whether people wanted to retire probably reveals more about the meanings people attach to their activities. Work for some people is more important and therefore they could choose to retire as late as possible. Alternatively, recreation could be more important

to other individuals and they might choose to retire as soon as possible. Emeriti's reasons for activities may have reflected such differences among emeriti.

The distinctions which the respondents made among their activities and reasons for activity demonstrated that emeriti's reasons for activity were complex. Work, volunteering, and recreation offered different rewards and opportunities to be active. The timing of retirement, whether people wanted to retire or not, and whether they considered themselves retired may have little effect on people's reasons for activities or their beliefs about their productive capabilities. However, institutionalized retirement does curtail people's opportunities to remain fully contributing members of society. Social policies and programs should remove the artificial barriers imposed by retirement. Social policies and programs which better represent the diversity of capacity and ability among all adults would enable society to more readily retain and recruit the services of highly skilled older adults. This would benefit society while providing opportunities for older adults to enrich their lives by maintaining greater control over their destinies.

#### Recommendations for Retirement Planning

The findings of this study demonstrated that retirement is a highly variable experience for retired academics. Different activities defined work, volunteering, and recreation. Retired academics provided different reasons for participating in work, volunteering, and recreation. Based on these findings the following recommendations are offered to academics and administrators interested in retirement planning.

#### Academics:

A central question for academics who are about to retire or have retired is, how will time be spent after "official retirement?" In answering this question academics may first



want to discern whether they consider themselves retired? Academics who do not consider themselves retired should assess the importance of work in their life? If economic and material gain, professional involvement, and ongoing career activity are highly important then alternate ongoing work activities should be considered. Based on this study academics are unlikely to receive the same rewards from volunteering and recreation as they do from work.

Academics who do consider themselves retired are less apt to find work a rewarding activity in late life. Instead non-work activities which provide opportunities for social contribution, ongoing community involvement, and personal enjoyment prove rewarding. Those who consider themselves retired (or ready to retire) should develop plans, both before and after retirement, which optimize their opportunities to pursue these activities. These plans may include financial preparation prior to retirement which enables the free pursuit these activities.

### Administrators

Administrators of retirement programs should to recognize the variability of physical, intellectual, and social capacity amongst retired or about to retire academics. Age is an inadequate ruler of behavior and performance. Academics who were productive prior to retirement age are likely to be productive after retirement age. Different activities are pursued for different reasons and these different activities have different reward structures. Administrators who are interested in securing the services of retired academics should recognize that adequate financial and professional compensation provide a strong stimulus for work among retired academics. Because someone is receiving a pension does no mean that they are likely to become a source of cheap labor.

Additionally, differences between men and women should be recognized. The men and women in this study had different reasons for activities and different patterns of activities during retirement. Retirement policies should reflect these differences in order to eliminate programs which discriminate in favor of one gender. Policies which address these differences could enable retired academics to more readily pursue their interests following retirement.

## References

- Atchley, R. C. (1976). The sociology of retirement, Cambridge, Schenkman.
- Atchley, R. C. (1977). The social forces in later life (3rd ed.). Belmont, CA: Wadsworth.
- Atchley, R. C. (1989). A Continuity theory of normal aging. Gerontologist 29(2), 183-190.
- Babic, A. L. (1972). The older volunteer: Expectations and satisfactions. The Gerontologist, 12, 87-90.
- Baines, E. M. (1986). Volunteerism and the older adult as benefactor and beneficiary: A selective review of the literature. Working paper series. Clemson University, SC. Strom Thurmond Institute of Government and Public Affairs.
- Becker, E. (1973). The denial of death, Canada, Collier Macmillan.
- Birren, J. (1990). Creativity, productivity, and potentials of the senior scholar. Gerontology and Geriatrics Education , 11(1-2), 27-44.
- Birren, J. and Stacey, C. (1988). Paradigms of aging: Growth versus decline. In J. E. Birren and E.R. Winkler (Eds.), Ethics and aging: The right to live, the right to die (pp. 54 -72). Vancouver, The University of British Columbia Press.
- Bolton, B. (1980). Second-order dimensions of the work values inventory. Journal of Vocational Behavior, 17 , 33-39.
- Borg, W. R. and Gall, M. D. (1989). Educational research: An introduction (5th ed.), New York, Longman.
- Brightbill, C. K. (1963). The challenge to leisure. Englewood Cliffs, Prentice Hall.
- Brodsky, D. M. (1983-84 ). Raising the social security retirement: A political economy perspective. Aging and Work, 6-7 ,
- Bronté, L. D. (1990). Long Careers and the Academy: Evidence from the long careers study of the need for an academy of senior scholars. Gerontology and Geriatrics Education, 11(1/2), 127-142.
- Brook, J. A. & Brook, R. J. (1989). Exploring the meaning of work and non work. Journal of Organizational Behavior , 1 10(2), 169-178.
- Burgess, E. (1960). Aging in western societies. Chicago, University of Chicago Press.
- Chambré, S. M. (1984). Is volunteering a substitute for role loss in old age? An empirical test of activity theory. The Gerontologist , 24(3), 292-298.

- Comfort, A. (1956). The biology of senescence. London, Routledge & Kegan Paul.
- Cooper, J. & Force, D. (1985). Police retirement; Career succession or obsolescence. Canadian Police College Journal, 2(4), 413-423.
- Crawford, M. P. (1970). Retirement and disengagement. Human Relations, 24, 255-260.
- Cummings, E., & Henry, W. (1961). Growing old: The process of disengagement. New York, Basic Books.
- Curtis, J. E. (1979). Recreation theory and practice. St. Louis, C. V. Mosley.
- Denton, F. T. (1980). The future financing of the Canada and Quebec Pension Plans: Some alternative possibilities. Hull, Canadian Government Publishing Centre.
- Dillman, D. A. (1978). Mail and telephone surveys: The total design method. New York, John Wiley & Sons.
- Doering, M.; Rhodes, S. R. & Schuster, M. (1983). The aging worker: Research and recommendation. Sage Publications, Beverly Hills, London.
- Donald, M. N., & Havighurst, R. T. (1959). The meaning of leisure. Social Forces, 37, 355-360.
- Dorfman, L. T. (1981). Emeritus professors: Correlates of professional activity in retirement II, Research in Higher Education, 14(2) 147-160
- Dorfman, L. T., Conner, K. A., Ward, W., & Tompkins, J. B. (1984). Reactions of professor to retirement: A comparison of retired faculty from three types of institutions, Research in Higher Education, 20(1) 89-101
- Einstein, G. (1973). The retired social worker as a volunteer. Social Casework, 54, 37-41.
- Estes, C. L. (1979). The aging enterprise. San Francisco, Jossey-Bass Publishers.
- Estes, C. L. (1983). "Fiscal austerity and aging" in Fiscal austerity and aging: Shifting Government responsibility for the elderly, Estes, C. L. and Newcomer, R. J. (Eds.), Beverly Hills, London, New Delhi, Sage Publications.
- Fox, J. H. (1981-82). Perspectives on the continuity perspective. International Journal of Aging and Human Development, 14(2), 97-115.
- Frankl, V. (1955) The doctor and the soul. New York, Random House.
- Frankl, V. (1966) Self-transcendence as a human phenomenon, Journal of humanistic psychology. 6: 97 - 107.

- Frankl, V. (1967) Psychotherapy and existentialism: Selected papers on logotherapy. New York, Washington Square Press.
- Friedmann, E. A. & Havighurst, R. J. (1954). The meaning of work and retirement. Chicago, The University of Chicago Press .
- George, L. K. (1980). Role transitions in later life. Monterey, Brooks/Cole.
- George, L. K., Fillenbaum, G. G. & Palmore, E. (1984). Sex differences in the antecedents and consequences of retirement. Journal of Gerontology, 39(3), 364-371.
- Gist, N. P. & Fava, S. F. (1964). Urban society. New York, Crowell Ltd.
- Grady, R. M., & Kastetler, J. (1970). An evaluation of the effectiveness of the foster grandparent program. Journal of Sociology and Social Research, 54, 181-189.
- Graebner, W. (1984). Retirement and the origins of age discrimination, in Readings in the political economy of aging, Minkler, M. and Estes, C. L., (Eds.) New York, Baywood Publishing Company.
- Grossin, W. (1986). The relationship between working time and free time and the meaning of retirement, Leisure Studies, 5, 91-101.
- Handler, P. (1960). Radiation and aging. In Aging, N. W. Schock (Ed.), pp. 199-223, Washington, Government Printing Office.
- Harpez, I. (1985). Meaning of working profiles of various occupational groups. Journal of Vocational Behavior, 26, 25-40.
- Havighurst, R. J. & Albrecht, R. (1953). Older People. New York, Longmans.
- Hayward, M. D. & Hardy, M. A. (1985). Early retirement processes among older men: Occupational differences. Research on Aging, 7(4) 491-515.
- Howard, J. H., Marshall, J., Rechnitzer, P. A., Cunningham, D.A., & Donner, A. (1982). Adapting to retirement. Journal of the American Geriatric Society, 30, 488-500.
- Kaye, L. W., & Monk, A. (1984). Sex role traditions and retirement from academe, Gerontologist, 24(4), 420-426.
- Kelly, J. R. & Steinkamp, M. W. (1985). Relationships among motivational orientation, level of leisure activity, and life satisfaction on older men and women, The Journal of Psychology, 119(6), 509-520.
- Kelly, J. R. & Steinkamp, M. W. (1987). Later-life satisfaction: Does leisure contribute? Leisure Sciences, 9(3), 189-199.

- Knapp, M. R. J. (1977). The activity theory of aging: an examination in the english context, The Gerontologist, 17(6), 553-559.
- Lachman, M. E. & Leff, R. (1989). Perceived control and intellectual functioning in the elderly: A 5-year longitudinal study. Developmental Psychology, 25 (5), 722-728.
- Lemon, B. W., Bengston, V. L., & Peterson, J. A. (1972). An exploration of the activity theory of aging: Activity types and life satisfaction among in-movers to a retirement community. Journal of Gerontology, 27(4), 511-523.
- Maas, H. S. (1984). People and contexts: Social development from birth to old age. Englewood Cliffs, Prentice-Hall.
- Malek, A. (1989). False myths, false realities. in Lifelong education in an aging society, Thornton, J. (ed). in a report prepared for the national advisor council on aging Ottawa, Vancouver, U. B. C.
- Marino-Schorn, J. A. (1985-86). Morale, work, and leisure in retirement. Physical and Occupational Therapy in Geriatrics, 4(2), 49-59.
- Marx, K. (1967). Capital: A critique of political economy (Vol. 1) (3rd ed.). New York, International Publishers.
- Miller, S. (1965). The social dilemma of the aging leisure participant. In A. M. Rose and W. Peterson (eds.), Older People and Their Social World, Philadelphia, I. A. Davis.
- Neumeyer, M. H. & Neumeyer, E. S. (1949). Leisure and recreation: A study of leisure and recreation in their sociological aspects. New York, A. S. Burns and Company.
- Pahl, R. E. (1988). On work: Historical, comparative & theoretical approaches. Norwich, Page Brothers.
- Palmore, E. B. (1981). Social patterns in normal aging. Durham, Duke University Press.
- Palmore, E. B., Fillenbaum, G.G. & George, L. K. (1984). Consequences of retirement, Journal of Gerontology. 39(1), 109-116.
- Parker, S. (1983). Leisure and work. London, George Allen & Unwin (Publishers) Ltd.
- Peterson, D. (1983). Facilitating education for older learners. London, Jossey-Bass Publishers.
- Phillipson, C. (1982). Capitalism and the construction of old age, London, The MacMillan Press Ltd.
- Phillipson, C. (1983). The state, the economy and retirement. In Anne-Marie Guillemard (Ed.), Old Age and the Welfare State. California, Sage Publications.

- Pritchard, D. C., & Tomb, K. (1981). Emerging new service roles for older adults in college and university campuses. Educational gerontology: An international Quarterly, 7, 167-175.
- Ruffin, S. C., Jr. (1984). School-business partnerships: Why not? Journal of educational public relations, 7(2), 4-9.
- Ruhm, C. J. (1989). Why older Americans stop working. The Gerontological Society of America, 29 (3), 294-299.
- Rothman, R. A. (1987). Working: Sociological perspectives. New Jersey, Prentice Hall.
- Schaie, K. W., (1983). Longitudinal studies of adult psychological development. New York, The Guilford Press.
- Schlossberg, N. K. (1981). A model for analyzing human adaptation to transition. The Counseling Psychologist, 9(2) 2-18.
- Swartz, E. I. (1978). The older adult: Creative use of leisure time. The Journal of Geriatric Psychiatry, 11, 85-87.
- Thornton, J. E. & Collins, J. B. (1986). Patterns of leisure and physical activities among older adults, Activities, Adaptation and Aging, 8(2), 5-27.
- Tinsley, H. E. A., Teaff, J. D., Colbs, S. L. & Kaufman, N. (1985). A system of classifying leisure activities in terms of the psychological benefits of participation reported by older persons. Journal of Gerontology, 40(2), 172-178.
- Tinsley, H. E. A., Teaff, J. D., Colbs, S. L. & Kaufman, N. (1987). The relationship of age, gender, health and economic status to the psychological benefits older persons report from participation in leisure activities. Leisure Sciences, 9(1), 53-65.
- Walker, A. (1983). Social policy and elderly people in Great Britain: The construction of dependent social and economic status in old age. In Anne-Marie Guillemard (Ed.), Old Age and the Welfare State. London, Sage Publications.
- Wiersma, W. (1986). Research methods in education: An introduction. Boston, Allyn and Bacon, Inc.
- Willis, S. L. (1985). Towards an educational psychology of the older adult learner: Intellectual and cognitive bases. Handbook of the Psychology of Aging, James E. Birren and K. Warner Schaie (eds.), New York, Van Nostrand Reinhold Company.
- Yalom, I. D. (1980). Existential psychotherapy, New York, Basic Books.

## **APPENDICES**



**APPENDIX A**  
**LETTERS OF TRANSMISSION TO EMERITI**  
**FROM THE UNIVERSITY OF BRITISH COLUMBIA**  
**AND SIMON FRASER UNIVERSITY**

# THE UNIVERSITY OF BRITISH COLUMBIA



**Adult Education**  
Department of Administrative,  
Adult and Higher Education  
5760 Toronto Road  
Vancouver, B.C. Canada V6T 1L2  
Tel: (604) 822-5881  
Fax: (604) 822-6679

Dr. John Emeritus  
5760 Toronto Road  
Vancouver, B. C.  
V7V 8K8

March 20, 1992

Dear Dr. Emeritus

I am doing a magistral study at the University of British Columbia that is concerned with the activity patterns of retired professors and university instructors. As a senior scholar you and what you do, are of particular interest to this study. The enclosed questionnaire explores three activities in which people participate (i.e. work, volunteering, and recreation) and their reasons for what they do. Would you kindly complete this questionnaire (it takes about twenty-five minutes) and send it to me by using the enclosed, postage paid, return envelope.

This is a province wide study. You and the other participants have been selected from the three major universities: the University of British Columbia, the University of Victoria, and Simon Fraser University. The results of this study will contribute to the current knowledge about professors and university instructors.

Your participation in this study is voluntary and you are under no obligation to complete this questionnaire. Any personal information about you is completely confidential.

Thank-you for your assistance with this study. If you would like to receive a summary of the findings from this investigation, please check the box below and return this letter with your completed questionnaire.

Yours Truly

Alard Malek  
Masters Candidate

Dr. James Thornton  
Department of Administrative,  
Adult, and Higher Education

Please send me a summary of the findings from this investigation. ☐

# THE UNIVERSITY OF BRITISH COLUMBIA



**Adult Education**  
Department of Administrative,  
Adult and Higher Education  
5760 Toronto Road  
Vancouver, B.C. Canada V6T 1L2  
Tel: (604) 822-5881  
Fax: (604) 822-6679

March 25, 1992

Dear Professor Emeritus

I am doing a magistral study at the University of British Columbia that is concerned with the activity patterns of retired professors and university instructors. As a senior scholar you, and what you do, are of particular interest to this study. The enclosed questionnaire explores three kinds of activities in which people participate (i.e. work, volunteering, and recreation) and their reasons for what they do. Would you kindly complete this questionnaire (it takes about twenty-five minutes) and send it to me by using the enclosed, postage paid, return envelope.

You and the other participants have been selected from the University of British Columbia and Simon Fraser University. The information you provide will contribute to the current knowledge about professors and university instructors.

Your participation in this study is voluntary and you are under no obligation to complete this questionnaire. Any personal information about you is completely confidential.

Thank-you for your assistance with this study. If you would like to receive a summary of the findings from this investigation, please complete the enclosed card and return it with your completed questionnaire.

Yours Truly

Alard Malek  
Masters Candidate

Dr. James Thornton  
Thesis Advisor

**APPENDIX B**  
**FOLLOW-UP LETTER OF TRANSMISSION**

# THE UNIVERSITY OF BRITISH COLUMBIA



**Adult Education**  
Department of Administrative,  
Adult and Higher Education  
5760 Toronto Road  
Vancouver, B.C. Canada V6T 1L2  
Tel: (604) 822-5881  
Fax: (604) 822-6679

April 28, 1992

Dr. John Emeritus  
5760 Toronto Road  
Vancouver, B. C.  
V9L 9X9

Subject: The Work, Volunteering, and Recreation  
Patterns of Senior Scholars Questionnaire

Dear Dr. Emeritus

Thank-you for agreeing to complete the enclosed questionnaire a second time. Your added efforts are greatly appreciated and will help establish the validity and reliability of this study.

The initial findings of the questionnaire are most encouraging and portray a vibrant image of the Senior Scholar. I feel these results suggest a variable perspective about the ongoing activities of Senior Scholars.

After you have completed the questionnaire, please return it to me in the enclosed, postage paid, envelope. If you require any additional information about this study, please telephone me at 736-7521.

Yours Truly

Alard Malek  
Masters Candidate

**APPENDIX C**  
**QUESTIONNAIRE**

## **THE UNIVERSITY OF BRITISH COLUMBIA**

### **The Work, Volunteering, and Recreation**

#### **Patterns of Senior Scholars**

### **INTRODUCTION**

Work, volunteering, and recreation are three major activities which people perform. This questionnaire explores how often you engage in these activities and the reasons for your activities. Personal definitions of work, volunteering, and recreation vary from person to person; section A of the questionnaire invites you to attach your own definitions to a list of general activities. Section B, allows you to identify how important are various reasons for what you do. The final section of the questionnaire asks for some personal information to help explain how people's activity patterns differ.

The answers you provide will be compared to those from people of a similar profession. There are no right or wrong answers. Your participation in this study will contribute to the field of knowledge about people's behavior across the life span.

Your participation in this study is voluntary and you are under no obligation to complete this questionnaire. The data collected is anonymous and your identity will be kept confidential.

Completion of this questionnaire is your agreement to participate in this study. The questionnaire takes about twenty to twenty-five minutes to finish. If you would like additional information please contact one of the researchers below.

Alard Malek (736-7521)  
Masters Candidate

Dr. James Thornton (822-2081)  
Department of Administrative, Adult  
and Higher Education

**Section A:****ACTIVITIES****Directions:**

People engage in a variety of activities which they may define as work, volunteering, or recreation. How they define an activity seems to depend on its context. For example, writing to a business associate may be seen as work; writing for a voluntary organization may be viewed as volunteering; and writing to a friend might be thought of as recreation. In each instance the activity (writing) is the same.

In the left hand column below are a series of activities which people commonly do. Please read the activities and report how often you participate in each one: as work, as volunteering, and as recreation by circling the abbreviation according to this coding system:

N = Never    Y = Yearly    Q = Quarterly    M = Monthly    W = Weekly    D = Daily

**Example:**

If you talk on the telephone daily for work, monthly as a volunteer, and weekly for recreation, you would mark the columns as follows:

<b><u>ACTIVITY</u></b>	<b><u>Work</u></b>	<b><u>Volunteering</u></b>	<b><u>Recreation</u></b>
talking on telephone	N Y Q M W D	N Y Q M W D	N Y Q M W D

For every activity, circle one letter in each of the three columns. Your first impression is usually the most accurate, so work rapidly and please do not skip any items.

<b><u>ACTIVITY</u></b>	<b><u>Work</u></b>	<b><u>Volunteering</u></b>	<b><u>Recreation</u></b>
1. gardening	N Y Q M W D	N Y Q M W D	N Y Q M W D
2. watching films or movies	N Y Q M W D	N Y Q M W D	N Y Q M W D
3. household maintenance	N Y Q M W D	N Y Q M W D	N Y Q M W D
4. visiting friends and relatives	N Y Q M W D	N Y Q M W D	N Y Q M W D
5. chairing meetings	N Y Q M W D	N Y Q M W D	N Y Q M W D
6. cooking	N Y Q M W D	N Y Q M W D	N Y Q M W D
7. entertaining	N Y Q M W D	N Y Q M W D	N Y Q M W D
8. attending entertainment events	N Y Q M W D	N Y Q M W D	N Y Q M W D
9. attending religious services	N Y Q M W D	N Y Q M W D	N Y Q M W D
10. travelling	N Y Q M W D	N Y Q M W D	N Y Q M W D



N = Never    Y = Yearly    Q = Quarterly    M = Monthly    W = Weekly    D = Daily

<b><u>ACTIVITY</u></b>	<b><u>Work</u></b>	<b><u>Volunteering</u></b>	<b><u>Recreation</u></b>
11. using a computer	NYQMWD	NYQMWD	NYQMWD
12. taking pictures (photography)	NYQMWD	NYQMWD	NYQMWD
13. teaching	NYQMWD	NYQMWD	NYQMWD
14. providing my skills and expertise to organizations	NYQMWD	NYQMWD	NYQMWD
15. writing	NYQMWD	NYQMWD	NYQMWD
16. reading	NYQMWD	NYQMWD	NYQMWD
17. providing service to community agencies.	NYQMWD	NYQMWD	NYQMWD
18. leading seminars	NYQMWD	NYQMWD	NYQMWD
19. visiting clients	NYQMWD	NYQMWD	NYQMWD
20. repairing things	NYQMWD	NYQMWD	NYQMWD
21. providing my skills and expertise to individuals	NYQMWD	NYQMWD	NYQMWD
22. getting physical exercise	NYQMWD	NYQMWD	NYQMWD
23. managing projects	NYQMWD	NYQMWD	NYQMWD
24. performing research	NYQMWD	NYQMWD	NYQMWD
25. participating in sports	NYQMWD	NYQMWD	NYQMWD
26. doing arts and crafts	NYQMWD	NYQMWD	NYQMWD
27. meeting with people	NYQMWD	NYQMWD	NYQMWD
28. mentoring	NYQMWD	NYQMWD	NYQMWD
29. problem solving	NYQMWD	NYQMWD	NYQMWD
30. playing games	NYQMWD	NYQMWD	NYQMWD
31. watching television	NYQMWD	NYQMWD	NYQMWD
32. public speaking	NYQMWD	NYQMWD	NYQMWD

**Section B:****REASONS**

Here is a list of reasons which people often give to explain their own activities. Please circle the phrase which best reflects the importance of each reason in your particular pattern of activities.

**Example**

If the reason "to stay physically fit" is highly important, circle highly important .

1. To stay physically fit.	not at all	somewhat important	moderately important	highly important	critically important
<hr/>					
1. To use my skills.	not at all	somewhat	moderately	highly	critically
2. To give my life purpose.	not at all	somewhat	moderately	highly	critically
3. To earn money for basic expenses, e.g. food, shelter, and clothing.	not at all	somewhat	moderately	highly	critically
4. To fulfill my obligations to society.	not at all	somewhat	moderately	highly	critically
5. To spend time with friends, colleagues, and peers.	not at all	somewhat	moderately	highly	critically
6. To express my creativity.	not at all	somewhat	moderately	highly	critically
7. To avoid stagnating.	not at all	somewhat	moderately	highly	critically
8. To have new experiences.	not at all	somewhat	moderately	highly	critically
9. To structure my time.	not at all	somewhat	moderately	highly	critically
10. To remain professionally involved.	not at all	somewhat	moderately	highly	critically
11. To keep myself active.	not at all	somewhat	moderately	highly	critically
12. To exercise choice and control in my life.	not at all	somewhat	moderately	highly	critically
13. To enjoy freedom from obligation.	not at all	somewhat	moderately	highly	critically

14. To continue work after retirement.	not at all	somewhat	moderately	highly	critically
15. To do well at what I do.	not at all	somewhat	moderately	highly	critically
16. To augment my income.	not at all	somewhat	moderately	highly	critically
17. To experience comfortable physical surroundings.	not at all	somewhat	moderately	highly	critically
18. To learn about things.	not at all	somewhat	moderately	highly	critically
19. To experience challenge.	not at all	somewhat	moderately	highly	critically
20. To promote the welfare of my family.	not at all	somewhat	moderately	highly	critically
21. To keep doing what I've always done.	not at all	somewhat	moderately	highly	critically
22. To compensate for what I lost from work after retirement.	not at all	somewhat	moderately	highly	critically
23. To contribute to the welfare of the next generation.	not at all	somewhat	moderately	highly	critically
24. To enjoy myself.	not at all	somewhat	moderately	highly	critically
25. To keep in tune with my personal being.	not at all	somewhat	moderately	highly	critically
26. To experience changes.	not at all	somewhat	moderately	highly	critically
27. To compete with others.	not at all	somewhat	moderately	highly	critically
28. To contribute to society.	not at all	somewhat	moderately	highly	critically
29. To continue with the career interests I had prior to retirement.	not at all	somewhat	moderately	highly	critically
30. To participate in cultural activities.	not at all	somewhat	moderately	highly	critically
31. To keep up to date.	not at all	somewhat	moderately	highly	critically
32. To create meaning in my life.	not at all	somewhat	moderately	highly	critically

33. To do the things I was unable to do during my working career.	not at all	somewhat	moderately	highly	critically
34. To promote my well being and fitness.	not at all	somewhat	moderately	highly	critically
35. To balance my physical, social, and emotional needs.	not at all	somewhat	moderately	highly	critically
36. To enjoy a sense of solitude and peace.	not at all	somewhat	moderately	highly	critically
37. To share experiences with people I feel close to.	not at all	somewhat	moderately	highly	critically

### Section C:

### PERSONAL INFORMATION

The next 7 questions ask how you feel about these areas of your life and living conditions. Please circle the phrase which best describes your feelings.

1. How do you feel about your health?

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion
----------------	--------------------	-----------------------	-------------------	------------

2. How do you feel about your finances?

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion
----------------	--------------------	-----------------------	-------------------	------------

3. How do you feel about your housing?

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion
----------------	--------------------	-----------------------	-------------------	------------

4. How do you feel about your family relations.

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion
----------------	--------------------	-----------------------	-------------------	------------

5. How do you feel about your friendships?

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion
----------------	--------------------	-----------------------	-------------------	------------

6. How do you feel about your life as a whole?

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion
----------------	--------------------	-----------------------	-------------------	------------

7. Would you describe yourself as ...

Very Happy	Somewhat Happy	Somewhat Unhappy	Very Unhappy	No Opinion
------------	----------------	------------------	--------------	------------

In this final segment, please take a few moments to provide us with some information about yourself. Please fill in the blank or circle the best answer.

8. What is your age? \_\_\_\_ 9. Gender : Male Female

10. What is your marital status? (Please circle the correct phrase.)

Married Widowed Divorced Never married Other \_\_\_\_\_

11. When did you retire from the university? .... a.) Prior to the mandatory age  
(Circle only one.) b.) At the mandatory age  
c.) After the mandatory age  
d.) Not applicable.

12. Which rank best describes your pre-retirement academic status?

Full Professor Associate Professor Assistant Professor Senior Instructor Other \_\_\_\_\_

13. Did you want to retire? Yes No Not yet retired

14. Do you have emeritus status? Yes No

15. What is your academic specialty?

Applied Science Arts/ Humanities Law Medicine Dentistry Education Forestry  
Agricultural Science Commerce & Business Administration Engineering Pharmaceutical Science Other \_\_\_\_\_

16. Are you currently receiving income from any of the following pension programs?  
(Please circle all that apply.)

University TIAA-CREF CPP Old Age Other \_\_\_\_\_ Not Yet Receiving Pension

17. Are you receiving income from other sources? ... Yes No Not yet

18. Do you consider yourself "retired?" Yes No No opinion

		<u>Before</u>	<u>After</u>
19. What percentage of your working time have you spent in these activities. Please state how you allocated your time both before and after retirement. Please ensure that the activities total 100% in each column.	Teaching	_____	_____
	Research	_____	_____
	Consulting	_____	_____
	Public & community service	_____	_____
	Other	_____	_____
	Total	100%	100%

20. Identify three professional organizations you belonged to prior to retirement. (Select the ones you were most active in.)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

21. Identify three professional organizations you currently belong to. (Select the ones you are most active in.)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

**Optional Section:**

In an effort to help verify this survey's reliability and validity, would you be prepared to complete this survey again in about two weeks time? If so, please put your name and mailing address in the space below. (Your identity will remain confidential and completion of this optional section is voluntary.)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Thank-you** for your time and effort in completing this questionnaire. Your participation in this study will contribute to the field of knowledge about people's behavior across the life span.

# APPENDIX D

## ACTIVITIES DEFINED AS VOLUNTEERING

### BY GENDER, AGE, TIMING OF RETIREMENT, WANTED TO RETIRE,

### CONSIDERED SELF RETIRED, AND GENERAL SATISFACTION

Activity	Gender	Age	Timing	Want	Retired	Life
1. gardening	.07	.05	-.02	-.13*	.11	.00
2. watching films or movies	-.01	.02	.20*	.06	.16	-.11
3. household maintenance	-.11	.04	.07	.00	.06	-.13*
4. visiting friends and relatives	.05	.15*	.04	-.08	.07	-.07
5. chairing meetings	.03	.07	.06	-.07	-.01	.22**
6. cooking	.01	.02	.05	-.02	.16*	-.14*
7. entertaining	-.01	.11	.13*	.02	.10	-.09
8. attending entertainment events	-.05	.05	.04	.00	.13*	-.06
9. attending religious services	-.10	.06	-.01	.01	-.04	-.00
10. travelling	-.11	.06	.11	-.07	.00	-.03
11. using a computer	.15*	-.02	-.01	-.17*	.04	.11
12. taking pictures	.02	.09	.08	.04	.03	.00
13. teaching	.00	-.10	.06	-.16*	.07	-.09
14. skills & expertise to orgs..	.13	.07	-.01	-.19	-.10	.08
15. writing	.08	.14*	.11	-.09	.07	.09
16. reading	.07	.08	.10	-.13	.08	.10
17. serving community agencies	.04	.07	-.01	-.11	-.09	.13*
18. leading seminars	.05	.07	.11	-.07	.11	.16
19. visiting clients	.02	-.05	.00	-.10	.02	.02
20. repairing things	-.07	.09	.01	-.04	.05	-.16*
21. skills & expertise to inds.	.10	.06	.09	-.15*	-.02	.08
22. getting physical exercise	.04	.20	.18	-.04	.12	-.10
23. managing projects	.07	-.05	.03	-.18*	.03	.13
24. performing research	.05	.14*	.14*	-.07	.10	.06
25. participating in sports	-.04	.10	.09	.15*	.05	-.19*
26. doing arts & crafts	.06	.06	-.03	-.09	.18*	-.02
27. meeting with people	.04	.06	.07	-.10	.02	.11
28. mentoring	.24**	.01	.07	-.15*	.06	.04
29. problem solving	.08	.00	.07	-.16*	.02	.05
30. playing games	.11	.01	-.04	-.08	.13*	-.16*
31. watching television	.05	.04	.12	-.03	.25**	-.02
32. public speaking	-.09	.11	.15*	-.03	.03	.11

#### Key

\*p<.05; \*\*p<.001

Gender (-r=male, +r=female). Age (-r=younger, +r=older). Timing (-r=earlier retirement, +r=later retirement). Wanted (-r=wanted to retire, +r=did not want to retire). Retired (-r=considers self retired, +r= does not consider self retired). Life (-r=lower general satisfaction, +r=higher general satisfaction).

## APPENDIX E

### ACTIVITIES DEFINED AS RECREATION

#### BY GENDER, AGE, TIMING OF RETIREMENT, WANTED TO RETIRE,

#### CONSIDERED SELF RETIRED, AND GENERAL SATISFACTION

---

<u>Activity</u>	<u>Gender</u>	<u>Age</u>	<u>Timing</u>	<u>Want</u>	<u>Retired</u>	<u>Life</u>
1. gardening	.16*	-.03	.03	-.04	-.15*	.00
2. watching films or movies	-.05	-.11	-.05	-.08	-.05	-.06
3. household maintenance	-.16*	-.05	.07	-.03	.12	-.05
4. visiting friends and relatives	.24**	.07	.02	.02	.05	.08
5. chairing meetings	-.00	.01	-.09	.01	.12	.02
6. cooking	.10	-.09	-.20*	-.02	.11	.13*
7. entertaining	.14	-.02	-.11	-.12	.01	.09
8. attending entertainment events	.26**	.08	-.09	-.03	-.08	.08
9. attending religious services	.22*	-.06	-.07	.02	.02	.05
10. travelling	.05	-.04	-.11	-.12	-.04	.10
11. using a computer	-.02	-.16*	.02	-.07	.05	.01
12. taking pictures	-.05	-.10	.00	-.08	-.10	.07
13. teaching	.01	.04	-.01	-.09	.04	-.09
14. skills & expertise to orgs..	.16	.07	-.12	-.18*	.04	.03
15. writing	.08	.20*	.02	-.09	.00	.06
16. reading	.05	.18	.01	.00	-.06	-.06
17. serving community agencies	.11	.15*	.06	-.07	-.02	.01
18. leading seminars	-.02	.02	.04	-.07	.00	.00
19. visiting clients	-.06	.15*	-.09	-.04	.04	-.05
20. repairing things	-.30**	-.14*	-.09	-.15	.00	.06
21. skills & expertise to inds.	.18*	.09	.06	-.13*	-.05	.04
22. getting physical exercise	-.03	.01	-.02	-.03	-.08	.03
23. managing projects	.16*	-.03	-.02	-.20*	.01	.02
24. performing research	-.05	.12*	.11	-.03	.10	.00
25. participating in sports	-.07	-.09	-.15*	-.04	.05	.13*
26. doing arts & crafts	.27**	-.03	-.06	-.19*	.04	-.04
27. meeting with people	.26**	.14*	.07	.06	.14*	.05
28. mentoring	.17*	-.12	.01	-.09	.12	.03
29. problem solving	.00	-.04	-.07	-.01	.05	-.08
30. playing games	-.02	.05	-.05	-.10	-.06	.06
31. watching television	.07	-.02	.03	-.07	.02	.13*
32. public speaking	.00	.13*	.04	.00	.01	-.02

---

#### Key

\*p<.05; \*\*p<.001

Gender (-r=male, +r=female). Age (-r=younger, +r=older). Timing (-r=earlier retirement, +r=later retirement). Wanted (-r=wanted to retire, +r=did not want to retire). Retired (-r=considers self retired, +r= does not consider self retired). Life (-r=lower general satisfaction, +r=higher general satisfaction).