

LEISURE ACTIVITY AND ADJUSTMENT TO THE
RETIREMENT PROCESS

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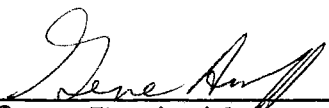
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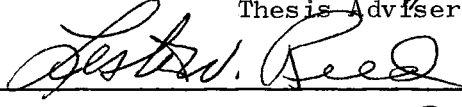
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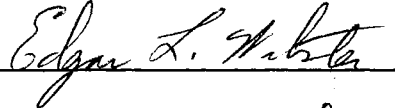
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CHAPTER I

INTRODUCTION

Since the beginning of the twentieth century, there has been a dramatic increase in leisure time for every age group within the United States society. The retirement age has been lowered, vacation time has been extended, and the average work week has been shortened. As examples of this trend, the average weekly hours of work have declined from 61.9 in 1890 to 40.7 in 1963 and to 39.8 in 1970. The increase in paid holidays has been from about two per year in 1890 to six per year now, and paid vacations have also increased from about four days per year in 1890 to ten days per year now.¹

In addition to this general trend toward more leisure time throughout the society, the postwork leisure role, or retirement, is more available to or is being forced upon increasing numbers of persons. There has been a rapid rise in the number of retirees both absolute and in proportion to other age groups. In 1900, there were three million people aged 65 and over in the United States, eighteen million in 1965, and over twenty million in 1970. The proportion of the population aged

¹ Juanita Kreps and Joseph Spengler, "The Leisure Component of Economic Growth," in National Commission on Technology, Automation and Economic Progress, The Employment Impact of Technological Change: Appendix Vol. II, Technology and the American Economy (Washington, D.C., 1966), pp. 353-397.

65 and over rose from four percent in 1930 to nearly nine percent in 1960 and to 9.7 percent in 1970.²

Another factor to be considered concerning increase of leisure for older persons is life expectancy. Individuals tend to live longer today than in 1900. Table I illustrates this trend for fifty-year-olds.

TABLE I
EXPECTATION OF LIFE IN THE UNITED STATES, AT AGE 50

	White Male	White Female	Nonwhite Male	Nonwhite Female
1900-1902	20.76	21.89	17.34	18.67
1909-1911	20.39	21.74	16.21	17.65
1919-1921	22.22	23.12	20.47	19.76
1929-1931	21.51	23.41	17.92	18.60
1939-1941	21.96	24.72	19.06	20.95
1949-1951	22.83	26.76	20.25	22.67
1965	23.20	28.50	21.00	25.00

Source: Statistical Bulletin of the Metropolitan Life Insurance Co. Compiled from various publications of the National Vital Statistics Division, National Center for Health Statistics, and the Bureau of the Census.

²Francis M. Carp, The Retirement Process, Report of a Conference, U. S. Department of Health, Education, and Welfare (Washington, D.C., 1966), pp. 13-14; and Herman Brotman, Facts and Figures on Older Americans, U. S. Department of Health, Education, and Welfare, 1971.

This trend toward increased leisure time can be expected to continue due to the increase in technology, automation, and particularly for the older person, medical advances which are aimed at extending life past the present expectancy.³ People aged 65 and over today are the first group to experience this increase in leisure time. As one group of authors points out:

. . . the emerging pattern of social life which we designate as retirement represents the development in modern society of a new and distinct role available universally for ever larger number of persons which has virtually no precedence in existing or previous forms of social organization. Retirement is the creation of an economically nonproductive role in modern societies which are capable of supporting large numbers of persons whose labor is not essential to the functioning of the economic order. As a process, retirement is the prescribed transition from the position of an economically active person to the position of an economically nonactive person in accordance with the norms through which society defines this change.⁴

If these trends are maintained, younger aged groups will probably experience the shift from economic activity to nonactivity much earlier than the present group of retirees. As Carp points out, "Older workers are the 'trial piece' on which society will learn about the new leisure, but retirement can no longer be equated with old age."⁵

The practical questions concerning this trend are obvious. How is this free time employed? Can a person engage in meaningful leisure for extended periods of time? More specifically for the older person, Riley

³Herbert M. Golden, "The Dysfunctional Effect of Modern Technology on the Adaptability of the Aging," The Gerontologist, 13 (Summer, 1973), pp. 136-143.

⁴W. Donahue, H. Orbach, and O. Pollack, "Retirement: the Emerging Social Pattern," in Tibbits, C. (ed.), Handbook of Social Gerontology (Chicago, 1960), pp. 330-397.

⁵Carp, p. 15.

and Foner have asked, How is society setting the stage for the retiree? Is meaningful use of leisure in old age contingent upon participation and practice in leisure activities during the pre-retirement years?⁶

Other writers have also addressed themselves to this issue. Warren Peterson has set, as a research priority, the investigation of possible trends in the use of leisure time. He suggests the following:

To the extent, for example, that research establishes that retired people (or certain types of retired people) are developing a truly meaningful life in resort areas or in mobile homes, combined with the potential acceleration of such patterns, the problem becomes broadened to include the ecology of resort environments and possibilities for encouraging the migration of retired people from congested metropolitan areas.⁷

He further suggests that research should be systematically developed and implemented on select, relatively homogeneous groups.

Vivian Wood notes that several studies indicate that new patterns of behavior in retirement are emerging among small subgroups of older adults which find acceptance in the particular subgroups of which they are a part and which may eventually be accepted in the wider society. She further states that:

. . . evidence for the emergence of norms for mobile leisure-oriented kinds of behavior in retirement is growing. We are witnessing increasing numbers of persons retiring well before age 65 who are in good physical condition and who have had much more experience with leisure and mobility than earlier generations of older persons. It may be expected that some of these persons will be 'pioneers' in creating new and different life patterns in retirement. These individuals and subgroups may well be setting the patterns which retirees will adopt in increasing numbers. In order to anticipate

⁶Matilda Riley and Anne Foner, Aging and Society, Vol. I (New York, 1968), p. 511.

⁷Warren Peterson, "Research Priorities on Perceptions and Orientations Toward Aging and Toward Older Persons," The Gerontologist, 11 (Winter, 1971), p. 62.

emergent life styles it is important to study subcultures such as different types of retirement communities and housing developments and to investigate the experiences of innovative individuals such as early retirees or those who take sabbaticals in midlife before turning to new careers.⁸

This call for research has also been continued by Carp when she says, "Because of the number of persons anticipated in the new developmental period, such studies should not be delayed."⁹ As a final note regarding groups of retiring persons deserving special attention, she contends that:

In order to obtain optimal as well as normative views of retirement, 'successful' retirees should be studied. In addition, social and medical forecasts suggest that future retirees will be in more favorable circumstances and that they will enjoy better health than persons retiring today. Therefore, special efforts should be made to identify and study the retirement of elite and advantaged groups.¹⁰

Research designed specifically for the investigation of the aforementioned suggestions has been sparse. Several indications have pointed to an increasing interest in outdoor recreation as a possible trend. For instance national park visits, purchases of outboard motors, and the number of fishing licenses issued have increased more rapidly than the United States population itself or the disposable income per capita.¹¹ The proportion of recreational expenditures for sports equipment has

⁸Vivian Wood, "Age Appropriate Behavior for Older People," The Gerontologist, 11 (Winter, 1971), p. 75.

⁹Carp, p. 13.

¹⁰Ibid., p. 156.

¹¹Outdoor Recreation Resources Review Commission, 1962, Outdoor Recreation for America, Final Report (Washington, D.C.), p. 213.

been steadily rising,¹² and finally the number of swimming pools, beaches, playgrounds, and similar facilities increased by some 75 percent between 1940 and 1950.¹³

These indications most certainly reflect interesting implications for all age groups. However, more specifically for the older person, several writers have been especially concerned. As the amount of leisure time has increased, the retirement age has decreased and retirement benefits have increased. A recent report indicates the following: In early 1962 approximately 1.5 million workers had retired on social security before age 65 -- or 16.3 percent of all retired workers collecting benefits. These figures increased to 4.1 million or 34.4 percent of all retired workers collecting benefits.¹⁴ In other words there are more retirees with more money and time on their hands than ever before.

Statement of the Problem

This research will examine the nature and types of activities in which retirees have become involved and the effects of the involvement on the variables of life satisfaction and self-esteem. Though answers to many practical questions will be sought, the research will not be without theoretical implications. The present gero-sociological literature abounds with correlates of successful aging. The theory in this

¹²Sebastian de Grazia, Of Time, Work, and Leisure (Garden City, New York, 1964), p. 535.

¹³Fortune, Editors of, 1958, "\$30 Billion for Fun," in Eric Larrabee's Mass Leisure (Glencoe), pp. 161-172.

¹⁴Frances Carp, ed., Retirement (New York, 1972), p. 56.

area is not without contradiction and controversy where the concept of activity in retirement is considered. As an attempt to clarify existing theory, this research will examine the relationship between the number of activities and the effects of activity types on the aforementioned dependent variables, which are generally considered indicators of successful aging.

CHAPTER II

OVERVIEW AND CRITIQUE OF CONTEMPORARY
GERONTOLOGICAL THEORY

Social gerontology is a relatively new academic discipline which has yet to establish an integrated body of theory. It primarily arose during the late forties and early fifties under the influence of Merton's call for theory of the "middle-range."¹ Because of this it began with numerous small scale studies and little or no attempt at integration of the findings into broader generalizations. In 1955, Bernard Kutner's book, Five Hundred Over Sixty, marked the turning point for the discipline and numerous large scale studies began to appear.² These studies led to the formulation of two major theoretical approaches to aging; namely, the activity theory and the disengagement theory. These two theories have remained the major thrusts in social gerontology despite several newly formulated theories and numerous critiques of each of the "older" theories. The following discussion represents an overview of these two major theories as well as a presentation of other more recent theoretical perspectives.

¹Robert K. Merton, Social Theory and Social Structure (New York, 1957), pp. 5-11.

²Bernard Kutner et al., Five Hundred Over Sixty, A Community on Aging (New York, 1956).

The Activity Theory³

The activity theory was one of the first frameworks for research in the area of social gerontology. It guided research in the 1940's through the 1960's and continues to be an approach in much of today's literature.

The theory, though not formally formulated as a theory, provided the implicit underlying framework for the early research in social gerontology. Not until the introduction of the disengagement theory did it become an explicit theoretical perspective. It is regarded as the polar opposite of the disengagement position and because of this has received its due recognition.

Havighurst has summarized the activity theory as follows:

. . . the activity theory implies that, except for the inevitable changes in biology and in health, older people are the same as middle-aged with essentially the same psychological and social needs. In this view, the decreased social interaction that characterizes old age results from the withdrawal by society from the aging person; and the decrease in interaction proceeds against the desires of most aging men and women. The older person who ages optimally is the person who stays active and who manages to resist the shrinkage of his social world. He maintains the activities of middle age as long as possible, and then finds substitutes for work when he is forced to retire, and substitutes for friends and loved ones whom he loses by death.⁴

Thus, the basic assumption of the activity approach is that high morale or successful aging is dependent upon a maintenance of the social

³The discussion of these theories was greatly facilitated by an annotated bibliography of the aging literature compiled by David Adams and David Oliver and distributed by the Institute of Community Studies, Kansas City, Missouri, 1968.

⁴Robert Havighurst in Age With a Future, (ed.), P. Hansen (Philadelphia, 1964), p. 49.

activity patterns of middle-age. This assumption has been the subject of several investigations.

Implicit in the work of Cavan, Burgess, Havighurst, and Goldhammer is the proposition that retirement or old age brings with it a decreasing number of roles (Burgess first coined the term "roleless role" of the aged) for the older person, which may lead to a reorientation of attitudes and behavior to meet the requirements of the new situation.⁵ The extent to which the individual successfully adapts to his new position may be termed as how well he has personally adjusted. The authors divide the cycle of personal adjustment into five phases: (1) adjustment to the original situation, (2) stimulation or frustration arising from entrance into a new situation, (3) unadjustment during the period of the blocking of reaction, (4) maladjustment to the new situation, and (5) readjustment, which may take place in one or more typical ways. The relevance of this cycle for activity theory is found in the readjustment phase. The authors say:

Many older persons pass from the unadjusted to the readjusted stage without going through a period of maladjustment. In either case, however, readjustment is mediated by one of two processes: (a) reorientation of attitudes . . . and (b) adaptation of activities.⁶

Kutner, Fanshel, Togo, and Langner contend that, "many older people require activities in retirement that will be substantial functional substitutes for the responsibilities of gainful employment, family

⁵Ruth Cavan, Ernest Burgess, Robert Havighurst, and Herbert Goldhammer, Personal Adjustment in Old Age (Chicago, 1949).

⁶Ibid., pp. 15-16.

rearing, and homemaking."⁷ The authors also acknowledge the belief that activity and activity programs promote health among the aged; however, they state that:

. . . our contention . . . is that not any activity but only activities that provide status, achievement, and recognition can lift morale, and that those that are not basically satisfying needs do not contribute much to the individual's adjustment.⁸

Rosow implies that friendships, or social activity, are necessary for the individual if he is to successfully adjust in his retirement years,⁹ and Bengston indicates that activity level correlates positively with life satisfaction.¹⁰ Following a study of social adjustment in old age, Pollack concluded that:

Retirement means that the derived need of the individual to engage in gainful activity is exposed to the danger of dissatisfaction, even if his financial needs are satisfied. The existence of such derived needs for gainful activity presents problems of occupational and vocational adjustment which merit investigation.¹¹

In an article which appeared in 1963, Britton, after assessing the adjustment of 123 old residents of a rural community and determining underlying dimensions of adjustment, reported, "The results showed that beneath the measures of adjustment there seemed to be three dimensions,

⁷Kutner et al., p. 103.

⁸Ibid., p. 104.

⁹Irving Rosow, Social Integration of the Aged (New York, 1967).

¹⁰Vern Bengston, "The Generation Gap: Differences by Generation and by Sex in the Perception of Parent-Child Relations," (A paper presented at the annual meeting of the Pacific Sociological Association, Seattle, April, 1969).

¹¹Otto Pollack, Social Adjustment in Old Age (New York, 1948), p. 126.

which are interpreted as an activity factor, a sociability factor, and a composure-serenity-integrity factor."¹²

As a final reference to activity theory, Tobin and Neugarten have supported this approach through a test of the disengagement theory. Their data seem to support the idea of engagement. In their words, "It appears that with advancing age engagement rather than disengagement is more closely related to psychological well being."¹³

In summary, activity theory is concerned with the fullest possible involvement with others. As the individual relinquishes his societal roles during the process of disengagement, successful aging demands the establishment of new activities, acquaintances, etc.

Criticisms of Activity Theory

There have been several major criticism of activity theory. Cumming and Henry, treating successful aging from their disengagement perspective have made two of them: (1) They had the opinion that the activity theory did not adequately deal with the social aspects of aging. Most activity theory was based upon an ephemeral idea of "feeling useful." They argue that feeling useful is not defined and that no rationale exists to make clear why the aged should be expected to feel that way. (2) The second criticism is that the place of death is not dealt with in activity theory. They feel that the ultimate reality of

¹²Joseph Britton, "Dimensions of Adjustment of Older Adults," Journal of Gerontology, 18 (1963), pp. 60-65.

¹³Sheldon Tobin and Bernice Neugarten, "Life Satisfaction and Social Interaction in Aging," Journal of Gerontology, 16 (1961), pp. 344-346.

death is ignored in order to justify the concept of an ever-expanding life.¹⁴

Another criticism of activity theory has been offered by Rosencranz. He states:

In the accumulating body of social gerontological literature an area which remains distinctively problematic relates to the adjustment role of the older person. Specifically, the most frequently used indexes of adjustment rely on criteria essentially composed of middle-age 'norms' and middle-age 'activity' assumptions. Thus, 'good adjustment' has been operationalized as social competency, social participation, life satisfaction, and morale by contemporary investigators and very often at comparison levels commensurate with earlier age standards.¹⁵

Finally, Arnold Rose has cited three weaknesses of the interactionist approach: (1) There is a neglect of biogenic and psychogenic influences on behavior, and sometimes even a tendency to assume that these do not exist. (2) There is a neglect of unconscious processes in behavior, and sometimes even a tendency to assume that these do not occur. (3) There is a neglect of power relationships between persons or groups, and while these are generally assumed to exist, they are seldom given due weight.¹⁶ That is, the quality of social relationships though few may be more important than the quantity of social relationships though many.

¹⁴Elaine Cumming and William Henry, Growing Old: The Process of Disengagement (New York, 1961), p. 13.

¹⁵Howard Rosencranz, "Role Perceptions of Significant Others by Older People," (Proceedings, Seventh International Congress of Gerontology, Vienna, 1966), pp. 237-240.

¹⁶Arnold Rose, Human Behavior and Social Process (Boston, 1962), p. x.

Disengagement Theory

Perhaps the first formally stated theory in social gerontology was the theory of disengagement. This theory, which has been the center of much research and controversy, was introduced in 1961 by Elaine Cumming and William Henry in their book, Growing Old: The Process of Disengagement.¹⁷ Unlike the activity theory, which is based in symbolic interactionism, the theory of disengagement is based in a structural-functional perspective and rests on the basic assumption that death is inevitable.

Cumming and Henry define disengagement as an "inevitable process in which many of the relationships between a person and other members of society are severed, and those remaining are altered in quality."¹⁸ From this basic definition the authors derive nine postulates concerning the disengagement process.

Postulate 1.

Although individuals differ, the expectation of death is universal, and decrement of ability is probable. Therefore, a mutual severing of ties will take place between a person and others in his society.

Corollary 1.

Because people differ in physiology, temperament, personality, and life situation, disengagement occurs earlier for some people than for others; furthermore, the precise number of bonds broken, and the number remaining, differ from person to person.

Corollary 2.

Because of the differences among people, qualitative changes that occur in relationships with the people to whom the aging individual is still bonded will vary from person to person.

¹⁷Cumming and Henry, 1961.

¹⁸Ibid., p. 102.

Postulate 2.

Because interactions create and affirm norms, a reduction in the number or variety of interactions leads to an increased freedom from the control of the norms governing everyday behavior. Consequently, once begun, disengagement becomes a circular or self-perpetuating process.

Postulate 3.

Because the central role of men in American society is instrumental, and the central role of women is socio-emotional, the process of disengagement will differ between men and women.

Postulate 4.

The life cycle of an individual is punctuated by ego changes; for example, aging is usually accompanied by decrements in knowledge and skill and at the same time, success in an industrialized society is based on knowledge and skill and age-grading is a mechanism used to insure that the young are sufficiently well trained to assume authority and the old are retired before they lose the skill. Disengagement in America may be initiated by either the individual because of ego changes or by the society because of organizational imperatives, or by both simultaneously.

Postulate 5.

When both the individual and society are ready for disengagement, complete disengagement results. When neither is ready, continuing engagement results. When the individual is ready and society is not, a disjunction between the expectations of the individual and of the members of his social system results, but usually engagement continues. When society is ready and the individual is not the result of the disjunction is usually disengagement.

Corollary 1.

If society is ready before the individual, lowered morale is the likely result.

Corollary 2.

If society dispenses with the skills of an individual who is not ready to disengage he may re-engage himself in another capacity.

Corollary 3.

If an individual has disengaged but society is not ready, society will re-engage him.

Postulate 6.

Because the abandonment of life's central roles, work for men, marriage and family for women, results in a dramatically reduced social life space, it will result in crisis and loss of morale unless different roles, appropriate to the disengaged state are available.

Postulate 7.

If the individual becomes sharply aware of the shortness of life and the scarcity of time remaining to him and if he perceives his life space as decreasing and if his available ego energy is lessened, then readiness for disengagement has begun.

Postulate 7b.

The needs of a legal-rational occupational system in an affluent society, the nature of the nuclear family and the differential death rate lead to society giving echelons of people its permission to disengage.

Postulate 8.

The reduction in interaction and the loss of central roles result in a shift in the quality of relationship in the remaining roles. There is a wider choice of relational rewards, and a shift from vertical solidarities to horizontal ones.

Corollary 1.

People of high prestige and power therefore shift to horizontal relations in serious disjunction, therefore retirement is a traumatic experience.

Postulate 9.

Disengagement is a culture-free concept, but the form it takes will always be culture bound.¹⁹

Even though the basic tenants of the theory have been maintained by the authors, they have made some alterations. In a later paper, Henry starts from the observed fact of disengagement rather than from the theoretical, functional necessity of it. He then allowed for possible reengagement and the inclusion of variable life styles.²⁰

¹⁹David Adams and David Oliver, Annotated Bibliography (Kansas City: Institute for Community Studies, 1968).

²⁰William Henry, "The Theory of Intrinsic Disengagement," (A paper presented at the International Gerontological Research Seminar, Markaryd, Sweden, 1963).

In another article, Cumming further modified the theory. She recognized four shortcomings: (1) the theory did not take into account such non-modal cases as widowhood before the marriage of the last child or of work protracted past the modal age of retirement; (2) there are individual differences in disengagement; (3) lively oldsters may increase their recreational activities; and (4) several other causes of disengagement besides the anticipation of death, such as rapid social change making obsolete some of the roles of older people, the gulf between generations in future-oriented society, and the drastic shift in roles for men when they retire.²¹

The theory of disengagement has been subject to a wealth of criticism. Diagramming the predictions of Postulate 5 as follows (Figure 1), Adams levies the criticism that if different roles of the same individual are considered, he may be placed in each of the cells of the diagram.²²

Perhaps one of the best critiques of disengagement theory has been given by Arnold Rose.²³ He contends that the disengagement theory has been misinterpreted. According to Rose:

The disengagement theory is not an hypothesis which states that as people get older, they are gradually separated from their associations and their social function. Nor does the theory of disengagement state that, as people become physically feeble or chronically ill, they are thereby forced to abandon their associations and social function Finally, the theory of disengagement does not say that because older

²¹Elaine Cumming, "New Thoughts on the Theory of Disengagement," in New Thoughts on Old Age, ed., Robert Kastenbaum (New York, 1964).

²²Adams and Oliver bibliography, 1968.

²³Arnold Rose, "A Current Theoretical Issue in Social Gerontology," in Older People and Their Social World, eds., Arnold Rose and Warren Peterson (Philadelphia, 1965).

people tend to have a reduced income in our society they can no longer afford to participate in many things.²⁴

SOCIETY	THE INDIVIDUAL	
	Ready to Disengage	Not Ready to Disengage
Ready to Disengage Individual	Well Adjusted Highest Morale Disengagement Occurs	Poorly Adjusted Lowest Morale Disengagement Occurs
Not Ready to Disengage Individual	Poor Adjustment Low Morale Remains Engaged	Well Adjusted High Morale Remains Engaged

Figure 1. The Predictions of Disengagement

He interprets disengagement as saying that, "the society and the individual prepare in advance for the ultimate 'disengagement' of incurable disease and death by an inevitable, gradual, and mutually satisfying process of disengagement."²⁵ From this orientation, Rose cites three lines of criticisms of the theory:

- (1) The first criticism holds that not only is it not inevitable but that non-engagement in the later years is simply a continuation of a life-long social-psychological characteristic of some people.²⁶

²⁴Ibid., p. 360.

²⁵Ibid., p. 360.

²⁶Ibid., p. 362.

This criticism is based on the research of Videbeck and Knox which indicated that 90 percent of non-participants after 65 years of age were non-participants five years earlier, while 90 percent of those participants after 65 were also participants five years earlier. The conclusion of these authors is that there is a type of person who has limited his social involvements throughout life and continues this pattern in old age. They do not think of disengagement as a process characteristic of old age exclusively.²⁷

- (2) The second criticism challenges the value judgement that disengagement is desirable for older people.²⁸

As a basis for this criticism, Rose cites Havighurst, Neugarten, and Tobin, who have presented empirical evidence that the engaged elderly, rather than the disengaged, are the ones who are generally, though not always, happiest and have the greatest expressed life satisfaction.²⁹

- (3) The third criticism is that in the context of the social structure and social trends, the theory is a poor interpretation of the facts.

Rose acknowledges that in the United States older people tend to lose many of their social roles, but this should not be considered a function of the culture for all times. He further indicates trends which are in the process of changing this situation. These include:

²⁷Richard Videbeck and Alan Knox, "Alternative Participatory Responses to Aging," in Rose and Peterson, pp. 37-48.

²⁸Rose, p. 363.

²⁹R. J. Havighurst, B. Neugarten, and S. Tobin, "Disengagement and Patterns of Aging," (Unpublished manuscript read at the International Gerontological Research Seminar, August, 1963).

- (1) Modern medical science and health practices are allowing an ever increasing number to remain in good health past 65.
- (2) Social security legislation and private pensions and annuities are slowly increasing the economic security of the retired.
- (3) Older people are beginning to form a social movement to raise their status and privileges and that this movement is increasing.
- (4) The trend toward earlier retirement from chief life role (work) may eventually lead to re-engagement.
- (5) The types of engagement for which older people would be eligible have increased . . . voluntary activities and hobbies.³⁰

Koller points out three criticisms of disengagement theory. The first criticism is that the theory does not explain aging in all people but is merely a life style of some. This same criticism in different form can be raised of all functional theories. What appears to be explanation is merely ideology. The second criticism by Koller is that disengagement is neither necessary nor desirable for all older people. Koller's third criticism is that the theory does not fit the facts concerning social structures and trends. Koller states,

As Rose notes, those who have disengaged have been forced into such a position by such pressures as youth orientation, compulsory retirement, and minimal opportunities in self-employment. None of these is irreversible³¹

Burgess notes that many myths about aging have sprung up in Western cultures to sanction what he called the "roleless role" of the aged. These myths include: the expectation of passive behavior on the part of the aging, the older person should take it easy, dependence upon others

³⁰Rose, p. 363.

³¹Marvin Koller, Social Gerontology (New York, 1968), pp. 151-153.

is considered to be the norm while custodial care in institutions is the norm for those who are too much of a burden upon kin. Withdrawal from participation is the expected norm upon departure from employment and typically no preparation for this withdrawal is expected to be necessary. Withdrawal is seen as "natural." As Burgess points out, these myths are detrimental to older people, prejudging them by an assumed universal normative standard.³²

Others have challenged various aspects of the theory of disengagement. Brehm,³³ Kutner,³⁴ and Maddox,³⁵ have challenged the alleged universality of the theory and propose that it is not applicable to all older people. Roman and Taietz³⁶ suggest incorporation of the intervening variable of opportunity structure, and Tallmer and Kutner³⁷ offer evidence that the impact of physical and social stress rather than age increases with the aging process.

Other critics include Rose and Peterson³⁸ who suggest that disengagement in later life may be a continuation of a life of low social

³²Ernest Burgess, "Aging in Western Societies," Aging in Western Society, ed., Ernest Burgess (Chicago, 1960), pp. 5-10.

³³R. Brehm, "Sociology and Aging: Orientations and Research," The Gerontologist, 8 (1962), pp. 24-31.

³⁴Bernard Kutner, "The Social Nature of Aging," The Gerontologist, 2 (1962), pp. 5-8.

³⁵B. Maddox, "Disengagement Theory: A Critical Evaluation," The Gerontologist, 4 (1964), pp. 80-82.

³⁶Roman and Taietz, "Organizational Structure and Disengagement: The Emeritus Professor," The Gerontologist, 7 (1967), pp. 147-152.

³⁷Tallman and Kutner, "Disengagement and the Stress of Aging," Journal of Gerontology, 24 (1969), pp. 70-75.

³⁸Rose and Peterson, pp. 362-363.

participation, and Streib³⁹ who summarizes studies of the aged as a minority group and concludes that the aged are not systematically deprived of power and privileges, are not excluded from public facilities, and are not precluded from jobs that they are qualified to perform. Furthermore, Glenn and Grimes⁴⁰ concluded from a study of political behavior that political interest and participation increased with advances in age, and Youmans⁴¹ found that while men experience disengagement from their work role, it does not necessarily follow that disengagement from family roles nor leisure activities is necessary.

Critique of the Activity and Disengagement

Theories

The two theories which have been covered to this point have been by far the dominant theoretical themes in the literature of social gerontology at this stage of its history. Each has its strong points as well as its weaknesses. As a summary of these two perspectives, this lengthy quote from Havighurst, Neugarten, and Tobin appears to be appropriate:

Our data provide convincing evidence of decline in both social and psychological engagement with increasing age. Disengagement seems to us to be a useful term by which to describe these processes of change.

In some ways our data support the activity theory of optimal aging: as level of activity decreases, so also do the individual's feelings of contentment regarding his present activity.

³⁹Gordon Streib, "Are the Aged a Minority Group?" Applied Sociology, ed., Alvin W. Gouldner (New York, 1965), p. 48.

⁴⁰Glenn and Grimes, "Aging, Voting, and Political Interest," American Sociological Review, 33 (1968), pp. 563-568.

⁴¹E. G. Youmans, "Studies of Family Disengagement Among Older Urban and Rural Women and Among Rural and Urban Men," Journal of Gerontology, 22 (1968), pp. 209-211.

The usual relationships found in this sample are high activity with positive affect; and low activity with negative affect. This relationship does not decrease after age 70.

At the same time, the data in some ways support the disengagement theory of optimal aging: there are persons who are relatively high in role activity who would prefer to become more disengaged from their obligations; there are also persons who enjoy relatively inactive lives.

We conclude that neither the activity theory nor the disengagement theory of optimal aging is itself sufficient to account for what we regard as the more inclusive description of these findings: that as men and women move beyond age 70 in a modern, industrialized community like Kansas City, they regret the drop in role activity that occurs in their lives.

At the same time, most older persons accept this drop as an inevitable accompaniment of growing old; and they succeed in maintaining a sense of self-worth and a sense of satisfaction with past and present life as a whole. Other older persons are less successful in resolving these conflicting elements--not only do they have strong negative affect regarding losses in activity; but the present losses weigh heavily, and are accompanied by a dissatisfaction with past and present life.

The relations between levels of activity and life satisfaction are influenced also by personality type, particularly by the extent to which the individual remains able to integrate emotional and rational elements of the personality. Of the three dimensions on which we have data--activity, satisfaction, and personality--we regard personality as the pivotal dimension in describing patterns of aging and in predicting relationships between level of activity and life satisfaction. It is for this reason, also, that neither the activity nor the disengagement theory is satisfactory, since neither deals, except peripherally, with the issue of personality differences.⁴²

Subculture Theory

Recognizing the limitations of each of the above predominant lines of gerontological thought, the late Arnold Rose developed a synthesizing framework for research which has been referred to as subculture theory. This theory sets forth as its basic assumption that, "a subculture may

⁴²R. J. Havighurst, B. Neugarten, and S. Tobin, in Hansen, Age With a Future, p. 52.

be expected to develop within any category of the population of a society when its members interact with each other significantly more than they interact with persons in other categories."⁴³ Rose further states that this occurs under two possible sets of circumstances: (1) the members have a positive affinity for each other on some basis; and (2) the members are excluded from interaction with other groups in the population to some significant extent.⁴⁴

Rose believed that each of these circumstances applies to older people in American society. He had the opinion that an aging subculture is developing in this country and lists trends which have created the conditions necessary for the development. These trends included:

- (1) There is a growing number and proportion of persons who are beyond age 65 (from 4.1% in 1900 to over 9.0% in 1960). This is relevant only in that there are more people eligible for creating an aging subculture.
- (2) Because of the advances in preventive medicine and in acute communicable disease control, etc., and because of general progress in sanitation and increased use of birth control, there has been a tendency for a much larger proportion of the population to reach the age of 65 in vigor and health, and hence capable of creating a subculture.
- (3) Most older persons are likely to develop chronic illnesses bringing about a longer period of treatment. This can cause grievances in costs of medical care, etc. for the aging.
- (4) There have been some self-segregating trends such as 'retirement communities,' etc. Studies show that older people often do not follow general patterns of migration out of a rural county and so are left behind to form the dominant element in the population of an area.

⁴³Arnold Rose, "The Subculture of the Aging: A Framework for Research in Social Gerontology," in Rose and Peterson, Older People, 1965, p. 3.

⁴⁴Ibid., p. 3.

- (5) There has been an increase in compulsory and voluntary retirement. This decline of older people in occupations has meant a loss of integration into the general society.
- (6) Because of the long-run improvement in the standard of living and in educational level, an increasing proportion of people reach the age of 65 with the means to do something they consider constructive, and what they do often becomes part of their subculture.
- (7) The development of social welfare services for the elderly serves to bring and enhance opportunities for identifying with each other and developing a subculture.
- (8) There is less of a tendency for adult children to live in the homes of their parents who retain their positions as heads of household, and more of a tendency for older people to live by themselves, or for intergenerational dwelling-together units.⁴⁵

In the same volume, Rose continues to offer a basis for subculture theory in a discussion of "aging group consciousness." He conceptually defines this phenomenon as existing among a group of people who:

. . . become aware, not merely that they are old, but that they are subject to certain deprivations because they are old, and they react to these deprivations with resentment and with positive effort to overcome the deprivations. Further, they are aware that most, or all, older people are subject to these deprivations, and they feel a positive sense of identification with other elderly persons for this reason.⁴⁶

In order to provide an operational definition for research purposes, he defines the aging group conscious person as one who joins formal organizations whose memberships consist only of elderly people.⁴⁷

Adams has noted several points concerning this discussion:

- (1) During past decades, there has been the growth of a new phenomenon which is greatly expanding the scope of the

⁴⁵Ibid., p. 4-5.

⁴⁶Arnold Rose, "Group Consciousness Among the Aging," in Rose and Peterson, 1965, p. 19.

⁴⁷Ibid., p. 20.

aging subculture. This may be called 'aging group consciousness' or 'aging group identification.'

- (2) Probably only a minority of the elderly have so far taken this social psychological step, but their number is growing. One of the early manifestations of this attitude is for them to join some kind of recreational or other expressive association in which they can interact almost exclusively with persons of similar age.
- (3) This group identification of the elderly may take place within organizations that are not age-graded, i.e., the elderly members simply interact more with each other than with the other members.
- (4) The next phase occurs when they begin to talk over their common problems in a constructive way. They begin to talk in terms of taking social action, not merely individual action, to correct the situation.
- (5) The elderly seem to be on their way to becoming a voting block with a leadership that acts as a political pressure group. Even the elderly who are organized into recreational groups sometimes shift naturally into political pressure groups., e.g., in San Francisco and Los Angeles social clubs for the elderly formed a pressure group to get reduced bus fare for those over 65.
- (6) For the growing minority that has reacted against the negative self-conception characteristic of the aging in our society and has seen the problems of aging in a group context, there are all the signs of group identification--a desire to associate with fellow-agers, especially in formal associations.
- (7) With this group pride comes some self-acceptance as a member of an esteemed group, and the showing off of prowess as an elderly person--such as "life begins at eighty."
- (8) In terms of future research, we need to know something about the characteristics of these people and the conditions under which they form or participate in the subculture to different degrees.⁴⁸

⁴⁸ Adams and Oliver, Annotated Bibliography, 1968.

Personality and Reference Group Theory

Personality theory is a broad concept which takes into account numerous variables and covers a wide range of behavior. This theory proposed by Havighurst essentially deals with life satisfaction.⁴⁹ Unlike the previously discussed theories, personality theory moves away from the general societal explanation of successful aging and more toward the idea of aging as an individual phenomenon. In general terms, adjustment to old age is seen as being a personal matter which is dependent upon the individual's unique personality makeup, his satisfaction with the present situation, and particularly his past life experiences. This idea was partially developed from the psychological proposition that with the onset of senility the short term memory of the older person begins to wane, whereas long term memory seems to remain more intact.⁵⁰ Thus, the general satisfaction with life's past experiences should be considered an important variable for successful aging. Those older people who feel they have accomplished their major goals, who have reared their children to be successful, and who have in general a feeling of accomplishment can be expected to be more adjusted to older age than the person for whom the reverse is true.

Springing from this general approach, a model for successful aging called "life pattern maintenance" has been proposed.⁵¹ In this model,

⁴⁹R. J. Havighurst, "Flexibility and the Social Roles of the Retired," American Journal of Sociology, 59 (1954), p. 310.

⁵⁰Jack Botwinick, Cognitive Processes in Maturity and Old Age (New York, 1967).

⁵¹Suan Reichard, F. Livson, and P. Peterson, Aging and Personality (New York, 1962).

adjustment to older age is seen as a life-long process. If the person has been unsuccessful in adjustment in his earlier life he will continue this pattern in the later years. Successful adjustment in his earlier life would, in turn, continue and adjustment to old age would be facilitated.

Research into these models has led to alterations and clarification of the general theory. One investigator has contended that the adjustment of the older person is contingent upon two factors: (1) the environment, and (2) the individual's personal resources.⁵² Concerning the latter, it would appear that the influence of personal resources would be an age independent variable. Yet as psychological changes and decrease in psychological space occur in the later years the ability of the older person to adjust to environmental shock decreases. Thus, the crucial variable appears to be the individual's inner resources and his ability to utilize them in adapting to new situations, regardless of his past experiences.

Tallmer contends that this creates a situation of differential adjustment skills among a group of people, who have less resistance than they had in younger years, being faced with the environmental shocks of (1) widowhood, (2) loss of children, and (3) retirement and decrement of health. There is variation from individual to individual concerning the inner resources available to aid in adjusting to these shocks. Tallmer indicates that for a well-adjusted person, one shock does not significantly lower the adjustment level, but with the cumulation of shocks

⁵²Jaber Gubrium, "Environmental Effects on Morale in Old Age and the Resources of Health and Solvency," The Gerontologist, 10 (Winter, 1970), pp. 294-297.

there is a sharp reduction followed by a leveling effect which seems to negate the effects of additional shocks.⁵³

Recognizing the individual limitations of the activity model of successful aging and the disengagement theory, Romeis, Albert, and Acuff have suggested the concept of reference groups as an important variable for successful aging.⁵⁴ They believe that neither of these two major theories are capable of dealing with the following questions:

- (1) Why are some older people who are actively and extensively involved with others apparently well adjusted? (unexplained by disengagement theory)
- (2) Why are some older people who are actively and extensively involved with others apparently poorly adjusted? (unexplained by activity theory)
- (3) Why are some people who have withdrawn and have disengaged from society apparently well adjusted? (unexplained by activity theory)
- (4) Why are some people who have withdrawn from society apparently poorly adjusted? (unexplained by disengagement theory)⁵⁵

The authors contend that these questions can be answered by analyzing the older person's reference group behavior. To make this analysis, they list the following assumptions:

⁵³Margot Tallmer and Bernard Kutner, "Disengagement and the Stresses of Aging," Journal of Gerontology, 1 (January, 1969), pp. 70-75.

⁵⁴James Romeis, R. Albert, and F. Acuff, "Reference Group Theory: A Synthesizing Concept for the Disengagement and Interactionist Theories," International Review of Sociology, 1 (1971), pp. 66-70.

⁵⁵*Ibid.*, pp. 68-69.

- (1) Reference group is a valid approach in that people are influenced by their relationships with others and that people obtain from others an evaluation of self, as well as, standards for their behavior.
- (2) Past, present, and future reference groups do operate.
- (3) A person may participate in positive and negative reference groups.
- (4) A reference group may be any group, real or imaginary.
- (5) A person may have a multiplicity of reference groups.
- (6) Self image is derived from interaction with others and the others will be contained within reference groups.
- (7) Reference groups provide the individual with a basis for attitudes, values, and norm formation.⁵⁶

David Adams has suggested that, "it appears that not only activity level, but specifically activity with 'friends' or a reference group is a necessary correlate of satisfaction."⁵⁷ He cites the work of Rosow which demonstrated that satisfaction and activity level are both related to neighborhood age density,⁵⁸ Lopata who discussed the importance of a "society of widows,"⁵⁹ and Phillips, who found that a peer group with respect to chronological age is an important intervening variable

⁵⁶Rodney Albert, "Reference Group Theory: Application to Gerontology," Oklahoma State University, Department of Sociology, 1970.

⁵⁷David Adams, "Correlates of Satisfaction Among the Elderly," The Gerontologist, 11 (1971), pp. 64-68.

⁵⁸Irving Rosow, Social Integration of the Aged (New York, 1967).

⁵⁹Helena Lopata, "Social Relations of Widows in Urbanizing Countries," (A paper presented at the International Social Science meetings, Varna, Bulgaria, 1970).

between role change and adjustment.⁶⁰ Others have used the term "age identification" which would appear to be related to the concept of reference group; however, these investigations have been explicitly connected with the theory of the subculture of the aging. It should be noted however, that the implication of this research could be viewed as somewhat supportive of reference group theory.

Summary

Though the discipline of social gerontology is a relatively recent area, its body of theory has grown rapidly. The major prevailing theoretical approaches have been the functional theory of disengagement and the activity theory, derived from an interactionist perspective. Each of these theories are primarily concerned with successful aging among the aging population in general. The activity model basically assumes that high morale or successful aging is dependent upon a maintenance of the social activity patterns of middle-age. Its polar opposite, the theory of disengagement, considers aging as universally characterized by an inevitable process in which many of the relationships between a person and other members of society are severed, and those remaining are altered in quality. Successful aging is viewed as a mutually satisfying process between the individual and the society in which the individual is disengaged from his life roles.

Recognizing the limitations of each of these major approaches, other theories have been developed by researchers to expand the

⁶⁰B. Phillips, "Role Change, Subjective Age, and Adjustment: A Correlation Analysis," Journal of Gerontology, 16 (1961), pp. 347-352.

literature and bridge the gap between the individual aging person and the society. These theories include the subculture theory of aging, which has as its basic assumption that a subculture may be expected to develop within any category of the population of a society when its members interact with each other significantly more than they interact with persons in other categories. Arnold Rose, the chief proponent of this theory believed that trends were developing within the United States society which would facilitate the development of an aging subculture.

Other theoretical approaches which deal primarily with an individualistic approach to aging include the general personality theory, the theory of life-pattern maintenance, and the reference group approach. Each of these theories are relatively new theories and the research to this date has been sparse concerning them.

CHAPTER III

RETIREMENT, WORK, AND LEISURE

Each of the previously discussed theories deals with the manner in which members of the older population adjust to life changes in the later years of life. For the older male one of the major life changes is retirement, or loss of the work role and entrance into a leisure role. Most authors agree that the three concepts of retirement, work, and leisure cannot be separated; therefore, each must be analyzed in terms of the others.

Definitions of Retirement

A review of the retirement literature yields several definitions of the concept. Marvin Sussman defines retirement as, "a phenomenon with multiple meanings. It may be studied as a status or as a process."¹ Taylor defines it as, "an event precipitating significant changes in behavior or as a process paralleling other ongoing processes."²

Taking an anthropological view of retirement, Clark states the following:

¹Marvin B. Sussman, "An Analytical Model for the Sociological Study of Retirement," in Retirement, ed., Frances Carp (New York, 1972), p. 29.

²Charles Taylor, "Developmental Conceptions and the Retirement Process," in Carp, 1972, p. 75.

In some sense it is almost impossible to define retirement without first defining work. That is, retirement implies the absence rather than the presence of certain activities. In order to designate an individual as retired, then, we must know that the activities he is now engaged in are not defined in his society as work, at least for that particular person.³

A lay definition has been given by Mitchell. He says, "the retirement we are attempting to characterize . . . is the situation which occurs when, to all intents and purposes, a career of gainful employment is permanently interrupted in upper middle-life."⁴ Atchley has given a general definition of retirement as, "the separation of an individual from a work role, a role performed for pay."⁵ This idea was expressed earlier by Friedmann and Havighurst; "a description of the people who are living out the last ten or twenty years of their lives without working for a living,"⁶ and also as, "socially approved unemployment."⁷

Finally, Atchley has refined the concept of retirement. He provides the following discussion:

Retirement can be viewed as an event, as a process, or as a social role . . . Operationally, retirement as an event is probably best defined in terms of the point at which the individual separates himself or is separated from a job and has no intent to seek another job . . . It tends to be a continuous process that begins when the individual recognizes that some day he will leave the work force and ends when he leaves it for good . . . Finally, it is possible

³Margaret Clark, "An Anthropological View of Retirement," in Carp, 1972, p. 118.

⁴William Mitchell, "Lay Observations on Retirement," in Carp, 1972, p. 199.

⁵Robert Atchley, The Social Forces in Later Life (Belmont, California, 1972), p. 153.

⁶Eugene Friedmann and Robert Havighurst, The Meaning of Work and Retirement (Chicago, 1954), p. 1.

⁷Ibid., p. 185.

to view retirement as a position in society with rights and duties accompanying it.⁸

Atchley further gives the following diagrammatical representation of these three components (process, event, and role) of retirement:⁹

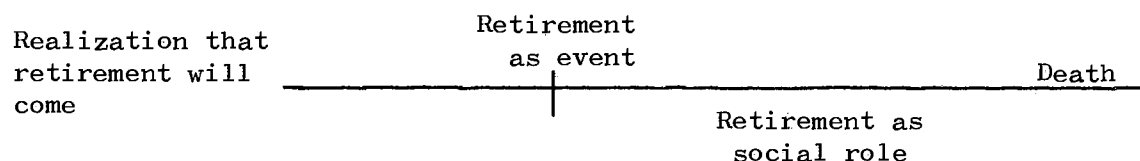


Figure 2. The Retirement Process

Definitions of Leisure

Most definitions of the concept of leisure, like retirement, are conceptualized as time free from the obligatory requirements of the work role. Lundburg, Komorovsky, and McInery give an objective, measurable, observable definition: "leisure consists of time which is free from the more obvious and formal duties which a paid job or other obligatory occupation imposes on us."¹⁰ In contrast to this definition, Kaplan proposes a,

. . . subjective, less measurable, and flexible set of definitions . . . resulting from responses from various persons:

⁸ Atchley, The Social Forces in Later Life, p. 156.

⁹ Ibid., p. 157.

¹⁰ George Lundberg, Mirra Komorovsky, and Mary McInery, Leisure, A Suburban Study (New York, 1934), p. 2.

time when I rest, time to loaf, when I do nothing, when the children are in bed, after work, vacation time, when I can do what I want, and so forth.¹¹

In addition to this subjective set of definitions, Kaplan, working toward a theory of leisure, synthesizes these two definitions and builds an ideal type construct. He says there are six dimensions of leisure:

- (1) an antithesis to work as an economic function;
- (2) a pleasant expectation and recollection;
- (3) a minimum of involuntary social role obligation;
- (4) a psychological perception of freedom;
- (5) a close relation to values of the culture, and the inclusion of an entire range from inconsequence and insignificance to weightiness and importance; and
- (6) often, but not necessarily, an activity characterized by the element of play.¹²

Parker's discussion of leisure as a component of a time scheme of life space to some extent qualifies the concept. He defines "life space" as, "the total of activities or ways of spending time that people have."¹³ Division of the life space using the time scheme produces the following conceptualization of leisure in diagrammatical form.¹⁴ (See Figure 3.)

¹¹Max Kaplan, "Toward a Leisure Theory for Social Gerontology," in Aging and Leisure, ed., Robert Kleemeir (New York, 1961), pp. 391-392.

¹²Max Kaplan, Leisure in America: A Social Inquiry (New York, 1960), p. 22.

¹³Stanley Parker, The Future of Work and Leisure (New York, 1971), p. 25.

¹⁴Ibid., p. 27.

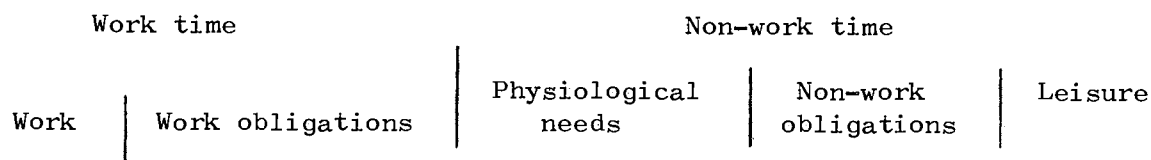


Figure 3. The Life Space

Thus, the total life space is divided into the general categories of work and non-work activity. A further breakdown results in five categories defined as follows:

- (1) Work time: Though usually having a wider range of meaning, within this scheme work is referred to as time spent in earning a living.
- (2) Work obligations: This category includes time traveling to and from the place of work and preparing or "grooming" for work. Voluntary overtime or second jobs may also be included.
- (3) Existence time: Time spent sleeping, eating, washing, eliminating, etc. Generally, meeting the physiological needs.
- (4) Non-work obligation: This category may be referred to as semi-leisure. It is meant to describe activity which, from the point of view of the individual, arises in the first place from leisure, but represents in differing degrees the character of obligations. The obligation may be to other people, pets, homes, gardens, etc.
- (5) Leisure: Spare time, uncommitted time, discretionary time, choosing time are all synonymous with leisure.¹⁵

Additional attempts at the definition of leisure include: "'leisure' was not defined in this study, save tacitly to mean the hours when a man is not working primarily for money,"¹⁶ and "Leisure is time beyond

¹⁵Ibid., p. 25-27.

¹⁶G. Hunter, Work and Leisure (London, 1961), p. 16.

that which is required for existence, the things which we must do, biologically, to stay alive, and subsistence, the things we must do to make a living as in work"17

The Problem of Retirement

This section will deal primarily with the idea that contemporary United States society may be in a transitional period from a work-oriented to a leisure-oriented society. Understanding retirement as a "problem" in this transition requires an historical view of the concepts of work and leisure.¹⁸ The following quotation from Carp illustrates the basic problem of use of leisure, and generally how this developed:

For the first time in history, significant numbers of people have completed their work well before the end of their life span. Ironically, that same society which added years to life with improved health and economic security, also ingrained into members of today's older generation strong habits of work and respect--almost reverence--for labor. Older people tend to equate industry with virtue and they have had little acquaintance with leisure.¹⁹

In one historical vein, work has been a major trial and tribulation for mankind since Adam's punishment for "the fall," which was the necessity to work for a living. "In the sweat of your face you shall eat bread."²⁰

¹⁷C. K. Brightbill, The Challenge of Leisure (New York, 1963), p. 4.

¹⁸This discussion, especially the historical notes was basically drawn from Parker, The Future of Work and Leisure, pp. 33-43, and Robert Havighurst, "The Nature and Values of Meaningful Free-Time Activity," in Aging and Leisure, ed., Robert Kleemeier, (New York, 1961), pp. 309-345. This historical discussion should be considered as only one approach.

¹⁹Frances Carp, The Retirement Process, p. 15.

²⁰Genesis 3:19.

The primary concern of early man was survival. Out of necessity he was bound to use his time in an unending search for food and preparation of adequate shelter and clothing. His remaining time was used caring for his children and pursuing favorable relations with supernatural phenomena, which were believed to facilitate provision of his survival needs.

As time progressed, division of labor occurred, and the meaning of work was altered. Work for all members of the society was no longer a necessity for survival. In early Greco-Roman times, a low social value was attached to the labor of producing items that were necessary for subsistence. This mechanical labor was delegated to the peasants and slaves and generally considered no more than a curse. The Greeks regarded as drudgery physical work of any kind. It was viewed as the lowest position within a hierarchy of manners for use of time, serving only to brutalize the mind, making man unfit for thinking. Located on a higher level, though not fully accepted by the "elite," were activities which included the manufacture of tools, books, weapons, etc. Finally at the top position were the "higher activities," including dealing with people through conversation, government, religious worship, and other "leisurely" activities. Thus, in this period of history, leisure was considered the acceptable means of using time.

The Hebrews also viewed work as a painful necessity, but they incorporated the belief that it was the punishment for the original sin. Work was, more or less, accepted as expiation through which man could gain salvation from the sin of his ancestors. Manual work thus gained some degree of dignity and value.

Eventually two contrasting views concerning the use of time

emerged. The first of these viewed life as starting with the heedless activity of the child followed by heedful activity of the adult, and closing with inactivity. Only in the adult phase of life was work considered absolutely necessary and expected. The other view considered work the most valuable use of time at all ages. Children were encouraged to work as early as possible. Inactivity had no value except as preparation for work. Contemplation was viewed with suspicion as being not far removed from mere vegetation. And, according to this view, a person might as well be dead as merely a vegetating man.

Protestantism established the second viewpoint as the prevailing ideology. In the teachings of Martin Luther, work was still related to the fallen man and all who could work were expected to do so. To work was to please God; profession became "calling" and a path to salvation. Calvin further developed this line of thought with the concept of predestination. It was taught that only a few were selected to live eternally. Work, and the fruits of work in Protestantism, became a secular symbol of a sacred reality (election). Having removed the overt sign of the sacred, i.e., the seven sacraments of the church, Protestants had to have a "sign" of God's favor. Idleness and luxury were themselves considered a sin, and for those who did not work, "election" was doubtful. The aspect of Calvinism which lay the basic foundation for the nineteenth century work ethic was the idea that man should work hard to accumulate wealth, but should not spend it on himself. This led to Weber's "Protestant Ethic," or work for the sake of work. Once the Protestant Ethic was incorporated into mainstream European-American society, the concepts of work and leisure were totally dichotomized.

Work was considered "good," and in most contexts play or idleness was viewed negatively.

According to Havighurst, as long as the Protestant Ethic held sway in an economy of scarcity, there was no problem of meaningful use of time.²¹ Men were supposed to work and be as productive as possible all their lives. During the nineteenth century, work became a good in itself. Through the unblinding pursuit of work during that period, such an abundant amount of goods was produced that the descendants of that generation have been forced to spend part of their life in retirement. This retirement comes despite the fact that the Protestant Ethic is still embraced.

Presently, success in life is usually equated with money, activity, and youth, each of which is bound up with work. Retirement reduces income, creates conditions conducive to inactivity, and confronts the person with loss of youth. For many persons, retirement offers nothing to make up for the loss of these supports to their self-esteem.²²

History has shown, however, that the high value placed on work is not unalterable. Indeed several writers have suggested that a change from the work-orientation to a more leisure-oriented society is now in progress. Havighurst has noted this transitional period,²³ and Shanas has stated,

While the data are still too sparse to demonstrate conclusively a changing American attitude toward work, it may

²¹Kleemeier, Aging and Leisure, p. 310.

²²Carp, p. 81.

²³Robert Havighurst, Older People (New York, 1953), p. 127.

be that for an increasing number of men the job is only a source of income and that these men have their real interest in leisure-time activity.²⁴

Miller has suggested three discernible periods reflecting the work-leisure tradition:

- (1) The Pre-industrial Period: A period in which traditional work was alleviated only by related customs, practices, and rites;
- (2) The Industrial Period: A period characterized by the polar opposition of work and leisure;
- (3) The Post-industrial Period: The contemporary period where there is an integration of work and leisure.²⁵

More recent discussion of this transition is found in Glasser's categorization of work and leisure. He divides this tradition as follows:

- (1) Phase I: Primitive Survival Society -- for 3.5 million years man's major preoccupation was to survive in an environment that was constantly rigorous and often hostile. For the species to survive, human cooperation was necessary.
- (2) Phase II: Primitive Identity Society -- as pleasure and leisure time became part of man's experience and as the world became a less hostile place in which to live, man had time for rituals, symbols, and religion as ways in which to identify himself.

²⁴Ethel Shanas, "Adjustment to Retirement: Substitution or Accommodation," in Retirement, ed., Carp, p. 233.

²⁵Stephen Miller, "The Social Dilemma of the Aging Leisure Participant," in Arnold Rose and Warren Peterson, Older People and Their Social World (Philadelphia, 1965), p. 80.

- (3) Phase III: Civilized Survival Society -- with the increase in population, the decrease of available game, and the discovery of agriculture, land became extremely valuable and aggressive men fought one another to obtain and exploit it.
- (4) Phase IV: Civilized Identity Society -- in the past twenty years, man has begun to move away from the collected inertia of centuries, and toward a role-dominated society in which human concern again centers on self-identity, self-expression, and cooperation.²⁶

According to Havighurst, the transition from work to leisure came after World War I. He says, "A person born after 1920 is in many ways quite a different person from one born around 1900, just because of the changes in work and leisure."²⁷ He further suggests that the present generation of retirees may be trendsetters in the meaningful use of time in retirement. People in large numbers are, for the first time in history, finding themselves in an older age category, with time on their hands, money to spend, and in better health. The old separation of work and play has in recent decades diminished, and the idea of work as a duty and play as a privilege has changed.²⁸ The psychological meanings of work now have certain identical meanings to those of play. Havighurst notes the following resemblances:

- (1) Play as well as work may mean a source of social prestige or recognition by others.

²⁶William Glasser, "The Civilized Identity Society: Mankind Enters Phase IV," Saturday Review (February, 1972), pp. 21-23.

²⁷Havighurst, Older People, p. 127.

²⁸Kleemeier, Aging and Leisure, pp. 310-311.

- (2) Play as well as work is a means of social participation or a means of associating with friends.
- (3) Play is certainly as effective as work is in providing a source of intrinsic enjoyment, or creative self-expression.
- (4) Play as a way of making time pass or of escape from boredom is as effective as work for this purpose.
- (5) Play may serve as a way of being of service to others, if the use of leisure time for cultivating the arts of friendship and service is included.²⁹

Therefore, there is some equivalence of work and play. In today's economy of abundance, where work is reduced in quantity to a level where it is not physically unpleasant, many of the values of play can be achieved through work and of work through play. Again quoting Havighurst:

If this principle is fully realized in the lives of people, the problem of retirement will be solved, provided economic security is also generally achieved. That is, retirement from work will simply be the signal to increase the amount of play or leisure-time activity so as to get the satisfactions from play that were formerly gotten from work. When to these satisfactions are added the freedom from external compulsion, which is characteristic of work, leisure activities may have a great advantage over work for most people.³⁰

Leisure-Related Research

Several studies have dealt with the meaning attached to work and leisure in modern industrial society with reference to old age and retirement. These independent pieces of research, however, have been

²⁹Havighurst, p. 130.

³⁰Ibid., pp. 130-131.

rather inconclusive regarding the relative value of work and leisure to the retired worker.

Weiss and Morse have proposed that work is losing its status as a central life interest for many people, but to date has not been adequately replaced as a means to adjustment in the present social structure.³¹ Donahue also posits that there are changing attitudes toward work which are potentially creating a situation for increasing positive attitudes toward leisure and retirement. She has further suggested that future generations may be more positively oriented to retirement.³² This optimism is also expressed by Friedmann, who calls those who reached retirement between 1950 and 1960 the "transitional man," one who was aware of the coming of retirement and the opportunity to plan for the demise of his work role,³³ and Hecksher and de Grazia have also noted more favorable attitudes toward leisure and retirement among executives.³⁴

Riley and Foner have indicated that people gradually expand the time they spend in leisure roles as age increases, and they point out that, "leisure has been studied as a residual category of time that is 'free' from work or from other pursuits regarded as more serious or

³¹Weiss and Morse, "The Functions and Meaning of Work and Job," American Sociological Review, 20 (1955), pp. 191-198.

³²Wilma Donahue, "An Experiment in the Restoration of Personality in the Aged," in Planning the Older Years, eds. Wilma Donahue and Clark Tibbits (Ann Arbor, 1950).

³³E. Friedmann, and R. Havighurst, The Meaning of Work and Retirement (Chicago, 1954).

³⁴Hecksher and de Grazia, "Executive Leisure," Harvard Business Review, 37 (1959), p. 6.

obligatory."³⁵ In a recent volume they concerned themselves with the following questions:

- (1) What do older people do with this time?
- (2) Are norms and customs developing to institutionalize a leisure role as a counterpart to a work role?
- (3) Is the leisure of older people more sedentary, passive, or home-bound than that of younger people?
- (4) What differences occur among older individuals, with their varying levels of education, income, or health and their range from the 60's to the 90's and beyond?
- (5) Is the older person's pattern of leisure characteristic of old age generally, not dictated by the particular experiences of his generation or the particular facilities now available?
- (6) How are today's younger people being prepared for their own future leisure in retirement?³⁶

As mentioned earlier, and again noted by Riley and Foner, the published data which would aid in answering these questions are of uneven quality. Large samples have been surveyed by the Census Bureau regarding outdoor related activities, and a miscellany of small studies have provided suggestive and often mutually supporting data. However, for the most part,

. . . the research suffers generally from confused definitions and connotations of leisure and from the difficulties of obtaining and summarizing, over many individuals, accurate measures of the many disparate activities involved.³⁷

³⁵Matilda Riley and Anne Foner, Aging and Society, Vol. I (New York, 1968), p. 511.

³⁶Ibid., p. 511.

³⁷Ibid.

Leisure-Retirement Theory

With the exception of two contrasting perspectives, the literature of social gerontology is almost devoid of any formulated theory specifically related to leisure and its meaning for the retired worker. Even though leisure could be viewed as a concern within the context of the activity or disengagement theories, it was only addressed in general terms. The two exceptional theories have been proposed by Atchley,³⁸ the identity-continuity theory, and Miller,³⁹ the identity-crisis theory. These two opposing perspectives are, as their labels imply, concerned with the consequences for the identity of the retiree upon the loss of work. The general question approached by these investigators is whether or not leisure is capable of giving the individual the kind of self-respect and identity that he got from his job. Atchley has taken a positive stand, whereas Miller views the situation negatively. Since this controversy is central to the value of leisure for the retired person, it merits a detailed review.

Miller's identity-crisis theory is based on the assumption that a person's identity is derived primarily from his job. Also implied is the idea that since work affords the individual his identity, workers want to remain on the job, and that most retirement is involuntary. This theory includes the following ten major points:

- (1) Retirement is basically degrading because, although there is an implication that retirement is a right that is earned through life-long labor, there is also a tacit understanding that this reward is being given primarily

³⁸Robert Atchley, "Retirement and Leisure Participation: Continuity or Crisis?" The Gerontologist, 11 (1971), pp. 13-17.

³⁹Miller, "The Social Dilemma," pp. 77-93.

to coax the individual from a role he is no longer able to play.

- (2) Occupational identity invades all of the other areas of the person's life. Accordingly, the father and head of household roles, the friend role, and even leisure roles are mediated by the individual's occupational identity.
- (3) The identity that comes from work is related to deeply ingrained values as to which roles can give a legitimate identity.
- (4) Leisure roles cannot replace work as a source of self-respect and identity because it is not supported by norms that would make this legitimate. That is, the retired person does not feel justified in deriving self-respect from leisure. Leisure is simply not defined as a legitimate source of self-respect by the general population.
- (5) Beyond the simple need to be doing something there is a need to be engaged in something that is defined by most people as utilitarian or gainful in some way. Thus, the stamp collector must emphasize the financial rewards, paintings are offered for sale, or woodworking is confined to immediately 'useful' objectives. In short, the only kinds of leisure that can provide identity are work substitutes.
- (6) There is a stigma of 'implied inability to perform' that is associated with retirement and carried over into all of the individual's roles and that results in an identity breakdown.
- (7) Identity breakdown involves a process whereby the individual's former claims to prestige or status are invalidated by the implied inability to perform, and this proves embarrassing for the stigmatized person. Miller calls this result the 'portent of embarrassment.'
- (8) Embarrassment leads to the individual's withdrawal from the situation or prevents him from participating to begin with.
- (9) The answer lies not in inventing new roles for the aging, but rather in 'determining what roles presently exist in the social system . . . offering vicarious satisfactions, that can reduce the socially debilitating loss accompanying occupational retirement.'

- (10) Miller implies that creating an ethic which would make fulltime leisure an acceptable activity for a worthwhile person is a possible way to resolve the dilemma of the retired leisure participant.⁴⁰

Citing several pieces of research as a basis for his theory, Atchley presents the positive point of view of leisure and retirement in the identity-continuity perspective. Basically, it consists of the following points, including citations of supportive empirical research.

- (1) Retirement has been found to result in a loss of a sense of involvement, but this was unrelated to other self-concept variables of optimism and autonomy.⁴¹
- (2) Strong work orientation is frequently found among retired people, but this is not accompanied by anxiety, depression, dislike of retirement, or withdrawal from activity.⁴²
- (3) Middle-status and semiskilled workers carry their job skills with them into retirement, thus, being somewhat 'trained' for a leisure activity.
- (4) The style of work activity tends to remain dominant in retirement.
- (5) Data from retired railroaders indicate that there are continuities in the situations that people face that minimize the impact of retirement.⁴³ Family, friends, church, and other roles continue despite retirement.
- (6) Cottrell's data also indicate that as the concept of retirement is incorporated into the culture, the

⁴⁰In presenting the identity - Crisis theory, Atchley's analysis, found in his article, "Retirement and Leisure Participation: Continuity or Crisis?" and also in his book The Social Forces in Later Life, is used.

⁴¹K. W. Back and C. S. Guptill, "Retirement and Self-Ratings," Social Aspects of Aging, eds. I. H. Simpson, K. W. Back, and J. C. McKinney (Durham, 1966).

⁴²F. Cottrell and R. C. Atchley, Women in Retirement: A Preliminary Report (Oxford, Ohio, 1969).

⁴³F. Cottrell, Technological Change and Labor in the Railroad Industry (Lexington, Massachusetts, 1970).

tendency to look upon work as a temporary part of life is increasing.

- (7) In terms of ethic, it is not at all clear whether most people regard work as a necessary prerequisite for making leisure legitimate or simply as a necessary economic function which interferes with the pursuit of leisure.
- (8) Nearly two-thirds of retired men retired as a result of their own decision.⁴⁴

Each of these theories has dealt with a crucial issue for social gerontology. In recent years the retirement rate has been increasing steadily, leaving a growing number of men in a leisure role. What are the consequences for these individuals?

. . . The relation between work and leisure, for the individual is a significant one. The hard-driving individual for whom work is everything may allocate leisure to a place of relative unimportance. This pattern of work-leisure presents the individual with serious problems at the onset of retirement. On the other hand, an individual who has pursued some hobby while working to survive, experiences great delight at the onset of retirement--his hobby need no longer be interrupted by work.⁴⁵

Summary

This chapter has included definitions of the concepts of retirement and leisure. These definitions were found to be overlapping in content, and almost always linked to the concept of work. Retirement comes after work, leisure is non-work activity divorced from the usual obligations surrounding the work role; retirement may very well be conceptualized as a "life of leisure."

⁴⁴Cottrell and Atchley, Women in Retirement, and Riley and Foner, Aging and Society.

⁴⁵James Murray, Edward Powers, and Robert Havighurst, "Personal and Situational Factors Producing Flexible Careers," The Gerontologist, 11 (Winter, 1971), pp. 6-7).

In addition to the definitional description of work and leisure, the two concepts and their meanings were traced historically. The idea was developed that despite the work ethic which was developed from the ideology of Protestantism, the high value placed on work may not be unalterable. This suggestion was followed by the presentation of several supportive research reports and a discussion of the growing similarity of meaning attached to work and play (leisure).

Finally, two theories of leisure were presented. These opposing theories, identity-continuity and identity-crisis, dealt with the identity of the retired worker and the consequences of retirement.

CHAPTER IV

RESEARCH AND PROCEDURES

At the onset of retirement the individual is faced with the problem of finding some means of filling the time which was previously occupied by work. Reviewing several theories of successful aging leads to the conclusion that little emphasis has been placed upon specific leisure activity patterns of retirees.

Activity theory contends that the retiree must maintain his former social patterns and resist the shrinkage of his social world in order to adjust to his retirement role. This theory, however, does not deal specifically with leisure activity, but addresses itself to the total social environment of the retiree.

On the other hand, the disengagement theory maintains that the individual must give up his social roles in preparation for the ultimate disengagement, death. Like the activity theory, it also is concerned with the totality of social roles and does not address itself specifically to leisure roles.

The subculture, personality, and reference group theories are all concerned with social and psychological support systems of the older person. Like the aforementioned theoretical perspectives, these theories also ignore the use of leisure time.

The omission of the leisure role as a focus for contemporary gerontological theory represents a critical void in the gero-sociological

literature. In its most simple definitional form, retirement is an event which marks the entrance into a "life of leisure." The diverse manner in which this increased amount of leisure time is utilized by the retiree will be the focus of this research.

Definition of Variables

Before presenting the specific hypotheses, it is necessary to specify and provide nominal definitions of the major variables included in the study. The variables will be operationally defined in a later section of this report.

Activity

While there is probably an infinite number of activities which may be used by the retiree to fill his leisure time, activity is conceptualized in this study as an endeavor which is devoid of obligations that are characteristic of occupational or professional activity, i.e., free-time, recreational, or "play" activity.

Activity Types

As activity is defined in this study, it is possible to classify specific activities into one of four different descriptive categories or "types," based upon two criteria: (1) whether the activity would normally be engaged in by one person or a group, and (2) whether the activity calls for a considerable amount of physical vigor or whether it entails little physical effort.

From these two criteria four activity types may be established:

(1) Active-social, (2) Active-isolate, (3) Sedentary-social, and

(4) Sedentary-isolate. These four types are defined as follows:

- (1) Active-social: Activities which require considerable physical effort and normally take place in a group (e.g., team sports);
- (2) Active-isolate: Activities which require considerable physical effort and are normally performed by one person (e.g., jogging);
- (3) Sedentary-social: Activities which require little physical effort and are normally performed in groups (e.g., club activities);
- (4) Sedentary-isolate: Activities which require little physical effort and are normally performed by one person (e.g., reading).¹

Life Satisfaction

Probably the most frequently used indicator of successful aging is the variable of life satisfaction. As a dependent variable, life satisfaction is conceptualized as a multi-dimensional, social psychological variable which reflects a psychological well-being of the older adult subsequent to the retirement experience. Neugarten, et al., points out that life satisfaction is made up of a number of individually-oriented components. Among them are (1) whether the individual takes pleasure from the round of activities that constitutes his everyday life; (2) whether he regards his life as meaningful and accepts resolutely that which life has been; (3) whether he holds a positive image of himself;

¹This discussion and the classification of activity types was taken from, Leonard Breen et al., The Adult Years (A report prepared for the Bartholomew County Retirement Foundation by the Department of Sociology, Purdue University, 1961), pp. Ei-E2.

- (4) whether he feels he has succeeded in achieving his major goals; and
- (5) whether he is able to maintain happy and optimistic attitudes and moods.²

Self-Esteem

Self-esteem is conceptualized as a social-psychological variable which reflects an individual's attitude toward himself. The definition given by Rosenberg in the following passage will be used in this study:

When we speak of high self-esteem . . . we shall simply mean that the individual respects himself, considers himself worthy; he does not necessarily consider himself better than others, but he definitely does not consider himself worse; he does not feel that he is the ultimate in perfection but, on the contrary recognizes his limitations and expects to grow and improve.³

The Hypotheses

While this research is essentially an exploratory study, directional hypotheses will be stated where there appears to be a sufficient theoretical foundation to warrant prediction. Generally speaking, the underlying assumptions for this research follow the framework of the activity theory even though hypotheses dealing with group activity are eclectically drawn from subculture, reference group, and personality theory. Hypotheses related to activities will be presented first, followed by the hypotheses related to various socio-demographic variables. These variables will be discussed in a later section of this report.

²Bernice Neugarten, Robert J. Havighurst, and Sheldon Tobin, "The Measurement of Life Satisfaction," Journal of Gerontology, 16 (1961), p. 139.

³Morris Rosenberg, Society and the Adolescent Self-Image (Princeton: 1965), p. 37.

Hypotheses Related to Number of Activities

These hypotheses represent a test of both the activity and disengagement theories of successful aging. Following the basic tenants of the activity theory, it could be predicted that life satisfaction and self-esteem would directly vary with the number of activities in which the retiree is participating. On the other hand, disengagement theory would predict an inverse relationship. While this inconsistency is ever present in the literature, it appears that most research supports the prediction of the activity model, and the following hypotheses will be stated based from this perspective.

Hypothesis 1: There will be a direct relationship between the total number of activities in which a retiree participates and life satisfaction.

Hypothesis 2: There will be a direct relationship between the total number of activities in which a retiree participates and self-esteem.

Since retirement leaves the individual with time to fill, the increase or decrease in leisure participation is an important consideration when discussing numbers of activities. It is believed that an increase in activity is essential to the retiree for maintenance of high life satisfaction and high self-esteem.

Hypothesis 3: Life satisfaction of retirees who increase the number of activities in which they participate will be significantly higher than the life satisfaction of those retirees whose participation decreases or remains constant.

Hypothesis 4: Self-esteem of retirees who increase the number of activities in which they participate will be significantly higher than the self-esteem of those retirees whose participation decreases or remains constant.

Hypotheses Related to Activity Types

The type of activity in which the individual participates is believed to be important for the retiree. As conceptualized in this study, activities may be generally categorized as either physical or sedentary and either social or isolate. Using combinations of these categories leads to the establishment of four activity types: (1) active-social, (2) active-isolate, (3) sedentary-social, and (4) sedentary-isolate.

Examining the physical versus sedentary dimension of activity, it would appear that higher life satisfaction and self-esteem would be characteristic of those retirees engaging in activities which require a considerable amount of physical effort. This idea is based primarily on previous research which has shown a positive correlation between the variables of health and perceived age with life satisfaction.⁴ Assuming that good health is a prerequisite for vigorous physical activity, the following hypotheses are stated:

⁴David Adams, "Correlates of Satisfaction Among the Elderly," The Gerontologist, 11 (Winter, 1971), p. 65.

Hypothesis 5: Life satisfaction of retirees who primarily⁵ participate in a physical activity will be significantly higher than the life satisfaction of those retirees who primarily participate in a sedentary activity.

Hypothesis 6: The self-esteem of retirees who primarily participate in a physical activity will be significantly higher than the self-esteem of those retirees who primarily participate in a sedentary activity.

When the dimension of social versus isolate type activities is considered, the literature of reference group, personality, and subculture theory overwhelmingly supports the more positive nature of social participation rather than isolated activity.

Hypothesis 7: The life satisfaction of retirees who primarily participate in a social activity will be significantly higher than the life satisfaction of those retirees who primarily participate in an isolate activity.

Hypothesis 8: The self-esteem of retirees who primarily participate in a social activity will be significantly higher than the self-esteem of those retirees who primarily participate in an isolate activity.

When each of these two dimensions are combined and the resultant

⁵The term "primarily" used in this and the following hypotheses refers to the time that is invested in the activity. While an individual may be involved in numerous activities, for analytical purposes the actual activity in which the individual invested the most time was chosen as the classificatory criteria.

four activity types are examined, the following general hypotheses can be stated:

Hypothesis 9: There will be a significant difference in life satisfaction between the four activity types.

Hypothesis 10: There will be a significant difference in self-esteem between the four activity types.

Another question which must be considered in the examination of activity participation deals with whether or not the individual is primarily participating in the activity he most enjoys. Various factors, including health, finances, etc., may in effect limit participation in many activities; this limitation may in turn "force" the retiree to participate in some activity other than the one he most enjoys. It is believed that this incongruity will have a negative effect on his life satisfaction and self-esteem.

Hypothesis 11: Life satisfaction of retirees who are primarily participating in the activity which they most enjoy will be significantly higher than the life satisfaction of those retirees who are primarily participating in an activity which is not considered their most enjoyable activity.

Hypothesis 12: Self-esteem of retirees who are primarily participating in the activity which they most enjoy will be significantly higher than the self-esteem of those retirees who are primarily participating in an activity which is not considered their most enjoyable activity.

Hypotheses Related to Socio-Demographic

Variables

While this research is primarily focused on activity participation, a number of socio-demographic variables were included in the study. These variables have, in previous studies, been found to relate to the variable of life satisfaction. Because of this, it was decided to include them as possible control variables.

Biological Variables

The two most extensively investigated biological variables are age and health. In regard to age, research has provided little consensus concerning its effect on life satisfaction. Some reports have found a decline with age, while others have found a curvilinear relationship, and still others have found no relationship at all.⁶ Given these inconclusive findings, Maddox and Eisdorfer have contended that, "attention should be shifted from age as an independent variable to the combination of factors for which age serves as an index."⁷

Health is a most important variable in the study of older populations. The inevitable decline in physical facility many times alters the quality of life, not only in objective, physical terms, but also in more subjective, psychological terms. Since this study is focused upon

⁶David Adams, "Correlates of Satisfaction," p. 65; and M. Loeb et al., Growing Old In Rural Wisconsin (University of Wisconsin, School of Social Work, 1963).

⁷G. Maddox and C. Eisdorfer, "Some Correlates of Activity and Morale Among the Aged," Social Forces, 4 (1962), pp. 254-260.

activity, health must be considered extremely important. As Adams states:

While it is recognized that loss of physical vigor in an activity-oriented society may have some direct detrimental effect on satisfaction, health is generally considered an intervening variable restricting possible social contacts, which in turn adversely affect satisfaction.⁸

Another author has stated that, "Health is the kind of variable upon which everything else depends. Without health in some satisfactory manner, the activities of life and the act of living itself are not likely to continue for long."⁹

Since this study deals with life satisfaction, a self-rating of health was considered appropriate as a measurement device. Studies have demonstrated that the self report is more important than the objective assessment of physical condition as a determinant of the psychological well-being of the elderly person.¹⁰

Hypothesis 13: There will be no relationship between chronological age and life satisfaction.

Hypothesis 14: There will be no relationship between chronological age and self-esteem.

Hypothesis 15: There will be a direct relationship between perceived health status and life satisfaction.

Hypothesis 16: There will be a direct relationship between perceived health status and self-esteem.

⁸ Adams, p. 65.

⁹ Charles Lewis, "Meaning and Adjustment: A Study of Active Professionals, Professors and Clergy of a Southwestern State (Unpublished Ph.D. dissertation, Oklahoma State University, May, 1972).

¹⁰ George Maddox, "Some Correlates of Differences in Self-Assessment of Health Status Among the Elderly," Journal of Gerontology, 17 (1962), pp. 180-185.

Hypothesis 17: There will be no significant difference between the four activity types with respect to age.

Hypothesis 18: There will be no significant difference between the four activity types with respect to health.

Psychological Variables

Two psychological variables which have been shown to affect life satisfaction are the attitude toward retirement and the perception of potential problems (the source of greatest concern for the retiree). A positive correlation between attitude toward retirement and life satisfaction was found by Thompson.¹¹ The more favorably the retiree views his retirement status, the more satisfied he is.

Hypothesis 19: There will be a direct relationship between attitudes toward retirement and life satisfaction.

Hypothesis 20: There will be a direct relationship between attitudes toward retirement and self-esteem.

Hypothesis 21: There will be no significant difference between the four activity types with respect to attitude toward retirement.

Sociological Variables

Numerous sociological variables and their effects upon life satisfaction have been studied. Among these are education, income, homeownership, living arrangements, etc.

¹¹Wayne Thompson, "Pre-retirement Anticipation and Adjustment in Retirement," Journal of Social Issues, 14 (1958), pp. 35-45.

Income, occupation, and education, the general indexes of socio-economic status, have all been found to be positively correlated with life satisfaction.¹² A person's satisfaction in retirement depends not only on his post-retirement income but also upon his income prior to retirement. The pre-retirement income is believed to be an important factor in the development of attitudes toward the coming loss of work. People in higher income levels tend to believe they have enough money for retirement and estimate their minimum needs at a substantially lower level than their present income provides. Lower income families, on the other hand, tend to believe they will need a much larger proportion of their income during retirement.¹³

Occupation also appears to be an important variable. There appears to be a curvilinear relationship between attitudes toward retirement and scales of occupational prestige. Persons at higher occupational levels, except for professionals, tend to view retirement more favorably than those in lower occupational groups.¹⁴ The level of educational achievement is an integral part of both income and occupation.

In terms of this study, these three variables must be considered in lieu of the cost of leisure participation. The lack of adequate funds can severely limit the retiree's possible range of activity involvement.

¹²Adams, p. 66.

¹³Riley and Foner, p. 445; W. Thompson, "The Impact of Retirement," (Unpublished Ph.D. dissertation, Cornell University, 1956).

¹⁴Riley and Foner, p. 445; George Katona, Private Pensions and Individual Saving, Monograph No. 40 (Ann Arbor: Survey Research Center, University of Michigan, 1965).

- Hypothesis 22: There will be a direct relationship between both pre- and post-retirement income and life satisfaction.
- Hypothesis 23: There will be a direct relationship between both pre- and post-retirement income and self-esteem.
- Hypothesis 24: There will be no significant difference between the four activity types with respect to pre- or post-retirement income.
- Hypothesis 25: There will be a direct relationship between occupational prestige and life satisfaction.
- Hypothesis 26: There will be a direct relationship between occupational prestige and self-esteem.
- Hypothesis 27: There will be no significant difference between the four activity types with respect to occupational prestige.
- Hypothesis 28: There will be a direct relationship between educational attainment and life satisfaction.
- Hypothesis 29: There will be a direct relationship between educational attainment and self-esteem.
- Hypothesis 30: There will be no significant difference between the four activity types with respect to educational attainment.

Several variables relating to retirement have been shown to affect life satisfaction.¹⁵ Among these are the number of years in retirement, whether retirement was voluntary or involuntary, and whether or not the retiree has a source of income maintenance.

Hypothesis 31: The life satisfaction of retirees who are presently employed will be significantly higher than the life satisfaction of retirees who have no present employment.

Hypothesis 32: The self-esteem of retirees who are presently employed will be significantly higher than the self-esteem of retirees who have no present employment.

Hypothesis 33: There will be no significant difference between the four activity types with respect to their present employment status.

Hypothesis 34: The life satisfaction of retirees who retired voluntarily will be significantly higher than the life satisfaction of retirees who were retired involuntarily.

Hypothesis 35: The self-esteem of retirees who retired voluntarily will be significantly higher than the self-esteem of retirees who were retired involuntarily.

¹⁵Hansen and Yoshioka, Aging in the Upper Midwest: A Profile of 6300 Senior Citizens (Kansas City: Community Studies, 1962); G. Lloyd, "Social and Personal Adjustment of Retired Persons," Sociology and Social Research, 39 (1955), pp. 311-316; and M. Loeb et al., Growing Old in Rural Wisconsin (University of Wisconsin, School of Social Work, 1963).

Hypothesis 36: There will be no difference between the four activity types with regard to the nature of their retirement.

Marital status, home ownership, and living arrangements have also been related to successful aging. Each of these variables have been the subject of research and have positively correlated with life satisfaction.¹⁶

Hypothesis 37: The life satisfaction of married retirees will be significantly higher than the life satisfaction of unmarried retirees.

Hypothesis 38: The self-esteem of married retirees will be significantly higher than the self-esteem of unmarried retirees.

Hypothesis 39: There will be no significant difference between the four activity types with regard to marital status.

Hypothesis 40: The life satisfaction of retirees who own their home will be significantly higher than the life satisfaction of retirees who do not own their home.

Hypothesis 41: The self-esteem of retirees who own their home will be significantly higher than the self-esteem of retirees who do not own their own home.

¹⁶ Hansen and Yoshioka, Aging in the Upper Midwest; Kutner et al., Five Hundred Over Sixty (New York, 1956); Loeb et al., (1966); and P. Townsend, The Family Life of Old People (Baltimore, 1963).

Hypothesis 42: There will be no significant difference between the four activity types with regard to home ownership.

Hypothesis 43: The life satisfaction of retirees who live with others will be significantly higher than the life satisfaction of retirees who live alone.

Hypothesis 44: The self-esteem of retirees who live with others will be significantly higher than the self-esteem of retirees who live alone.

Hypothesis 45: There will be no significant difference between the four activity types with regard to living arrangement.

Summary of Hypotheses

Hypothesis 1: There will be a direct relationship between the total number of activities in which a retiree participates and life satisfaction.

Hypothesis 2: There will be a direct relationship between the total number of activities in which a retiree participates and self-esteem.

Hypothesis 3: Life satisfaction of retirees who increase the number of activities in which they participate will be significantly higher than the life satisfaction of those retirees whose participation decreases or remains constant.

Hypothesis 4: Self-esteem of retirees who increase the number of activities in which they participate will be

significantly higher than the self-esteem of those retirees whose participation decreases or remains constant.

Hypothesis 5: Life satisfaction of retirees who primarily participate in a physical activity will be significantly higher than the life satisfaction of those retirees who primarily participate in a sedentary activity.

Hypothesis 6: The self-esteem of retirees who primarily participate in a physical activity will be significantly higher than the self-esteem of those retirees who primarily participate in a sedentary activity.

Hypothesis 7: The life satisfaction of retirees who primarily participate in a social activity will be significantly higher than the life satisfaction of those retirees who primarily participate in an isolate activity.

Hypothesis 8: The self-esteem of retirees who primarily participate in a social activity will be significantly higher than the self-esteem of those retirees who primarily participate in an isolate activity.

Hypothesis 9: There will be a significant difference in life satisfaction between the four activity types.

Hypothesis 10: There will be a significant difference in self-esteem between the four activity types.

- Hypothesis 11: Life satisfaction of retirees who are primarily participating in the activity which they most enjoy will be significantly higher than the life satisfaction of those retirees who are primarily participating in an activity which is not considered their most enjoyable activity.
- Hypothesis 12: Self-esteem of retirees who are primarily participating in the activity which they most enjoy will be significantly higher than the self-esteem of those retirees who are primarily participating in an activity which is not considered their most enjoyable activity.
- Hypothesis 13: There will be no relationship between chronological age and life satisfaction.
- Hypothesis 14: There will be no relationship between chronological age and self-esteem.
- Hypothesis 15: There will be a direct relationship between perceived health status and life satisfaction.
- Hypothesis 16: There will be a direct relationship between perceived health status and self-esteem.
- Hypothesis 17: There will be no significant difference between the four activity types with respect to age.
- Hypothesis 18: There will be no significant difference between the four activity types with respect to health.
- Hypothesis 19: There will be a direct relationship between attitudes toward retirement and life satisfaction.

- Hypothesis 20: There will be a direct relationship between attitudes toward retirement and self-esteem.
- Hypothesis 21: There will be no significant difference between the four activity types with respect to attitude toward retirement.
- Hypothesis 22: There will be a direct relationship between both pre- and post-retirement income and life satisfaction.
- Hypothesis 23: There will be a direct relationship between both pre- and post-retirement income and self-esteem.
- Hypothesis 24: There will be no significant difference between the four activity types with respect to pre- or post-retirement income.
- Hypothesis 25: There will be a direct relationship between occupational prestige and life satisfaction.
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- Hypothesis 31: The life satisfaction of retirees who are presently employed will be significantly higher than the life satisfaction of retirees who have no present employment.
- Hypothesis 32: The self-esteem of retirees who are presently employed will be significantly higher than the self-esteem of retirees who have no present employment.
- Hypothesis 33: There will be no significant difference between the four activity types with respect to their present employment status.
- Hypothesis 34: The life satisfaction of retirees who retired voluntarily will be significantly higher than the life satisfaction of retirees who were retired involuntarily.
- Hypothesis 35: The self-esteem of retirees who retired voluntarily will be significantly higher than the self-esteem of retirees who were retired involuntarily.
- Hypothesis 36: There will be no difference between the four activity types with regard to the nature of their retirement.
- Hypothesis 37: The life satisfaction of married retirees will be significantly higher than the life satisfaction of unmarried retirees.

- Hypothesis 38: The self-esteem of married retirees will be significantly higher than the self-esteem of unmarried retirees.
- Hypothesis 39: There will be no significant difference between the four activity types with regard to marital status.
- Hypothesis 40: The life satisfaction of retirees who own their home will be significantly higher than the life satisfaction of retirees who do not own their home.
- Hypothesis 41: The self-esteem of retirees who own their home will be significantly higher than the self-esteem of retirees who do not own their own home.
- Hypothesis 42: There will be no significant difference between the four activity types with regard to home ownership.
- Hypothesis 43: The life satisfaction of retirees who live with others will be significantly higher than the life satisfaction of retirees who live alone.
- Hypothesis 44: The self-esteem of retirees who live with others will be significantly higher than the self-esteem of retirees who live alone.
- Hypothesis 45: There will be no significant difference between the four activity types with regard to living arrangement.

The Sample

Judgment or "purposive" sampling was selected as the primary sampling procedure for this research. According to Miller:

When practical considerations preclude the use of probability sampling, the researcher may seek a representative sample of other means. He looks for a subgroup that is typical of the population as a whole. Observations are then restricted to this sub-group, and conclusions from the data obtained are generalized to the total population.¹⁷

The sample was restricted to male retirees within the state of Oklahoma. These retirees were selected from the Oklahoma Chapter of the National Retired Campers and Hikers Association, the Stillwater chapter of the American Association of Retired Persons (AARP), the Stillwater Senior Citizen Activity Center, and from senior citizen centers in Tulsa and Oklahoma City, Oklahoma.

After considering several methods of data collection, a questionnaire survey was chosen for this study. This method has many advantages for data collection, but the overriding factor for this study was the relatively low cost in both time and money.¹⁸ The questionnaire was mailed to 247 members of the Retired Campers and Hikers Association along with a postage-paid return envelope. From this initial mail-out, 113 usable instruments were returned. The remainder of the sample was given the questionnaire and asked to complete it at that time, while

¹⁷Delbert C. Miller, Handbook of Research Design and Social Measurement (New York, 1970), p. 56.

¹⁸For a detailed description of the advantages and disadvantages of the questionnaire as a data collection method, see Selltitz et al., Research Methods in Social Relations (New York, 1959), pp. 238-241.

the investigator was present. This group included retirees at the senior citizen centers and from the AARP.

The Questionnaire

Part I

The first section of the questionnaire contained fourteen items representing the previously discussed socio-demographic variables which appear to be important for the life satisfaction of the retiree. The following table summarizes these variables and their respective item numbers. The questionnaire itself is found in Appendix A.

TABLE II
ITEM NUMBERS OF SOCIO-DEMOGRAPHIC VARIABLES

Item Number	Variable
1	Age
2	Health
3	Occupation prior to retirement
4	Number of years retired
5	Post-retirement employment
6	Perception of retirement
7	Nature of retirement
8	Sources of concern
9	Education
10	Marital status
11	Home ownership
12	Living arrangement
13	Pre-retirement income
14	Post-retirement income

Part II

The second part of the questionnaire consisted of the Life Satisfaction Index A (LSIA) which was used to measure life satisfaction. This scale has been the predominant measurement device in social gerontology since it was first developed in 1961. It was devised in an extensive study of older people in the Kansas City area by Bernice Neugarten, Robert Havighurst, and Sheldon Tobin.¹⁹ Working primarily from the framework of the activity theory of successful aging, the authors purposefully developed this scale as a multi-dimensional instrument. It purports to measure five dimensions of life satisfaction including: (1) zest for life as opposed to apathy, (2) resolution and fortitude as opposed to resignation, (3) congruence between desired and achieved goals, (4) high physical, psychological, and social self-concept, and (5) a happy, optimistic tone.²⁰

In addition to its frequent use by numerous investigators²¹ the LSIA has been subject to several validity tests. A correlation of $r = .73$ was found between the LSIA and the Cavan Adjustment Rating

¹⁹Bernice Neugarten, R. J. Havighurst, and Sheldon Tobin, "The Measurement of Life Satisfaction," Journal of Gerontology, 16 (1961), p. 139.

²⁰Ibid., p. 141.

²¹Vivian Wood, Mary Wylie, and Bradford Sheafor, "An Analysis of a Self-Report Measure of Life Satisfaction: Correlation with Rater Judgments," Journal of Gerontology, 24 (1969), pp. 465-469; C. T. Pihlblad and H. A. Rosencranz, The Health of Older People in the Small Town (Columbia, Missouri, 1967), Grant CH 00384-03; and Mary Wylie, "Life Satisfaction of a Program Impact Criterion," Journal of Gerontology, 25 (1970), pp. 36-40.

Scale,²² $r = .58$ when tested against the Life Satisfaction Rating,²³ and a consistency coefficient of $r = .80$, as measured by the Kuder-Richardson formula, was found by Lewis.²⁴

The scoring procedure for this scale yields scores ranging from 0-20. On each item the respondent may either agree, disagree, or remain neutral. One point is scored for each "right" response. The items and scoring key are found in Table III.²⁵

Part III

The third section of the questionnaire was incorporated to measure self-esteem using Rosenberg's Self-Esteem Scale.²⁶ This scale was designed to measure attitudes toward the self along a favorable to unfavorable dimension. The author designed the self-esteem scale with several criteria in mind. One was the following conception of self-esteem:

When we speak of high self-esteem . . . we shall simply mean that the individual respects himself, considers himself worthy, he does not necessarily consider himself better than others, but he definitely does not consider himself worse, he does not feel that he is the ultimate

²²R. J. Havighurst, "Successful Aging," The Gerontologist, 1 (1961), pp. 8-13.

²³Neugarten et al., "The Measurement of Life Satisfaction."

²⁴Lewis, "Meaning and Adjustment," p. 39.

²⁵The LSIA has been subject to revision by D. Adams, "Analysis of a Life Satisfaction Index," Journal of Gerontology, 25 (1970), pp. 36-40, and the revised version has been utilized with various scoring procedures. For an example of the alternate procedure, see Wood, Wylie, and Sheafor, 1969.

²⁶M. Rosenberg.

TABLE III
LIFE SATISFACTION INDEX A*

Here are some statements about life in general that people feel differently about. Would you read each statement on the list, and if you agree with it, put a check mark in the space under "AGREE." If you do not agree with a statement, put a check mark in the space under "DISAGREE." If you are not sure one way or the other, put a check mark in the space under "?." PLEASE BE SURE TO ANSWER EVERY QUESTION ON THE LIST.

	AGREE	DISAGREE	?
1. I am just as happy as when I was younger.	_____	_____	_____
2. These are the best years of my life.	_____	_____	_____
3. My life could be happier than it is now.	_____	_____	_____
4. This is the dreariest time of my life.	_____	_____	_____
5. Most of the things I do are boring and monotonous.	_____	_____	_____
6. Compared to other people, I get down in the dumps too often.	_____	_____	_____
7. The things I do are as interesting to me as they ever were.	_____	_____	_____
8. I have made plans for things I'll be doing a month or a year from now.	_____	_____	_____
9. Compared to other people my age, I make a good appearance.	_____	_____	_____
10. As I grow older, things seem better than I thought they would be.	_____	_____	_____
11. I expect some interesting and pleasant things to happen to me in the near future.	_____	_____	_____
12. I feel old and somewhat tired.	_____	_____	_____
13. As I look back on my life, I am fairly well satisfied.	_____	_____	_____

TABLE III (CONTINUED)

	AGREE	DISAGREE	?
14. I would not change my past life even if I could.	_____	_____	_____
15. I've gotten pretty much what I expected out of life.	_____	_____	_____
16. When I think back over my life, I didn't get most of the important things I wanted.	_____	_____	_____
17. In spite of what people say, the lot of the average man is getting worse, not better.	_____	_____	_____
18. I have gotten more of the breaks in life than most of the people I know.	_____	_____	_____
19. I feel my age, but it does not bother me.	_____	_____	_____
20. Compared to other people my age, I've made a lot of foolish decisions in my life.	_____	_____	_____

*Key: Score 1 point for each response marked X.

in perfection but, on the contrary, recognizes his limitations and expects to grow and improve.²⁷

Thus, from this basic conceptualization of the variable, this scale seems to represent a minimal definition of self-esteem and should be appropriate for older populations who face the reality of limitations.

The scale consists of ten Likert-type items allowing one of four responses: strongly agree, agree, disagree, and strongly disagree. Positively and negatively worded items are presented alternately in order to reduce the danger of response set. The ten items, through the use of contrived items, are scored to yield a seven-point scale.²⁸

Using the Guttman procedure, the reproducibility of this scale was 92 percent and its scalability was 72 percent for a sample of over 5,000 students. It has also shown a test-retest reliability of .85 for a group retested after two weeks.²⁹ In addition, there have been several attempts to test validity:

- (1) A significant association was obtained between self-esteem and depression. Depression items were "often gloomy" and "frequently disappointed."
- (2) A significant correlation appeared between self-esteem and depression affect.
- (3) A significant association was found between self-esteem and choice as a class leader.³⁰

²⁷Ibid., p. 37.

²⁸S. A. Stouffer et al., "A Technique for Improving Cumulative Scales," Public Opinion Quarterly, 16 (1953), pp. 273-291.

²⁹T. Leary, Interpersonal Diagnosis of Personality (New York, 1957), p. 30.

³⁰Ibid., p. 30.

Even though the scale has not been used in older populations, the author believes that it is appropriate across all age groupings. This scale and the scoring procedure follows. An asterisk represents a "positive" response.³¹

The Rosenberg Self-Esteem Scale

Scale Item I was contrived from the combined responses to the three questions listed below. If a respondent answered 2 out of 3, or 3 out of 3 positively, he received a positive score for Scale Item I. If he answered 1 out of 3 or 0 out of 3 positively, he received a 0 for Scale Item I.

I feel that I'm a person of worth, at least on an equal plane with others.

- * 1 _____ Strongly Agree
- * 2 _____ Agree
- 3 _____ Disagree
- 4 _____ Strongly Disagree

I feel that I have a number of good qualities.

- * 1 _____ Strongly Agree
- * 2 _____ Agree
- 3 _____ Disagree
- 4 _____ Strongly Disagree

³¹The reader should note that whereas Rosenberg's scoring procedure denoted a "positive" response as representative of low self-esteem, this report considers positive to be indicative of high self-esteem, i.e., the scoring procedure has been reversed.

All in all, I am inclined to feel that I am a failure.

- 1 _____ Strongly Agree
- 2 _____ Agree
- * 3 _____ Disagree
- * 4 _____ Strongly Disagree

Scale Item II was contrived from the combined responses to two self-esteem questions. One out of 2 or 2 out of 2 positive responses were considered positive for Scale Item II.

I am able to do things as well as most other people.

- * 1 _____ Strongly Agree
- * 2 _____ Agree
- 3 _____ Disagree
- 4 _____ Strongly Disagree

I feel I do not have much to be proud of.

- 1 _____ Strongly Agree
- 2 _____ Agree
- * 3 _____ Disagree
- * 4 _____ Strongly Disagree

Scale Item III

I take a positive attitude toward myself.

- * 1 _____ Strongly Agree
- * 2 _____ Agree
- 3 _____ Disagree
- 4 _____ Strongly Disagree

Scale Item IV

On the whole, I am satisfied with myself.

- * 1 _____ Strongly Agree
- * 2 _____ Agree
- 3 _____ Disagree
- 4 _____ Strongly Disagree

Scale Item V

I wish I could have more respect for myself.

- 1 _____ Strongly Agree
- 2 _____ Agree
- * 3 _____ Disagree
- * 4 _____ Strongly Disagree

Scale Item VI was contrived from the combined responses to two self-esteem questions. One out of 2 or 2 out of 2 positive responses were considered positive.

I certainly feel useless at times.

- 1 _____ Strongly Agree
- 2 _____ Agree
- * 3 _____ Disagree
- * 4 _____ Strongly Disagree

At times I think I am no good at all.

- 1 _____ Strongly Agree
- 2 _____ Agree
- * 3 _____ Disagree
- * 4 _____ Strongly Disagree

Part IV

The fourth part of the questionnaire was designed to determine:

(1) the total number of activities in which the respondent is presently participating, (2) the total number of activities in which the respondent participated five years prior to retirement, (3) the specific activities in which the respondent participates, (4) in which one activity the respondent invests the most time, and (5) from which activity the respondent derives the most enjoyment. The data gathered from this section of the instrument was used to test each of the hypotheses dealing with activity participation.

This section was basically composed from the Leisure Participation and Involvement Index developed by C. R. Pace in 1941.³² From that, an index of leisure activities was developed which would be applicable to the target population of retirees. The final index consisted of 32 specific activities. In addition to these 32 activities, open-ended items were included for those respondents whose activities were omitted from the original list. The activities included are found in Table IV.

For each activity, the respondents were asked to check each one in which they were presently participating and also those in which they participated five years prior to retirement. From this information, both current activity level and pre-retirement activity level were ascertained. This data facilitated calculation of the increase or decrease of activity participation subsequent to retirement. This calculation was performed from the simple formula:

$$\text{Change} = \text{Present level} - \text{Pre-retirement level.}$$

³²C. R. Pace, They Went to College (Minneapolis, 1941).

TABLE IV
LIST OF ACTIVITIES

Walking	Jogging
Gardening	Swimming
Odd jobs at home	Traveling and touring
Woodworking	Fishing
Hunting	Playing golf
Participation in team sports	Tennis
Camping	Shuffleboard
Sitting and thinking	Painting (art)
Craftwork	Reading for pleasure
Watching TV	Literary writing
Playing musical instruments	Visiting friends
Playing cards	Volunteer work
Entertaining at home	Dominoes
Checkers	Chess
Bingo	Hobbies

In addition to the activity checklist, the respondents were asked to choose the one activity in which they invested the most time, as well as the one which they like the most. These two items were used as the criteria for classification into the various activity tapes.³³ The basic classification scheme employed in this study is found in Table V.

Three additional items were included in this section to aid in delineating whether or not the activity would be classified as an isolate or social activity. Several activities were rather ambiguous in this regard, e.g., traveling and touring, volunteer work, etc. These activities could be considered either isolate or social depending upon whether or not they were participated in as part of a group or as individual activities. These three items were:

- (1) Do you belong to any group with whom you participate in the activity in which you invest the most time?
- (2) What group?
- (3) How often does it meet?

If the respondent did engage in the activity with a group which meets at least once each month, the activity was classified as a social activity.

Analysis Procedures

Data analysis was approached in three separate phases: (1) descriptive analysis, (2) test of hypotheses dealing with activity

³³It was recognized by the author that both factors, intrinsic enjoyment and time invested, were important factors. After much deliberation time invested in the activity was chosen as the criterion for classification into the activity types. It is realized that this is a limitation of the study; however, it appeared that the implications of which factor to choose created the basic dilemma of the behavioral versus cognitive approaches of social psychology.

TABLE V
CLASSIFICATION OF ACTIVITIES

Category	Activities
Active-Social	Traveling and touring
	Camping
	Team Sports
	Tennis
Active-Isolate	Walking
	Gardening
	Odd jobs at home
	Woodworking
	Jogging
	Swimming
	Fishing
	Hunting
Sedentary-Social	Golf
	Shuffleboard
	Visiting friends
	Playing cards
	Entertaining at home
	Volunteer work
	Dominoes
	Checkers
	Chess
Sedentary-Isolate	Bingo
	Sitting and thinking
	Painting
	Craftwork
	Reading
	Watching TV
	Literary writing
	Hobbies

participation; (3) test of hypotheses dealing with the socio-demographic variables. Each of these phases entailed the use of various analytical techniques.

Descriptive Analysis

This phase of the data analysis included: (1) a description of the sample with respect to each variable; and (2) a descriptive breakdown of activity participation. The specific statistics used in the descriptive analysis were frequencies, percentages, sample means, and measures of dispersion.

Test of Hypotheses Dealing with Activity

This part of the data analysis included the use of several test statistics, including analysis of variance, the Pearson product-moment correlation coefficient, and the t-test. The following discussion briefly describes each of these statistical techniques.

Analysis of Variance

The primary purpose of the analysis of variance is to determine differences between means of three or more different groups. The analysis, however, uses sample variance, rather than mean scores for calculation of these differences.

The basic idea behind the analysis of variance is to divide the observed difference into components and relate these components to the factors which are producing these differences. The deviation of an individual score from the mean of all scores can be broken into additive components: (1) the variation of the score about the mean of the

subgroup in which it occurs and (2) the variation of the mean of the subgroup about the mean of all scores. Squaring these deviations and summing them for all individuals divides the total sum of squared deviation into two additive parts: (1) the sum of squared deviation within the subgroups and (2) the sum of squared deviation between the subgroups.

The total degrees of freedom can also be divided into two additive parts: (1) the df within groups and (2) the df between groups. If each sum of squared deviation is divided by its degrees of freedom, the resulting mean squares can be placed in the F ratio. The mean square between groups is always placed in the numerator of the F ratio, and the mean square within groups is placed in the denominator. If the null hypothesis is true, the value of the F ratio would be about one. If the null hypothesis is false, the value of the F ratio would be larger than one.

The F statistic has four underlying assumptions:

- (1) The data are interval or ratio;
- (2) The samples are random samples from their respective populations;
- (3) The populations from which these samples were drawn are normally distributed; and
- (4) The variances of the underlying populations are equal.³⁴

³⁴This discussion was taken from Ralph Kolstoe, Introduction to Statistics for the Behavioral Sciences (Homewood, Illinois, 1969), pp. 244-245.

The t-Test

When one wishes to test for differences between mean scores of two groups, the t statistic is appropriate. The t ratio is a deviation divided by a standard deviation; the difference between the means is the deviation, and the standard error of the difference between the means is the standard deviation.

The t statistic, like any other, requires that certain assumptions are met:

- (1) The measurements should be reasonably close to interval or ratio;
- (2) The samples are random samples from their respective populations;
- (3) The populations from which these samples are drawn are normally distributed; and
- (4) The variance of the two populations are equal.³⁵

Pearson Product-Moment Correlation Coefficient

The Pearson product-moment correlation coefficient is a measure of the relationship between changes in two variables. It is basically defined as the mean of the cross products of standard scores which yields a quantitative value indicating the degree of relationship between two variables. The sign of the index will indicate whether the relationship

³⁵The discussion of the t statistic is from Kolstoe, 1969; and N. Downie and R. Heath, Basic Statistical Methods (New York, 1970), p. 178.

is negative or positive. The size of the index will indicate the strength of the relationship.³⁶

Tests of Hypotheses Related to the Socio-Demographic Variables

Chi-square and the Spearman rank-order correlation coefficient were used to test each of the hypotheses related to the socio-demographic variables.

Chi-Square

Chi-square is used as a test of significance when we have data that are expressed in frequencies or data that are in terms of percentages or proportions. There are three basic uses of this statistic: (1) to determine if a certain distribution differs from some predetermined theoretical distribution; (2) in testing hypotheses concerning the significance of the difference of the responses of two or more groups to a stimulus of one type or another; and (3) in testing goodness of fit.³⁷

The chi-square is a non-parametric statistical test, and as such does not require the stringent requirements of the parametric statistics. A non-parametric test is a test whose model does not specify conditions about the parameters of the population from which the sample was drawn. The assumptions associated with most non-parametric tests include the conditions that the observations are independent and the

³⁶Kolstoe, p. 167.

³⁷Downie and Heath, p. 197.

variable under study has underlying continuity, but these assumptions are fewer and much weaker than those associated with parametric tests.³⁸

Spearman Rank-Order Correlation Coefficient

The Spearman rank correlation coefficient is one of the earliest rank statistics to be developed and is perhaps the best known today. Represented by r_s (rho), it is a measure of association which requires that both variables be measured in at least an ordinal scale so that the individuals under study may be ranked in two ordered series.³⁹

Quoting Blalock:

The principle behind Spearman's measure is very simple. We compare the rankings on the two sets of scores by taking the differences of ranks, squaring these differences and then adding, and finally manipulating the measure so that its value will be +1.0 whenever the rankings are in perfect agreement, -1.0 if they are in perfect disagreement, and zero if there is no relationship whatsoever.⁴⁰

³⁸ Sidney Siegal, Non-Parametric Statistics for the Behavioral Sciences (New York, 1956), p. 31.

³⁹ Ibid., p. 202.

⁴⁰ Hubert Blalock, Social Statistics (New York, 1960), p. 317.

CHAPTER V

PRESENTATION OF FINDINGS

In the first section of this chapter, the sample of 206 respondents is examined with respect to the fourteen socio-demographic variables. As previously stated, each of these variables was selected because of its previously demonstrated relationship to the dependent variable, life satisfaction. Activity participation will also be examined.

Part 2 of the analysis deals with each of the forty-five hypotheses. In those cases where an independent variable is significantly related to life satisfaction and/or self-esteem, and there is a significant difference between the four activity types with respect to that variable, a further analysis of the relationship is conducted.

Characteristics of the Sample

The all-male sample of retirees appears to be representative of a very heterogeneous population with respect to most of the socio-demographic variables. The mean age of the 206 respondents was 68.80 with a standard deviation of 7.65. The age distribution is found in Table VI.

In Table VII, each of the nine occupational categories is represented within the sample. The most frequent responses fall in the category of "owner, manager, partner of a small business or small farm; lower level government official; military commissioned officer." Skilled

workers or craftsmen and professionals requiring a bachelor's degree are also frequently mentioned. These three categories include slightly over 60 percent of the sample.

TABLE VI
DISTRIBUTION OF SAMPLE BY AGE

Age	Frequency	Percentage
55 and under	10	4.854
56 - 60	13	6.311
61 - 65	47	22.816
66 - 70	55	26.699
71 - 75	40	19.417
76 - 80	27	13.107
81 - 85	12	5.825
86 - 90	2	0.971
Totals	206	100.000

Compared to today's educational standards, the educational attainment of this sample is relatively low (Table VIII). Over one-half of the respondents have obtained no more than a high school education, 15 percent claimed a bachelor's degree only, and 17 percent of the sample had pursued post-graduate work. This data must, however, be interpreted carefully because of the age of the population. It is doubtful that a high school education of 40-50 years ago could be compared with

the same level today either in content or in meaning for the respondent.

Examination of the frequency distributions for pre- and post-retirement incomes, revealed a marked financial decline for most retirees. While over 50 percent of the sample earned over \$10,000 prior to retirement, only 25 percent maintained this level after retirement. The median pre-retirement income fell in the \$10,000-\$12,499 category and dropped to the \$5,000-\$7,499 category subsequent to retirement. These distributions are found in Tables IX and X.

TABLE VII
DISTRIBUTION OF SAMPLE BY OCCUPATION

Occupation	Frequency	Percentage
Unskilled worker, laborer, farm worker	8	3.883
Semi-skilled worker (machine operator)	16	7.767
Service worker (policeman, fireman, barber, etc.), military non-commissioned officer	19	9.223
Skilled worker or craftsman (carpenter, electrician, plumber, etc.)	40	19.417
Salesman, bookkeeper, secretary, office worker, etc.	10	4.854
Owner, manager, partner of a small business or small farm; lower level government official; military commissioned officer	51	24.757
Professional requiring bachelor's degree (engineer, teacher, etc.)	29	14.078
Owner, high-level executive of large business or large farm; high-level government employee	14	6.796
Professional requiring advanced degree (lawyer, doctor, college professor, etc.)	19	9.223
Totals	206	100.000

TABLE VIII
DISTRIBUTION OF SAMPLE BY EDUCATION

Educational Level	Frequency	Percentage
Finished elementary school	52	25.490
Finished high school	59	28.920
Finished two years of college	21	10.294
Received Bachelor's degree	32	15.686
Received Master's degree	26	12.745
Received Doctoral degree	6	2.941
None of these	8	3.922
Totals	204	100.000

TABLE IX
DISTRIBUTION OF SAMPLE BY PRE-RETIREMENT INCOME

Pre-retirement Income	Frequency	Percentage
\$ 0 - 2,400	7	3.431
\$ 2,500 - 4,999	17	8.333
\$ 5,000 - 7,499	27	13.235
\$ 7,500 - 9,999	48	23.529
\$ 10,000 - 12,499	36	17.647
\$ 12,500 - 14,999	12	5.882
\$ 15,000 - 17,499	20	9.804
\$ 17,500 - 19,999	13	6.373
\$ 20,000 - or above	24	11.765
Totals	204	100.000

TABLE X
DISTRIBUTION OF SAMPLE BY PRESENT INCOME

Income	Frequency	Percentage
\$ 0 - 2,400	22	10.837
\$ 2,500 - 4,999	34	16.749
\$ 5,000 - 7,499	53	26.108
\$ 7,500 - 9,999	40	19.704
\$ 10,000 - 12,499	23	11.330
\$ 12,500 - 14,999	10	4.926
\$ 15,000 - 17,499	9	4.433
\$ 17,500 - 19,999	3	1.478
\$ 10,000 - or above	9	4.433
Totals	203	100.000

Approximately forty percent of the sample have been retired for 0-3 years and fifteen percent are still engaged in some present income producing activity (part-time employment or self-employment). The distributions for these items are found in Tables XI and XII.

Eighty percent of the sample voluntarily retired (Table XIII). This percentage is reflected in the distribution of responses to the item regarding attitude toward retirement to which approximately 82 percent of the respondents indicated a positive feeling toward their retirement as compared to only 18 percent who indicated that they would "like more to do," or "wish they had never retired" (Table XIV).

TABLE XI
DISTRIBUTION OF SAMPLE BY NUMBER OF YEARS RETIRED

Number of Years Retired	Frequency	Percentage
0 - 3	84	40.777
4 - 6	50	24.272
7 - 9	21	10.194
10 - 12	25	12.136
13 - 15	14	6.796
Over 15	12	5.825
Totals	206	100.000

TABLE XII
DISTRIBUTION OF SAMPLE BY PRESENT EMPLOYMENT

Present Employment	Frequency	Percentage
Yes	30	14.851
No	172	85.149
Totals	202	100.000

TABLE XIII
DISTRIBUTION OF SAMPLE BY NATURE OF RETIREMENT

Nature of Retirement	Frequency	Percentage
Voluntary	152	80.000
Involuntary	38	20.000
Totals	190	100.000

TABLE XIV
DISTRIBUTION OF SAMPLE BY RETIREMENT ATTITUDES

Retirement Attitude	Frequency	Percentage
Best years of my life	78	38.614
Retirement is o.k.	85	42.079
Would like more to do	28	13.861
Wish had never retired	11	5.446
Totals	202	100.000

Responses to the self-report of health item were rather evenly distributed with the exception of the "poor" category in which only 6 percent of the sample placed themselves. These results are interesting when the distribution of responses to the item dealing with the area of greatest concern is examined. Health was indicated by 36 percent of the sample as their area of most concern. Surprisingly, age and death was

considered the greatest area of concern by only 11 percent of the respondents. These distributions are found in Tables XV and XVI.

TABLE XV
DISTRIBUTION OF SAMPLE BY SELF REPORT OF HEALTH

Health Condition	Frequency	Percentage
Excellent	35	16.990
Very good	52	25.243
Good	62	30.097
Fair	43	20.874
Poor	14	6.796
Totals	206	100.000

TABLE XVI
DISTRIBUTION OF SAMPLE BY GREATEST CONCERN

Greatest Concern	Frequency	Percentage
Health	68	35.979
Finances	32	16.931
Children	25	13.228
Age and death	21	11.111
Lack of being useful	43	22.751
Totals	189	100.000

In terms of marital status, home-ownership and living arrangement; the majority of the sample can be characterized as married, living with spouse only, and owning their home. Responses to these items are found in Tables XVII and XVIII.

TABLE XVII
DISTRIBUTION OF SAMPLE BY MARITAL STATUS

Marital Status	Frequency	Percentage
Married, spouse living	175	85.366
Widower	24	11.707
Divorced	2	0.976
Never married	4	1.951
Totals	205	100.000

TABLE XVIII
DISTRIBUTION OF SAMPLE BY LIVING ARRANGEMENT

Living Arrangement	Frequency	Percentage
Live alone	14	6.897
Live with spouse only	156	76.847
Live with spouse and children	12	5.911
Single parent living with children	7	3.448
Live with other than the above	13	6.404
Totals	203	100.000

TABLE XIX
DISTRIBUTION OF SAMPLE BY HOME OWNERSHIP

Own Home	Frequency	Percentage
Yes	180	87.805
No	25	12.195
Totals	205	100.000

In summary, it appears that the sample is rather homogeneous with respect to retirement status, marital status, home-ownership, and living arrangement. However, the resultant distribution of responses to each of the remaining eleven socio-demographic variables precludes any general characterization of this group of retirees.

Life Satisfaction and Self-Esteem

The mean life satisfaction score for this sample was 13.504 with a standard deviation of 4.07. This mean is slightly higher than the mean score for the original Kansas City population from which the scale was developed (12.40).¹ It closely approximates the mean of 13.97 reported

¹Bernice Neugarten et al., "The Measurement of Life Satisfaction," Journal of Gerontology, 16 (1961), p. 319.

by Acuff² and 13.94 reported by Lewis³ in their studies of adjustment of retired professors and clergy.

A mean of 5.267 with a standard deviation of 1.14 was computed for the sample on the Rosenberg Self-Esteem Scale.* This appears to be comparative to the score calculated by Rosenberg in his study of an adolescent population. Since the self-concept is one of the social psychological dimensions, the LSIA purports to measure, a relatively high correlation between the two scales was expected. This was substantiated by the data. A correlation of .472, significant at the .0001 level, was calculated for the two scales. Means and standard deviations of the dependent variables are found in Table XX.

TABLE XX
SAMPLE MEANS AND STANDARD DEVIATIONS FOR
LIFE SATISFACTION AND SELF-ESTEEM

Variable	N	Mean	S.D.	C.V. %
Life Satisfaction	206	13.504	4.07	30.145
Self Esteem	206	5.267	1.14	21.721

²Gene F. Acuff, "Retirement, Meaning, and Adjustment: The Emeritus Professor and Retired Clergy of a Southwestern State," (unpublished Ph. D. Dissertation, University of Missouri, 1967).

³Charles Lewis, "Meaning and Adjustment: A Study of Active Professionals, Professors and Clergy of a Southwestern State," (unpublished Ph. D. Dissertation, Oklahoma State University, 1972).

*The coefficient of reproducibility for this sample was .93 and the scalability was 83 percent.

Present and Pre-Retirement Activities

Visiting friends, watching TV, odd jobs at home, traveling and touring with friends, and reading appear to be the most popular activities among this group of retirees. A complete ranking of the post-retirement activities is found in Table XXI.

The frequency distribution for pre-retirement activities is found in Table XXII. A comparison of the two activity distributions reveals that there is little change in the popularity of, or participation in, the specific activities subsequent to retirement. This finding lends support to the idea that quite possibly the meaningful use of leisure in old age is contingent upon participation and practice in leisure activities during the pre-retirement years. It also contradicts the popular stereotype of "retirement to the rocking chair" after retirement. There was very little shift toward the more sedentary activities.

In addition to the activities included in the checklist (Table XXII), several additional activities were listed by the respondents. These activities were:

- | | |
|------------------------------|------------------------|
| 1. Shooting guns | 10. Bicycling |
| 2. Making jewelry | 11. Genealogy |
| 3. Crossword puzzles | 12. Flower arrangement |
| 4. Coin and Stamp collecting | 13. Leathercraft |
| 5. Bird watching | 14. Ham radio |
| 6. Antiques | 15. Woodcarving |
| 7. Electronics | 16. Horse breeding |
| 8. Photography | 17. Gambling |
| 9. Rock hunting | 18. Boating |

TABLE XXI
PRESENT ACTIVITY PARTICIPATION*

Activity	Frequency	Percent	Percentage of Sample Participating
Visiting friends	158	6.97	77.6
Watching TV	157	6.93	76.2
Odd jobs at home	148	6.53	71.8
Traveling and touring (family)	136	6.00	66.0
Reading	135	5.96	65.5
Sitting and thinking	127	5.60	61.6
Fishing	122	5.38	59.2
Walking	120	5.29	58.2
Gardening	117	5.16	56.7
Traveling and touring (groups)	97	4.28	47.0
Hobbies	91	4.01	44.1
Camping (groups)	86	3.79	41.7
Playing cards	83	3.66	40.2
Entertaining at home	80	3.53	38.8
Camping (family)	76	3.35	36.8
Volunteer work	54	2.38	26.2
Woodworking	52	2.29	25.2
Dominoes	49	2.16	23.7
Craftwork	45	1.98	21.8
Hunting	42	1.85	20.3
Checkers	35	1.54	16.9
Swimming	31	1.36	15.0
Team sports	30	1.32	14.5
Bingo	29	1.28	14.0
Shuffleboard	29	1.28	14.0
Painting	18	0.79	8.7
Chess	17	0.75	8.2
Playing musical instruments	15	0.66	7.2
Other activities	14	0.61	6.7

TABLE XXI (Continued)

Activity	Frequency	Percent	Percentage of Sample Participating
Tennis	13	0.57	6.3
Golf	13	0.57	6.3
Literary writing	12	0.53	5.8
Jogging	9	0.39	4.3
Totals	2266	99.74	

*Many respondents selected more than one activity; hence, the number of activities far exceeds the number of respondents.

TABLE XXII
PRE-RETIREMENT ACTIVITY PARTICIPATION*

Activity	Frequency	Percent	Percentage of Sample Participating
Odd jobs at home	149	7.82	72.3
Watching TV	129	6.77	62.6
Visiting friends	125	6.56	60.6
Reading	119	6.24	57.7
Traveling and touring (family)	116	6.09	56.3
Gardening	115	6.03	55.8
Fishing	110	5.77	53.3
Walking	103	5.40	50.0
Sitting and thinking	92	4.83	44.6
Entertaining at home	76	3.99	36.8
Hobbies	72	3.78	34.9
Camping	65	3.41	31.5
Playing cards	63	3.30	30.5
Hunting	62	3.25	30.0
Woodworking	51	2.67	24.7
Volunteer work	48	2.52	23.3
Traveling and touring (groups)	48	1.52	23.3
Swimming	43	2.26	20.8
Other activities	38	1.99	18.4
Camping (groups)	37	1.94	17.9
Craftwork	34	1.78	16.5
Dominoes	30	1.57	14.5
Checkers	30	1.57	14.5
Team sports	28	1.47	13.5
Bingo	22	1.15	10.6
Golf	21	1.10	10.1
Shuffleboard	14	0.73	6.7
Painting	14	0.73	6.7
Literary writing	13	0.68	6.3

TABLE XXII (Continued)

Activity	Frequency	Percent	Percentage of Sample Participating
Musical instruments	11	0.58	5.3
Chess	10	0.52	4.8
Tennis	9	0.47	4.3
Jogging	9	0.47	4.3
Totals	1906	99.96	

*Many respondents selected more than one activity; hence, the number of activities far exceeds the number of respondents.

- | | |
|-------------------------|--------------------|
| 19. Hiking | 22. Flying |
| 20. Radio and TV repair | 23. Square dancing |
| 21. Skiing | 24. Bee keeping |

In terms of numbers of activities, a pre-retirement mean of 9.25 as compared to a post-retirement mean of 11.00 was calculated (see Table XXIII).

TABLE XXIII
DIFFERENCE IN ACTIVITY PARTICIPATION PRIOR
TO AND SUBSEQUENT TO RETIREMENT

	Mean	SD	df	t	SIG.
Pre-retirement	9.25	5.34			
vs.			204	3.32	p < .005
Post-retirement	11.00	5.37			

This result indicates that not only do retirees participate in the same activities after retirement, but new leisure endeavors are also developed.

Correlations between the numbers of pre- and post-retirement activities and the dependent variables, life satisfaction, and self-esteem, indicated a moderate positive relationship. Correlation coefficients of $r = .018$ ($p < .02$) and $r = .40$ ($p < .0001$) for pre- and post-retirement activities, respectively, were calculated with respect to life satisfaction. For self-esteem, the respective correlation coefficients were

.14 ($p < .03$) and .18 ($p < .007$).

A further analysis indicated a significant difference in the self-esteem and life satisfaction scores of those retirees who increased their activity participation versus those retirees whose activity level remained constant or decreased, thus, confirming Hypotheses 3-4. These results are found in Tables XXIV and XXV.

TABLE XXIV
DIFFERENCE IN LIFE SATISFACTION
FOR CHANGE IN ACTIVITY LEVELS

	Mean	SD	df	t	SIG
Increase	14.50	3.65			
vs			204	4.091	$p < .005$
No increase	12.24	4.25			

TABLE XXV
DIFFERENCE IN SELF-ESTEEM FOR
CHANGE IN ACTIVITY LEVELS

	Mean	SD	df	t	SIG
Increase	5.64	1.04			
vs			204	1.77	$p < .05$
No increase	5.06	1.26			

These results are supportive of the activity theory of successful aging. This perspective would predict the increase in activity participation after retirement, as well as the higher life satisfaction and self-esteem of retirees who increased their activity level after retirement. The relationship between number of activities and the dependent variables further substantiates this theoretical position.

The Activity Types

The respondents were distributed rather equally across the activity types. Approximately 60 percent of the sample was classified in one of the active categories, as compared to 40 percent in the sedentary categories. This distribution is found in Table XXVI.

TABLE XXVI
DISTRIBUTION OF SAMPLE BY ACTIVITY TYPES

Activity Type	Frequency	Percentage
Active-social	54	26.214
Active-isolate	67	32.524
Sedentary-social	40	19.417
Sedentary-isolate	45	21.845
Totals	206	100.000

The following results are related to Hypotheses 5-11. Hypotheses 5 and 6 were concerned with differences in life satisfaction and

self-esteem between the retirees classified in the more physical activity types versus those retirees who were primarily involved in sedentary activities. It was hypothesized that the active groups would score significantly higher than the sedentary types on each of the dependent variables. The results were supportive of each of these hypotheses. A t value of 5.162 ($p < .0001$) and 2.36 ($p < .05$) were calculated for life satisfaction and self-esteem, respectively. These results are found in Tables XXVII and XXVIII.

TABLE XXVII

DIFFERENCE IN LIFE SATISFACTION BETWEEN
PHYSICAL AND SEDENTARY ACTIVITY TYPES

Activity Type	Mean	SD	df	t	SIG
Physical	14.661	3.513			
vs			204	5.162	$p < .0001$
Sedentary	11.858	4.259			

TABLE XXVIII

DIFFERENCE IN SELF-ESTEEM BETWEEN PHYSICAL
AND SEDENTARY ACTIVITY TYPES

Activity Type	Mean	SD	df	t	SIG
Physical	5.42	1.02			
vs			204	2.36	$p < .05$
Sedentary	5.04	1.27			

The literature of reference group, subculture, and personality theory leads to the conclusion that social interaction and the feeling of group membership are necessary for the successful adjustment to old age and retirement. From these perspectives, it was hypothesized that retirees classified in the social activity categories would score significantly higher than retirees classified within the isolate categories (Hypotheses 7-8).

The hypothesis dealing with life satisfaction was supported (Table XXIX), $t = 4.28$ ($p < .0001$). However, this was not the case for self-esteem. There was no significant difference in the self-esteem scores on this activity dimension (Table XXX).

TABLE XXIX
DIFFERENCE IN LIFE SATISFACTION FOR SOCIAL
VERSUS ISOLATE ACTIVITY TYPES

Activity Type	Mean	SD	df	t	SIG
Social	14.776	3.203			
vs			204	4.276	$p < .0001$
Isolate	12.437	4.415			

TABLE XXX
DIFFERENCE IN SELF-ESTEEM FOR SOCIAL
VERSUS ISOLATE ACTIVITY TYPES

Activity Type	Mean	SD	df	t	SIG
Social	5.33	1.08	204	.745	NS*
vs					
Isolate	5.21	1.19			

*NS - not significant at the .05 level.

A combination of the two activity dimensions, active-sedentary and social-isolate, led to the general hypotheses that there would be a significant difference between the four resultant types with respect to each of the dependent variables. The means and standard deviations for the four types on life satisfaction and self-esteem are found in Tables XXXI and XXXII.

TABLE XXXI
MEANS AND STANDARD DEVIATIONS FOR FOUR
ACTIVITY TYPES ON LIFE SATISFACTION

Activity Type	Mean	SD
Active-social	15.833	2.463
Active-isolate	13.716	3.942
Sedentary-social	13.350	3.548
Sedentary-isolate	10.533	4.434

TABLE XXXII
MEANS AND STANDARD DEVIATIONS FOR FOUR
ACTIVITY TYPES ON SELF-ESTEEM

Activity Type	Mean	SD
Active-social	5.39	1.05
Active-isolate	5.45	1.00
Sedentary-social	5.25	1.13
Sedentary-isolate	4.87	1.37

To test for differences between the four types, the means were subjected to a simple one-way analysis of variance. A test of Hypothesis 9 yielded an F ratio of 17.29, significant at the .0001 level (Table XXXIII). While the difference was not as high as with life satisfaction, the difference in self-esteem was still statistically significant at the .05 level, $F = 2.665$ (Table XXXIV). It should be noted, however, that the small between type sum of squares leads to a tenuous substantive conclusion at best. The variation may be chance variation. The analysis of variance summary tables are found on the following page.

Another dimension of activity participation investigated in this study dealt with whether or not the retiree is primarily participating in the activity he most enjoys or whether he is primarily engaged in some other less enjoyable activity. It was thought that congruency on this dimension would result in higher life satisfaction and self-esteem than incongruency. When mean scores were compared, the resultant t value for life satisfaction was 2.168 ($p < .05$) indicating significantly

TABLE XXXIII
 DIFFERENCE IN LIFE SATISFACTION BETWEEN
 THE FOUR ACTIVITY TYPES

Source	SS	df	MS	F
Total	3397.49	205		
Between types	694.08	3	231.36	
Error	2703.41	202	13.28	17.287*

*p < .001

TABLE XXXIV
 DIFFERENCE IN SELF-ESTEEM BETWEEN
 THE FOUR ACTIVITY TYPES

Source	SS	df	MS	F
Total	268.315	205		
Between types	10.215	3	3.405	
Error	258.100	202	1.278	2.665*

*p < .048

higher life satisfaction for the congruent group (Table XXXV). There was no significant difference in self-esteem (Table XXXVI).

TABLE XXXV
DIFFERENCE IN LIFE SATISFACTION BETWEEN CONGRUENT
AND INCONGRUENT ACTIVITY PARTICIPANTS

Group	Mean	SD	df	t	SIG
Congruent	13.928	3.872			
vs			204	2.168	p < .05
Incongruent	12.626	4.305			

TABLE XXXVI
DIFFERENCE IN SELF-ESTEEM BETWEEN CONGRUENT
AND INCONGRUENT ACTIVITY PARTICIPANTS

Group	Mean	SD	df	t	SIG
Congruent	5.30	1.02			
vs			204	.635	NS*
Incongruent	5.12	1.26			

*NS - not significant at the .05 level.

The Socio-Demographic Variables

The previous results would appear to indicate a strong relationship

between the nature of activity participation and the dependent variables, life satisfaction and self-esteem. However, other variables must be considered before these findings can be considered conclusive. The following section of the analysis examines each of the socio-demographic variables. For each variable, the following questions were pursued:

- (1) Is there a relationship between the socio-demographic variable and the dependent variables?
- (2) Is there a significant difference across the four activity types with respect to the socio-demographic variable?
- (3) If there is a difference across the four activity types with respect to the socio-demographic variable, how does this effect the relationship with life satisfaction and self-esteem?

Three Hypotheses (13, 14, 17) were formulated relating to the age of the respondents. Since the literature has been inconclusive concerning the relationship between this variable and adjustment to old age, each of these hypotheses were stated in the null form. A test of Hypothesis 13 indicated a significant negative relationship between age and life satisfaction. A correlation coefficient of $r = -.17$ ($p < .009$) was computed for this dependent variable. Thus, as the age of the respondents increased, life satisfaction decreased.

The relationship did not hold for self-esteem. Age does not appear to be related to self-esteem. A correlation coefficient of $r = .018$ ($p < .791$) was calculated.

Hypothesis 17, relating to age differences across the four activity types, was tested by the chi-square statistic. Results of this test are found in Table XXXVII. In the original test, each of the nine age

categories were included. However, due to the small frequencies in some of the cells, several categories were collapsed into the resultant 4 x 3 table.

TABLE XXXVII
DIFFERENCE BETWEEN ACTIVITY TYPES
WITH RESPECT TO AGE

Activity Type	Age			Total
	< 55-60	61-70	> 70	
Active-social	9 (.39)*	33 (.32)	11 (.13)	53
Active-isolate	9 (.39)	37 (.36)	20 (.25)	66
Sedentary-social	3 (.13)	18 (.17)	19 (.23)	40
Sedentary-isolate	2 (.08)	14 (.14)	31 (.38)	47
Total	23	102	81	206

Chi-square = 26.98; df = 6; Probability Level = .003

*Proportions in parentheses.

The computed chi-square of 26.98 was found to be significant at the .003 level, indicating a significant difference between the activity types with respect to age. A closer examination revealed that the number of younger retirees are proportionately higher in the active types.

Each of these variables had been previously related to the dependent variables. Because of this relationship, an analysis of variance was computed, controlling for age. Results of this test indicated a significant difference between activity types on the life satisfaction

scale after removal of the variance attributed to age. The F ratio was 14.64 ($p < .0001$) for activity types and 4.79 ($p < .0093$) for age.

A review of each of the findings related to age seems to indicate the following:

- (1) There is a significant negative relationship between age and life satisfaction.
- (2) There is no apparent relationship between age and self-esteem.
- (3) As age increases, activity participation shifts toward the sedentary types.
- (4) Both age and activity types have significant effects upon life satisfaction independent of each other.

Interpreting these results, it would appear that increasing age brings about a change in the activity patterns of the older person which, in turn, contributes to a decrease in life satisfaction.

The second biological variable examined in this study was health. A self report of health was used to determine the health status of each respondent relative to others his age. Hypothesis 15, there will be a direct relationship between perceived health status and life satisfaction, was confirmed. A Spearman correlation coefficient of $r_s = -.49$ ($p < .0001$) was computed. The negative correlation was due to the coding of the health item, excellent = 1, very good = 2, etc. With a reversal of the coding a strong positive relationship is evident. A direct relationship was also found between health status and self-esteem, $r_s = -.31$ ($p < .0001$), thus confirming Hypothesis 16.

Surprisingly, there was no significant difference found across the four activity types with respect to perceived health status. The

resultant chi-square value for these two variables was 20.81 ($p < .063$) which exceeded the .05 rejection level. The results of this test are found in Table XXXVIII.

TABLE XXXVIII
DIFFERENCES IN ACTIVITY TYPES WITH
RESPECT TO HEALTH STATUS

Activity Type	Health Status					Total
	Excellent	Very Good	Good	Fair	Poor	
Active-social	17 (.48)*	12 (.23)	15 (.24)	8 (.19)	2 (.14)	54
Active-isolate	10 (.28)	18 (.35)	21 (.34)	14 (.33)	4 (.28)	67
Sedentary-social	6 (.17)	12 (.23)	11 (.18)	10 (.23)	1 (.07)	40
Sedentary-isolate	2 (.06)	10 (.19)	15 (.24)	11 (.25)	7 (.50)	45
Total	35	52	62	43	14	206

Chi-square = 20.81; df = 12; Not significant at .05 level.

*Proportions in parentheses.

Hypotheses 19-21 deal with the respondent's attitude toward retirement. Past research has indicated that the perception of retirement has a profound effect upon the adjustment to old age. The data gathered in this study further substantiates this idea. Hypotheses 19 and 20 were confirmed. A Spearman correlation coefficient of $r_s = -.50$ ($p > .0001$) was calculated for the relationship between attitude toward retirement

and life satisfaction. Like the health scale, the negative sign of the coefficient is attributed to the coding scheme. The association between the two variables is strongly positive. Self-esteem was also found to be highly related to retirement attitudes. For these variables $r_s = -.20$ which is significant at the .004 level.

A test of Hypothesis 21 revealed a significant difference between the activity types with respect to retirement attitudes. A chi-square value of 14.25 ($p < .003$) was computed. An examination of the cells revealed that those retirees engaged in the more physical activities appeared to possess a more positive attitude toward retirement than those engaged in the more sedentary activities. These results are found in Table XXXIX. Due to the small N for several cells in this analysis, attitudes were considered either positive or negative.

TABLE XXXIX
DIFFERENCE BETWEEN THE FOUR ACTIVITY TYPES WITH
RESPECT TO ATTITUDES TOWARD RETIREMENT

Activity Types	Attitude		Total
	Positive	Negative	
Active-social	50 (.31)*	4 (.10)	54
Active-isolate	52 (.32)	13 (.33)	65
Sedentary-social	34 (.21)	6 (.15)	40
Sedentary-isolate	27 (.16)	16 (.41)	43
Total	163	39	202

Chi-square = 14.25; df = 3; $p < .003$.

*Proportions in parentheses.

A further analysis of the relationship between activity types, attitude toward retirement, and the dependent variable was conducted. When the variance attributed to attitude toward retirement was removed, the F ratio for activity types, with respect to life satisfaction, was 11.85 ($p < .0001$). An F of 40.13 ($p < .0001$) was also found for the attitude variable. These results indicate that both activity type and attitude, independent of each other, significantly effect life satisfaction.

The relationship between activity and self-esteem did not hold when attitudes were controlled. The F value for activity types was only 1.75 ($p < .15$). Thus, it appears that the attitude one has toward retirement has much more effect on self-esteem than his activity patterns. An F value of 7.57 for attitudes remained significant at the .006 level.

Several hypotheses (22-30) were formulated regarding socio-economic status and its relation to life satisfaction and self-esteem. The specific indicators of socio-economic status included in these hypotheses were pre- and post-retirement income, occupational prestige, and educational attainment.

The findings from this research indicate that pre-retirement income, rather than the income level subsequent to retirement, is significantly related to the life satisfaction and self-esteem of the retiree. There was no significant relationship between post-retirement income and either of the dependent variables. Correlation coefficients of $r = .08$ ($p < .21$) and $r = .12$ ($p < .07$) were computed for life satisfaction and self-esteem, respectively.

Pre-retirement income does appear to be related to successful aging.

A correlation of $r = .18$ ($p < .009$) was found for life satisfaction, and $r = .21$ ($p < .002$) for self-esteem. Chi-square tests revealed no significant differences across the four activity types with respect to either pre- or post-retirement income (Tablex XL and XLI).

The second variable related to socio-economic status examined in this study was occupational prestige. A significant relationship was found between this variable and life satisfaction. The Spearman correlation coefficient for these variables was .17, significant at the .01 level. No significant relationship was found between occupational prestige and self-esteem ($r_s = .08$), and there was no difference across the activity types with respect to occupational prestige. These results are found in Table XLII.

TABLE XL
DIFFERENCE BETWEEN ACTIVITY TYPES WITH RESPECT
TO PRE-RETIREMENT INCOME

Activity Type	Income			Total
	0-7,499	7,500-14,999	>15,000	
Active-social	27 (.25)*	22 (.30)	5 (.24)	54
Active-isolate	34 (.31)	24 (.33)	8 (.38)	66
Sedentary-social	23 (.21)	13 (.18)	4 (.19)	40
Sedentary-isolate	25 (.23)	14 (.19)	4 (.19)	21

Chi-square = 1.39; df = 6; Not significant at the .05 level.

*Proportions in parentheses.

TABLE XLI

DIFFERENCE BETWEEN ACTIVITY TYPES WITH RESPECT
TO POST-RETIREMENT INCOME

Activity Type	Income			Total
	0-7,499	7,500-14,999	>15,000	
Active-social	10 (.20)*	29 (.30)	15 (.26)	54
Active-isolate	16 (.31)	30 (.31)	20 (.35)	66
Sedentary-social	11 (.21)	21 (.22)	8 (.14)	40
Sedentary-isolate	14 (.27)	16 (.17)	14 (.24)	44
Total	51	96	57	204

Chi-square = 4.98; df = 6; Not significant at the .05 level.

*Proportions in parentheses.

TABLE XLII

DIFFERENCE BETWEEN ACTIVITY TYPES WITH
RESPECT TO OCCUPATIONAL PRESTIGE

Activity Type	Occupational Prestige			Total
	Low	Medium	Hi	
Active-social	14 (.32)*	21 (.21)	19 (.31)	54
Active-isolate	11 (.26)	40 (.40)	16 (.26)	67
Sedentary-social	10 (.23)	17 (.17)	13 (.21)	40
Sedentary-isolate	8 (.19)	23 (.23)	14 (.23)	62
Total	43	101	62	206

Chi-square = 6.32; df = 6; Not significant at the .05 level.

*Proportions in parentheses.

Results similar to those found for occupational prestige were found for educational attainment. Education was significantly related to life satisfaction, $r_s = .21$ ($p < .003$), but did not correlate with self-esteem, $r_s = .11$ ($p < .08$). No differences were found between activity types with respect to educational attainment (see Table XLIII).

TABLE XLIII
DIFFERENCE BETWEEN ACTIVITY TYPES WITH
RESPECT TO EDUCATIONAL ATTAINMENT

Activity Type	Education			Total
	Less Than College	College	Graduate	
Active-social	33 (.30)*	12 (.23)	7 (.22)	52
Active-isolate	37 (.33)	19 (.36)	5 (.16)	61
Sedentary-social	20 (.18)	9 (.17)	11 (.34)	40
Sedentary-isolate	21 (.19)	13 (.25)	9 (.28)	32
Total	111	53	32	196

Chi-square = 8.87; df = 6; Not significant at the .05 level.

*Proportions in parentheses.

Six hypotheses (31-36) were formulated which dealt with the nature of retirement. These hypotheses included two variables, whether the retirees are engaged in some present employment and whether the retirement from his life's work was voluntary or involuntary. Previous research has shown these two variables to be related to life satisfaction.

Findings from this research, however, show little relationship between present employment and life satisfaction or self-esteem. Tests of Hypotheses 31 and 32 revealed no significant differences between retirees who are currently employed and those who have no present employment on either of the dependent variables. Results of these tests are found in Tables XLIV and XLV.

A significant difference was found between the four activity types with respect to whether or not the retiree was involved in some income-producing endeavor. A chi-square of 10.28 ($p < .01$) was found in the test of Hypothesis 33 (see Table XLVI). It appears that this difference is primarily attributable to the sedentary-social activity category. The frequency of employed retirees in this type was disproportionate to the distribution of the remainder of the sample.

TABLE XLIV
DIFFERENCE IN LIFE SATISFACTION BETWEEN
EMPLOYED AND UNEMPLOYED RETIREES

Group	Mean	SD	df	t	SIG
Employed	13.266	4.40			
vs			200	-.371	NS*
Unemployed	13.569	4.05			

*NS - not significant at the .05 level.

TABLE XLV
 DIFFERENCE IN SELF-ESTEEM BETWEEN EMPLOYED
 AND UNEMPLOYED RETIREES

Group	Mean	SD	df	t	SIG
Employed	5.266	1.20			
vs			200	-.164	NS*
Unemployed	5.284	1.12			

*NOS - not significant at the .05 level.

TABLE XLVI
 DIFFERENCE BETWEEN ACTIVITY TYPES WITH
 RESPECT TO PRESENT EMPLOYMENT

Activity Type	Employed	Unemployed	Total
Active-social	5 (.17)*	47 (.27)	52
Active-isolate	9 (.30)	57 (.33)	66
Sedentary-social	12 (.40)	27 (.16)	39
Sedentary-isolate	4 (.13)	41 (.24)	45
Total	30	172	202

Chi-square = 10.28; df = 3; $p < .01$.

*Proportions in parentheses.

The nature of the retirement event, i.e., whether voluntary or involuntary, appears to be an important consideration for successful adjustment. When mean scores for life satisfaction and self-esteem were

compared for these two groups, significant differences were found for both variables. Those retirees whose retirement was voluntary scored significantly higher. The results of these tests are found in Tables XLVII and XLVIII.

TABLE XLVII
DIFFERENCE IN LIFE SATISFACTION BETWEEN VOLUNTARY
VERSUS INVOLUNTARY RETIREES

Group	Mean	SD	df	t	SIG
Voluntary	14.164	3.67	186	5.280	p < .0001
vs					
Involuntary	10.500	4.04			

• TABLE XLVIII
DIFFERENCE IN SELF-ESTEEM BETWEEN VOLUNTARY
VERSUS INVOLUNTARY RETIREES

Group	Mean	SD	df	t	SIG
Voluntary	5.355	1.02	186	2.683	p < .05
vs					
Involuntary	4.805	1.41			

A significant difference between the activity types with respect to the nature of retirement was also found. Not surprising was the high proportion of retirees in the sedentary-isolate type who were retired against their wishes. It could be expected that many of these respondents were retired due to their health or possibly because of their age. The other type with several "involuntary" retirees was the active-social type. Results of this chi-square test are found in Table XLIX.

TABLE XLIX
DIFFERENCE BETWEEN ACTIVITY TYPES WITH
RESPECT TO NATURE OF RETIREMENT

Activity Type	Voluntary	Involuntary	Total
Active-social	41 (.27)*	9 (.25)	50
Active-isolate	51 (.34)	9 (.25)	60
Sedentary-social	33 (.22)	4 (.11)	37
Sedentary-isolate	27 (.18)	14 (.39)	41
Total	152	36	188

Chi-square = 8.33; df = 3; $p < .03$.

*Proportions in parentheses.

An analysis of variance, controlling for voluntary or involuntary retirement, was computed for both life satisfaction and self-esteem. After removal of the variance attributed to the nature of the retirement event, the strong relationship between activity type and life satisfaction remained. The F ratio was 11.85, significant at the .0001 level.

However, this was not the case with self-esteem. Controlling for the nature of the retirement, the difference between the activity types was diminished. The F ratio for this test was 1.75 ($p < .15$).

The final three socio-demographic variables included in the survey were marital status, living arrangement, and home ownership. It was hypothesized that those retirees who were married, who lived with others, and who owned their home would score significantly higher in life satisfaction and self-esteem than their respective counterparts.

Tests of Hypotheses 37 and 38 indicated a significant difference between married and unmarried retirees on the life satisfaction scale, but no difference was found for self-esteem. On the life satisfaction variable, married retirees had a mean score of 14.126 as compared to 9.931 for those retirees who were widowed, divorced, or never married. The resultant t value for these mean scores was 5.60, significant at the .0001 level (see Table L). For self-esteem, married retirees had a mean score of 5.314, compared to 4.967 for unmarried retirees. The t value of 1.54 was not significant at the .05 level. Results of this test are found in Table LI.

TABLE L
DIFFERENCE IN LIFE SATISFACTION BETWEEN
MARRIED VERSUS UNMARRIED RETIREES

Group	Mean	SD	df	t	SIG
Married	14.126	3.71			
vs			203	5.601	$p < .001$
Unmarried	9.931	2.53			

A chi-square test revealed a significant difference across the four activity types with respect to marital status. As could be expected, those retirees who were unmarried appear to participate primarily in the isolate type activities (Table LII).

TABLE LI
DIFFERENCE IN SELF-ESTEEM BETWEEN MARRIED
VERSUS UNMARRIED RETIREES

Group	Mean	SD	df	t	SIG
Married	5.314	1.12			
vs			203	1.549	NS*
Unmarried	4.967	.723			

*NS - not significant at the .05 level.

TABLE LII
DIFFERENCE BETWEEN FOUR ACTIVITY TYPES
WITH RESPECT TO MARITAL STATUS

Activity Type	Marital Status		Total
	Married	Unmarried	
Active-social	53 (.30)*	1 (.03)	54
Active-isolate	57 (.33)	9 (.30)	66
Sedentary-social	33 (.19)	7 (.23)	40
Sedentary-isolate	32 (.18)	13 (.43)	45
Totals	175	30	205

Chi-square = 14.69; df = 3; p < .002.

*Proportions in parentheses.

An analysis of variance, controlling for marital status, was computed for the activity types and life satisfaction. After removal of the variance attributable to marital status, a significant difference between the activity types on the life satisfaction scale remained. The F ratios were 12.407, significant at the .001 level, for activity type and 36.256 for marital status, also significant at the .001 level.

The data gathered in this research also indicated significant differences between homeowners and non-homeowners with respect to life satisfaction and self-esteem. Homeowners scored higher on each variable. Results of the t tests for these variables are found in Tables LIII and LIV. No significant difference was found between the four activity types with respect to home ownership (see Table LV).

TABLE LIII
DIFFERENCE IN LIFE SATISFACTION BETWEEN
HOMEOWNERS VERSUS NON-HOMEOWNERS

Group	Mean	SD	df	t	SIG
Homeowners	13.95	3.87			
vs			202	4.29	p < .001
Non-homeowners	10.29	4.33			

TABLE LIV
DIFFERENCE IN SELF-ESTEEM BETWEEN HOMEOWNERS
VERSUS NON-HOMEOWNERS

Group	Mean	SD	df	t	SIG
Homeowners	5.42	0.97			
vs			202	5.83	p < .001
Non-homeowners	4.08	1.64			

TABLE LV
DIFFERENCE BETWEEN ACTIVITY TYPES
WITH RESPECT TO HOME OWNERSHIP

Activity Type	Homeowner	Non-homeowner	Total
Active-social	50 (.28)*	4 (.17)	54
Active-isolate	60 (.33)	6 (.25)	66
Sedentary-social	35 (.19)	4 (.17)	39
Sedentary-isolate	35 (.19)	10 (.42)	45
Total	180	24	204

Chi-square = 6.27; df = 3; p < .09.

*Proportions in parentheses.

In terms of living arrangement, results similar to those of marital status were expected. Because of the small frequencies obtained in several categories, the sample was grouped according to whether the respondents lived with others or lived alone. T tests indicated that

retirees who lived with others scored significantly higher in life satisfaction than those who lived alone. No difference was found between the two groups with respect to self-esteem. Results of these tests are found in Tables LVI and LVII. A significant difference was found between the four activity types with respect to living arrangement. A high proportion of those retirees who lived alone were primarily engaged in the more sedentary activities, while those who lived with others were more active (see Table LVIII).

TABLE LVI

DIFFERENCE IN LIFE SATISFACTION BETWEEN RETIREES WHO LIVE
ALONE VERSUS RETIREES WHO LIVE WITH OTHERS

Group	Mean	SD	df	t	SIG
Live alone	9.04	2.51			
vs			201	5.72	p < .001
Live with others	14.02	3.68			

TABLE LVII

DIFFERENCE IN SELF-ESTEEM BETWEEN RETIREES WHO LIVE
ALONE VERSUS RETIREES WHO LIVE WITH OTHERS

Group	Mean	SD	df	t	SIG
Live alone	4.98	1.08			
vs			201	1.53	NS*
Live with others	5.27	.734			

*NS - not significant at the .05 level.

TABLE LVIII
DIFFERENCE BETWEEN ACTIVITY TYPES WITH
RESPECT TO LIVING ARRANGEMENT

Activity Type	Live Alone	Live with Others	Total
Active-social	1 (.07)*	51 (.27)	52
Active-isolate	2 (.14)	64 (.34)	66
Sedentary-social	6 (.43)	34 (.18)	40
Sedentary-isolate	5 (.36)	40 (.21)	45
Total	14	189	203

Chi-square = 8.87; df = 3; $p < .03$.

*Proportions in parentheses.

Summary

In this chapter, the findings of the research were presented. A description of the sample, their activity patterns, and tests of the forty-five hypotheses were included.

The frequency distributions for each of the socio-demographic variables indicated a relatively heterogeneous sample. The sample was rather equally dispersed on each variable with the exception of marital status, home ownership, and living arrangement.

The activities of this sample were numerous and diverse. Ranging from team sports to bird watching, a total of 57 different activities were listed by the retirees. Results from this research indicate that basically little change takes place, subsequent to retirement, in the specific activities in which many of the retirees participate. However,

it does appear that the number of leisure endeavors increase after retirement.

In terms of activity participation and the dependent variables, significant differences were observed between retirees who increased their leisure participation, subsequent to retirement, and those retirees whose participation remained constant or decreased. Life satisfaction and self-esteem of the group whose activities increased were significantly higher.

Significant differences in life satisfaction and self-esteem were also observed between the four activity types. T tests indicated that retirees participating in physical activities scored higher than those participating in sedentary activities on both variables. When the social versus isolate dimension was examined, a significant difference was observed for life satisfaction but not for self-esteem. Results also indicated that retirees who were primarily participating in the activity they most enjoyed, scored higher on life satisfaction than those who were incongruent, but the difference was not significant on self-esteem.

Table LIX summarizes the significant correlations found between life satisfaction, self-esteem, and the socio-demographic variables.

In addition to these correlations, significant differences were found between the following groups with respect to life satisfaction:

- (1) Voluntary versus involuntary retirees (voluntary significantly higher).
- (2) Married versus unmarried retirees (married significantly higher).

(3) Homeowners versus non-homeowners (homeowners significantly higher).

(4) Retirees living with others versus retirees living alone (living with others significantly higher).

On the variable of self-esteem, significant differences were observed between voluntary versus involuntary retirees and between homeowners versus non-homeowners.

TABLE LIX
CORRELATIONS BETWEEN SOCIO-DEMOGRAPHIC VARIABLES,
LIFE SATISFACTION, AND SELF-ESTEEM

Variable	Life Satisfaction	Self-Esteem
Age (b)	-.17*	.02
Health (a)	.49*	.30*
Occupational prestige (a)	.16*	.08
Attitude toward retirement (a)	.50*	.20*
Education (a)	.21*	.12
Pre-retirement income (b)	.18*	.21*
Post-retirement income (b)	.08	.12

*p < .05

(a) Spearman Correlation Coefficient.

(b) Pearson Correlation Coefficient.

Differences were observed across the four activity types on seven variables: age, attitude toward retirement, whether or not the

respondent was presently employed, whether or not retirement was voluntary, marital status, and living arrangement. When analyses of variance for the effects of the activity types on the dependent variables were computed, the effect of activity remained significant for each control variable. For self-esteem, the effects of activity remained significant except in the cases where attitude toward retirement and marital status were controlled.

CHAPTER VI

SUMMARY AND CONCLUSIONS

The primary focus of this study was on the activity patterns of retirees and the consequences of activity participation for the life satisfaction and self-esteem of the elderly leisure participant. The research was designed to pursue the answers to several practical questions regarding leisure among the elderly, as well as to clarify portions of the existing socio-gerontological theory.

Relatively new as an academic discipline, social gerontology has been plagued by contradictory and controversial theory. The two major theoretical perspectives which thus far have dominated the gerontological literature are the disengagement and activity (engagement) theories of successful aging. These two theories are viewed as polar opposites, one based on the assumption that successful aging requires relinquishing the roles of middle-age, while the other assumes the necessity for maintenance of middle-age activities.

More recent theoretical perspectives have focused on the individual and his need for social and psychological support systems in his later years. These perspectives include the subculture theory, the life-pattern maintenance approach, and reference group theory.

Most of the gerontological research to this date has ignored the leisure role. Retirement, in its most simple form, may be conceptualized as entrance into a life of leisure. With the loss of the work

role, which to many retirees represents not only the role of breadwinner, but also the hub of his social life, a retiree's ability to cope with the increase in leisure time becomes very important. Surprisingly, research has been sparse, and the major theoretical orientations of social gerontology have treated the leisure role lightly at best.

Methods and Procedures

The data for this research was collected during the months of July and August, 1973, through the use of a questionnaire survey.¹ Every attempt was made to obtain an adequate sample of the retired population of the state of Oklahoma. However, because of the relative unavailability of large groups of retirees from which to draw a random sample, the sampling procedure itself was rather unsystematic. Subjects included in the study were obtained from the Oklahoma chapter of the Retired Campers and Hikers Association, the Stillwater chapter of the American Association of Retired Persons, and from senior citizen centers in Tulsa and Stillwater. Through this "purposive" sampling procedure, a divergent group of respondents was procured. The final sample included 206 retirees who appeared to be very heterogeneous in terms of socio-demographic characteristics.

The survey instrument was constructed in four sections. Part I was used to obtain socio-demographic information related to fourteen variables which previous research had shown to be related to successful

¹Since the data was collected during the summer months, activities may be weighted toward the outdoors type of leisure. This is recognized as a limitation of the study.

aging. These variables included age, health, occupation, years in retirement, present employment, attitude toward retirement, the nature of the retirement event, areas of greatest concern, education, marital status, home ownership, living arrangement, and pre- and post-retirement income. Part II of the questionnaire contained the Life Satisfaction Index A, which was used to measure life satisfaction, the most frequently utilized indicator of successful aging. Part III consisted of the Rosenberg Self-Esteem Scale, designed to measure the self-esteem of the respondent, and the final section of the instrument included an activity checklist. This checklist was designed to determine in what activities the respondents participated prior to retirement as well as their present activity participation. The subjects were also asked to specify which one activity required the largest investment in terms of time. Responses to this item were used to classify the subject into one of the four activity types proposed by Breen et al., in their study of an aged population in Indiana.² The establishment of these types was based on two criteria: (1) whether the activity was essentially a group or individual activity, and (2) whether the activity required little or a considerable amount of physical vigor.

Even though the study was considered exploratory in nature, several directional hypotheses were formulated with respect to variables which previous research had investigated or in cases where existing theory seemed to indicate predictable relationships. A total of 45 hypotheses were tested. A significance level of .05 was set and maintained for rejection of a null hypothesis of no difference between means or of no

²Leonard Breen et al., The Adult Years (Purdue University, 1961).

significant association between variables. Statistical tests used in the analysis of the data included chi-square, the F test, the t test, Pearson's product-moment correlation coefficient, and the Spearman rank-order correlation coefficient.

Summary of the Findings

Results of the research indicated a wide range of activities in which the retirees were participating. A total of 57 different activities were listed. Examination of the distribution of the various activities among the sample (Table XXI) makes it difficult to make any general statement concerning the nature of leisure participation among the retirees. The four most popular activities represented each of the four activity types: visiting friends (sedentary-social), watching TV (sedentary-isolate), odd jobs at home (active-isolate), and traveling and touring (active-social). In terms of activity types, it should be noted, however, that eight of the first ten most popular activities were isolate type activities.

With respect to the change in activity patterns after retirement, the results were rather surprising. Prior to retirement, frequencies for the ten most popular activities in terms of activity types were as follows: active-social - 1, active-isolate - 4, sedentary-social - 2, sedentary-isolate - 3. For post-retirement activity, the frequencies for the types were 2, 4, 1, 3, respectively. These results suggest that there is little change in the nature of leisure participation at the onset of retirement.

The number of activities appear to increase after retirement. The mean number of activities prior to retirement was 9.25, compared to

11.00 after retirement. A t value of 3.32 indicated that this was a significant increase. Correlations for the number of activities and the dependent variables were strongly positive, and tests for differences in life satisfaction and self-esteem between those who increase their leisure participation versus those who decrease their participation level revealed significantly higher scores for those who increased. There are several theoretical implications for these results which will be discussed later.

Another dimension of activity participation examined in this research was the congruency of actual participation and the inherent enjoyment of the activity. In other words, are the retirees involved in their most enjoyable activity, and if not, does this affect life satisfaction and self-esteem? Results of t tests suggested that the life satisfaction of retirees who were primarily involved in their most enjoyable activity was significantly higher than for those retirees who were primarily involved in an activity other than their "favorite." There was no significant difference between the two groups in self-esteem.

The type of activity participation appears to have significant effects on life satisfaction and self-esteem. An analysis of variance resulted in highly significant differences between the four activity types on each dependent variable. A further analysis of each dimension indicated that retirees primarily involved in physical as opposed to sedentary activities scored significantly higher on both life satisfaction and self-esteem. When the social versus isolate dimension was examined, retirees engaged in social activities scored significantly higher in life satisfaction but not in self-esteem.

Several socio-demographic variables were found to be related to life satisfaction. These included age, health, occupational prestige, attitude toward retirement, education, and pre-retirement income. In general terms, these could be reduced to age and health, attitude toward retirement, and socio-economic status. In addition to those variables, marital status, home ownership, living arrangement, and the nature of the retirement event, i.e., voluntary or involuntary appeared to be related to life satisfaction.

Variables significantly related to self-esteem included health, attitude toward retirement, and pre-retirement income. Voluntary versus involuntary retirement, and home ownership also appeared to affect self-esteem.

Differences were observed across the four activity types on seven socio-demographic variables, including age, attitude toward retirement, present employment, nature of the retirement event, marital status, and living arrangement. When these variables were controlled, analyses of variance indicated the effects of activity type remained significant for each dependent variable, except for self-esteem when marital status, attitude toward retirement, and living arrangement were held constant.

Conclusions

The findings of this research facilitate the explication of several specific conclusions. The first of these is related to the dependent variables themselves. Prior to the investigation, it was believed that few differences would be found between life satisfaction and self-esteem in terms of the sample responses. The Life Satisfaction Index supposedly includes feelings about oneself as one of the social-psychological

dimensions which it measures. Even though a moderate correlation of $r = .47$ between the LSIA and the Rosenberg Self-Esteem Scale was calculated, the results of several tests indicate that life satisfaction and self-esteem can certainly not be equated.

The wide range of activities represented in this sample indicates a variety of interests within the aged population. Each activity type is represented within the sample. However, among the ten most popular activities, isolate activities are predominant. Both physical and sedentary are also represented. The number of isolated activities would appear to indicate a separation of the retiree from many of his social activities. However, when the change in the types of activities at the onset of retirement is examined, it is obvious that there is little shift toward the isolate types. Isolate activities are also popular in the pre-retirement years. This finding suggests that isolated leisure may be a predominant characteristic of American society in general, and is not restricted to the retired population. Another finding which contradicts the stereotype of the inactive nature of the retiree is the increase in numbers of activities rather than a decrease.

In terms of activity participation, it appears that both the number of activities in which the retiree participates and the nature of the activity itself have important consequences for the life satisfaction and self-esteem of the retiree. An increase in the number of leisure endeavors in which the individual engages himself subsequent to retirement seems to be necessary for successful aging. The findings also point to the positive effects on the dependent variables of the social and physical types of activities. In addition to number and type, the ability to participate in a "favorite" activity is important during

retirement. Of course this may apply to all age groups, however, for the older person the inability to engage in certain activities may represent decline in health, financial stress brought about by retirement, or other negative aspects of growing old and the aging process. The negative effects of this inability are indicated by the marked difference in the life satisfaction and self-esteem found in the sample between retirees who are primarily engaged in their favorite activity versus those retirees who, for some reason, are primarily engaged in a less enjoyable activity.

Age, health, attitude toward retirement, and socio-economic status must be considered important when considering activity participation. While the positive effects of the activity type remain significant when these variables are controlled, the observed differences across the four activity types with respect to each of these socio-demographic characteristics suggest that they, to some extent, influence the nature of the activity in which the retiree becomes involved.

As a final conclusion, the data suggest (1) that the work ethic is declining within the United States society, (2) that leisure is able to afford positive effects for the retiree, and (3) that the "portent of embarrassment," discussed by Miller, is found only in a small percentage of the retired population.³ This conclusion is based on the findings related to the effects of the increase of activity level at the onset of retirement and the effects of type of activity on life satisfaction and self-esteem, the large number of voluntary retirees which substantiates

³Stephen Miller, "The Social Dilemma of the Aging Leisure Participant."

the previous findings of Atchley, and the small proportion of the sample who have established post-retirement employment.⁴

Practical Implications of the Findings

Several writers have posed practical questions concerning the nature of leisure participation among the retired population. Riley and Foner have been rather specific in the following four questions:

- (1) How is the free time (after retirement) employed?
- (2) Can a person engage in meaningful leisure for extended periods of time?
- (3) How is the society setting the stage for the retiree?
- (4) Is meaningful use of leisure in old age contingent upon participation and practice in leisure activity during the pre-retirement years?⁵

It would be presumptuous to assume that this research has fully answered each of these questions; however, the results of this study do lend themselves to some insight into these practical considerations.

How is time employed after retirement? Obviously the retiree is faced with 6-8 hours of time to occupy when he gives up his work role. Results from this study indicate that he continues those leisure activities in which he participated prior to retirement, perhaps devoting more time to one or more of them. But, in addition to those activities, he develops new leisure pursuits. Findings indicate an average

⁴Robert Atchley, "Retirement and Leisure Participation: Continuity or Crisis?" The Gerontologist, 11 (1971), pp. 13-17.

⁵Matilda Riley and Anne Foner, Aging and Society, Vol. I (New York, p. 5.

increase of approximately two new leisure activities per retiree.

Can a person engage in meaningful leisure for extended periods of time? While this research did not pursue this question directly, several findings may apply. It appears that life satisfaction and self-esteem are related to numbers of activities. This would indicate that the retiree needs a variety of leisure pursuits, and an adequate number of them. It may be assumed that with increasing age and a decline in the physical capacity to participate in certain activities, numerous and varied leisure endeavors are necessary to maintain a positive attitude toward retirement and positive self-esteem. The negative correlations between age and the dependent variables might be explained in these terms. Those retirees whose leisure participation lessened in the later years also scored lower on the life satisfaction and self-esteem scales. Therefore, meaningful leisure over an extended period of time might best be addressed in terms of the number and variety of activities rather than in the quality of one activity, which may become beyond the physical capacity of the older retiree, leaving him with nothing to replace it.

How is society setting the stage for the retiree? This research suggests that social, as opposed to isolate, activity is necessary for successful aging; yet, the most popular activities among retirees and non-retirees are primarily isolate in nature. The findings further show little change in the general activity patterns of the individual subsequent to retirement, i.e., the retiree tends to engage in basically the same activities in which he participated prior to the retirement event. From these findings it would appear that more emphasis should be placed on group activity for workers approaching retirement age. An education

or recreational "training" program for those nearing the end of the work role might be a beneficial endeavor for employers to pursue.

Is meaningful use of leisure in old age contingent upon participation and practice in leisure activity during the pre-retirement years? As previously discussed, the answer to this question is most certainly yes. Retirement does not appear to bring about any drastic change in the activity patterns of the pre-retirement years. Therefore, some involvement in a meaningful leisure endeavor prior to retirement may be considered a necessity for successful adjustment to the retirement role.

Theoretical Implications of the Findings

While none of the major theoretical perspectives of social gerontology deal specifically with the leisure role, this research has several implications for the existing body of theory. These will be discussed for each theoretical approach.

Disengagement Theory

Disengagement is defined as an "inevitable process in which many of the relationships between a person and other members of society are severed, and those remaining are altered in quality."⁶ The theory is based in a functional perspective and rests on the basic assumption that death is inevitable.

The results of this research may be interpreted as either supportive or non-supportive of this theoretical orientation. Disengagement theory would predict an alteration of the activity patterns and a

⁶Elaine Cumming and William Henry, Growing Old: The Process of Disengagement (New York, 1961).

decrease in the number of leisure pursuits subsequent to retirement. Furthermore, it would predict that high life satisfaction and self-esteem would be the result of this altered leisure role. The findings of this study indicate the opposite of these predictions, thus, contradicting this theoretical perspective.

The basic assumption of disengagement theory, i.e., decline in physical capacity, etc., leading to death, seems to be supported; the effects of the "disengagement" process on activity participation are manifest especially with respect to the age and health variables.

It would appear from these findings that disengagement is an inevitable process, but the predictions of the theory, where related to the consequences of retirement, are contradictory to the findings of this research.

Activity Theory

The basic assumption of the activity approach is that successful aging is dependent upon the maintenance of social activities of middle age. As with disengagement theory, the present research is both supportive and non-supportive of this theoretical perspective.

Tests of the majority of the hypotheses, which were based in the activity framework, supported the predictions of the activity theory. Life satisfaction and self-esteem were directly related to activity participation. Furthermore, as age increased, the activity level and the scores for the dependent variables decreased. This could be interpreted as supportive of the activity approach; however, activity theory fails to explain the decrease in participation with increasing age, i.e., it ignores health, physical capacity, and other variables which

must be considered important for maintenance of a high level of activity participation.

Reference Group, Subculture, and Personality

Theory

Each of these theories suggest the importance of social integration and participation among the aged. The findings of this research certainly support this idea. The life satisfaction of retirees primarily engaged in social activities is significantly higher than for those participating in isolate activities. There are, however, two emergent problems with these perspectives. First, subculture theory is based on the assumption that, "a subculture may be expected to develop within any category of the population of a society when its members interact with each other significantly more than they interact with persons in other categories."⁷ Secondly, reference group theory contends that a person's reference group greatly affects his perception of aging. With respect to leisure participation, it appears that (1) there is no aging "leisure" subculture, and (2) most retirees have no "leisure" reference group. When the retiree's overall leisure patterns are examined, activity appears to be primarily isolated in nature.

A Final Statement

While this study was focused on activity participation among retirees, and not upon retirement per se, a final statement concerning retirement seems to appropriate. Retirement has been variously defined

⁷Arnold Rose, "A Subculture for the Aging."

as either an event, a process, or as a social role. The findings of this research lead this writer to conclude that retirement should be studied as a process, rather than as an event occurring at one point in time. If this process approach is taken, perhaps the disengagement and activity theories may be viewed as complementary, rather than opposing, explanations of successful aging. The activity theory may be applicable to the early years of retirement when health and physical vigor facilitate a high level of leisure participation; whereas, disengagement theory is more applicable to the later years of life when the decline in physical capacities limit the retiree's range of activities.

Retirement has usually been discussed concurrently with work and leisure. Historically, work has been viewed as the primary source of identity for the worker. The two theories which have been addressed to the loss of the work role and its consequences for the retiree's identity are the identity-crisis and identity-continuity theories. The general question approached by these theories is whether or not leisure is capable of providing the individual the kind of self-respect and identity he obtained from his work role. The results of this study lead to an affirmative answer to this question. Leisure can, and for many retirees, does provide for positive feelings toward themselves. As one of the respondents noted on his questionnaire: "True retirement is having the feeling of not having to impress anyone to make a living. I broke the work habit to enjoy life, but work enough to keep my health."

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APPENDIX

QUESTIONNAIRE

PART I

YOUR RESPONSE TO ITEMS ON THIS QUESTIONNAIRE WILL BE KEPT STRICTLY CONFIDENTIAL. PLEASE DO NOT WRITE YOUR NAME ANYWHERE. THIS WILL ASSURE YOUR ANONYMITY.

INSTRUCTIONS: PLEASE READ EACH ITEM COMPLETELY AND ANSWER AS IT APPLIES TO YOU. WRITE IN ANY REMARKS YOU MIGHT WANT TO MAKE AFTER ANY ITEM, BUT PLEASE ANSWER ALL OF THEM.

1-2. Age at nearest birthday _____. (Write in age)

3. Which of the following best describes your health, as compared to others your age? (Check one)

- _____ Excellent
- _____ Very Good
- _____ Good
- _____ Fair
- _____ Poor

4. Which of the following best describes your occupation before you retired? (Check one)

- _____ (1) Unskilled worker, laborer, farm worker
- _____ (2) Semi-skilled worker (machine operator)
- _____ (3) Service worker (policeman, fireman, barber, etc.),
military non-commissioned officer
- _____ (4) Skilled worker or craftsman (carpenter, electrician,
plumber, etc.)
- _____ (5) Salesman, bookkeeper, secretary, office worker, etc.
- _____ (6) Owner, manager, partner of a small business or small
farm; lower level government official; military
commissioned officer
- _____ (7) Professional requiring Bachelor's degree (engineer,
teacher, etc.)
- _____ (8) Owner, high-level executive of large business or large
farm; high-level government employee
- _____ (9) Professional requiring advanced degree (lawyer, doctor,
college professor, etc.)

5-6. How many years have you been retired? _____ (Write in years)

7. Are you presently employed in any job? _____ (Yes or no)

8. Which of the following statements best describes your feelings about retirement? (Check one)

- _____ (1) These are the best years of my life.
- _____ (2) Retirement is OK.
- _____ (3) I would like to have more things to occupy my time.
- _____ (4) I wish I had never retired.

9. Did you retire voluntarily? _____ (Yes or no)

10. Of the following items, which causes you the greatest amount of concern? (Check one)

- _____ (1) Health
- _____ (2) Finances
- _____ (3) Children
- _____ (4) Age and death
- _____ (5) Lack of being useful

11. Please check your highest level of education.

- _____ (1) Finished elementary school
- _____ (2) Finished high school
- _____ (3) Finished two years of college
- _____ (4) Received Bachelor's degree
- _____ (5) Received Master's degree
- _____ (6) Received Doctoral degree
- _____ (7) None of these

12. Marital status: (Check one)

- _____ (1) Married and spouse living
- _____ (2) Widower
- _____ (3) Divorced
- _____ (4) Never married

13. Do you own a home? _____ (Yes or no)

14. Concerning your present living arrangement, check the one best fitting your situation?

- _____ (1) Live alone
- _____ (2) Live with spouse only
- _____ (3) Live with spouse and children
- _____ (4) Single parent living with children
- _____ (5) Live with other than the above

15. Check the category which best fits your annual income BEFORE you retired: (Please indicate total income from ALL sources)

_____	(1) \$	0 -	2,499
_____	(2) \$	2,500 -	4,999
_____	(3) \$	5,000 -	7,499
_____	(4) \$	7,500 -	9,999
_____	(5) \$	10,000 -	12,499
_____	(6) \$	12,500 -	14,999
_____	(7) \$	15,000 -	17,499
_____	(8) \$	17,500 -	19,999
_____	(9) \$	20,000 or above	

16. Check the category which best fits your annual income NOW: (Please indicate total income from ALL sources)

_____	(1) \$	0 -	2,499
_____	(2) \$	2,500 -	4,999
_____	(3) \$	5,000 -	7,499
_____	(4) \$	7,500 -	9,999
_____	(5) \$	10,000 -	12,499
_____	(6) \$	12,500 -	14,999
_____	(7) \$	15,000 -	17,499
_____	(8) \$	17,500 -	19,999
_____	(9) \$	20,000 or above	

GO TO NEXT PAGE

PART II

Here are some statements about life in general that people feel differently about. Would you read each statement on the list, and if you agree with it, put a check mark in the space under "AGREE." If you do not agree with a statement, put a check mark in the space under "DISAGREE." If you are not sure one way or the other, put a check mark in the space under "?". PLEASE BE SURE TO ANSWER EVERY QUESTION ON THE LIST.

	AGREE	DISAGREE	?
1. I am just as happy as when I was younger.	_____	_____	_____
2. These are the best years of my life.	_____	_____	_____
3. My life could be happier than it is now.	_____	_____	_____
4. This is the dreariest time of my life.	_____	_____	_____
5. Most of the things I do are boring and monotonous.	_____	_____	_____
6. Compared to other people, I get down in the dumps too often.	_____	_____	_____
7. The things I do are as interesting to me as they ever were.	_____	_____	_____
8. I have made plans for things I'll be doing a month or a year from now.	_____	_____	_____
9. Compared to other people my age, I make a good appearance.	_____	_____	_____
10. As I grow older, things seem better than I thought they would be.	_____	_____	_____
11. I expect some interesting and pleasant things to happen to me in the near future.	_____	_____	_____
12. I feel old and somewhat tired.	_____	_____	_____
13. As I look back on my life, I am fairly well satisfied.	_____	_____	_____
14. I would not change my past life even if I could.	_____	_____	_____

	AGREE	DISAGREE	?
15. I've gotten pretty much what I expected out of life.	_____	_____	_____
16. When I think back over my life, I didn't get most of the important things I wanted.	_____	_____	_____
17. In spite of what people say, the lot of the average man is getting worse, not better.	_____	_____	_____
18. I have gotten more of the breaks in life than most of the people I know.	_____	_____	_____
19. I feel my age, but it does not bother me.	_____	_____	_____
20. Compared to other people my age, I've made a lot of foolish decisions in my life.	_____	_____	_____

PART III

The following statements deal with how you feel about yourself. Please place a check mark next to the response that best describes how you feel about each item.

1. I feel that I'm a person of worth, at least on an equal plane with others.

_____ (1) Strongly agree
 _____ (2) Agree
 _____ (3) Disagree
 _____ (4) Strongly disagree

2. I feel that I have a number of good qualities.

_____ (1) Strongly agree
 _____ (2) Agree
 _____ (3) Disagree
 _____ (4) Strongly disagree

3. All in all, I am inclined to feel that I am a failure.

_____ (1) Strongly agree
 _____ (2) Agree
 _____ (3) Disagree
 _____ (4) Strongly disagree

4. I am able to do things as well as most other people.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

5. I feel I do not have much to be proud of.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

6. I take a positive attitude toward myself.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

7. On the whole, I am satisfied with myself.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

8. I wish I could have more respect for myself.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

9. I certainly feel useless at times.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

10. At times, I think I am no good at all.

- _____ (1) Strongly agree
- _____ (2) Agree
- _____ (3) Disagree
- _____ (4) Strongly disagree

PART IV

Instructions:

We want to know how people usually spend their leisure time. Here is a list of activities. In the space provided, place a check mark by those activities in which you regularly participate now. Also, in the space provided, place a check mark by those activities in which you regularly participated during the five years prior to your retirement.

Pre-retirement Activities		Activity
Activities	(Five years prior to retirement)	
_____	_____	1. Walking
_____	_____	2. Gardening
_____	_____	3. Odd jobs at home
_____	_____	4. Woodworking
_____	_____	5. Jogging
_____	_____	6. Swimming
_____	_____	7. Traveling and touring with family only
_____	_____	8. Traveling and touring with groups
_____	_____	9. Fishing
_____	_____	10. Hunting
_____	_____	11. Playing golf
_____	_____	12. Participation in team sports (list sports)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	13. Tennis
_____	_____	14. Camping with family only
_____	_____	15. Camping with groups
_____	_____	16. Shuffleboard

Present Activities	Pre-retirement Activities	Activity
_____	_____	17. Sitting and thinking
_____	_____	18. Painting (art)
_____	_____	19. Craftwork
_____	_____	20. Reading for pleasure
_____	_____	21. Watching TV
_____	_____	22. Literary writing
_____	_____	23. Playing musical instru- ments
_____	_____	24. Visiting friends
_____	_____	25. Playing cards
_____	_____	26. Entertaining at home
_____	_____	27. Volunteer work (list)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	28. Dominoes
_____	_____	29. Checkers
_____	_____	30. Chess
_____	_____	31. Bingo
_____	_____	32. Hobbies (list)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	33. Any other activities? (list)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please answer each of the following questions:

1. Of all the activities you are PRESENTLY participating in, which one do you like the best?

2. In which of the activities that you are PRESENTLY participating in do you spend the most time?

3. Do you belong to any group with whom you participate in your most time consuming activity? _____ (yes or no)

What group? _____

How often does it meet? _____

VITA

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Education: Graduated from Lawrence County High School, Lawrenceburg, Tennessee, in June, 1965; received the Bachelor of Science degree in Microbiology from Memphis State University in 1969; received Master of Arts degree in Sociology from Memphis State University in 1971; completed requirements for the Doctor of Philosophy degree in December, 1973, from Oklahoma State University, Department of Sociology.

Professional Experience: Graduate Research Assistant, Memphis State University, 1970; Graduate Teaching Assistant, Memphis State University, 1971; Graduate Teaching Associate, Oklahoma State University, 1971-1973; Pre-Doctoral Fellow, Midwest Council for Social Research in Aging, Institute of Community Studies, Kansas City, Missouri, 1972-1973; Assistant Professor, Department of Sociology, Clemson University, 1973; member of the Southwestern Sociological Association, Southern Sociological Society, and Alpha Kappa Delta.