

# **WHAT IS THE RELATIONSHIP BETWEEN IDENTITY AND THE TRANSITION TO RETIREMENT AND HOW IS THE TRANSITION FACILITATED BY THE USE OF TECHNOLOGY?**

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## **ABSTRACT**

**Myrna Barwin - "What is the Relationship between Identity and the Transition to Retirement and How is The Transition Facilitated by the Use of Technology"?**

The objective of this research was to investigate the changes in identities of older adults transitioning to retirement and how information technology (IT) facilitates these changes. This was achieved by reviewing relevant literature pertaining to the key components of the research question and exploring the relationships between them, followed by a study of retired school teachers in Canada.

Two major trends that have emerged today are that seniors are active contributing members of society and that the use of information technology is ubiquitous. The result is a population of older adults who are more active and engaged in society, have more positive identities than their predecessors, and who use IT. This research is relevant as the previous generation generally did not use IT. The next generation will be computer literate and IT will have advanced significantly by the time they retire.

The teacher demographic was chosen as they are generally educated, financially stable, relatively healthy and use IT, factors that are likely to facilitate a positive identity when transitioning to retirement. Another demographic with different characteristics would likely give different results.

The results, which were generally consistent with the literature reviewed, showed that, in general, the teachers were socially active, had a positive identity and felt fully transitioned to retirement, mostly within two years. They have transferred their skills while working and applied them to their current activities.

The results are significant as they investigate the association between factors that were previously well researched, but the relationships between them had not been widely explored. Applying the results can be useful to organizations to prepare their constituents for retirement.

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# TABLE OF CONTENTS

<b>1.0</b>	<b>INTRODUCTION .....</b>	<b>1</b>
1.1	OVERVIEW.....	1
1.2	BACKGROUND AND PURPOSE .....	1
1.3	THE RESEARCH SAMPLE – SCHOOL TEACHERS IN CANADA .....	5
1.3.1	OVERVIEW – EDUCATION SYSTEM IN CANADA .....	5
1.3.2	HISTORY OF PUBLIC SCHOOL EDUCATION IN CANADA .....	7
1.3.3.	WORKING CONDITIONS OF TEACHERS IN CANADA .....	9
1.3.5	TECHNOLOGY – USAGE AND EXPECTATION.....	15
1.4	STRUCTURE OF STUDY.....	17
<b>2.0</b>	<b>LITERATURE REVIEW .....</b>	<b>19</b>
2.1	INTRODUCTION .....	19
2.2	IDENTITY .....	23
2.2.1	SYMBOLIC INTERACTIONISM.....	24
2.2.2	IDENTITY THEORY.....	27
2.2.3	SOCIAL IDENTITY THEORY .....	32
2.2.4	CONSUMERISM AND IDENTITY .....	34
2.2.5.1	Identity Work .....	37
2.2.5.2	Identity Play .....	38
2.2.5.3	Relationship between Identity work and Identity play .....	40
2.3	SOCIAL NETWORKS AND ACTIVITIES .....	41
2.4	TRANSITION TO RETIREMENT .....	45
2.5	CONTINUITY THEORY .....	47
2.6	DISENGAGEMENT THEORY.....	50
2.7	WORK CONDITIONS AND CIRCUMSTANCES OF RETIREMENT .....	52
2.7.1	ROLE SALIENCE AND RETIREMENT ALTERNATIVES.....	53
2.7.2	INVOLUNTARY RETIREMENT .....	53
2.7.3	VOLUNTARY RETIREMENT.....	55
2.7.4	PLANNED/WILLING RETIREMENT .....	56
2.8.	RELATIONSHIPS BETWEEN IDENTITY AND THE TRANSITION TO RETIREMENT .....	58

2.9	TECHNOLOGY AS A FACILITATOR.....	60
2.9.1	HOW TECHNOLOGY IS UTILIZED BY OLDER ADULTS...	60
2.9.2	ADAPTATION OF RETIREES TO ADVANCES IN TECHNOLOGY.....	62
2.9.3	THE IMPACT OF TECHNOLOGY ON IDENTITY DURING THE TRANSITION TO RETIREMENT .....	65
2.9.4	MOTIVATORS AND DETRACTORS .....	69
2.9.5	LIMITATIONS TO LITERATURE .....	70
2.10	CONCLUSION .....	71
<b>3.0</b>	<b>METHODOLOGY .....</b>	<b>72</b>
3.1	OVERVIEW.....	72
3.2	RESEARCH METHODOLOGY AND METHODS. ....	72
3.2.1	MIXED METHODS.....	74
3.2.2	QUANTITATIVE METHODS.....	74
3.2.2.1	Survey Technology.....	75
3.2.2.2	Survey Pilot .....	75
3.2.3	QUALITATIVE METHODS.....	76
3.2.4	METHOD FOR DETERMINING IDENTITY .....	78
3.3	DATA COLLECTION .....	80
3.3.1	PARTICIPANT SELECTION .....	80
3.3.2	DATA COLLECTION PROCESS .....	81
3.3.3	SURVEY .....	82
3.3.4	SEMI-STRUCTURED INTERVIEWS .....	83
3.4	PROBLEMS WITH PROCESS .....	84
3.5	ETHICAL CONSIDERATIONS.....	86
3.6	CONCLUSION .....	88
<b>4.0</b>	<b>RESULTS OF RESEARCH .....</b>	<b>90</b>
4.1	INTRODUCTION .....	90
4.2	DEMOGRAPHICS .....	90
4.2.1	AGE .....	92
4.2.2	GENDER .....	92
4.2.3	MARITAL STATUS .....	92
4.2.4	NUMBER OF YEARS RETIRED.....	93
4.2.5	LEVEL OF EDUCATION.....	94

4.2.6	LEVEL OF EDUCATION TAUGHT .....	95
4.2.7	PROVINCIAL DISTRIBUTION .....	95
4.2.8	GEOGRAPHIC LOCATION .....	96
4.3	RESULTS .....	96
4.3.1	OVERVIEW.....	96
4.3.2	FACTORS THAT IMPACT IDENTITY.....	109
4.3.2.1	Identity and Social Identity .....	109
4.3.2.2	Consumerism .....	114
4.3.2.3	Social Networks .....	115
4.3.2.4	Activities .....	120
4.3.3	FACTORS THAT IMPACT TRANSITION .....	126
4.3.3.1	The Transition Experience .....	126
4.3.3.2	Conditions of Retirement.....	129
4.3.3.3	Last Years of Work.....	132
4.3.3.4	Health.....	134
4.3.3.5	Financial Security .....	134
4.3.3.6	Continuity .....	136
4.3.3.7	Disengagement .....	139
4.3.3.8	The Relationships between Identity and the Transition to Retirement.....	140
4.3.4	TECHNOLOGY.....	142
4.3.4.1	Social Engagement .....	142
4.3.4.2	Activities .....	149
4.3.4.3	Purpose Driven Use of Technology.....	154
4.3.4.4	Comparison of Usage for Social Networks and Activities.....	156
4.3.4.5	Technology and Transition .....	159
4.4	OUTLIER CASE STUDY .....	163
4.5	DISCUSSION AND CONCLUSION .....	167
4.5.1	CONCEPTUAL MODEL .....	167
4.5.2	RELATIONSHIP TO LITERATURE .....	169
4.5.3	SUMMARY .....	172
<b>5.0</b>	<b>CONCLUSION.....</b>	<b>174</b>
5.1	INTRODUCTION .....	174
5.2	SUMMARY OF THE STUDY .....	174

5.3	IMPLICATIONS.....	176
5.3.1	TECHNOLOGY AND BEHAVIOUR.....	176
5.3.2	USAGE OF TECHNOLOGY.....	177
5.4	APPLICATION.....	179
5.5	RECOMMENDATIONS FOR FUTURE RESEARCH.....	182
5.6	COMMENTARY.....	184
<b>APPENDICES .....</b>		<b>187</b>
APPENDIX 1 - TEACHERS IN CANADA.....		187
APPENDIX 2 - EMAIL TO PROSPECTIVE RESPONDENTS .....		192
APPENDIX 3 - EMAIL FROM NOVA SCOTIA RETIRED TEACHER'S ASSOCIATION TO THEIR MEMBERS.....		194
APPENDIX 4 - GUIDELINES FOR SEMI-STRUCTURED INTERVIEW .....		195
APPENDIX 5 - SURVEY QUESTIONS.....		196
<b>BIBLIOGRAPHY .....</b>		<b>216</b>



## LIST OF TABLES

Table 1.1	Number of Teachers over 60	14
Table 1.2	General Usage of Technology	15
Table 1.3	Usage of Technology in the Classroom	16
Table 1.4	Usage of Technology for Classroom Preparation and Networking	16
Table 2.1	Identity Work and Identity Play	40
Table 2.2	Older Adult' Usage of Information Technology	63
Table 2.3	Impact of Educational Level on IT Usage	63
Table 2.4	Impact of Income on IT Usage	64
Table 2.5	Assistance Required by Seniors over 65 years old	64
Table 4.1	Age of Respondents	92
Table 4.2	Marital Status of Respondents	93
Table 4.3	Number of Years retired vs. Age at Retirement	93
Table 4.4	Analysis of Research Question Elements	98
Table 4.5	Summary of Results of Interviews	108
Table 4.6	Designation and Number of Respondents	110
Table 4.7	Social Networks - Importance	117
Table 4.8	Social Networks - Frequency	117
Table 4.9	Activities - Salience	122
Table 4.10	Activities - Frequency	123
Table 4.11	Number of Years to Transition	126
Table 4.12	Last years of work experience vs. Conditions of Retirement	133
Table 4.13	Last years of work experience vs. the number of years taken to transition.	133
Table 4.14	Attributes, Skills and Activities	137
Table 4.15	Information Technology - Importance: Friends and Family	143
Table 4.16	Information Technology - Frequency: Friends and Family	144
Table 4.17	Importance of Information Technology for Social Interaction	145
Table 4.18	Technology and Social Networks	146
Table 4.19	Information Technology – Importance: Activities	150
Table 4.20	Information Technology – Frequency: Activities	151
Table 4.21	Importance of Information Technology for Activities	153

Table 4.22	Information Technology Utilized During Retirement.	154
Table 4.23	Technology used at School	159
Table 4.24	Change in usage if Information Technology from Teaching to Retirement	161
Table A.1	Labour Disputes in Nova Scotia	187
Table A.2	Labour Disputes in Ontario	187
Table A.3	Labour Disputes in British Columbia	188
Table A.4	Median Salaries for Canadian Teachers All K-12 Teachers Median Salary by Job	189
Table A.5	Variation amongst Canadian Teachers' Salaries	190
Table A.6	Teachers Pensions	191

## LIST OF FIGURES

Figure 2.1	Conceptual Model.....	21
Figure 4.1	Level of Education of Respondents to Survey.....	94
Figure 4.2	Level of Education Taught.....	95
Figure 4.3	Technology and Priority – Friends and Family and Activities ...	158
Figure 4.4	Technology and Frequency of Use .....	158
Figure 4.5	Conceptual Model - Results of Research.....	168

# 1.0 INTRODUCTION

## 1.1 OVERVIEW

This thesis is a study of the relationship between the changes in the identities of older adults as they transition to retirement and the impact of Information Technology (IT) during this process. Specifically, the research question that will be examined is ***“What is the relationship between identity and the transition to retirement and how is the transition facilitated by the use of technology”?*** The outcome of the research is an understanding of the relationships between the components: identity, transition to retirement and how and why older adults use information technology. The research’s main contribution is examining the role of IT in facilitating identity transitions during retirement and accordingly bringing together three areas of literature (transition to retirement, identity and IT), which were previously dealt with individually. This research has focussed on the role of IT in facilitating identity transitions during retirement and the relationships between the components (retirement transitions, identity and IT). A conceptual model (Fig 2.1) which describes these relationships is contained in Section 2.1 and the results of the research, applied to the model in Section 4.5.1 (Fig 4.3).

This introduction provides an overview of why the research is important, what relevant research has been done, the methodology utilized and the research subjects. The chapter also contains a description of the background to the respondents, to provide a context for the research.

## 1.2 BACKGROUND AND PURPOSE

Two recent major trends in the developed world are the increase in the numbers of the senior demographic (Andrews 1999) and the pervasiveness of technology in general, and Information Technology (IT) in particular (Mitzner et al 2010). Researching the current demographic of retirees is important as it is a snapshot of three related developments that are in a process of change: active retirement leading to positive identities; the perception of retirement; and older adult’s extensive use of technology. The context for the research is an

environment where retired seniors are increasingly active and are contributors to society (Rudman 2006) and where IT is ubiquitous and the usage by seniors is increasing significantly (Smith 2014).

In the main, retirement is no longer regarded as a period of old age and disengagement among seniors, but retirees are a demographic who are active and contribute to society. The identity of older adults will change during the transition to retirement. Identity, for the purpose of this research, is described as how one feels about one's self (self-worth) in a particular situation, where self-worth is one's perceived level of success in relation to self-created expectations and is an aggregation of identities (Atchley 1989). In this case, I examined the self-worth of the retirees while they were transitioning to retirement. As a result of being more active and having the ability to retain and engage in new social networks, today's retirees are likely to have a feeling of self-worth that is more positive than the previous generation.

The percentage of older adults in the developed world is increasing and the attitude towards retirement is changing. Retirement has previously been described as the beginning of getting old and the beginning of social isolation (Cornwell et al 2008, Cummings and Henry 1961). Historically, the view was that old age began with retirement. "It has been depicted as mandatory expulsion from the workforce and seen to mark the transition to a period of ill health and poverty" (Hyde et al 2004, p 279). The current concept of retirement has changed significantly from being a mandatory passage from work life to old age, to an opportunity to continue being a productive member of society and explore new avenues (Rudman 2006). As the health and abilities of senior adults have improved, ideas such as Jahoda's (1997) belief that only work provides fulfilment and Cummings and Henry's (1961) Theory of Disengagement which implies that seniors do not have a sense of self-worth, are less applicable.

Partly as a result of the perception that retirement can be an opportunity, not a liability, older adults are now more likely to maintain a positive self-worth and positive identity for their situation as retirees. As older adults are more active

than the previous generation and there is government encouragement to delay retirement age, (Vickerstaff 2010) it is likely that the next generation will retire at a later age and that a study of their identity and transition to retirement would produce significantly different results.

Socially engaged and active older adults have contributed to the changing perception and expectation of retirement. Retirement may not be regarded as a time of social isolation and dependency on government funding, but can be a time when older adults can exercise freedom and find new challenges. This is due to a large extent to the now much publicised expectation that those who are older can enjoy physical and mental health, take control of their future and enjoy a productive retirement. (Rudman 2006). Much of this attitude has been promoted by government bodies whose fiscal interest it is to not support an aging population (Vickerstaff 2010). It is also endorsed by advertisers who see a large consumer market among the retired (Gilleard 1996).

Retirement is not an event, but should be regarded as a process (Nuttman-Shwartz 2004, Quick and Moen 1998, Gall et al 1997). There is no uniform age, behaviour or pattern to retirement. Each individual is unique, based on many factors such as their disposition and the circumstance of retirement. The age of retirement varies depending on the country and the occupation and is typically between 55 and 75. In Canada, the average age of retirement in 2016 for the general populations was 63.6 (statscan.ca no date b). Some employers have mandatory limits, while others allow freedom of choice, but there is generally an upper age limit to when employers will keep an individual on the payroll (Henrard 1996). Self-employed individuals have the ability to decide when and how they retire. .

While transitioning to retirement, older adults will likely focus more on their social network of family and friends than on past colleagues, who are still working (Kloep and Hendry 2001, Lancee and Radjl 2012). They will also have the time to engage in non-work activities, which are either new or a continuation of previous undertakings. Both their social networks and activities will have an impact on their identities. The time to transition to retirement, when

those who are no longer employed feel fully retired, differs among individuals and can vary from immediate to several years. Additional factors such as financial status, final years and conditions of work, salience of activities and strength of social networks can also influence identities during the transition period.

Researching the transition to retirement is also relevant as today's retirees are at a unique stage in terms of their use of, and familiarity with technology. Ubiquitous use of computers and the internet did not exist when they started their work-life and information technology was evolving. Even the most commonly used tools such as email and word processing were being developed. Currently, even if they are not fully familiar with IT, some form of computer literacy is becoming an essential skill (Mitzner et al 2010). Today's retirees are unique because they were not brought up with IT, but cannot ignore its use and impact. One of the activities that is frequently carried out by older adults is the use of IT in their day to day life. Tools are available which facilitate social interaction as well as a variety of actions and undertakings. The past generation did not have the technology options now available. The generation to follow will have come to maturity with IT and usage of tools and applications will be more intuitive. The generations following will be 'digital natives', and IT will have always been part of their lives. Examining identity, transition to retirement and the use of IT today is important for studying the needs of the current generation. Doing similar studies with the next generation will yield quite different results. The results of this research are important as it is a snapshot of the present. As IT and social media are changing so fast, a different experience will apply to later generations, as they must be able to adapt to both evolving technologies and a changing process of retirement.

This research is relevant as it gives a view of the challenges and opportunities for older adults facing the transition to retirement today. The purpose is to understand the needs during the transition to retirement of a specific generation. The results could be useful for, as examples, organizations for program planning, IT training and city planners who can use it as a guide to provide appropriate facilities. For this research, the respondents are school

teachers in Canada. While it is not possible to investigate the general population, by choosing a specific demographic, aspects of the findings can be extrapolated for groups with similar characteristics (e.g. well educated, receive a pension).

### **1.3 THE RESEARCH SAMPLE – SCHOOL TEACHERS IN CANADA**

This section contains an overview of the public school system in Canada, with particular reference to the provinces of Nova Scotia (NS), Ontario (Ont.) and British Columbia (BC) from where the participants in this study were recruited. It describes teachers' working environment, conditions for retirement and their use of technology while teaching. As an individual's work-life environment may have an influence on their retirement experience, the description is included to give an understanding of the respondents and their working conditions to provide the context for the literature review, methodology and results chapters of the thesis.

#### **1.3.1 OVERVIEW – EDUCATION SYSTEM IN CANADA**

To contextualize the research population, retired teachers in Canada, the Canadian school system is described in this section. In Canada there is no integrated national education system. Canada's Constitution Act of 1867 gives each province or territory the ability to make laws concerning education, under the responsibility of the Department of Education of that province or territory (laws-lois.justice.gc.ca no date). Public school education is under the jurisdiction of the 13 provinces and 3 territories, who have the responsibility to deliver education at the primary, secondary and post-secondary level. Public schools refer to schools that are not privately funded and are under the authority of the provincial or territorial government. Jurisdiction, which is under the Ministry of Education of each province or territory, includes curriculum, teachers' salaries and the creation of school boards and their trustees, who administer the programs. While there are some similarities in the education systems across Canada, there are also significant differences, such as the



emphasis on teaching the French language, which reflect the geographical, cultural and historical differences of each jurisdiction. (cmec.ca 2015).

This section describes the working conditions of Canadian teachers in general and teachers in NS, Ont. and BC in particular. The teachers who participated in this research range in age from 50 to 82 and the corresponding age at retirement between 49 (in 2015) and 55 (in 1990). Where applicable, this section will focus on the public school systems during the years the respondents were teaching.

Public school teachers were selected as the research population as they are a relatively uniform group who are mostly financially stable, well educated, and technology literate, all factors which may impact post retirement identity (Hogeboom et al 2010). Teachers have attributes that enable them to plan for and choose the timing of retirement, have the ability to take part in a variety of activities such as travel, and to maintain and enhance their social networks, all leading to a productive and meaningful transition to retirement (Kloep and Hendry 2006). Financial stability enables them to become involved in activities such as volunteering (Fernandez et al 1997). Being well educated and familiar with technology is likely to influence their willingness to use IT and social media to facilitate their transition to retirement.

Teachers are an appropriate population to investigate the arguments for this research. Due to their characteristics, attributes and resources, they are of a demographic that are very likely to transition to retirement with positive identities, whilst being able to utilize technology as a facilitator. If this supposition proves to be invalid for the teacher demographic, it is unlikely that it would apply to other segments of the population who do not have these characteristics (e.g blue collar workers).

Working conditions, particularly during the last years' of employment, may play a significant role in identity during the transition to retirement (Hyde et al 2004). Teachers in NS, Ont. and BC have, to varying degrees, experienced labour

disputes with their provincial governments, which could have made their working life stressful.

### **1.3.2 HISTORY OF PUBLIC SCHOOL EDUCATION IN CANADA**

In the three provinces where the respondents reside, disagreements between the governments and the teachers unions occurred. The history of these disputes is addressed to give a context for conditions of teachers' work-life up to the time of their retirement. It is possible that work conditions can have an impact on the transition to retirement (Kloep and Hendry 2006) and that a stressful environment could lead to early retirement.

While schools fall under provincial jurisdiction, the structure for all are similar. The provinces are divided into school districts, which are governed by elected school boards. The boards are responsible for education from kindergarten to grade 12 (K-12) for administration, facilities, hiring teachers, enrolling students and class sizes. The exception is Ontario, where there are not only district school boards (English Public; English Catholic; French Public; and French Catholic), but a central school board association, that is responsible for class size. All teachers in NS, Ont. and BC must belong to their local union, who are responsible for negotiating salaries and benefits. This includes giving them the right to strike, which is an important factor in their perception of satisfaction and self-control with their profession.

#### **NOVA SCOTIA**

All Public School teachers in Nova Scotia belong to the Nova Scotia Teachers Union (NSTU), which includes central and local representatives (nstu.ca no date a). The NSTU includes central and local representatives. Nova Scotia teachers experienced the least labour disputes of the three provinces and before the expiration of the last collective agreement in July 2015, there were no significant disagreements. Following the expiration of their collective agreement, 3 offers were made by the government between December 2015 and October 2016. All were rejected and the teachers went on a one day strike, the first in 22 years. In February 2017, new legislation was passed and

the teachers were given a new collective agreement. Appendix 1 (Table A.1) details the government's actions and the teacher's reaction. Although the strike and subsequent back to work legislation occurred after the respondents for this research had retired, the history is included to illustrate the tensions that led to the disputes while some of them were still teaching.

## ONTARIO

All Public School teachers in Ontario belong to the Ontario Teachers Federation (OTF). As there are both central and local school board organizations ([cge.ontarioschooltrustees.org](http://cge.ontarioschooltrustees.org) no date) labour disputes are complex because the central issues need to be dealt with before the local issues can be addressed. As a result of a forced collective agreement, there was a one day walk-out and a series of rotating one day strikes, followed by back to work legislation from May to December 2012. In 2015 a bill proposing to eliminate class sizes was followed by a work-to rule campaign. Teachers were legislated back to work. Appendix 1 (Table A.2) details the government's actions and the teacher's reaction. As in the case of the teachers of NS, although the labour actions occurred after some of the respondents for this research had retired, the history is included to illustrate the tensions that led to the disputes, while they were still teaching.

## BRITISH COLUMBIA

All Public School teachers in BC belong to the British Columbia Teachers Federation (BCTF). The province with the most troubled labour relations is BC. The history will be described in more detail than is included for NS and Ont. as many of the labour disputes occurred while the respondents were teaching. Understanding the history between the teacher's union and the BC Government provides an appreciation of the current conditions and attitudes of teachers and retired teachers in the Province.

The 41,000 public school teachers in BC must become members of the BCTF, which was established in 1917 ([bctf.ca](http://bctf.ca) no date a). There is a long and unhappy history between the Union and the BC Government since teachers were given

the right to strike in 1987, and this history has had a direct impact on their working conditions and job satisfaction. Up to May 2014, there has been a constant disagreement between the BCTF and the BC government, resulting in 51 strikes and 3 lockouts, 3 legislated contracts, 1 legislated “cooling off” period (during which time teachers were legislated to return to work) and 2 negotiated deals. Consistently, the most disputed areas of disagreement have been over classroom size, salaries, and hours of work. Disputes even reached the level of legal actions and appeals to the Supreme Courts of British Columbia and Canada. Appendix 1 (Table A.3) shows the details of the labour disputes from 2001 up to the Supreme Court of Canada’s ruling in 2016, which occurred while many of the respondents from BC were still teaching. Since the Supreme Court of Canada’s ruling in favour of the teachers, there has been a change in government, classroom sizes have been reduced, and the teachers working conditions have improved.

### **1.3.3. WORKING CONDITIONS OF TEACHERS IN CANADA**

According to Hyde et al (2004), there may be a link between satisfaction with the last years of an individual’s time at work and how well they adapt to retirement. The following describe the background and work conditions of Canadian teachers, which have both satisfying and frustrating aspects and which may have a direct impact on their outlook.

#### **SALARIES AND BENEFITS**

Public school teachers in Canada are classified into six categories based on a combination of academic qualifications and experience. This determines which level between Kindergarten and Grade 12 (K-12) they are qualified to teach. Their salary scales are then determined according to the category (White 2014). A post-secondary degree, Bachelor of Education (B Ed) and a teachers’ certificate from the province is needed to teach, which places the teachers in a well-educated category. This characteristic will likely contribute to their ability to embrace technology, which could facilitate the ease of transitioning to retirement (Hogeboom et al 2010). Appendix 1 (Table A.4) shows the median salaries for

Canadian teachers in each category, which range between C\$47,682 for Kindergarten to C\$57,496 for secondary school teachers.

In general, teachers are paid higher than the average Canadian worker, but lower than other professionals. The average per capita income in Canada in 2010 was \$31,639 (Duxbury and Higgins 2013). According to the BC Government Websites Salary Comparison chart from December 2013 to March 2014, the average salary for the highest qualified government employed nurse was \$85,228, Professional Engineer \$77,599 and Pharmacist \$66,868 (gov.bc.ca no date a).

There is a variation in the salaries of teachers across the provinces and territories. Appendix 1 (Table A.5) shows examples of the variation among salaries for the equivalent of Category 5, Primary School teachers across the country. The highest is North West Territories (min. C\$71,007 – max. C\$108,533) and the lowest Quebec (min. C\$41,451 – max. C\$74,244). In BC the lowest salary is C\$45,909 and the highest C\$74,353, in Ont. the lowest salary is C\$51,738 and the highest C\$89,614 and in NS the lowest salary is C\$50,205 and the highest C\$71,654. Both NS and BC are on the lower end of the pay-scale for teachers in Canada and Ont. is close to the median. While they are a respected profession, the knowledge they are on the lower end of the pay-scale for professionals could have an impact on their self-esteem, which can be carried through to retirement. While salaries were not the major factor in the disputes between teachers and their governments, it is a significant source of dissatisfaction with their perception of how they are valued, (White 2014), which may have an impact on their self-worth while teaching and during the transition to retirement.

All Canadian teachers are entitled to two months of paid summer holidays as well as at least one week in the spring and one week at Christmas (www.hrsb.ca no date, www.edu.gov.on.ca no date, www2.gov.bc.ca no date b). As teachers are accustomed to over two months of not working during the summer, when they retire they will have experienced not working for relatively long periods, which could make the transition to retirement easier.

## PENSIONS

Teachers are in the category of individuals who have financial security through a guaranteed pension, a significant factor in their retirement. The age of retirement is flexible and when a teacher chooses to retire can be dependent on the pension they will receive. As they can choose when to retire, within defined parameters, they can plan for retirement and choose an age that makes sense for their personal circumstances. There is no mandatory age at which teachers must retire. The average age of retirement for Canadian teachers is 60, typically after 26 years of service (Woo A and Giovannetti J 2014). Having financial security and the ability to plan removes some uncertainty of the transition experience and allows for the individuals to engage in activities such as travel, sports and volunteering. Financial stability is also a factor in an individual's self-esteem and attitude (Fernandez et al 1997).

Appendix 1 (Table A.6), provides details of the pension plans for NS, Ont. and BC teachers (nstu.ca no date b, ottp.com no date, bctf.ca no date c), showing the similarities and differences of pension calculations for the three provinces. The calculation is generally a combination of  $2\% \times \text{age} \times \text{number of years of service}$ . The table includes eligibility and age requirements and shows that teachers are able to choose an age of retirement that is appropriate for their circumstances. This gives them a steady income that enables them to take part in activities that meet their social needs after they leave the workplace. Teachers' pensions can be up to 70% of salary and include benefits such as medical and dental expenses. In general, teachers are reported to be satisfied with their benefits and pensions (oecd.org 2005), which is a positive attribute of the profession that compensates for lower salaries and heavy work-loads and can contribute towards a positive outlook during the transition to retirement. .

## WORKLOAD AND STRESS

Conditions of the last years of the workplace can have an impact on the retirement experience (Kloep and Hendry 2006), including stress, which could potentially lead to early retirement. There is a perception among the general

public that teachers have a low stress job with short hours and long summer holidays. Research has shown that all Canadian teachers work long hours, are involved in extra-curricular activities, have little support, are subjected to stress (Froese-Germain 2014) and are unpaid for overtime (Livingstone and Antonnelli 2007). In 2007, the average work week in Canada was 45 hours for professionals including teachers (Livingstone and Antonnelli 2007). Working hours for teachers have increased still further to 50-55 hours, with 10-12 of those hours taking place outside the school (Froese-Germain 2014). The long hours worked by teachers was confirmed by Duxbury and Higgins (2013) in their study of Alberta teachers. Class sizes have increased and the number of teachers decreased, resulting in an additional work load. Time spend at school is not sufficient to cope, and many teachers spend an average of 14 hours per week on evenings and weekends to manage the workload (Duxbury and Higgins 2013).

Despite these long hours, 69% of Canadian teachers were involved in voluntary work, which is significantly more than the general public (Duxbury and Higgins 2013). In BC, 12.5% of teachers volunteer during their summer holidays (Naylor and White 2010). Much of the volunteer work was related to their commitment to community sustainability. Despite their stressful working conditions, teachers are concerned with their community (Livingstone and Antonelli 2007), which is a characteristic they are likely to take into retirement

As a result of their working conditions, many teachers feel a high level of stress, which may have an impact on when they retire as well as their self-esteem while they are transitioning. Teachers perceive that while they are expected to work long hours and multi-task, they do not have the classroom resources needed to be effective (Froese-Germain 2014). As well as nurses and social workers, teachers have the highest burnout rate in Canada and teaching is ranked as one of the most stressful jobs (Froese-Germain 2014). From the Canadian Federation of Teachers survey (ctf.ca 2014), 90% of respondents felt that stress from work/life imbalance was a result of classroom size as well as lack of time to teach, take part in extra-curricular activities and perform administrative tasks. As an example, BC Teachers experience a

higher level of stress than most workers in BC. The long hours of work lead to stress, fatigue, burnout and absenteeism and possibly in some cases, early retirement (Naylor and White 2010).

Long work hours and increased demands have resulted in a workforce that are not necessarily dedicated to their schools as organizations, but they are fully committed to their students and will continue to teach. Duxbury and Higgins (2013) found that 50% of Alberta teachers were not fully committed to their organization, compared to 33% of Alberta knowledge workers. While most teachers were satisfied with their salary (76%), job security (75%) and basic teaching (60%) they were dissatisfied with their workload (62%) and numbers of hours they worked (59%) (Duxbury and Higgins 2013). Stress in the workplace is particularly applicable to teachers in BC as they have a long history of unhappy negotiations with the BC Government, classroom size being a major factor. BC teachers stress is exacerbated by their feeling of lack of support from the BC Government. Stress for BC teachers increases with age. 60% of the BCTU Salary Indemnity Plan (SIP) disability claims were from teachers over 50 years of age, although only 39% of teachers were over 50 (Naylor and Vint 2009).

#### AVAILABILITY OF TEACHING JOBS

Despite the challenge of the teaching profession the number of available teaching jobs are limited. There are proportionately fewer teaching jobs available in BC than in the rest of Canada. In 2012 there were between 2,700 and 2,800 qualified teachers applying for the 800 available teaching positions (Steffenhagen 2012). In the rest of Canada, teaching jobs are scarce. In Ontario, new graduates with a B Ed. degree are facing a job market where there is a provincial 38% teacher unemployment rate, including 50% in Toronto (Newcomb 2014). In NS teaching jobs are scarce due to a combination of job cuts and too many new graduates (Ross 2012).

The lack of teaching jobs is partially due to the increased tendency for teachers to continue working beyond when they qualify for a retirement pension (Mason



2012). As an example, in BC, although the overall number of full-time teaching jobs dropped by 900 from 2006 to 2011, during the same time period there was an increase in the number of educators over 60, as illustrated in the following table. (Mason 2012).

Table 1.1 Number of Teachers over 60

<b>Age Range</b>	<b>2006</b>	<b>2011</b>
No. teachers between 60-65	1057	1768
No. teachers > 65	92	254

These figures show a significant change in trend. According to the results of an earlier survey by Hawkey (2003), the greatest number of BC teachers in the workforce were in the 50-54 age range and there were only a handful over 65. According to Matthijs and Visser (2011), who studied teachers in Holland, despite a trend towards early retirement, teachers may stay in the workforce beyond the time when they are able to retire if they have support from their employer or they have financial incentives. In the case of BC teachers, the reason may be due to the lower wages and loss of income during the periods of strike. As having a choice of when to retire can lead to a more positive outlook (Jensen and Overbye 2013), when and why teachers choose to leave the workplace may have an impact on their transition experience.

This evidence suggests that, despite the challenges faced, teaching is still a respected and desirable profession, leading to a positive work-identity. Conversely, as job availability is low, teachers may accept less than ideal conditions if they wish to remain in the profession, which can lead to negative work-identity. Teachers work-identity will likely be carried through to the transition to retirement, which will be a factor satisfying their self-worth. It is possible that when teachers retire, their perception about their career will be ambivalent.

Despite the turbulent history of labour unrest and stressful working conditions, which may influence their attitude towards the transition to retirement, retired teachers are young enough, mostly healthy and in a positive financial situation where they can enjoy retirement. Many have been exposed to stressful

working conditions, and while they are dedicated to their profession, they may be looking forward to becoming involved in activities and social networks that are not work related. Most have been exposed to technology and are able to utilize tools and applications that will facilitate their transition to retirement.

### 1.3.5 TECHNOLOGY – USAGE AND EXPECTATION

As with the workplace in general, the use of technology in schools is ubiquitous. Most schools are connected to the internet and there is an expectation that teachers will have a working knowledge of IT. Several programs have been implemented to improve efficiency in the classroom and facilitate on-line learning. No longer is the question whether to implement technology, but how (Zhao 2003). Canadian teachers are well educated and have experience with some form of technology. This will give them the ability to utilize tools and technology available to facilitate an easier transition to retirement.

The introduction of technology in the workplace has had a significant impact on teachers. In a study of over 2,000 teachers for the Pew Research Center's Internet and American Life Project, Purcell et al (2013) found that teachers, including those close to retirement, were more technology literate than the general adult population. The following table, deduced from data from Purcell et al (2013), demonstrates the differences between teachers and the general population

Table 1.2 General Usage of Technology

<b>Technology Usage</b>	<b>Teachers</b>	<b>General Population</b>
Cell Phones	94%	88%
Smart Phones	58%	45%
Laptops	93%	61%
Social Media (Facebook, LinkedIn)	78%	59%

As in the case of the general population, there is a difference in usage between older and younger teachers. The following table, deduced from data from

Purcell et al (2013), shows the differences between technology perception and usage between teachers aged over 55 and under 35.

Table 1.3 Usage of Technology in the Classroom

<b>Technology Usage</b>	<b>Teachers over 55</b>	<b>Teachers under 35</b>
Feel that students know more about technology than they do	59%	23%
Develop or share work on a web page	34%	45%
Develop new ways of using technology in the classroom	13%	22%

As demonstrated in the following table, (deduced from Purcell et al 2013, Naylor and White 2009, Duxbury and Higgins 2013) technology plays an important role in classroom preparation and networking.

Table 1.4 Usage of Technology for Classroom Preparation and Networking

<b>Use by Teachers for Classroom Preparation and Networking</b>	<b>% Usage</b>
Receive email alerts relevant to their field of teaching	80%
Use technology to communicate with parents	67%
Use technology to communicate with students	57%
Students use mobile	73%
Students access and submit assignments on-line	70%

The pervasive use of information technology identified in the Pew study (Purcell et al 2013), is consistent with the research of Duxbury and Higgins (2013) who compared 25,021 educated knowledge workers from the general population to 2,462 teachers. According to PBS and Grunwald Associates (2011), teachers believe that the use of technology in the classroom enhances their ability to teach. Students are more engaged when IT devices and tools and web-based systems are used as means to impart information. Teachers can also share resources and obtain social and professional support through on-line professional communities.

Consistent with both of the above studies, teachers in Canada are to a large extent familiar with the use of technology. They communicate with their colleagues and with students' parents by email. Courses both for teachers and students are available on-line. Professional information they require is usually contained on the union, pension and retired teachers' association web-sites. (NSTU 2017, Otffeo 2017, bctf.ca no date d). The demographic of the respondents for this research are likely to have used some of the technology available while they were teaching. While teachers who are of the older demographic may not feel as comfortable using technology, in order to be effective in their work environment, they will, as a minimum, need to use email (Duxbury and Higgins 2013). Once retired, teachers will have the experience and ability to take advantage of IT to satisfy their social needs and to facilitate their activities.

## **1.4 STRUCTURE OF STUDY**

The following chapters summarize the material that has contributed to an understanding of the factors that address the research question: a review of relevant literature, the methodology and methods considered appropriate and the results of the research. The Conclusion examines the implications of the research.

Chapter 2 contains a review of existing literature about the components applicable to the research question: identity, transition to retirement and the usage of technology. The relationship between these three items is examined and the theoretical basis of the theories of identity is described. For the purposes of this research, the theories of identity that deal with self-worth (including Identity Theory, Social Identity Theory, Consumerism, Identity Work and Identity Play) are explored. The salience and levels of commitment to activities and situations which impact identity, and the role of social networks, are also discussed.

During the transition to retirement, identities change but the need to maintain self-worth and social networks remain (even though these networks may

change). Transition can occur over a period of time and can be dependent on factors such as work conditions, circumstances of retirement, strength of social networks and salience of activities. The attributes and skills of individuals are likely to continue through the transition period, which can contribute to the feeling of self-worth. In addition to the individual factors that are described, the relationship between identity and the transition to retirement is then examined. How IT is utilized and its impact during the transition to retirement as well as what motivates or detracts retirees from employing technology are then addressed.

Chapter 3 describes the theories of social science research and the associated methodology and methods as applicable to the research question. It also contains the data collection methods, including participant selection and pilot studies. The ethical considerations while designing and implementing the research are described. A mixed methodology was adopted to address all the parts of the research question. The aspects, which involve emotions are more suited to qualitative methods. How the respondents utilize technology is subjective and can be ascertained by quantitative methods. It is also useful to use qualitative methods to examine in more depth how and why the respondents utilize technology.

The results of the research are presented in Chapter 4. The demographics of the research population are described. The research is then focussed on the factors that impact identity, transition to retirement and the relationship between them and how the usage of IT is a facilitator. An outlier case study is included to illustrate the impact of a retiree not using technology.

The conclusion contains a summary of the thesis, the impact of the study and recommendations for further areas for research as well as suggestions for where the results may be of benefit. How the advances in IT may impact future generations is also addressed

## 2.0 LITERATURE REVIEW

### 2.1 INTRODUCTION

The Research Question to be examined is: ***“What is the relationship between identity and the transition to retirement and how is the transition facilitated by the use of technology?”*** The main contribution of the research is the result of addressing the role of IT during the transition to retirement and to thereby examine the relationship between identity, retirement transition and the role of IT. Some previous studies have separately focussed on identity of seniors (Hogg et al 1995), the transition to retirement (Nutmann-Shwartz 2004 ) and how older adults utilize technology (Smith 2014). This review addresses the literature on the topics pertaining to the research question and identifies where it is useful in general, where it applies directly to the research question and where it is deficient for the purposes of the proposed research.

There is extensive research literature on seniors and their identity when they retire (e.g. Atchley 1971, Mutran and Reitzes 1981, Reitzes and Mutran 2006), but identity changes during transition have not been broadly addressed. From the literature researched, some researchers have examined both identity and retirement, but not the transition process (e.g. Kaufmann and Elder 2003, Price 2003, Sargent et al 2011). While retirement is recognized as a transition, not an event, the spectrum of identity changes and time taken to transition by those recently retired have not been broadly described. Equally, much research has been published on seniors and technology (e.g. Smith 2014, Mitzner et al 2010, Neves et al 2013), but this often refers to older adults in general and there is not always a differentiation made between those who are working or are retired. The proposed research will fill these gaps as it deals with the identity of older adults and specifically its relationship to the transition to retirement and also addresses the role of technology during that period.

The research question addresses the relationship between identity and the transition to retirement. The literature on the theories of identity are explored, including Symbolic Interactionism as the theoretical basis. Identity is defined as

the sense of self (self-worth) under certain circumstances, where self-worth is the aggregation of identities (Atchley 1989, Barnhart and Peñaloza 2013). The theories of identity that have been considered, all of which contribute to a sense of self-worth, are identity theory, social identity, consumerism, identity work and identity play. Identities can be positive or negative, depending on the circumstances. In the case of retirement, older adults are faced with transitioning from a work related identity to those of a retiree, which due to the loss of status, may initially be negative. With time, new endeavours and the usage of IT, new and positive identities often evolve.

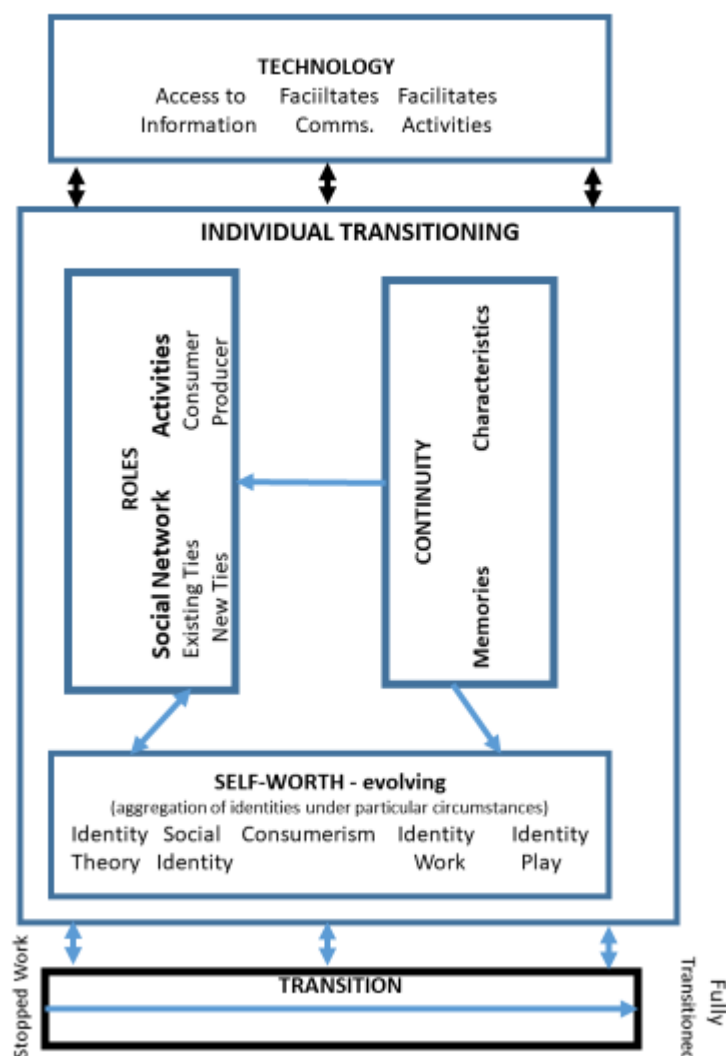
The development of identities through social networks is addressed. The limited literature on evolving identities in the context of changing circumstances, particularly the transition to retirement, is discussed. Older adults experience a change in expectations and activities, leading to changes in social networks and their resulting identity. Continuity theory, which advocates that individuals exhibit a continuity of characteristics as they evolve from one situation to another, is described as a theoretical basis for understanding retirement in this research. Not all adults have the same experience of transition to retirement and past work experience as well as the circumstances of retirement have an influence. How technology can facilitate the actions that give older adults a sense of self during transition to retirement is discussed, as well as how IT is used to create and maintain networks that are a large component of a person's perception of themselves.

The research question addresses the relationship between identity and the transition to retirement and how technology facilitates the transition. Previous research has dealt with the components individually. The contribution of this research is that it has focussed on the role of IT in facilitating identity transitions during retirement and the relationships between the components (retirement transitions, identity and IT).

The following diagram is a conceptual model illustrating the relationships. The model illustrates how IT can enhance the experience of those transitioning to retirement (Saalovara et al 2010, Hogeboom et al 2010). It demonstrates the

relationship between the identities of individuals that impact their self-worth, to the period of transition (Gall et al 1997). The model also shows how, according to Continuity Theory (Parker 1995), continuity of behaviour can influence self-worth and the usage of IT. It shows theories of identity that deal with self-worth and how self-worth feeds into transition. The diagram is dynamic in that as identities change with time and circumstances, so does self-worth and the usage of IT at a particular time during transition.

Figure 2.1 Conceptual Model



Technology is ubiquitous and is a facilitator for those who are transitioning to retirement (Smith 2014). The usage of technology plays a significant role as a



facilitator for maintaining and enhancing social networks and activities as it facilitates communications. It is also a fast and easy way to access information. The usage increases and/or changes with evolving roles, which can result in more positive feelings of self-worth, impacting the time-frame of acceptance of retirement. Conversely, as social networks and activities evolve, additional IT tools and applications may be used. There is a 2-way relationship between using IT and feelings of self-worth – as usage increases so may the sense of self, which can stimulate new experiences requiring new technologies (Saalovara et al 2010, Hogeboom et al 2010). Past experiences may also have an impact on the usage of IT. This may be from skills previously acquired and/or from an attitude that is conducive to embracing new experiences (Parker 1995).

The model addresses theories of identity that deal with self-worth - Identity Theory, Social Identity Theory, Consumerism, Identity Work and Identity Play. Roles which contribute to identity are belonging to social networks and engaging in activities. When they first stop working, older adults rely heavily on friends and family for support and use IT to maintain contact. As they engage in more activities, they increase their social networks (Hogg et al 1995). This is a 2-way relationship. With the increase of activities and social networks, their sense of self-worth increases, which can accelerate transition.

There is also a relationship between continuity of behaviour and self-worth and continuity and the evolution of the roles that impact identity. Past memories and characteristics impact feelings of self-worth during the transition to retirement, as well as having an impact on the evolution of social networks and activities. How an individual perceives the past impacts how they feel about current circumstances of retirement as well as their motivation to use IT (Parker 1995).

Older adults do not necessarily accept the status of retirement when they stop working. The time taken is dependent on several factors, which will evolve until the feeling of being fully retired is achieved (Nuttman-Shwartz 2004). Seniors are likely to feel retired if they have a strong sense of self-worth, which is

impacted by their perceptions of the past, their current roles and by the usage of IT. The following sections explore in more detail the elements of the model.

## **2.2 IDENTITY**

The use of the word 'Identity' in social science is pervasive and there are several interpretations that can be found in the literature. Identity is sometimes used as being synonymous with 'culture' (e.g. the aboriginals are losing their identity). It can also be used as a description of what someone does (e.g. I am a teacher). Identity can also refer to a group (e.g. Aboriginal) (Côté 2006, Stryker and Burke 2000). In the following sections, identity related to social behaviour in terms of the relationship between self and society will be discussed.

For the purpose of this research, Identity is defined by how individuals feel about themselves (sense of self) in particular situations (Barnhart and Peñaloza 2013). 'Sense of self', or self-worth, can be considered as the perceived level of success in relation to self-created expectations and is an aggregation of identities (Atchley 1989). The behaviour of individuals is influenced by the situations they are in and they confirm their identities by their behaviour within those situations (Stryker 2008). People express their feelings of self-worth in relation to the social categories they are engaged in, including gender, nationality and being retired. (Barnhart and Peñaloza 2013). Within these social categories are different situations, such as being a grandparent and a volunteer and each of these situations can elicit a different identity. As situations can change, older adults' sense of themselves will not be static and they will take on new identities throughout the transition to retirement.

For this review the theories of identity that are addressed are Identity Theory, Social Identity Theory, Consumerism and Identity Work and Identity Play as they are all concerned with the sense of self (self-worth) in particular situations. Identity Theory deals with roles and their salience. As retirees can be engaged in many roles, they may have a different sense of self in each situation. Social

Identity Theory is concerned with sense of self within a group environment. It is appropriate to examine whether identifying with a group such as a retired teachers association, and in certain circumstances exhibiting group behaviour, is part of the identity of older adults. Consumerism, which also deals with sense of self, defines identity by possessions and acquisitions, not feelings. Seniors are a growing consumer group (Gilleard 1996) and how consumerism defines their feeling of self-worth is relevant. Identity work addresses 'who am I', while identity play considers 'who do I want to be'. These theories of identity address how individuals feel about themselves, which will evolve with changes in life circumstances and specifically during the transition to retirement. Symbolic Interactionism, which addresses self and society, is the theoretical basis for the theories on identity.

### **2.2.1 SYMBOLIC INTERACTIONISM**

Symbolic Interactionism describes how an individual's identity is based on how they interact within society (Blumer 1969). It is also the basis for Structural Symbolic Interactionism (Stryker 1980), which addresses how an individual's identity is influenced by their perceived position in society. Symbolic Interactionism describes 'self' as a product of social interaction and that an individual's identity is based on their interaction with things, which include people (Stryker 1980). Mead (1934) and Cooley (1902) proposed that an individual's behaviour was a result of social interaction and deals with the relationship of how society impacts self and self impacts social behaviour. An individual's sense of who they are is a reflection of their interaction in society. Mead and Cooley also believed that an individual has only one identity, which is related to their relationships within one homogeneous group. While Mead (1934) and Cooley's (1902) description of sense of self is consistent with the definition of Identity for the purpose of the research, individuals do not only interact within a homogeneous group and they can have more than one identity, each being dependent on the situation at the time (Hogg et al 1995).

Complementary to Mead (1934) and Cooley (1902), James ([1890] 1959) recognized that as people tend to interact in many groups, they can operate as

many different selves, each of which is a reflection of the particular group. Blumer (1969) coined the term “Symbolic Interactionism” and built on the work of Mead, Cooley and James to examine the roles individuals play within groups and how this impacts their social behaviour. According to Blumer (1969), interactionism foregrounds three main concepts: First, individuals act towards things (which includes other individuals) based on what they mean to them. As an example, when someone retires, friends and family become more important. Second, the same objects can have different meanings for different individuals e.g. friends may become more important than family to an unmarried retiree. Third, what things mean results from the social interaction of the individuals. The relationships that retirees maintain or develop are only significant if there is regular and meaningful contact, even if the interaction is through technology.

Change occurs through the interpretation of the things the individual encounters. Therefore change can be seen as a series of interpretations. Consequently, meanings are not inherent, but can change as a result of social interaction. Individuals give things a meaning and their actions are based on that meaning, which in turn will be modified by their subsequent actions. As the usage of IT has taken on a significant role in facilitating relationships, the technology itself can take on new meanings. Transition to retirement is an example of how changes will occur. As retirees form new and enhance existing social networks, they may adapt their behaviour to be more accepting of their role as retirees.

While he addressed behaviour within society, Blumer (1969) did not address how individuals felt about themselves. Stryker (2008) considered how behaviour is influenced by individuals’ perception of themselves within the social environment and defined a modified discipline, Structural Symbolic Interactionism, which describes behavioural changes as a process that is impacted by society. Society is composed of organized systems of interactions and role relationships and is a complex mosaic of differentiated groups, communities and institutions. According to Structural Symbolic Interactionism, individual behaviour is influenced by the behaviour of others within a particular social structure. Examples of social structure are age, class, race and ethnicity.

Behaviour is influenced by how individuals see themselves and others in the social environment and through the roles they play. Roles can be regarded as “The function assumed or part played by a person or thing in a particular situation.” (oxforddictionaries.com no date), which may vary depending on the status of that role within a particular society and are formed through socialization with others in the same role. Identities evolve through behaviour and social interaction within the role. Individuals have a sense of identity by the position they are assigned to in society, which influences their behaviour. They are not passive within the roles they play but are influenced by their perceptions of the meanings of these roles (Fernandez et al 1997). Roles evolve by identifying with the role and understanding the significance of its values and meanings (Stryker and Burke 2000). To a retiree, the role of a volunteer may become progressively more important as they meet others and develop a new social network, resulting in an increasing feeling of positive self-worth.

The theory of Structural Symbolic Interactionism links identity with social structure and describes that how individuals perceive they are situated in the society that they belong to determines their identity and behaviour. Structural Symbolic Interactionism applies to the transition to retirement, an ongoing process, during which individuals will constantly re-evaluate themselves by referring to current and previous identities. Symbolic Interactionism and Structured Symbolic Interactionism are based on roles individuals play in society. Although they do not apply to all situations, roles are a significant component of the mosaic of the lives of individuals.

Based on Structural Symbolic Interactionism (Stryker 1980), two different but related forms of Identity Theory were developed by Stryker and Burke (2000). Both are concerned with how one's self is impacted by social structures and how as a result sense of self has an impact on behaviour.

### **2.2.2 IDENTITY THEORY**

Identity Theory, is based on the assumption that an individual can have many identities, each related to a particular role that they occupy. According to Identity Theory, how individuals feel about themselves is dependent on which role they are playing at a particular time. As older adults transition from working to retirement, some of their identities will change and the salience will be dependent on how committed they are to the role they are playing at a given time (Hogg et al 1995). Identity Theory evolved from the Structural Symbolic Interactionism concept of how identities are influenced by behaviour within a role. The term Identity Theory is widely used when referring to the relationship between self and social structure (Hogg et al 1995). Identity Theory as described by Stryker (1980) is that self is a reflection of the society in which an individual operates. Self consists of several identities, each associated with a role that the individual occupies, giving them a feeling of self-meaning (Hogg et al 1995).

Identity Theory evolved in two different but complementary directions, both based on Structural Symbolic Interactionism. First the work of Stryker (1980) addresses the relationship of the impact of social structure on self and the subsequent impact of self on social behaviour. Stryker (1980) proposed that, as society is not uniform and cuts across many boundaries, an individual can be engaged in many roles (e.g. mother, teacher, dancer). An individual will choose an identity that is appropriate for the role they are playing at any given time. According to the theories of Stryker, “behaviour is impacted by commitment to social structures through relationships resulting in behaviour that is appropriate for the salience of that structure” (Stryker and Burke 2000 p 288).

Second, Burke approached identity from the perspective of the expectations and meanings that are incorporated into one’s self within a role. The behaviour of individuals is shaped by their expectations of standards (Stets and Burke 2000), which are self-generated and dependent on the individuals’ expectation of themselves (Stryker and Burke 2000). An individual’s self-worth

is related to their perception of whether they meet these standards or need to modify their behaviour to remove the discrepancy. Complementary to Stryker, the work of Burke focusses on the internal forces that influence an individual and how this impacts their behaviour (Stryker and Burke 2000). Burke (1980) focussed on the internal dynamics of behaviour within groups. He described the internal process of self-verification and was concerned with an individual's concept of self-meaning within a group and their behaviour within that role. He proposed that individuals saw themselves in terms of standards, which defined their identity in an environment. He suggested that they have control over their social conditions and would modify their behaviour in order to conform to achieve the perceived identity they felt was socially appropriate. As situations can be changed by behaviour, individuals would alter their actions to fit what they felt was socially appropriate (Stryker and Burke 2000). The combination of the emphasis on social structural sources of identity (Stryker 1980) and internal identity process (Burke 1980) resulted in the position that behaviour expresses identities. Stryker and Burke (2000) believed in role based identities and that an individual takes on the role of the environment they are in, while still maintaining their individual characteristics with that environment or group.

According to Identity Theory, people have multiple identities which match the roles they play in society. Which role they prefer to play is related to its salience within the current social circumstances and their expectations of being successful within that role. Based on Symbolic Interactionism, identities are self-meanings, which develop into roles (Stryker and Burke 2000). As people occupy multiple roles, they will have several identities which can be described as how they define themselves within a particular role or as a member of a particular social category. Identity is how individuals distinguish themselves, not only within the many roles they play, but by the roles they do not play (e.g. teacher vs. student, mother vs. father) (Hogg et al 1995, Stets and Burke 2000). While any activity that is undertaken can be considered a role, only those roles that are salient and have the commitment of an individual are relevant for influencing behaviour

As people can play many roles, their experience of their identity is not necessarily consistent. An individual may feel competent as a worker, but less confident about their ability to parent. The desire to conform to what one believes is a valid role in society creates identity confirming behaviour to get re-affirming feedback. As an example, an employee may work overtime to get positive re-enforcement from their employer. Similarly, older adults may feel that they no longer have a role in society and use their past identity as a worker, or ex-role (e.g. Retired teacher), where they felt they made a significant contribution, to get validation from others (Reitzes and Mutran 2006). The sense of self-meaning has been described as being reflexive and directly related to how others respond (Hogg et al 1995). If they are being observed their actions may change. An example of this is how someone may dress when they are alone at home compared to when they are among others.

For those in a high profile position, there is likely a correlation between their attitude towards retirement and their commitment to their occupation (Glamser 1976). While working, they are reminded daily of their status. When they retire and seek alternate activities, they are unlikely to receive daily re-enforcement of their importance and will miss their social standing. As status is a factor of identity and an individual's perception of themselves is a reflection of how others see them, those in a high profile position may elicit approval and respect from others which will likely be lost when that situation changes through retirement (Paul and Batnick 2010). Examples are physicians, ambassadors and even the wives of ambassadors, who may feel that they have less respect from others when they are retired. On the other hand, Quick and Moen (1998) found that those with a high occupational status such as managers were more likely to have a satisfactory transition to retirement. Those with high salient positions may feel less social pressure on their identity, be relieved and have more satisfaction as retirees, while still maintaining the status of their previous role. Conversely, people seek endorsement of those whose social position is considered important and may adjust their behaviour to gain approval. Approval is sought from both those who are within a role as well as those who are outside (Stets and Burke 2000). As an example, teachers will seek approval from their colleagues as well as from parents of their students.



According to Reitzes and Mutran (1996), retirement is a process during which non work-related roles will take priority. If an individual played many non-worker roles with associated networks while employed, transitioning should not be distressing (Cornwell et al 2008). When individuals transition to new roles, they may use existing roles, which will remain, as a tool for adjusting to the new situation. As an example, when older adults retire, they will maintain their role as family member and friend and use this to stabilize their identity while they transition to new roles to replace their worker role, such as a volunteer or even a pensioner (Reitzes and Mutran 2006).

According to Identity Theory, how an individual behaves within each role is dependent on its salience and the salience of a role is dependent on the commitment to that role. An individual can have as many identities as the number of networks in which they interact and play roles. Identity salience can be defined as “.. the probability that an identity will be invoked across a variety of situations, or alternatively across persons in a given situation” (Stryker and Burke 2000 p286). The salience of each role is hierarchal and can vary with changes in circumstances (Stryker and Burke 2000). On retirement, friends and family can become more important than volunteering for an extracurricular school activity. The salience of a role is influenced by the evaluation of the importance of others in that role as well as how they feel that those in the role regard them (Hogg et al 1995). For teachers, as there will likely be less contacts with work colleagues following retirement, school related activities (such as attending a year-end concert) may become less important.

As there is a relationship between identity within a role and behaviour, the salience of each role played is significant. Those roles that are considered to be more salient at a given time are those that will take precedence in terms of behaviour. Two individuals playing the same role may attach different priorities to that role if they do not regard it as having the same significance. The salience of a role will also determine a person's identity within that role as they

will mostly be concerned with their performance within the role that is most salient at a given time. The salience of a role is not static and depends on circumstances, such as retirement. When there is a shift in priorities of a role, both behaviour and attitude towards that role will change (Stryker and Burke 2000). According to Reitzes and Mutran (2006), pre-retirement identity will have an influence on self-esteem for up to 2 years during the transition to retirement.

Commitment to a role can be described as how much an individual relies on their identity in a particular network to maintain their relationship within that role. "Commitment shapes identity salience shapes role choice behaviour" (Stryker and Burke 2000, p 285). The more committed an individual is to a role, the higher the level of identity salience. How committed that individual is to a particular role is dependent on the importance of the social relationships encountered within that role (Hogg et al 1995). When a role is lost due to circumstances such as retirement, the impact is dependent on how committed that individual is to the social network within that role and whether that network can be maintained (Hogg et al 1995).

Commitment can be measured by determining how much the loss of relationships within a role (such as losing contact with co-workers on retirement) impacts the salience of that role (Hogg et al 1995). The impact of role loss during transition is also dependent on how committed the individual is to their identity for non-work related roles for activities that can continue post-retirement. The salience of the previous non-work related roles may increase or new roles may take precedence. Either could result in a positive self-esteem with being retired, even among those who were totally committed to their occupation. This implies that if a new role becomes salient, the impact of role change due to retirement can be positive. The commitment of a worker to their attachment of their role as an employee is also a predictor of their self-esteem post-retirement (Quick and Moen 1998, Reitzes 1996).

While the Identity Theory described above deals with the individual, Social Identity is concerned with the behaviour within a group. In their paper on

Identity Theory and Social Identity Theory, Stets and Burke (2000) explore the similarities between the two theories. They argue that although the two theories have differences, there are similarities and that combining the two can lead to a more complete picture of 'self'.

### **2.2.3 SOCIAL IDENTITY THEORY**

Social Identity Theory deals with feeling of self-worth while within a defined collective and refers to group behaviour within a role. It is similar to Identity Theory in that an individual's behaviour is related to the role that they are playing. The major difference is that the individual exhibits group, not individual behaviour. The theory is regarded as relevant as teachers are members of a defined group and under certain circumstances could exhibit common behaviour such as solidarity during a strike. There are many similarities between Identity Theory and Social Identity Theory, as well as the use of some of the same terminology (identity, salience, commitment). Both theories are role based and deal with the relationship between self and society (Hogg et al 1995). However, there are significant differences in the theories based on individual vs. group behaviour which warrant examining in the context of the identities of teachers during the transition to retirement.

Social Identity Theory was developed from the work of Tajfel and Turner (1979) and proposes that those within a group take on the identity of the group as a whole and not as individuals within the group. This group is made up of those who have a common view of both the group and the role they play within it. This implies that membership of that group will be of like-minded persons who hold the same values and beliefs of that group (Stets and Burke 2000). An individual's identity and self-esteem is associated with the members of the group who are judged positively as opposed to those who are not in the group and are considered outsiders. Social identity is defined as an "individual's knowledge that he [sic] belongs to certain social groups together with some emotional and value significance to him [sic] of this group membership" (Tajfel 1972 p. 292). How individuals perceive themselves in relation to others within a group determines how they define their group

identity. Individuals have the need to evaluate themselves. If they want to remain a member of the group they will perceive that the group contributes positively to their social identity and sense of self-worth. If there is no positive re-enforcement, they will either leave the group or redefine its value. How an individual perceives the group is dependent on their comparison to the perceived attributes of similar groups and the differences between groups must be such that the attributes of their group have greater value (Tajfel 1972).

To maintain their social identity, individuals become committed to their group as well as believe in the associated attributes and values. Cohesiveness of the group depends on the relationship between those in the group and the nature of their ties with other members. A strong commitment to the group can result in merging personal identity with the group and exhibiting behaviour that is not necessarily advantageous e.g. a member of a team who personally accepts blame for a poor performance. The level of commitment of the members to that group will determine the collective behaviour of that group. How committed members are to the group will depend on their perception of themselves relative to others with similar function (Elmers et al 2002).

Being a member of the group implies that how its members think, feel and behave is set and if membership is salient, their thoughts and behaviour become strongly influenced (Hogg et al 1995). Members are motivated to behave as being in the group as opposed to being outside, in order to maintain their membership (Hogg et al 1995). Having a particular social identity implies that the member shares the values and behaviours of that group and feels comfortable assuming that role. Self-categorization and self-enhancement are undertaken by members of the group in order to validate their membership. The former involves accentuating boundaries and focussing on the perceived similarities of the behaviours within the group and comparing this to the perceived differences outside the group. Self-enhancement occurs by validating the features of the group and denigrating those outside the group, often on the basis of stereotypes (Hogg et al 1995, Stets and Burke 2000). According to Social Identity Theory, as all individuals can assume roles in many

groups, their perception of themselves is a unique combination of their social identities (Stets and Burke 2000). While still working, teachers belong to a well-defined group and can exhibit coherent behavior, particularly under adverse or threatening circumstances such as a strike. To some extent, retired teachers can maintain their group identity by belonging to establishments such as Retired Teachers Organizations (RTO's), receiving newsletters and taking part in their activities.

While Identity Theory and Social Identity are concerned with an individual's sense of self by what they do, Consumer Identity defines a person's self-worth by what they have (Gilleard 1996). As seniors are a growing group of consumers, an examination of consumer identity is included to add another dimension of identity during transition.

#### **2.2.4 CONSUMERISM AND IDENTITY**

The literature on consumerism is relevant as it describes an evolving pattern of identity related to consumption by older adults (Gilleard 1996), which can be facilitated by technology as well as the consumption of technology. All individuals are, to some extent, consumers and to many this is of high salience and a major factor in determining identity. Although not the only factor, consumerism is important in defining an individual's perception of their self-worth by exhibiting their possessions, rather than by their emotions and identity is based on consumption not production. People can be more concerned with defining themselves and projecting this to others by what they own and can show (Gilleard 1996)

Many older adults have the financial security and the ability to continue to be consumers during the transition to retirement (Barnhart and Peñaloza 2013) e.g. teachers in Canada are eligible for pensions. The term "positive aging" has been used to refer to older adults who can be "empowered" as they have financial and physical ability as well as access to the technology for on-line purchasing. (Barnhart and Peñaloza 2013 p 1136). Pre-retirement acquisitions result in possessions and equity that are important as symbols

during the transition to retirement, such as a house or car. Consumerism has become a major part of how older adults change, create and manage their identity during the transition to retirement (Gilleard 1996). An older adult's perception of their social position and status in society can be determined by the display of consumed goods ranging from how they dress, where they travel and how nice their garden looks (Gilleard 1996). Even if they are not in the upper financial bracket, choices are available such as what music they listen to and what leisure activity they pursue. These choices can be influenced by others and based on what is perceived to be desirable to the general population (Gilleard 1996). Having sufficient financial resources to consume post retirement can contribute to a positive identity (Gilleard 1996). The converse is also likely to apply. It can be deduced that those who need to reduce their level of consumerism can feel that their self-image is reduced e.g. if they need to downsize their home or are no longer able to travel.

According to Gilleard (1996) and Barnhart and Peñaloza (2013), advertising plays a large part in making consumer goods desired by the older demographic. Older adults are continuously exposed to consumerism through television, radio, billboards and other means. With the increasing number of seniors, advertisers are realising that there is a growing market for what is perceived to be a desirable identity such as exotic travel or membership of exclusive clubs. Likely due to the growing consumer market, advertising often focusses on removing the stigma of old age and portraying older adults as active rather than not having a useful role in society. As a result, older adults are heavily influenced by consumer culture and what they perceive to be the social convention (Barnhart and Peñaloza 2013).

The literature on Identity Theory and Social Identity Theory is appropriate to examine as it contains descriptions of how individuals feel about themselves in particular situations, including the transition to retirement. The theories are role based and identity are dependent on a particular role, which implies that if there is no defined role, there is no identity. It cannot be assumed that individuals

have no sense of self when they take part in every-day activities which are not considered as roles, such as consumerism. While Identity Theory and Social Identity Theory address identity for a significant portion of a person's life, they only provide a partial picture. Excluding identity that is not associated with a role leaves a deficiency in the literature about the understanding of how individuals feel about themselves.

While Identity Theory and in some cases Social Identity Theory are appropriate as the theoretical background for the research question, the literature describing these theories is one dimensional and identifies a direct linear relationship between identity, roles, salience, commitment and networks. Roles and identities tend to be treated as relatively static, fixed, determined and determining. Additional factors that have a significant impact on behavior are not given much consideration. While some moderating variables are included in the literature on the theories of identity such as health and financial security (Mutran and Reitzes 1981, Sargent et al 2013), the identity of a consumer is often excluded, even though it is a dimension that has a substantial impact on an individual's identity. The theories of identity described are appropriate as a theoretical basis for the research question, but consumerism should also be included. Consumerism is ubiquitous and almost everyone engages in this practice to some degree.

#### **2.2.5 IDENTITY WORK AND IDENTITY PLAY**

Self-worth consists of the combination of many identities that reflect the real or perceived achievements of an individual, including those of the past (Ibarra and Petriglieri 2010). Two further theories of identity which address self-worth are identity work and identity play. They are complementary in that an individual may be engaged in identity work, which implies a purpose and then during periods of transition or doubt, experiment with identity play, which allows them to project possible and/or desirable images of themselves. Identity work addresses 'who am I', under certain circumstances, while play 'explores who do I want to be' (Fachin and Davel 2014, Woo et al 2017).

### **2.2.5.1 Identity Work**

Identity work has several complementary definitions in the literature. “Identity work is a set of active processes which serve to construct a sense of identity. It is a sense making process – making sense of the external environment and is self-reflecting” (Cascon-Pereira et al 2016 p 19). An alternative way of looking at identity work is that individuals do not have an identity, but engage in identity work. They obtain their sense of self-worth by acting in a way to obtain approval from others and then reflect on their self (Woo et al 2017). In times of transition, individuals rely on past perceptions to enable them to cope with the present. They will continuously assess their present sense of self-worth and the past is viewed in light of the present. This process enables individuals to justify their current identity to their social network (Fachin and Davel 2014). If an individual feels that they are not being regarded as behaving how they should within a role, they may feel that their identity is being threatened (Ibarra and Petriglieri 2010). Similar to transition to retirement, identity work is not an event, but an ongoing process that encompasses creating a sense of self for the future (Fachin and Davel 2014). Identity can be considered as a “continuous casting and re-casting of self” (Carolla and Guerri 2017 page 250).

While identity theory and social identity theory describe discrete identities where an individual can have many identities at a given time, but the salience can vary depending on the time and circumstances, identity work is an exploration into ‘who am I’ by individuals and is impacted by those with whom they interact (Fachin and Davel 2014). In order to maintain the desired self-worth, individuals strive to act and look the part to gain approval. Identity work has two phases – individual’s form their identities by gauging what they feel is expected of them by society. They then sustain this identity by interacting with society (Cascon-Pereira et al 2016). It is based on two assumptions, how important is the external image of a particular role and behaving according to these roles to maintain their legitimacy. They try to project a social image of themselves that they feel is appropriate for the role that they are playing. In order to be given the desired identity, individuals need to behave according to



the expectation of the part (Ibarra and Petriglieri 2010). Playing the role well, increases the likelihood that the individual will be well regarded by others and this behaviour re-enforces a positive identity (Ibarra and Petriglieri 2010).

As situations change, particularly during the transition to retirement, the theory of identity work is applicable to the research question, however it appears to be more appropriate for the generation who are currently working. They do not expect to be employed by the same organization over a long period of time. They are flexible and their work identity is constantly changing. In general, the retired teachers that were interviewed for the study were of the generation that were likely to live and work in the same geographic area and keep the same job for most of their lives. For most, their focus was likely to have been on personal development within their occupation. The current work-force are more likely to be flexible and for many, work is linked to personal branding by using tools such as Facebook and LinkedIn. In general, this working force is flexible. If a situation does not work out, they will adapt, move on to another and revalue their identity work. (Lyons and Kuron 2013, Pitt-Catsoupes and Matz-Costa 2008).

Identity work and play have different objectives. Work focusses on maintaining an existing identity by a behaviour that reflects externally imposed image requirements. Play, on the other hand, is a projection into the future of potential re-inventions (Ibarra and Petriglieri 2010). Play can be the basis for future work (Fachin and Davel 2014).

#### **2.2.5.2 Identity Play**

While identity work has been defined as “.....goal oriented, play is an escape and is about discovery, exploration and imagination that can open up many possibilities” (Fachin and Davel 2014 p 372). Identity play is more applicable to the current generation, as they are likely more dynamic, flexible and open to experimentation, than the generation interviewed for this research. They are more likely to project possibilities and then try them out. If they do not work out,

the individual will move on to alternatives (Lyons and Kuron 2013, Marcie Pitt-Catsoupes).

During transitions such as retirement, individuals can cope with changes in identity by exploring possibilities (Fachin and Davel 2014). When circumstances are changing, individuals may oscillate between work and play. Play gives the opportunity to imagine a potential future. At the threshold of a transition such as retirement, it can be a bridge between current self and the need to experiment with a sense of self in the future (Ibarra and Petriglieri 2010).

Play is about projecting and imagining, while work is about attaining an objective (Ibarra and Petriglieri 2010). Play can be associated with situations as a re-alignment of identity occurs, such as during the transition to retirement. Individuals need to re-examine their expectations and may adapt the techniques of play to test out possibilities (Ibarra and Petriglieri 2010). Identities are examined during periods of transition. During times of relative stability, work is embraced. During times of change, identities can fluctuate and periods of play may be adopted while options are being explored (Ibarra and Petriglieri 2010). While being involved in organizational life, individuals may work at aspects of their life and play at visualizing becoming others. Ibarra and Petriglieri (2010 p 13) define play as “the crafting and provisional trial of immature possible selves”.

Play is a useful means of having aspirations and acting as if they are real and gives the opportunity to imagine the possible (Ibarra). Play is a mechanism whereby an individual can experiment with a desired identity until they are comfortable and then accept it as real. Play can also be regarded as the bridge between current reality and future options (Ibarra and Petriglieri 2010). It gives the possibility to try out many identities without making a commitment to continue with any of the options (Ibarra and Petriglieri 2010). By adopting the concept of play, individuals need not be influenced by past feelings of self-worth in order to project where they feel they may find satisfaction. Individuals

can then have the choice of exploring options of a work identity that did not provide them with satisfaction (Ibarra and Petriglieri 2010).

### 2.2.5.3 Relationship between Identity work and Identity play

Generally identity work and play are considered as separate entities, although there is a relationship between them, particularly during transitions and each may have an impact on the other. Individuals can create environments through play, which with time could evolve into work (Fachin and Davel 2014).

The following table, extracted from Fachin and Davel (2014), summarizes the attributes of work and play and shows the differences.

Table 2.1 Identity Work and Identity Play

	Identity Work	Identity Play
Purpose	Preservation of existing identities or compliance with externally imposed image requirements	Reinvention of one-self according to one's own internal motives and guidelines
Direction	Outward	Inward
Driver	Validation	Discovery
Focus	Ends	Means
Aim	Past histories and current identities	Future possibilities
External	Strong	Weak
Self-Awareness	Identity is current understanding of self	Identity is still unknown
Change	Ongoing struggle with social constraints	Escape from struggle and social constraints

The theories on Identity described above include the need to maintain social networks and participate in activities, which impact identities during the transition to retirement, as an individual's perception of their self-worth has been described as being closely tied to social interaction (Hogg et al 1995, Stryker and Burke 2000). The following section examines social networks and activities in relation to Identity and Transition to Retirement in more detail.

### **2.3 SOCIAL NETWORKS AND ACTIVITIES**

So far, this review has described the importance of social networks during the transition to retirement as well as how technology can facilitate the maintenance and creation of these networks. Identities have been described as being formed and developed through social interaction within the networks that a person belongs to and identifies with (Hogg et al 1995, Stryker and Burke 2000, Stets and Burke 2000). Consequently the social networks that people operate in can have a significant influence on their perception of themselves and are an important component of their roles and their identity. There is a direct relationship between an individual's identity and the social networks they utilize as the means to join and stay connected to their social structures. People form long standing social networks which they count on to get support and affirmation for their identity when they go through situations of change, such as the transition to retirement (Atchley 1971).

Individuals maintain contacts with members of their social networks through social ties, which are the means by which they sustain social support, where ties are defined as contacts formed with individuals or friends who have like interests or characteristics (e.g. club members or family members) (Licoppe and Smorede 2005). Social networks can be defined as "a set of social ties possessing one or more relational dimensions" (Licoppe and Smorede 2005 p 317). There is a distinction between strong and weak ties (Granovetter 1973, Granovetter 2005). Strong ties are formed within homogeneous groups with like interests and contacts and who have a solid bond with each other. While

they would all be willing to assist each other, fresh information from other groups is unlikely to flow smoothly as they all have the same limited contacts. Weak ties are formed with connections outside the usual social group and are more effective for transmitting information across social networks.

Acquaintances have access to information not available to those in a close network. In the case of retirees, strong ties are needed for security while moving to a new environment and losing contact with work colleagues. Weak ties are more useful for reaching larger populations and obtaining broader information about resources such as social and sports groups, travel and health information (Granovetter 1973, Granovetter 2005, Baker-Doyle 2011).

According to Licoppe and Smorede (2005) and Hogeboom et al (2010), people communicate through social network ties, the amount of information that flows through being dependent on the strength of the tie and the frequency of use. If a relationship is important, they will focus on maintaining the strength of that tie.

Maddox (1963) examined the need for older adults to maintain contacts in order to remain engaged with society during the transition to retirement. He believed that while retirement changes the nature of these contacts, the necessity to sustain them remains and that at different stages of the life cycle interaction with others is what sustains an individual's identity. According to Hogeboom et al (2010) to maintain their quality of life, those who are transitioning to retirement need to feel socially connected. Social Networks are a means of providing independence, which is important for retirees to maintain their feeling of self-worth. Although they felt that there was a loss of contact with former colleagues, they were now able to spend more time with family and friends and become involved with new networks, by joining organizations and clubs and volunteering, which would give them credibility in society (Kloep and Hendry 2006). Retirees are likely to feel less isolated if they have strong networks and can maintain their contacts (Hogeboom et al 2010). Through their ties they can obtain information about new activities which can enhance their feelings of self-worth.

For those who either do not have strong networks, or interacted only with work colleagues, forming new networks can be difficult and they may be reluctant to

give up the identity of being a worker. A means of coping is to enhance relationships with family and friends and replace co-workers with new social contacts (Lancee and Radl 2012). Whether a strong social network precipitates early retirement or is established during transition, having the ability to make wide connections gives older adults an opportunity to focus on what really interests them (Cornwell et al 2008). Provided they remain in good health and are able to manage financially, they have the time to become socially connected, interact more with family and friends and enhance their social networks. (Salovaara et al 2010).

From the research, Youmans (1969) reported that there is a direct relationship between social participation among retirees and their previous level of interaction. Consistent with Continuity Theory (Atchley 1989), those, whose typical behaviour is to purposely manage their actions, may try to maintain the connections and social activities to which they are accustomed during transitions (Cornwell et al 2008). Conversely, those who have a tendency to let things happen may be more likely to be dissatisfied at work and with retirement. They may not seek new social networks or activities or take advantage of free time. Not all older adults have the need for taking control even if they may have the option and some are content to just let events take over (Saalovara et al 2010). From their research, Cornwell et al (2008) found that how older adults engage in social networks is related to their personality more than on what stage of life they are in. They reported a direct relationship between identity and social networks and that how someone feels about themselves is dependent on their social interaction within situations. Many factors such as health, financial status, physical location and age may have an influence on social networks and there will likely be a spectrum of behaviour, which can change over time (Saalovara et al 2010). Since an aspect of this research is the role of IT on facilitating the factors that impact identity during the transition to retirement, Section 2.9 will address how social networks can be supported by IT.

Social networks can be the means to connect individuals to others of like interest, which can facilitate involvement in new activities, while still maintaining

the existing. Activities that are undertaken during the transition to retirement will have an impact on the emotions of the retirees. According to Nuttman-Shwartz (2004), Gall et al (1997), older adults will put more emphasis on activities that interest them, either those they had undertaken prior to retiring and/or new undertakings. Their actions will have an impact on how they feel about themselves under the evolving circumstances, which will result in new identities. Identities associated with personal circumstances replace those that were work related. How an individual will behave during the transition is dependent on the salience of the activities undertaken during that period (Hogg et al 1995). When they are no longer working, retirees not only have the time, but feel that activities associated with personal connections such as being together with a grandchild, friend or sibling take on a higher salience (Reitzes and Mutran 1996). IT can also play an important role in facilitating the ease of the transition to retirement. Many day to day social interactions as well as activities can be facilitated by tools such as email and search engines such as Google (Zickuhr and Madden, 2012 Smith 2014).

In addition to the importance of strong social networks, being involved in activities of high salience is a significant factor in enabling the transition to retirement. As well as the day to day activities such as keeping in touch with family and friends, the types of activities undertaken have been categorized as consumer and producer, although they are not mutually exclusive (Sargent et al 2011, Rudman 2006). Examples of producer actions are volunteering, unpaid work and training/coaching where older adults can use skills, including technology, they acquired from the workplace (Kim and Feldman 2000). Consumer activities include travel and joining clubs as well as focussing on acquiring goods (Gilleard 1996). Technology for communication and facilitating activities are accessible to the retiree demographic.

For those who find difficulty in adapting to an unstructured lifestyle when they no longer have the workplace, opportunities are available to satisfy their needs by creating structure (Paul and Batnick 2010) such as regularly coaching a team, volunteering to teach or enrolling in classes. Conversely, those who felt that the workplace was too rigid, may feel relief and freedom and undertake

activities that allow flexibility (Kloep and Hendry 2006). These activities have an impact on the identity of those who are transitioning to retirement and being involved will influence how they feel about themselves and help change emotions from a sense of loss, uncertainty and nothing to do, to satisfaction with a meaningful and fulfilling life (Nuttman-Shwartz 2004, Sargent et al 2011)

The social networks of retirees are one of the factors that have an impact on the time taken to fully transition to retirement. The time-frame is likely to vary, depending on a combination of the social networks and activities undertaken as well as other factors such as health and financial stability.

## **2.4 TRANSITION TO RETIREMENT**

Several researchers have addressed retirement as a transition, not an event (Nuttman-Shwartz 2004, Quick and Moen 1998, Gall et al 1997) and how a retiree's perception of themselves evolves from when they stop working to fully accepting retirement (when they are satisfied with no longer being in the work-force) (Nuttman-Shwartz 2004, Reitzes et al 1996, Fernandez et al 1997, McGee et al 1979, Quick and Moen 1998). During the research, transition was defined to the interviewees as the time from when they stopped working to when they fully accepted the status of being retired from teaching. This applied even if the respondent was engaged in unpaid volunteering or part-time work.

Emotions change during the transition period leading to the full acceptance of retirement (Nuttman-Shwartz 2004, Kloep and Hendry 2006, Reitzes and Mutran 2006). Transition has been described as a period during which behaviour and sentiments will evolve, starting with "confusion and emotional discomfort, leading through a brief period of sadness or despair to stabilized moods" (Saalovara 2010, p 810). Initially an individual can experience a feeling of disorientation, disruption and stress and uncertainties can be experienced which are resolved with time (Kloep and Hendry 2006). The transition to retirement can be perceived as a time of opportunities and losses (Kloep and Hendry 2006). The majority of older adults see retirement as a positive transition, even if they had difficulty in adapting immediately after retiring.



However, a minority have an adverse response and have difficulty in coping (Nuttman-Shwartz 2004, Kloep and Hendry 2006, Reitzes and Mutran 2006). This group view the transition to retirement as leaving an environment where they had some status, to being perceived as having little value to society (Kloep and Hendry 2006). The absence of having a work role in society can cause anxiety and stress (Quick and Moen 1998), which could be related to their perceptions of past work experience, the reason they left work or their personality (Parker 1995). While many researchers have recognized that retirement is a transition (e.g. Kloep and Hendry 2006, Reitzes et al 1996, Fernandez et al 1997, McGee et al 1979, Quick and Moen 1998), some studies have also focussed on the steps involved in transition, rather than addressing it as just another stage of life. (Gall et al 1997 and Nuttman-Shwartz 2004, Reitzes and Mutran 1996)

A longitudinal study of 56 retired Israeli men was conducted by Nuttman-Shwartz (2004). Immediately prior to retirement, the majority of respondents felt uncertainty about how they would face retirement. Almost half experienced a feeling of crisis, while a quarter were optimistic about change and the remainder regarded retirement as a natural continuation of life. The respondents were interviewed after a year and almost all were happily occupied and felt that they were leading productive lives. A further longitudinal study was carried out by Gall et al (1997). A survey of 117 males was conducted immediately prior to stopping work, one year later and after 6/7 years. Level of activity, health, financial security and interpersonal relations were measured at the three time points. The respondents were also asked about their life satisfaction. While the parameters were different, results were consistent with those of Nuttman-Shwartz (2004) in that the majority of retirees experienced an improvement in how they felt about themselves one year after retiring. Although none of the above research directly addresses identity, it could be deduced from the results that older adults will experience a positive transition to retirement and that general life satisfaction is associated with a positive identity.

While these studies show that, mostly within a year, retirees will have fully accepted their status and are leading happy and productive lives, there is a spectrum of satisfaction, ranging from being depressed or just coping and managing to being fully content and having a positive sense of self-worth. The time frame to transition to being fully accepting of retirement can vary and also be dependent on factors such as health, financial security and circumstances of retirement as well as the strength of the social networks and salience of activities during retirement (Gall et al 1997). Not all retirees will reach the stage of full acceptance and some may experience disengagement throughout their retirement (Nuttman-Shwartz 2004). The phases of acceptance can be categorized as honeymoon, disengagement and re-orientation. Initially the newly retired can be enthusiastic and energetic. They may then feel that their expectations were unrealistic and resources were limited. Finally there is re-orientation which consists of an assessment and re-adjustment of expectations (Atchley 1976). Not all retirees will go through all the phases and the time-frame for each is different.

During the transition to retirement, in addition to creating and maintaining new activities and relationships, individuals will rely upon their past experiences as well as the continuity of their attitudes, behaviour and memories to facilitate the transition process.

## **2.5 CONTINUITY THEORY**

Continuity Theory is appropriate as a theoretical underpinning for the present study as continuity of behavior is described as a major factor impacting how individuals modify their identities during the transition to retirement (Atchley 1989). The literature examined identifies the relationship between continuity of behavior and changing life phases.

According to Parker (1995) collective memories are a significant factor in current identity and individuals are, in part, defined by their memories. Older adults' feelings of self-worth can be considered as being a collection of their perceptions about themselves. Continuity Theory, as described by Atchley

(1989) is contained in the literature review as a theoretical basis for the research to be undertaken as it is relevant to understanding the relationship between identity and the transition to retirement. According to Continuity Theory, behaviour is on a continuum and the pattern of actions taken pre-retirement are likely to continue during the transition to retirement. Although situations will change, the basic characteristics of a person will remain the same (Atchley 1989). The research question addresses situations during a significant period of change in the life of an older adult and how this change impacts their identity. The time taken to transition to retirement varies with each individual (Nuttman-Shwartz 2004, Quick and Moen 1998, Gall et al 1997). Identities will undergo changes, as the salience and commitment to the situations they are in will flux. According to Continuity Theory, an individual's current identity is not only defined by the salience of the situation they are in, but is an aggregation of continuous behaviour as a result of remembering and applying past experiences. Life experiences are not formed by just one independent event following another, but by individuals trying to understand events as being related to each other. Each previous situation influences a gradual change in identity during the next phase (Parker 1995). As part of normal aging, adults will apply behaviour patterns that are based on their past experiences. As situations change an individual's current identity will be influenced by their past experiences (e.g. a positive work experience can result in a successful transition to retirement) (Reitzes et al 1966, Fernandez et al 1997).

Continuity can be both internal and external. "Internal Continuity is defined by the relation to a remembered inner structure, such as .... temperament, experiences, preferences, dispositions and skills". (Atchley 1989 p 184/185). Internal continuity is also important for self-esteem, the perceived level of success in relation to expectations, as there can be no expectation if there is no memory (Parker 1995). Individuals will see their change in status (retirement) through the filter of their previous experiences and the outcome will be dependent on their degree of self-esteem (Fernandez 1997). The need to create internal continuity can be met by reminiscence of personal life factors

(Parker 1995). Memory is the basis for internal continuity as there cannot be consistency for decision making without a reference to the past. (Parker 1995).

“External Continuity is defined in terms of a remembered structure of physical and social environments, role relations and activities” Examples are “remembering a familiar environment, doing familiar activities with familiar people” and is dependent on structure and relationships (Atchley 1989 p 184/185). External continuity reflects the individuals need for social support which comes from making others aware of the past identity and achievements of the older adult. (Parker 1995). Both Internal and External Continuity are based on remembering the past (Atchley 1989). Internal and external continuity results in the continuous process of building on perceived strengths and expectations and the adaptation to new information that relates to previous behaviour. As older adults approach retirement, they are likely to adopt patterns of behaviour that are familiar and secure and not try to move from their level of comfort in order to maintain both internal and external continuity (Parker 1995).

If behaviour is on a continuum and based on previous patterns, how an individual perceives and remembers their previous actions will be reflected in their current behaviour. People apply selective mechanisms to filter their memories in order to preserve their desired identity (Parker 1995). In order to maintain continuity of an individual’s feeling of worthiness, the expectation and perception of success will change over time and particularly at milestones such as retirement (Atchley 1989). The activities of older adults will be related to what they previously undertook, but the emphasis and extent will depend on their current priorities and circumstances. Reminiscence is an effective way of facilitating adaptation to a new situation. People get a sense of their identity by transposing their perceptions of previous activities and sentiments to the current situation. Stressful events, such as retirement, can trigger a person to feel insecure and adapt coping strategies such as reminiscence to maintain the feeling of continuity of what was important in their past (Parker 1995).

According to Continuity Theory, older adults will continue with similar lifestyle abilities and activities following retirement and to a large extent, their characteristics will remain constant and their behaviour and actions will reflect their previous life style patterns (Parker 1995, Atchley 1989). Retirement is an opportunity to apply skills from their previous roles and identities to new situations. As an example, skills learned during work, such as organizing events, can be applied to new activities, such as working in a voluntary agency (Kim and Feldman 2000). As adults age, using previous behaviours and skills help in coping with the changing circumstances, resulting in active lifestyles, the feeling of being a contributing member of society and having a positive identity (Atchley 1989).

According to Fernandez et al (1997), while age related physical changes may be disruptive there can be positive outcomes as mostly older adults use continuity as a strategy to adapt. A positive identity while working will likely result in a positive attitude towards retirement, with an associated optimistic identity when not working. Those who anticipate continuity in life-style satisfaction will maintain their identity and have a positive retirement experience (McGee et al 1979). Even though there is a significant modification in the life circumstances of retirees, they can cope with the ongoing change as it occurs as a continuum, starting from pre-retirement, through a transition phase, to the fully retired state (Atchley 1989, Reitzes and Mutran 1996). The converse is true for those who did not have a positive identity while working and their retirement experience may not be satisfying and they could become disengaged from society.

## **2.6 DISENGAGEMENT THEORY**

Disengagement Theory can be considered a subset of Continuity Theory for those who become disengaged while they are transitioning to retirement. This is likely to apply to those who have shown a disposition towards not being socially active while working. According to Rudman (2006) and Youmans (1969), the attitude towards retirees and the usefulness of the lives of older adults has changed and older adults are mostly regarded as having a purpose

in society. As a result, most older adults feel that they can be contributors to society and are likely to transition to retirement with a positive feeling of self-worth. However, there is a small number who do not adapt to retirement, likely because work was all encompassing or they previously exhibited the characteristics of not fully participating in society (Atchley 1989). This behaviour can be described by Disengagement Theory. While the majority of seniors find that the outcome of the retirement process is positive, there are those who do not adapt to advancing age and not working (Youmans 1969). Cummings and Henry (1961) proposed the concept of Disengagement Theory to describe the behaviour of those individuals who do not easily adapt. They believed that a normal process of ageing was that seniors became less involved in social systems as they became older and they viewed older adults as becoming more isolated as their age increased. "Healthy old age" was considered a contradiction (Coleman 1991 p 218). According to Disengagement Theory older adults become less interested in lifestyle activities post retirement. They will likely be less involved in social systems than they were pre-retirement and it is inevitable that after age 60, their activities will decrease significantly. Cummings and Henry (1961) reported that as age increased, there was a significant reduction in social interaction and consequently participation in social networks. Lack of social interaction has been described as the primary result of disengagement following retirement (Kim and Feldman 2000), although this would likely only apply to those who mainly relied on their workplace for social interaction. According to Youmans (1969), disengagement may be caused by stress which can be as a result of life changing events such as retirement, but is independent of age. This is considered to be prevalent if the work-role is central to identity. The role and status while working is replaced by belonging to a perceived low status group such as retirees (Henrard 1996).

According to Kleemeier (1964) and Youmans (1969), disengagement is perceived as detrimental to older adults and only those who are active can have a fulfilling lifestyle. However, the perception of older adults and retirees has changed and while Disengagement Theory is dogmatic and categorizes all older adults as not being contributing members of society, later research has shown that, in the majority of cases this is no longer valid (Rudman 2006). The

theory can be regarded as ageist and as being discriminatory towards seniors by assuming that they cannot play an active role in society (Parker 1995, Andrews 1999). Some studies on retirees have found no support for Disengagement Theory and that the majority of older adults remain engaged in meaningful lifestyles (Prasid 1964, Youmans 1969, Shamas 1968).

Disengagement Theory is included in this review as it may apply to those who become disengaged following their previous life-style of not being socially involved (Youmans 1969). Consistent with Continuity Theory, negative characteristics of older adults are regarded as being a result of poor past behaviour such as failure to participate in family and social activities (Youmans 1969). When someone retires, their experience can be positive and they will not feel a loss if they maintain their identity associated with their occupation (e.g. ex teacher) or adopt an identity which gives them a feeling of self-worth. On the other hand, if they cannot accept the change in status when they retire, they may have an “identity crisis” and suffer emotional stress (Reitzes and Mutran 1996 p 4).

As how retirees behavior and self-worth is dependent on past attributes and experiences, the work environment and the circumstances of it ending will now be examined.

## **2.7 WORK CONDITIONS AND CIRCUMSTANCES OF RETIREMENT**

According to the results of research (e.g. Kloepe and Hendry 2006, Hyde et al 2004) significant factors that will have influence on the identity of retirees as they transition to retirement are the conditions and experience of the last years of work and circumstances of retirement. Consistent with Continuity Theory, retirees who see themselves as effective and competent while still working, are likely to take this attitude into retirement (Atchley 1971). Conversely, some may feel that they will lose their place in society and their identity following retirement and feel resentment. Contradictions may be explained by

understanding the retirees' pre-retirement work experience as well as the reason for retirement (Hyde et al 2004).

### **2.7.1 ROLE SALIENCE AND RETIREMENT ALTERNATIVES**

According to Kloep and Hendry (2006), the conditions and experience of the last years of work and circumstances of retirement are significant and will have an influence on the transition experience. If an older adult retires voluntarily and is looking forward to exploring new opportunities, new role identities are likely to become more salient. Those who are forced to retire are likely to feel a loss of their identity and making new identities relevant during the transition may be difficult. Three categories of how older adults leave work, "Push, Pull and Jump" have been described by Jensen and Øverbye (2013). Push refers to when someone leaves the work force involuntarily. Pull refers to voluntary retirement and jump refers to those older adults who feel that they are ready to have new experiences while they are still physically able and some will choose to take early retirement. Which of the above directions will be followed is dependent on several other factors such as financial security, whether retirement was planned for, health, engagement in activities outside work and the strength of social networks. According to McNair (2006), older adults who have financial security such as a pension when retired are more likely to be able to take on new roles such as a volunteer, traveller or senior student. They will have had the ability to plan for and look forward to retirement. Health plays an important part in the retirement experience and older adults who are healthy are able to find new activities or focus on previous activities, which will give them new identity salience. As teachers will receive pensions, they can plan for retirement, provided that moderating variables, such as health or change in personal circumstances do not have an impact.

### **2.7.2 INVOLUNTARY RETIREMENT**

Push refers to circumstances of retirement when an older adult is forced to retire, which is especially difficult for those who do not have regular family and friend contact and may want to work longer (Lancee and Radl 2012). This is also difficult for those who work past retirement age. In their study of 244 men



and 212 women between the ages of 50 and 72, Quick and Moen (1998) reported that the older their respondents were when they left work, the more likely they were to have had a negative retirement experience, as they were likely to have had a less satisfying last years of work, due to ageism and possible general lessening of their abilities. There are many negative reasons why an older adult will cease to work. Most often they are forced to retire because they have reached the designated age. Some are fired or made redundant, which they may perceive as elder discrimination. Another form of involuntary retirement is when, those who are in a stressful occupation such as teaching, may leave the workplace before retirement age and in some cases before they are eligible for their pension.

For those older adults who leave the workforce before they are ready, there are many possible negative impacts. They may feel that they have lost their social standing as well as not being contributors to society. They could feel that they will be stereotyped as their status is an indication of old age. (Kloep and Hendry 2006). They will no longer have daily contact with their co-workers, may find it difficult not having a daily routine and could be feeling that only work could provide a purpose to life (Paul and Batinic 2010). Some of those who leave unwillingly may not feel personal satisfaction or have a positive retirement transition experience, which sometimes results in a lack of motivation to broaden their social networks (Kloep and Hendry 2006). Some who are forced to retire may leave work with a feeling that they are not contributing to society and are just passing time (Kloep and Hendry 2006). Many may fear that their social networks will shrink as they will lose their contacts at work. These older adults are likely to feel that there is a relationship between employment and being relevant to society. The positive feeling of being needed can disappear following retirement (Kloep and Hendry 2006) and their non-worker identity will be negative.

There is also a group of workers who have dedicated their lives to the workplace and have no strong social networks or outside interests. Those who had the greatest commitment to their occupation and have been successful could have the most difficulty and take longer to relinquish their identity of being

a worker during the transition to retirement. They may feel that they still need to contribute to their organization and will find moving to new roles difficult (Quick and Moen 1998). Retirees whose total social contacts were at work and feel that they are invaluable to their organization may be unwilling to leave the workplace (Lancee and Radjl 2012).

Professionals and others who hold a high status in the workforce could be reluctant to give up the prestige (Kloep and Hendry 2006) and have a less satisfactory retirement experience. Work for them can be all encompassing and they may have few social connections or no status outside the work environment. They may have a feeling of being irreplaceable and anticipate a negative retirement (Quick and Moen 1998). This group are likely to leave the workforce only when forced to do so, likely because of age and with an attitude of disengagement and absence of meaning, which may carry through to retirement (Kloep and Hendry 2006). As an example, teachers who have limited social networks and outside of work interests may not want to retire when they are eligible for a full pension, but will continue to work until they are forced to leave (Lancee and Radl 2012). This may result in them not being as competent in their later years, which in turn may lead to dissatisfaction with their retirement. However, Reitzes and Mutran (1996), in their study of 800 retirees found that there was no evidence that a strong work commitment resulted in a negative retirement experience

While the feelings of negativity towards retirement have been reported in the literature, this may not always be the case for a population such as unionized teachers. In general, teachers in Canada have job security and are not forced to retire at a certain age (Duxbury and Higgins 2013). Any involuntarily retirement is likely to be due to stress or illness. These retirees may feel relieved that they are no longer required to work.

### **2.7.3 VOLUNTARY RETIREMENT**

Some older adults do not have satisfaction during their last years of employment and have planned for and are positively anticipating a meaningful

retirement. There may also be a group who feel it is their well-deserved reward to retire after a long and possibly successful and satisfying working life. Others may choose to retire early due to reasons such as stress. Pull refers to circumstances when older adults are willing to retire and have accepted that their future status will be that of a retiree. They see an opportunity to maintain the same pattern of outside of work social contacts and lifestyle and view retirement as the time to focus on what they feel has become a priority (Quick and Moen 1998). As employees approach retirement, family and friends take on a more important role (Reitzes and Mutran 1996).

There is a category of workers who found their last years at work unsatisfactory. "If they did not enjoy their job, they were more likely to report that retirement is better" (Quick and Moen 1998 p 62). From her literature search, Vickerstaff (2010) reported that if the workplace is not designed to meet the needs of older adults, they will not be motivated, feel little interest or that they are working too hard and will be looking to retire. Their day to day routine may be boring and unproductive, they are not motivated or content with their last year of employment, but are happy to 'coast' until, they can retire. They may stay at work for financial reasons such as waiting to be eligible for their pension and bide their time until they can leave. The identity of being a worker is of low priority and they may not spend time enhancing their work skills and are content to focus on outside social activities. They will use this time to plan for retirement, build up their social networks and may be eagerly anticipating the time when they are unencumbered from work (Armstrong-Stassen 2008). Others may choose to retire because of 'ageism'. They feel that they are no longer being appreciated and do not have support from their managers or colleagues (Rudman 2006). These employees are not concerned with losing their worker role and retirement for them can be a relief from stress (Quick and Moen 1998).

#### **2.7.4 PLANNED/WILLING RETIREMENT**

Jump applies to those older adults who perceive retirement as an opportunity to enjoy new experiences and are actively looking forward to and planning for

retirement. People who enjoy their last year of work and have a positive attitude are likely to be valuable employees (Armstrong-Stassen 2008). Some, if they feel that they made a positive contribution and were appreciated, will retire with a feeling of self-worth and be open to new roles and experiences with confidence (Reitzes and Mutran 1996). Those who had a strong investment in their worker role are also likely to have a successful retirement as they will maintain their characteristics when transitioning to retirement. Older adults who are comfortable with the tools and techniques of technology look forward to utilizing their skills in alternate roles (Lee et al 2011). Kloep and Hendry (2006 p 571) wrote that “earlier life experiences play a significant role in later retirement decisions and adjustments”. According to Hyde et al (2004), there can be a link between the last years at work and how well older adults adapt to retirement. Consistent with Continuity Theory, those with a positive attitude will take this forward into retirement. This group will likely be looking forward to retiring, plan for their future and anticipate the freedom to be able to undertake activities such as making new connections, travel, volunteer and sport. They will still feel that they can contribute to society and can use the skills learned, including information technology skills (Quick and Moen 1998). Highly skilled employees have the attitude and approach that can be applied during retirement (Quick and Moen 1998, Kim and Feldman 2000). In accordance with Continuity Theory, they will use the skills learned for alternate activities and remain active (Quick and Moen 1998). They are likely to anticipate retiring with a feeling of accomplishment, not uselessness (Hyde et al 2004). Financial security and the ability to plan for retirement are key factors in a positive attitude towards retirement (McNair 2006).

Employees may actively choose to leave work if they are no longer experiencing work satisfaction, want relief from the pressure of daily routine, are constrained by a schedule (Quick and Moen 1998), or want to slow down and feel that they will have an opportunity to re-invent themselves This group will most likely experience a positive transition (Kloep and Hendry 2006). Voluntary retirement can be precipitated by several factors. Older adults with strong social ties outside the workplace or those feeling pressure to spend more time with family may feel that they would rather be retired (Lancee and

Radl 2012). Consistent with Continuity Theory, older adults who were positively anticipating and planning for retirement may feel a sense of relief, freedom and the ability to undertake new adventures such as travel, volunteer, make new social connections and join clubs. Those who take voluntary retirement are more likely to have planned for new activities that they could not do while fully occupied at work (Hyde et al 2004). Planning for retirement should result in a smoother and less stressful transition (Wang and Shultz 2010). This is particularly relevant to teachers who have the ability to choose when to retire, within the guidelines of their pension plan. By nature and experience, teachers are planners and will likely carry this characteristic through to retirement, giving them not only financial stability, but the ability to plan well ahead for their retirement (Smith et al 2014).

The previous sections addressed the main factors that impact identity (social networks, activities, continuity of characteristics and skills), described transition in the context of this research and examined the impact of work conditions and the circumstances of retirement on the transition experience. The following section examines the relationships between these elements, which will be further explored during the research on Canadian teachers.

## **2.8. RELATIONSHIPS BETWEEN IDENTITY AND THE TRANSITION TO RETIREMENT**

Transition occurs over a period of time which differs, depending on the individual, their circumstances and characteristics. The relationship between identity and the transition to retirement evolves and is dependent on the combination of several factors. Identity is defined as how individuals feel about themselves (their self-worth) under particular circumstances. When older adults stop working, the change in circumstances causes them to feel differently about themselves, leading to changes in identities. During the transition to retirement, emotions will change, starting when the retiree stops working. Older adults are likely to put more emphasis on their network of friends and family. They may continue with activities they had previously undertaken and/or get involved with new activities. Changes in how they feel

about themselves under the evolving circumstances may result in new identities. Their self-worth during the transition will depend on the strength of their existing social networks and the satisfaction from their current salient activities, all of which will continue to develop as circumstances change.

For those who gain satisfaction from identifying with groups, having a continuing social identity can be an additional layer which can impact on the transition experience. Teachers can have identities that are unique to themselves when transitioning to retirement e.g. volunteer, while also having a sense of belonging to a group, which may or may not be related to their occupation, e.g. a member of the Retired Teachers Association (Hogg et al 1995). An additional factor that can impact the transition experience is having a consumer identity, which is dependent on what an individual possesses. Whether retirees can maintain their level of possessions during the transition will also influence their feelings of self-worth.

Continuity Theory which was described as a theoretical basis for this research, posits a strong link between identity and transition. The theory contains a description of how older adults cope with changing circumstances such as retirement and how their perceived past is a factor in how they feel and behave under changing environments, such as the transition to retirement (Atchley 1989). Past attributes allow those transitioning to continue to find new networks and activities, which can impact their evolving identity.

Additional factors that may influence the transition experience are the last years at work and conditions of retirement. Retirement can occur under a variety of circumstances. Older adults can leave the workplace with varying emotions and their feeling of self-worth at the time they left the workforce may have an impact on the ease and length on transition.

The above addresses the literature that relates Identity to the transition to retirement. The use of information technology is ubiquitous among the retiree demographic and how the use of tools and applications impact the activities

and social networks of older adults and facilitates the transition to retirement is described in the following section.

## **2.9 TECHNOLOGY AS A FACILITATOR**

This section focusses on how technology is used by older adults in general and retirees in particular and how the utilization impacts identity during the transition to retirement. Technology refers to Information Technology (IT). The following provide descriptions of the most commonly used tools and applications that are referred to as well as the current trends of usage by seniors. The specifics of how technology can facilitate the range of activities that are continued or adopted during the stages of the transition to retirement (Smith 2014) is addressed. The role of IT in facilitating the social networks which impact identity during transition is described.

### **2.9.1 HOW TECHNOLOGY IS UTILIZED BY OLDER ADULTS**

The term devices applies to the hardware, which hosts the applications and can be multi-purpose. Email is the application that is used most by older adults (Zickuhr and Madden 2012, McMurtrey et al 2011) as a means to communicate either to an individual or a group. As such, it can facilitate communication with friends and family or provide the ability to make contacts for a variety of activities such as travel, keeping contact with or initiating new networks, or obtaining information. Email has the facility for attachments such as photos and enables immediate access to web sites by including their internet address (URL) in the text.

Retirees are likely to use search engines such as Google to get information that facilitates their activities such as volunteering opportunities and travel.

Instagram allows older adults to post their photos and share them with others with like interests. An interesting phenomenon that has evolved is technology that gives users who are not in the same physical location the sense of being 'virtually there'. Applications such as Skype and FaceTime (which allow users to not only talk to each other but to have a video of the other person on their

computer screen, tablet or smart phone), blur the line between being present and absent. Grandparents can feel that they are with their grandchildren and retirees can keep in contact with their social networks. An example of technology that is designed for older adults is Seniornet ([www.seniornet.org](http://www.seniornet.org)), a web site designed for those over 50, to enhance their lives. Users can learn to use email, buy and sell over eBay, take digital photos and apply the many uses of search engines. It also offers discussion groups for older adults.

Social media are applications which facilitate the establishment of online communities that allow the creation of a profile, addition of friends, sharing ideas and events, and communication with other members. The most utilized of these is Facebook, which is becoming popular among older adults who wish to obtain information about organizations, maintain and create new networks, effectively exchange information and keep in touch with grandchildren. Twitter is becoming more popular for information exchange and giving users a feeling of being informed and relevant. While LinkedIn is mostly used as a business networking tool, retirees can use it to maintain contacts and keep informed of the activities of their colleagues.

Social media give the users the ability to create an on-line identity by posting items that give a positive feeling of self-worth. This can be related to past identities as well as showing new roles that have been created during the transition to retirement. The application is flexible and profiles can be changed as they evolve following retirement (Quinn 2013). The attributes of social media make it easy to re-connect with past acquaintances to maintain social networks. These can be actively pursued or remain dormant. The user has the control to activate ties that either have an impact on re-enforcing their identity, including past identity, or can provide useful information for their new roles (Quinn 2013). As social media was not prevalent when the current cohort of retirees were in the workforce, the concept of posting personal information may be unfamiliar. It is likely that the social media identity of the older adults will be that of a grandparent or parent and they will mostly follow the posting of the activities of the younger generations.



The above are some examples of how technology is used by those in transition to retirement. This is not an exhaustive description and the technology is changing rapidly. However, it does give an indication of how technology can facilitate creating or maintaining the identity of older adults transitioning to retirement. The popularity of applications is changing but the functionality and need that is satisfied remains. As an example, the previously almost universal social networking site MySpace is no longer widely used and has to a large extent been replaced by Facebook.

### **2.9.2 ADAPTATION OF RETIREES TO ADVANCES IN TECHNOLOGY**

According to Neves et al (2013) and Reisenwitz et al (2007) two major trends in the developed world are the surge in the numbers of the senior demographic and the pervasiveness of IT and social media in society. Technology is ubiquitous and its use is necessary to function in today's society (Mitzner et al 2010). The internet has become an important means to provide information and maintain communication for older adults (Smith 2014). Retirees are at the stage of their lives where they are in transition both with how they use fast evolving technology and their adaptation to a new way of social interaction (Saalovara et al 2010). The current cohort are unique as IT was not in wide usage when they entered the workforce, but the majority have been exposed to some extent, either at work or in their private lives. Teachers, specifically those in Canada, are likely to have needed technology for their work (Duxbury and Higgins 2013). The retiree's need to maintain identities which give self-respect has not differed, however the retirement experience has changed significantly over the past fifteen years (Quick and Moen 1998). Not only are older adults healthier and more active (Rudman 2006), but many are also computer literate (Zickuhr and Madden, 2012 Smith 2014). Technology plays an important role as tools and techniques are available that they can use to carry out the activities that impact their identities during the transition to retirement (Hogeboom et al 2010).

Extensive studies of the use of internet technology by 1,526 adults in the USA over the age of 65 were carried out by the Pew research centre in 2012 and 2014 (Zickuhr and Madden, 2012 Smith 2014). They found that technology usage among seniors is increasing and that the tools and devices that can be employed to facilitate changing roles during the transition to retirement are accessible. To keep up with society, older adults have learned to adapt to the way communication occurs today and the growth rate in the usage of technology and social media is significant. (Hogeboom et al 2010, Zickuhr and Madden 2012, Smith 2014).

The following tables, based on the research by Zickuhr and Madden (2012) and Smith (2014), illustrates the usage of IT by older adults.

Table 2.2 Older Adult' Usage of Information Technology

<b>IT Utilized</b>	<b>65 – 69 years old</b>	<b>70 – 74 years old</b>
Internet	74%	65%
Wi-fi	65%	55%
Cell Phone	84%	84%
Smart Phone	29%	21%

The economic and educational state of an individual has an impact on their usage of technology (Neves et al 2013, Smith 2014).

Table 2.3 Impact of Educational Level on IT Usage

<b>Level of Education</b>	<b>Internet Usage</b>	<b>Cell Phone Usage</b>	<b>Smart Phone Usage</b>
College	87%	87%	35%
High school or less	40%	70%	10%

Of the users of the internet, 71% were on line daily and 11% three to five times daily (Smith 2014). Teachers in Canada have post-secondary education and fall into the upper income bracket of the survey. It is anticipated that they will be familiar with the use of technology.

Table 2.4 Impact of Income on IT Usage

<b>Annual Income</b>	<b>Usage</b>
> \$75,000	90%
< \$30,000	33%

Keeping up to date with changing technology is a challenge and the majority of older adults feel that they need assistance.

Table 2.5 Assistance Required by Seniors over 65 years old

<b>Type of Assistance Required</b>	<b>% Requesting Help</b>
Teach themselves – no help required	18%
Generally want help	77%
Want help with Social Media	56%

79% of users felt that those who did not utilize the tools and applications available through the internet were at a disadvantage. Half of the non-users of technology felt that they were missing social contact, access and information (Zickuhr and Madden 2012). The implication is that those who are not familiar with the use of technology will find it even more difficult to keep up and to take advantage of the devices and applications that could lead to a more positive transition.

The Pew studies (Zickuhr and Madden 2012, Smith 2014) do not differentiate between email and general internet usage. McMurtrey et al. (2011) reported an approximately equal split between email and the sum of other applications, although the sample age in the study varies between 65 and 101. In his qualitative study of older adults in developed countries, Saalovara et al (2010) found that the majority were adept at using web browsers, e-mail and cellular phones. As a significant number of non-users feel that the technology is difficult to use (Smith 2014), it can be projected that as services increase and become more user-friendly and the senior population become more familiar with technology, usage will increase.

### **2.9.3 THE IMPACT OF TECHNOLOGY ON IDENTITY DURING THE TRANSITION TO RETIREMENT**

This section summarizes literature that addresses why older adults use technology and illustrates the impact on their identities during the transition to retirement. From literature on older adults and technology (Saalovara et al 2010, Hogeboom et al 2010), a pattern of how technology can facilitate a smooth transition to retirement can be deduced. Following retirement, older adults are likely to place more emphasis on the non-worker roles they were involved in while they were employed and/or they migrate towards new roles that will give them new identities (Gall et al 1997). They can be conflicted between wanting to spend time with family and friends, as well as having the freedom to travel and/or take on new roles, which can result in less time for personal networking and emphasis on activity based identities such as volunteering and travel (Saalovara et al 2010). As they are no longer tied down to a routine, daily activities can be less structured and the ability to using devices any-time any-where gives retirees flexibility to manage contradictory roles simultaneously such as travelling and staying in regular contact with family. IT and social media provide dual functionality for facilitating activities, as well as for communicating and feeling connected, for those transitioning to retirement (Saalovara et al 2010). Information required to take on new roles is mostly available via web sites and search engines, while social media and email provide the technology which enables communication through networks (Hogeboom et al 2010).

Another way of looking at technology is as a catalyst for activities during transition. Devices such as PC's and tablets and applications such as Face Time, for example, enable grandparents to have contact with grandchildren or join a virtual community of common interest (Saalovara et al 2010). A transition role can be generated by technology as retirees may purchase a device to communicate with others who are using the same mechanism e.g. a PC for email and then use that device for a different role at a later time e.g. a search engine for information about travel (Saalovara et al 2010).

Nuttman-Shwartz (2004) and Saalovara et al (2010) have described that the major fear of those who are about to retire is that they will lose the identities that give them a feeling of self-worth and they will feel isolated, irrelevant and have nothing to do if they are not working. Literature on seniors and technology describe how the use of IT and social media to maintain contacts and facilitate activities can help alleviate these anxieties (Sum 2009). From their research on 24 Norwegian retirees, Salovaara et al (2010) found that those who actively take control over their transition to retirement tend to cope better with their new salient identities. This group is also more likely to use the tools provided by technology to avoid becoming isolated.

Friends and family become more important when retirees are no longer in the workforce and the identities of grandparent, friend, sibling, care-giver or baby-sitter, take on a higher salience (Salovaara et al 2010). By having the facilities of the technology available, contact with those who live both near and far is available and easy (Wellman 2001). Planning for these activities is typically facilitated by email, Skype, Facebook and other IT applications. With the exception of Skype, an advantage to the recipient is that they have control over when and where to respond, compared to a telephone call that requires an immediate two-way dialogue (Quinn 2013).

Day to day activities, which give older adults an identity can be made easier by the use of IT. Information concerning health, community and various levels of government and municipal services are available on-line by means of web sites (Neves et al 2013). On-line banking has become more accessible and users are encouraged by the banks to use ATM services. According to research on older adults in New Zealand, those who used e-banking tend to prefer the convenience of not needing to visit a bank. Banks are developing applications aimed at a growing clientele who are older and affluent (Xiong and Matthews 2005), which implies that it will become more difficult for those who are not comfortable using e-banking. While not mutually exclusive, those transitioning to retirement can take on roles as consumers or producers (Sargent et al 2011). Producers engage in socially beneficial activities and want to 'give back' to society. They can volunteer or take on unpaid work. Information concerning

these activities is typically found on web sites by using a search engine. Once a retiree has joined a group, subsequent communication is typically by email or posted on web sites (Hogeboom et al 2010).

Following retirement, many older adults have the health and financial resources to focus their identity on consumer related activities (Sargent et al 2011, Sargent et al 2013). These include travelling, belonging to sports and recreational clubs and purchasing. Extensive travel information is available on numerous web sites. Flight, train and bus tickets and accommodation can be purchased on-line. The role of a travel agent is becoming less needed. Check-in for flights is mostly done through a web site or a device at the airport. In some circumstances, the only way to purchase a bus or rail ticket is by using a machine at the departure location. While there are many web sites available to facilitate travel, they are so numerous and those who are unfamiliar with how to use them may be intimidated to attempt to do so (Bernstein and Awe 1999). Membership of clubs and organizations is frequently done on-line and communication to members is typically by email (Putnam 2000).

Identities are formed and developed through social interaction within the networks that a person belongs to and identifies with (Hogg et al 1995, Stryker and Burke 2000, Stets and Burke 2000). According to the results of Putnam's (2000) research on social changes in America, although there has been a decline in direct social contact, such as visiting local clubs and there is a decreasing number of venues to congregate, the need for older adults to maintain their identity through social contacts following retirement remains. IT and social media play an important role in providing this function. Communities no longer need to be geographically close and can operate through technology and social media (Wellman 2001). "Computer networks are inherently social networks, linking people, organizations, and knowledge" (Wellman 2001 p2031). During transition, retirees will gradually shift from previous to new social networks, which can be facilitated by the use of IT. They tend to modify and adapt their means of communicating to fit with those methods used by members of their social network (Saalovara et al 2010).

Networks are managed through ties. Family and friends provide strong ties and the tools that are used to maintain them are typically email, Skype and Facebook. However it has been found that personal contact does not necessarily decrease amongst those who use email and other tools, but rather that the technology acts as a facilitator. From his review of studies in North America, Wellman (2001) reported that those who are frequently on-line tend to be more involved in their communities. This has been corroborated by Hogeboom et al (2010), who found that those over 50 who used the internet are more likely to take part in social activities such as joining clubs, compared to non-internet users.

From research on seniors, it has been found that those with strong social networks are less likely to suffer from stress, are healthier and more physically active (Hogeboom et al 2010). Similarly those with “close friends, friendly neighbours and confidants are less likely to experience sadness, loneliness and low self- esteem “(Helliwell and Putnam 2004, p 1437). As technology provides a convenient, automated means of re-establishing and making new contacts, which can become important when retirees leave the workforce (Quinn 2013), it can be extrapolated that that seniors will miss activities which help build up social networks if they do not have access to technology (Peacock and Künemund 2007, Neves et al 2013).

Technology is ubiquitous and available to seniors to facilitate their networks and activities. Many were familiar with some tools and devices while they were working. According to Sum et al (2008) retirees who have the attitude and aptitude to get involved in social networks and the use of technology have the opportunity to create and maintain positive identities. The following section explores what motivates older adults to take advantage of the tools and applications that technology offers to facilitate their retirement and conversely, the factors that detract from its use.

#### **2.9.4 MOTIVATORS AND DETRACTORS**

From the results of their research on adults over 65 in North America, Mitzner et al (2010) reported that it is likely that older adults who are pre-disposed to having a positive attitude are more likely to have a positive experience with technology. Conversely, those who lack motivation to learn new techniques are more likely to fall into the category of disengagement and will have difficulty not becoming isolated during the transition to retirement.

The major factors that will determine how and why older adults make use of IT and social media are not age, cost or ease of use, but attitude, perceived usefulness and the desire to succeed (Neves et al 2013, Chung et al 2010, Melenhorst et al 2006). Factors that give older adults the incentive to make use of available technology are the desire to learn, the ability to communicate in order to not feel isolated from friends and family, social pressure, the need to keep up with others and familiarity with and the ability to use the tools (Hogeboom et al 2010). Reconnecting with previous contacts is also a motivator for older adults (Zickhur and Madden 2012). As long as the technology is perceived to be useful, older adults will be motivated to make use of a device or application, even if it is faulty (Saalovara et al 2010).

Consistent with Continuity Theory, those who are willing to learn new techniques prior to retirement are more likely to continue to use technology, learn new methods and stay connected. An example of motivators and detractors for using technology can be found in the study by Xiong and Matthews (2005) on the usage of electronic banking by seniors. Many bank customers felt that ATM's were unnecessary, too complicated or open to theft or exploitation and they preferred the face-to-face contact of a teller. However, when it was demonstrated to customers that ATM's were safe, convenient and useful, they readily accepted the new method and appreciated the advantages of e-banking. Some older users have difficulty with IT and internet usage due to lack of access and skills (Quinn 2013, Neves et al 2013, Lee et al 2011). A lack of access and training was found to be as much of a deterrent to using



ATM's as physical limitations, such as lack of mobility (Xiong and Matthews 2005).

Negative attitudes such as feelings of low self-efficacy and anxiety about the use of computers are most frequently associated with technology being perceived as creating "inconveniences, and having unhelpful features" (Mitzner et al 2010 p 1710). Specific factors are security and reliability concerns, lack of trust of web sites, lack of knowledge and training and inaccessibility and the preference for face to face encounters (Lee et al 2011, Neves et al 2013).

## **2.9.5 LIMITATIONS TO LITERATURE**

While there is extensive literature on the identity of seniors and how they utilize technology, there are several gaps. Most of the literature on the use of technology by seniors is survey based, which is useful to show trends, but is static and does not allow for interactive information. The result is that there is relatively little attention paid to context. The questions are typically identified and selected by the researcher, which does not give the respondents the ability to suggest their own issues, concerns and perspectives. Consequently important individual experiences and emotions are not captured (Kloep and Hendry 2006). Most of the literature on motivation contains the results of surveys. Exceptions are the focus group based research of Mitzen et al (2010) and Melenhorst et al (2006) and interviews conducted by Saalovara et al (2010). Their qualitative results confirm the trends reported by others and give a deeper understanding of the emotional aspects of the adoption of technology by seniors.

The literature addressed for this research mostly addresses older adults and there is often no differentiation made between those who are working, are transitioning or have been retired for a long period. This implies that how technology is used is independent the stage of life. An exception is Hogeboom et al (2010), who addresses retirement (but not transition) and concludes that the use of the internet can strengthen the social networks of retirees.

Identity is also generally not addressed in the literature researched for this study on senior's usage of technology. Exceptions are Saalovara et al (2010), and Quin (2013) who address both identity and retirement transition while Bailey and Ngwenyama (2010) deal only with identity and retirement. IT also facilitates maintaining social networks. Quin (2013) addresses the challenges of older adults' use of social media to maintain social networks. Bailey and Ngwenyama (2010) address the topic of social identity and technology by describing how technology telecentres for seniors and youth can facilitate the creation of social identities among the seniors. Sum et al (2008) address well-being of retirees, but not specifically identity and concluded that the impact of the internet is dependent on the specific technology.

## **2.10 CONCLUSION**

This chapter examined the literature which addresses the components of the research question. Factors impacting identity and the transition to retirement were described. How and why older adults use technology was explored. While for the most part, identity, transition to retirement and technology use by seniors is treated independently in the literature researched, any relationships were identified and if there was no explicit associations, possible links between them were deduced. How identity evolves during the transition to retirement is dependent on many variables. The use of technology is ubiquitous and is useful and readily available to facilitate the activities and networks which influence identity. The following chapter describes the Methodology that was utilized as the foundation for the research.

## 3.0 METHODOLOGY

### 3.1 OVERVIEW

The Research Question to be examined, as applied to retired Canadian teachers is: ***“What is the relationship between identity and the transition to retirement and how is the transition facilitated by the use of technology?”***

While there has been extensive research conducted on the identity of retirees and on the use of technology by seniors, how identity changes and how technology is utilized during the transition to retirement has not been widely addressed. This chapter describes the methodology that was utilized to investigate the research question as applied to a specific population (retired teachers). It also contains an overview of social science research methodology, the methods and means of data collection as applied to the research as well as addressing ethical considerations.

### 3.2 RESEARCH METHODOLOGY AND METHODS.

The components of Social Science research are ontology, epistemology, methodology, methods and resources. To conduct meaningful and successful research, it is necessary to understand these components, their roles in the research process and their relationship to each other (Grix 2002, Bryman 2008). According to Grix (2002) there is a sequential relationship between these components and it is necessary to establish each step before determining the next. Ontology can be defined as “the image of social reality on which a theory is based” (Grix 2002 p177). As the world can be envisioned as consisting of independently verifiable facts, versus contextualised meanings, there are two kinds of ontology, objectivism, which is usually measured by quantitative research and subjectivism, determined by qualitative research. For this research, a mixture of objectivism and subjectivism is appropriate as parts of the research question can be addressed empirically and others are more subjective. Epistemology, the theory of knowledge, addresses what knowledge is possible to have and how is having that knowledge possible (Bryman 2008). It can similarly be divided into positivism, measured quantitatively and constructivism, measured qualitatively.

As with the ontology, both these branches of epistemology are applicable to the research question and a combination of the two approaches will give the most comprehensive results.

Methodology is the approach taken for research and is concerned with the options and restrictions of a particular means of carrying out the research. Method applies to the “techniques and procedures used to obtain and analyze the data and resources” (Grix 20002 p179). Social science research can be conducted by utilizing quantitative or qualitative methods. Generally quantitative research is carried out by means of a survey and qualitative research by, among other methods, structured or semi-structured interviews (Bryman 2008). As both methods have limitations, during the 1980’s many researchers began to use mixed methods, a combination, each providing a different perspective. (Symonds and Gorad 2010). Mixed methods can be used for a study by logically and practically combining qualitative and quantitative methods and techniques (Burke Johnson and Onwuegbuzie 2004). The objective is to address the research question and not impose limitations due to philosophical restrictions. According to Symonds and Gorad (2010) and Burke Johnson and Onwuegbuzie (2004), both qualitative and quantitative methods are useful and mixed methods are not a replacement, but an enhancement to meaningful research. They propose that researchers design their investigations according to the research question and not the philosophy and that the methods utilized are those that best address the specific component being considered. Researchers should first formulate the question to be investigated and then utilize the methods that are the most productive and effective for their particular research. According to Symonds and Gorad (2010) and Burke Johnson and Onwuegbuzie (2004), the design strategy was often pre-determined and limited to either qualitative or quantitative methods, which can inhibit the research.

The methods chosen for my research were tailored to the research question and the particular methods utilized were chosen for their ability to address the different aspects. As all methods have biases, omissions and distortions, using more than one approach can help to eliminate limited results.

### **3.2.1 MIXED METHODS**

I used a mixture of quantitative and qualitative methods to address the different aspects of the research question and obtained data by means of a survey and semi-structured interviews. I chose to conduct the two phases sequentially, which allowed me to include the trends deduced from the survey in the design of the questionnaire. The same questions were asked in different ways and in more depth to substantiate the results. As well as demographics, questions in the survey addressed the social networks and activities of the respondents as well as their use of technology and any trend established was validated during the interviews. As an example, the survey indicated that the respondent population was active and engaged. This was not only confirmed during the interviews but I was able to explore in detail the specific activities (e.g. kite surfing), not only their categories (e.g. sports) and also which specific technology was used to facilitate the activity (e.g. email).

### **3.2.2 QUANTITATIVE METHODS**

For quantitative research, surveys are the most appropriate methods used for hypothesis testing (Bryman 2008). Although there was no hypothesis for the proposed research, a short, simple, well designed and easily accessible survey was the most effective and efficient method of determining the trend for what activities, networks and technology were being utilized by those transitioning to retirement. In addition I investigated whether the demographic of the respondents had an impact on their transition experience. Surveys are useful to gather data fast and establish trends, which, in some cases, can be confirmed in more depth by interviews. They also allow for a large number of participants to be included. My research sample for the survey was 100. Sources of those completing the survey were unidentified. As the subject matter is not very sensitive, I assumed that respondents were likely to be honest. I examined any individual outlier data to determine if there were circumstances (such as illness) that produced a result that differed from the trend.

From the survey I obtained basic demographic information such as age, number of years retired, gender and education of the retired teachers. I determined the activities undertaken, the social networks which facilitated those activities and their frequency and salience. I also ascertained what technology was utilized to facilitate the activities and social networks.

#### **3.2.2.1 Survey Technology**

With the advancement of technology, on-line survey software that is cheap, convenient and quick to disseminate is available. As the quality of measurement determines the accuracy (validity) and consistency of measurement (reliability) of using a survey (Bryman 2008), a reliable tool was needed to capture and provide some analysis of the data gathered. I used Survey Monkey, an automated well tested product. The survey was easy to design and use, provided confidentiality and data quality as well as some analytical tools. The resulting survey was easy for participants to complete and the results were assumed to be reliable. As the results of the survey generally showed consistency with the interviews, this assumption was validated.

Survey Monkey does some analysis and presents this in a comprehensive manner (e.g. 83% of all respondents use e-mail, 86% of all respondents find technology useful for interacting with friends and family). Where analysis was not provided by Survey Monkey (e.g. number of years retired vs. age at retirement), I downloaded a spreadsheet from Survey Monkey and sorted by the various demographic and moderating variables, as well as by the most salient networks, activities and technologies. I could then determine if there appeared to be any relationships between the variables and which, if any were important to the retirement experience.

#### **3.2.2.2 Survey Pilot**

Once the design of the survey was completed, I conducted a pilot, which is useful to determine weaknesses in questions and approach and allow for changes to be made (Bryman 2008). A total of ten retirees, and in some cases retired teachers, completed the survey and commented specifically on clarity, ease of use, duplication, time to complete and whether it was consistent and maintained their interest. I also asked them to critique the letter and

information sheet that I proposed to send to potential participants. From the feedback, I placed emphasis on the need for the survey to be simple, undemanding of the respondents and take approximately 10 minutes to complete. Based on their comments, I modified the design to be more succinct, shortened the survey and made a compromise between detail and brevity. I included questions that gave sufficient information to establish trends. As an example, I condensed questions asking about interaction with 'parents, children, siblings and other family members' to one question concerning 'family'. Activities were classified (e.g. Arts/ Sports) rather than listing the specific activities. I also eliminated complex matrices (making a direct correlation between activities and applications e.g. iPad for photography). Based on the input, I also changed the letter to participants and combined it with the information sheet, which contained the URL for the survey, which eliminated the need for multiple interactions (Appendix 2).

### **3.2.3 QUALITATIVE METHODS**

I addressed the argument against surveys that social meaning cannot be established by simply finding a correlation between elements (deVaus 1991) by conducting complementary qualitative research. Compared to quantitative methods, qualitative methods are more suited for an in-depth exploration of the complexity and detail of the emotions experienced by the respondents (Bryman 2008). For the elements of the research question that required ascertaining emotional data, I conducted 19 semi-structured interviews. Qualitative research is defined as hypothesis seeking and the research question is seen through the eyes of the respondents. As I had no way of contacting the respondents to the survey and there was no opportunity for clarification or the addition of questions, the interviews provided the opportunity to verify the validity of the results of the survey (Bryman 2008). The interview also provided an opportunity to ask about changes since retirement, explore topics in more depth, and ask questions that covered the emotional aspects of the transition to retirement.

In theory, the results of all forms of qualitative research (e.g. observation, interviews and focus groups) can be combined with the results of data from questionnaires (Creswell 2009). I eliminated two forms of qualitative analysis, as observation was not appropriate to address the research question and organizing a focus group was not practical due to the geographical diversity. Semi-structured interviews are a series of questions based on specific issues, but are more general and questions are not in a fixed order. The interviewer has the freedom to ask further questions if the answers are applicable to warrant further investigation (Bryman 2008). They are appropriate for generating theory, gaining an understanding of thoughts and behaviour and are verbal, intuitive and inductive. While the semi-structured interviews were time consuming, they were valuable in giving a more comprehensive view of the perception of the respondents. Unlike the survey, it was possible to clarify points and misunderstandings immediately (Bryman 2008, Denzin and Lincoln 2008). Conversely, as the number of respondents interviewed was only 19, which is too small to generalize or make predictions, where possible I compared the detailed results of the interviews with the more general data from the survey (e.g. the activities undertaken) and if there was consistency, I could assume that there was credibility.

I followed the same process for each respondent. Before the interviews I had created a checklist of the items I wished to address (Appendix 4). After explaining the purpose of the research and explaining what I meant by identity and retirement, I asked the initial question "Tell me about your retirement?" This would lead to additional questions but by the end of the interview I ensured that all the points on the checklist were covered and I had the answers that were relevant to the research question. Being of the same demographic as the respondents was useful in making them feel comfortable. The semi-structured interviews explored the relationship between identity and the transition to retirement. Respondents expressed their feelings of self-worth at the time of retirement and at the current time. They also conveyed whether there were any changes in their characteristics and behaviour and whether they still identified as teachers. I also explored the impact of the conditions of their last years of work, circumstances of retirement, whether there was a sense of



social identity and whether these factors impacted their transition experience. There was variation among the respondents in the time it took to fully transition to retirement and I was able to explore and understand the process in some detail with each of the interviewees. I was able not only to explore their activities during retirement and confirm the trends demonstrated in the survey, but go into more detail (e.g. sculpting vs. general arts). I included questions about the motivators and detractors of using technology for each of the respondents and was able to go into more detail and understand the motivation for using a specific technology for a specific activity (e.g. internet search for knitting patterns).

For the interviews, I installed the application “Dictaphone” on an i-Phone. It provides a clear recording and runs for over an hour. For the transcripts, I tried using the voice recognition tool, Dragon Naturally Speaking as well as Google Dictate. Neither of these tools provided adequate voice recognition and I manually transcribed the recordings. Although time consuming, this was useful as I could reflect on and perform some analysis while I was transcribing.

As a pilot. I conducted an interview with a retired teacher who is still substitute teaching. I had constructed an interview guide covering the questions related to the research question, but started with a general question “Tell me about your retirement”. I was able to steer the discussion to cover all the elements required but still able to keep the structure informal. The session went well and I included the interview in the results. I also felt that I did not need to do any further pilot interviews.

### **3.2.4 METHOD FOR DETERMINING IDENTITY**

Identity is based on feelings of self-worth. Although there is literature on measuring emotions empirically, the means of doing this are complex and not suited to the research. Exploring identity, transition to retirement and the relationship between them is not well suited to quantitative methods.

Initially my intent was to conduct quantitative research and to empirically determine how identity changed during the transition to retirement as well as what technology was utilized. The initial survey design contained questions on emotions and feelings and asked respondents to rank them on a Likert scale. I encountered difficulty in determining which questions were appropriate to quantify identity and how to measure changes over a period of time. While researchers have addressed the measurement of identity, the methods they used were not appropriate for the present study (Scherer 2005, Sturdy 2003). Burke and Tully (1977) presented a complex mathematical formula which scored identity. Scherer (2005) and Sturdy (2003) assessed identity by asking questions such as 'what is the respondents self-worth and feeling of usefulness to society'. These were measured on a Likert scale and they calculated a total score for the identity of each respondent. Even if it was possible to formulate the right questions and respondents could remember their emotions while teaching and during the transition to retirement, a large number would be required to answer a time-consuming survey in order to obtain a statistically significant result. Given survey fatigue, it is likely that many potential respondents would abandon the survey before completion. It would also be difficult to acquire the large number of participants required to make the survey statistically significant.

In addition, as the questions addressed the relationship between identity and the transition to retirement, to empirically determine the changes in identity during transition for each individual would require a longitudinal study. Assessing the identity of a respondent at a given time of transition and comparing it to that of another individual at a different time would not indicate whether that individual's identity had changed. As identity is an emotional experience, and based largely on an individual's perception of their feelings, I felt that, instead of obtaining a score from a questionnaire, I would likely get a more meaningful result by directly asking respondents how they feel about themselves at their current state of retirement as well as whether this has changed since they retired. While this would apply only to a relatively small number of respondents, the results would be more detailed and in depth as individuals know their own feelings and perceptions, which constitute their

identities both in the past and the present. As identities are mostly implicit rather than explicit and individuals experience them in the present, rather than reflect on the past, it is relatively difficult to capture them in a survey. By contrast, the results of interviews potentially gives the researcher the opportunity to explore the experiences of the respondents and obtain the emotional changes during the transition to retirement. For the reasons stated above, I determined that, rather than assigning a number to a sentiment, it would be more meaningful to address the emotional aspects of the research question by qualitative analysis with a subset of the respondents, exploring their feelings and emotions in depth and relating these to their transition experiences.

### **3.3 DATA COLLECTION**

#### **3.3.1 PARTICIPANT SELECTION**

For the research sample, rather than try to find a random group of recently retired older adults, I characterized the respondent group and used purposive sampling. I selected retired school teachers as the research population as they are a relatively uniform group who are mostly financially stable, well-educated and technology literate, all factors which impact the post retirement experience (Gall et al 1997, Hogeboom et al 2010, Price 2003).

I approached Teachers Unions (TU), Retired Teachers Associations (RTO) and Teachers Pension Plans (TPP) in Nova Scotia (NS), Ontario and British Columbia (BC) to identify gatekeepers and potential respondents. I sent e-mails explaining the purpose of the research, outlining the methods and assuring confidentiality and ethics approval. Only the NS TU and RTO were willing to assist, on condition that ethical approval was obtained from the University of Leicester and that they approved the letter requesting participation of their members. As they were conducting a research study on transition to retirement and in particular isolation, they were incented to support the research. I committed to sending them an overview of the results which would not contain any data or names of respondents.

Following the approvals, they distributed an email to the Directors of their 23 branches asking that they forward the request to their members and encourage participation. In addition, to obtain respondents by means of a snowballing process, I approached personal contacts in BC and Ontario, who agreed to contact colleagues who were retired and ask them to participate and also to distribute the request to their networks.

### **3.3.2 DATA COLLECTION PROCESS**

The email sent to all potential respondents contained information about the research, assurance of confidentiality and anonymity, and stressed the ability to withdraw from participating at any time. It also asked those who were willing to participate, to access the survey by means of the URL contained in the email. The first question in the survey asked for consent. As I had no direct contact with the respondents there was no way of knowing who had completed the survey. Only the location was identified, which was important to ascertain whether there were differences across the provinces. Respondents were also asked if they would agree to be interviewed and if so, to send an email to an email address created for the research. Their input would be confidential and as the survey was anonymous there was no way of correlating the questionnaire responses with the individuals who had volunteered to be interviewed. As an incentive to obtain participants, I committed to donate \$1 per survey respondent and \$5 per interviewee to a charity for students with learning disabilities. The charity was chosen after consultation with retired teachers in Ontario as the cause is likely to have the empathy of all educators.

A guideline for sample size is to collect data until saturation occurs, where saturation is defined as “data adequacy” (Morse 1995, p147), meaning that there is no benefit to continue, since results are not providing any new information. While saturation usually refers to qualitative research, the principle can be applied to quantitative methods. The number of respondents who completed the survey was 100. Although this is not a large number, results were relatively uniform and considered sufficient for the research. For qualitative research, 19 retired teachers were interviewed and with the

exception of the small number of outliers, the results were generally consistent both within the interviews and with the results of the survey. I was also able to address and discuss the behaviour of the outliers, who were the exceptions.

### **3.3.3 SURVEY**

As there is a danger of survey fatigue, when designing the questionnaire, I made a trade-off between being concise to avoid the respondents losing interest and being comprehensive to capture the data required. As an example, I replaced a list of sports activities with the general category 'sports'. The first question asked the participants to formally give permission to use the results for the research. The last question asked if they were willing to be interviewed, and if so, to send an email. Questions were closed-ended and gave respondents a choice of options to select. This line of questioning made it fast, easy to analyze the results and determine trends. Respondents provided a snapshot of their current circumstances and were not asked what they remembered from the past. A copy of the survey is contained in Appendix 5.

To address the research question I obtained the demographics of the sample, which included geographic location, age, marital status, gender, level of education, number of years retired, urban or rural experience, level and subject taught. I then ranked activities, networks and technology with their salience and frequency. From the results I was able to determine whether there was a trend relating the demographics to activities, networks and use of technology. I was able to compare the use and importance of technology for maintaining networks and carrying out activities. I could also determine whether exceptions, including those who were partially retired, suffered from ill health or were financially inhibited, exhibited different trends.

Although I had a choice of collecting data sequentially or concurrently, I did not commence the semi-structured interviews until I had completed a preliminary analysis of the survey data. I could then incorporate some of the data, deduced by the trends, into the questions, which would give me an opportunity

to clarify any ambiguities or gaps from the results of the survey, if any were found. (Creswell 2009).

### **3.3.4 SEMI-STRUCTURED INTERVIEWS**

Once I had analyzed results of the survey, I conducted approximately one-hour long semi-structured, interviews with a subset of the respondents to explore identity for the activities undertaken during their transition to retirement. I was able to elicit emotional aspects of identity by having a two-way conversation which gave the respondents an opportunity to express their feelings about transitioning to retirement. While there was an interview guide containing all the topics to be covered, the questions were open-ended and I was careful not to lead the respondents. Where possible, in Ottawa and during a visit to Victoria BC, I held face-to-face interviews. The rest were mainly via Skype, or in some cases, by telephone for the respondents who were not comfortable with the technology. During the first few minutes of the interview, I thanked respondents, explained the purpose of the study and asked if they had any questions. The interview contained general questions to make the respondents feel comfortable and to gain their trust and willingness. I re-iterated the purpose of the research, confidentiality and anonymity and that they could stop at any time. At the end of the interview, I asked the respondents if they had any concerns and if they would like to receive an overview of the results of the research. I provided them with my email address in case they had any further input or concerns at a later stage.

A copy of the interview schedule is contained in Appendix 4. Some of the interview questions were factual and the same as those that were contained in the survey, but in more detail (e.g. specific activities). In addition I addressed topics relating to identity, social identity and transition and asked that they express their feelings of self-worth. I also included more personal questions about their use of technology, which are suited to interviews and not surveys. These included the motivators and barriers to using IT, comments on the usefulness/necessity of utilizing IT and which networks are important to maintain identity. I also addressed whether there were changes in

characteristics and behavior over a period of time. In addition, the semi-structured interview contained questions specifically pertaining to the teaching experience, including their last years of work experience and circumstances of retirement. I also explored how technology was utilized in relation to activities and social networks. I made a summary table for each respondent and also created a spreadsheet with the names of the respondents and the categories that were explored, including demographic data, as well as topics such as whether they were socially active, used technology while teaching and how they described themselves (Table 4.4). While I was transcribing the interviews, I populated the spreadsheet. I then used this as a guide when analyzing the data to determine if there were any trends or anomalies and to compare the trends from the survey to the individual responses from the interviews.

By combining the results of the interviews with the trends established in the survey, a reasonably comprehensive picture emerged of how technology is employed by the respondents, and how it facilitates their identity during the transition to retirement. The major limitation of the interviews was that I asked each respondent about past experiences and their perceptions may not have been accurate.

### **3.4 PROBLEMS WITH PROCESS**

While the survey was useful in showing trends for the activities, social networks and technologies utilized by the respondent population, there were deficiencies. As the survey was short, the questions did not contain matrices such as relating specific activities to specific technologies (e.g. Google for booking travel). One question addressed all the activities and another all technology utilized. The direct mapping was then undertaken during the interviews. Questions were related to the present and did not ask for retroactive information from the actual time of retirement. As an example, the respondents were only asked to identify their current use of technology, not the evolution from when they were teaching to the present. In general, while surveys are the methods that are best for mass data collection, there is no direct contact with the respondents and the data is non-verbal, which provides

a limited perspective and no opportunity for clarification, contextualization or the possibility to reply. These limitations were mitigated by conducting semi-structured interviews with a sub-set of the respondents.

Response rates for the survey were relatively low. Despite encouragement from the NS RTO, less than 50 members of the total membership of 7,000 from the 23 branches responded, less than 2 per branch. The RTO Director committed to asking the regional Directors to do a follow-up request one month after the initial email, but I did not receive any additional responses. The initial email in Ontario was to 60 members of a retired teacher's choir in Ottawa. Despite personal encouragement from a choir member, only 6 responded. As requests from Ontario were by ten individuals who are personal contacts, it is not possible to know how many email requests were sent. The BC RTO declined to place an advertisement in their newsletter as they indicated that their membership was saturated with surveys and had no interest in completing them. Over 8 individuals in BC sent out requests and a personal contact, who is a member of the Victoria RTO, placed an advertisement in their local newsletter. On the other hand, 37% of those who completed the survey, volunteered to be interviewed.

As participants were collected from emails sent out from divergent sources, I could not anticipate or control the demographic of respondents. In order to track the transition to retirement, the ideal response would have been from those who had been retired between 0 and 2 years as they were more likely to have a recollection of their retirement experience. There were relatively few in this category, and most of those who responded to the survey had been retired longer, up to 27 years. This disadvantage was mitigated during the interviews by exploring the participants experience during the first two years of retirement. Interviewing older retirees also gave the opportunity to track the evolution of their use of technology from retirement to the present.

Due to the need to ensure anonymity for the survey, I could not select a representative sample to be interviewed. I did not anticipate that such a large number of those who completed the survey would be willing to be interviewed.



As I had no indication of who had responded, I emailed each of them and asked how many years they had been retired, their age and geographical location. As transition to retirement was a key aspect, I chose respondents from each of the three provinces, who were most recently retired. I also tried to obtain a quota sample by selecting a distribution of respondents that was approximately proportional to the percentage of respondents from each geographical area. I also purposively selected three outliers, one who deliberately does not use technology, one who retired at age 50 and was familiar with technology while working and one who is 82 and did not have access to technology while teaching. The aim was to investigate whether their behaviour was significantly different.

There are potential limitations with the selection process. Respondents were initially contacted by a third party via email, which is a form of self-selection and the sample was weighted towards those who use this form of communication. As the standard means of contact by teachers with their union, school board or school is via email, I assumed that teachers who had recently retired are, to some extent, computer literate and that the sample would not be significantly biased. Another potential source of self-selection is that the NS teachers were all contacted through a teachers' organization, which implied that they maintained their social identity following retirement. This did not apply to Ontario as all respondents were from personal contacts. In BC teachers were approached both by personal contact and an advertisement, placed by an acquaintance, in the Victoria RTO newsletter. Potential differences in results will need to be considered in light of these contexts.

### **3.5 ETHICAL CONSIDERATIONS**

The purpose of an ethical review of a research study is to ensure that no harm is done to the respondents and that an ethical code of conduct is adhered to. Research must meet ethical standards, which can be achieved by obtaining approval from a credible institution such as the University of Leicester and the respondents need an understanding of what is expected before they agree to participate. While the ethical aspects of research have always been important,

the priority has increased and ethical research boards exist in academic institutions which, with Governments and professional bodies, define standards, provide guidelines and monitor the research. (Sieber 1993).

The ethical issues that are anticipated in this study relate to the sensitivity of the senior demographic who feel that they are entering a stage in their lives where they may not be as useful or competent as previously. Unless the participants are handled carefully, there may be problems in collecting meaningful data without inadvertently giving offence. As they are of an older demographic, they may suffer insecurities or uncertainties. The methodology consisted of an on-line survey (which was anonymous and confidential) and interviews with a sub-set of respondents. Information gathering took into account ethical considerations. All respondents were told of the objectives of the study and asked to agree to answer the questions. Sieber (1993) addressed the subject of informed consent and stressed that ethical guidelines require that researchers inform participants of the general nature of the research so they can make an informed decision about whether or not to participate. It was important to ensure the respondents that all information gathered would be anonymous and only used to ascertain information for the purpose of the study. For surveys, anonymity should not be an issue and questions were structured to give the incentive to respond honestly. It was also important to ensure the respondents that the data would be secure and only used for the research.

One of the questions on the survey was whether the respondent would agree to be interviewed. While there were no issues anticipated from the respondents who completed the survey, those being interviewed could experience sensitivities due to lack of anonymity to the researcher. Each interviewee was personally assured of confidentiality, privacy and told how their demographic could be helped by the research. They were free to withdraw from participating at any stage

As there is a general perception that males are more adept than females with technology, (Peacock and Künemund 2007), this could cause some gender

sensitivities among the respondents. The design of the survey and the questions for the interviews were such that they showed no gender bias. As I am female, there was no conscious or unconscious effort to address this perception or try to influence the results or consequences. The intent was to conduct ethical and meaningful research which would not cause any stress to the participants but which could result in information that could be of benefit. As there is limited general literature on the use of technology during the transition to retirement and specifically for teachers, the retired teachers' organization supporting the research (NS RTO) has requested that I share the results with them so they can incorporate them into their own research on the transition to retirement. While I agreed to send a summary of the results, no names or any other confidential information will be included.

### **3.6 CONCLUSION**

This chapter has described the methods used to investigate the questions and sub-questions related to the research question. The mixed methods utilized were related to the philosophical concepts described. From these methods it was possible to address both the factual and emotional aspects that contribute to the transition to retirement experience. Although I did not anticipate any sensitive topics, care was taken to respect any potential ethical issues.

The limitations that were encountered need to be acknowledged when interpreting the results of the research. While I made every effort to obtain a representative sample of the teacher demographic, there was a relatively low take-up rate for the survey. It is likely that those who volunteered for the survey were not isolated, found retirement fulfilling and were familiar with the use of technology. I attempted to mitigate this failing in the methodology by asking respondents during the interview about their experiences with their colleagues.

Although a relatively small sample was used, both for the survey and the interviews, there was sufficient data to establish some trends. As an example, the majority of respondents are avid users of email. In other cases, relationships were not obvious, particularly with data from the interviews (e.g. a

relationship between the last years of work experience and the ease of transition). As the sample was small, it is not possible to know whether there is no trend, or a bigger sample would show relationships. The following chapter contains the results of the research and addresses the research question in relation to retired Canadian school teachers.

## 4.0 RESULTS OF RESEARCH

### 4.1 INTRODUCTION

As adults age, they experience changes in their lifestyle, especially after they retire. Identities are likely to change during the transition to retirement. As most teachers are familiar with information Technology (IT) and its tools and applications, it is likely that technology plays a significant part in facilitating their retirement. The elements of the research question, ***“What is the relationship between identity and the transition to retirement and how is the transition facilitated by the use of technology?”*** were explored during the research. As was addressed in the literature review, previous studies have separately focussed on the identity of seniors, the transition to retirement and how older adults utilize IT. The research described in this chapter combines these elements and explores the relationships between them. The questions contained in both the survey and the semi-structured interviews address topics that were related directly or indirectly to the research question.

The demographics of the research sample, retired Canadian teachers, are described. This is followed by an exploration of social networks, activities and consumerism, as some of the factors that influence identity and social identity. The transition to retirement for the respondents was investigated by examining what factors had an impact on the nature of the retirement experience and on the length of transition: voluntary vs. involuntary retirement, last years at work, health, financial security, continuity and disengagement. The relationship between identity and retirement is then discussed and how and why retirees used IT to facilitate their transition experience is explored. Prior to the discussion and conclusion, an outlier case study is described to provide further context for the results.

### 4.2 DEMOGRAPHICS

One hundred retired teachers from Nova Scotia (NS), Ontario and British Columbia (BC) responded to the survey about their retirement. Thirty nine indicated that they were willing to be interviewed and nineteen took part in semi-structured interviews. As the total number who responded to the survey was 100, a statistical analysis

would not provide results that were generalizable. However, the number of participants were sufficient to show a trend of social interaction and activities undertaken and the usage of IT, which was investigated further during the semi-structured interviews.

I selected 19 interviewees from those who indicated their willingness in the survey question. Those who were selected had been retired the least number of years and represented the three provinces. The exception was an 82 year old female, who I included to capture her experience of IT as a teacher, which would likely be different from her younger colleagues. I also included two outliers, a 59 year old female (Jackie) who does not use IT and a 50 year old male (Dean), who was forced to retire due to illness and is of the demographic who are likely to be general users of IT while employed. Beverley and Derek, a married couple, were interviewed together.

While there were individual differences between the respondents, mostly they were financially stable, generally healthy, socially active and, regular IT users, with positive feelings towards themselves. This may be due to in part the fact that the sample was self-selecting. The request for participants was either by e-mail or in an electronic newsletter, eliminating non IT users. Interviews were held with a sub-set of those who indicated agreement to be interviewed in the survey and contacted me by email. Of the 39 who responded, 2 had recently had medical problems and I did not schedule an interview, although these were not chronic conditions. It is likely that those who chose to be interviewed were satisfied with their retirement. Some felt that they appreciated being able to have the opportunity to reflect (Derek, Bert). It is unlikely that anyone who is isolated or unhappy would volunteer to be part of the study, although it is possible that participation in research can be a way to offload frustration, as perhaps demonstrated by the one outlier interviewed who was solicited as she does not use IT.

The following tables and graphs show the demographics of those who responded to the survey which included the sub-set that were interviewed. The demographics captured included age, gender, marital status, number of years retired, level of

education, level of education taught, provincial distribution and geographic location. Where appropriate, the same categories are addressed for the interviews.

### 4.2.1 AGE

Table 4.1 Age of Respondents

Answer Options	Survey		Interviews	
	Response Percent	Response Count	Response Percent	Response Count
under 50	0%	0	0%	0
50-54	3%	3	5%	1
55-59	13%	13	11%	2
60-64	15%	15	16%	3
65-69	32%	32	31%	6
70-74	26%	26	31%	6
75 or older	11%	11	5%	1

The age of the respondents ranges between 50 and 82. Given the comparatively small number of interviewees and eliminating the extremes, it would appear that the ages of the respondents that were interviewed were approximately the same distribution as those who responded to the survey.

### 4.2.2 GENDER

Seventy two (72.7%) females and twenty seven (27.3%) males responded to the survey. Only one respondent skipped the question about gender. For the qualitative research, I interviewed fourteen females (70%) and six males (30%), a proportion which is consistent with the survey. This is also similar to the proportion of female to males in the teaching population. According to research conducted by Statistics Canada in 2006, 74% of teachers in Canada are female and 26% male (statscan.gc.ca, no date a). Although there are a larger proportion of female than male teachers, gender difference did not appear to be a factor, as there is no gender difference for teachers in Canada in required qualifications, pay-scale, pension or benefits. An analysis of the results of the strengths of the social networks and levels of activities of the respondents showed no noticeable gender differences.

### 4.2.3 MARITAL STATUS

The following table shows the marital status of the respondents for the survey and interviews.

Table 4.2 Marital Status of Respondents

What is your marital status?				
	Survey		Interview	
Answer Options	Response Percent	Response Count	Response Percent	Response Count
Single	7.10%	7	10.50%	2
Married/Partnered	70%	70	84.00%	16
Divorced/Separated	8.10%	8	0%	0
Widowed	14.10%	14	5.50%	1
Other (please specify)	0.00%	0	0.00%	0
answered question		99		
skipped question		1		

For those interviewed, none were currently divorced although two were in second marriages. In general, and given the small number of interviewees, the proportions for the survey and interviews were of the same order of magnitude. While it may be assumed that there are differences for single and partnered retirees, the results showed that there were no significant variations in the level of activities and social networks, although the specifics may have been different.

#### 4.2.4 NUMBER OF YEARS RETIRED.

The following table shows the distribution of number of years retired, the age at retirement and current age for those interviewed.

Table 4.3 Number of Years retired vs. Age at Retirement

# Years Retired	1	1	2	2	2	3	4	4	5	5	6	8	10	14	14	15	15	17	27
Age at Retirement	49	57	58	67	67	62	65	70	55	55	59	66	60	45	57	50	58	57	55
Current Age	50	58	60	69	69	65	69	74	60	60	65	74	70	59	71	65	73	74	82

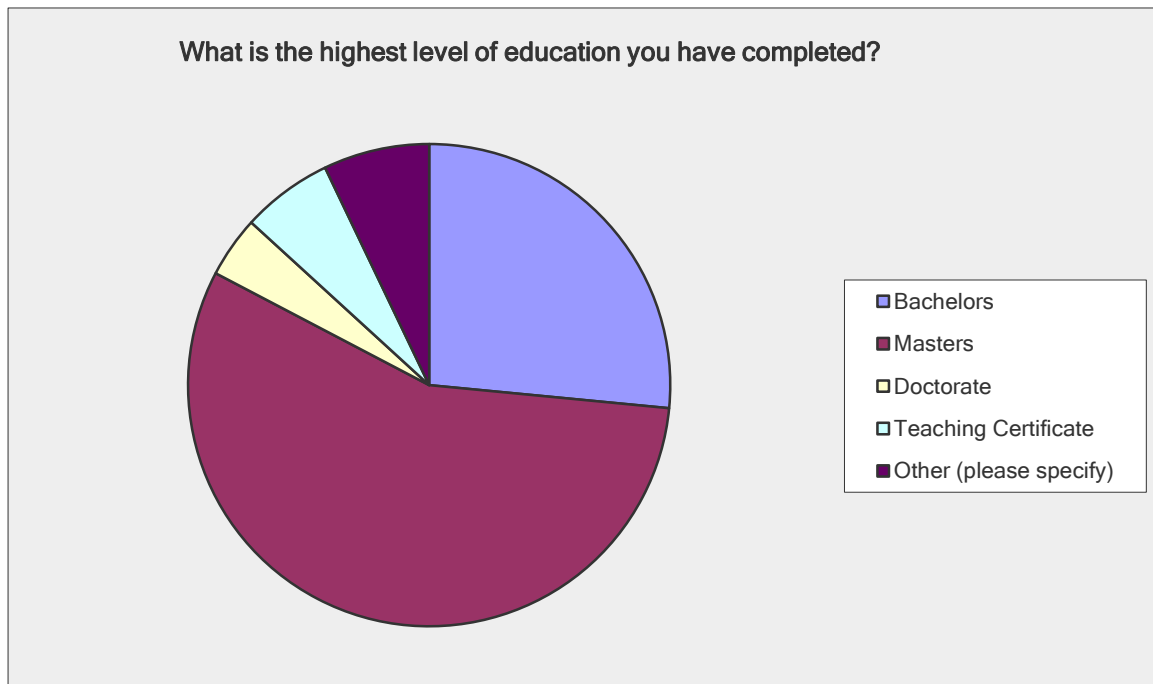
For those interviewed, at the extremes, one fifty year-old has been retired one year, but this was due to disability. The oldest, an eighty two year-old has been retired twenty seven years. The average number of years retired is 8.2 and the average age at retirement of the respondents is 66.5. The average age of retirement for all employees in Canada in 2009 was 66 (statscan.gc.ca no date b).



#### 4.2.5 LEVEL OF EDUCATION

The following figure shows the level of education attained by the respondents to the survey.

Figure 4.1 Level of Education of Respondents to Survey



Other - Categories that were not specified in the survey and were identified by the respondents: Certificate in Administration, Health Record Administrator, B Music, MA (Psychology).

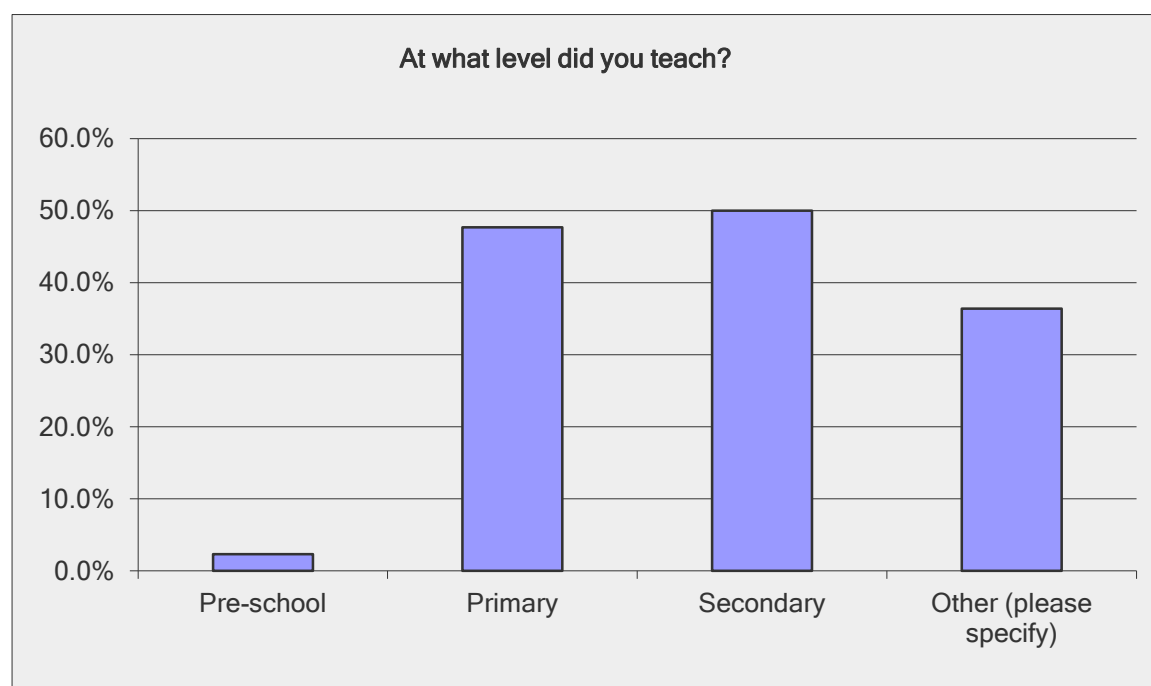
In order to teach, the minimum level of education required is a teaching certificate or bachelor degree (27%). There are a significant number of respondents with a Master's degree (56%). It is possible that those with a post-graduate degree have a greater interest in research and were motivated to help. From an analysis of the results there

appeared to be no relationship between the level of education of the respondents and the factors addressed in the research question.

## 4.2.6 LEVEL OF EDUCATION TAUGHT

The following figure shows the level of education taught by the respondents

Figure 4.2 Level of Education Taught



Other - Categories that were not specified in the survey and were identified by the respondents: Students who are deaf or hard of hearing (all ages), Special Education, Music, Administration, Vocational School, Supervisor of Language Arts and ESL (English as a Second Language), University as well as High School.

The results show that, apart from pre-school, there was an even distribution of levels taught. This was reflected in the interviews and there appears to be no significant relationship between level of education taught and the factors that address the research question.

## 4.2.7 PROVINCIAL DISTRIBUTION

Of the one hundred who responded to the survey, ninety seven answered the question concerning location. 36 (37%) taught in BC, 36 (37%) in NS and 30 (31%) in Ontario. In addition, 14 (14%) indicated that they had taught in other locations including Canadian provinces of Manitoba, Quebec, Alberta, Saskatchewan, New

Brunswick, Newfoundland, Prince Edward Island; as well as Caracas (Venezuela), London (UK), New Jersey(US), Melbourne (Australia). For the qualitative research, the split between provinces was 9 from BC (47.3%), 5 from NS (26.3%) and 5 from Ontario (26.3%). There were no noticeable provincial differences found in the results of the research.

Although BC teachers had experienced significant political turmoil between their union and the government while they were teaching, there appeared to be no correlation between the location of the respondents and the elements that addressed the research question.

#### **4.2.8 GEOGRAPHIC LOCATION**

Of those who responded to the survey, 88 (90.7%) lived in urban areas and 25 (25.8%) in rural and 15 (15%) had lived in both. Three respondents skipped the question. For those interviewed, 13 (68%) lived in urban areas and 6 (32%) in rural. As this distribution is a reflection of the general population it is likely not significant that there were more urban than rural participants. There appeared to be no differences in the trends of the factors relevant to the research question between rural and urban respondents, although it could be expected that communications would be more important in rural areas. A possible explanation for this not being the case is that, on the one hand, those who are in rural areas could be expected to utilize more IT as face-to-face contact would be more difficult. On the other hand, many who live in rural areas do so because they value a quieter life-style

### **4.3 RESULTS**

#### **4.3.1 OVERVIEW**

This section deals with the results of the research and the elements that relate to the research question. It addresses the research question as applied to the research sample, including changes in identity, the transition experience and the impact of utilizing IT. Based on the findings from 100 respondents surveyed and 19 interviewed, I deduced the argument of my thesis, based on retired teachers in Canada. Unless specifically stated, the results of the research appear to be

independent of the demographics (ie. age, gender, marital status, number of years retired, level of education taught, geographic location).

Based on the research, following is an analysis of the impact and influence of all the elements contained in the Conceptual Model (Fig 2.1). The table below shows the responses of the research sample to the elements showing the progression during transition.

Table 4.4 Analysis of Research Question Elements

Who	#yrs	IT Utilized	Activities/ Networks during Transition	Ties during Transition	Self-worth	Continuity	Comment on IT Usage
Liz	0	e-mail, web site, on-line booking systems, GPS, e-mail, google  email with clients for weddings etc.  email for communications email, texting, iPhone, iPad, FaceTime	Ran B&B  Became a lay chaplain  Clothing group - mindfulness <b>Social Contacts</b>	Friends, family, guests  Friends, family, clients  Friends, clothing group Husband, friends, children, teacher colleagues	Apprehensive  content  Well adjusted, content	Used social skills, psychologist training  Used social skills, psychologist training. Always aware of mindfulness  Mindfulness	I love the technology  I like to be connected. That is not only a technology thing but a personal thing too.
Anita	0	For re-union and general: Facebook, spreadsheets, Macbook, iPad  e-mail, Google	Hockey, skating, knitting, quilting  <b>Social Contacts</b>	Spouse, friends, children, teacher colleagues  Large family - mostly teachers	Positive, more relaxed, less stress	Likes organizing, positive can-do attitude	Sometimes I think I would lose contact with people. It's convenient to do things like helping my nephew with resume and I can do this from home. Things like that make it much more convenient and quicker
Beverley	0	Needed tech to teach  Email; Use VRBO – search engine Web page (done by 3rd party) Email, texting	Volunteer teaching overseas  Travel Photographer, sculptor <b>Social contacts</b>	Spouse; Nephews  Book club, friends	Positive since retiring	Teaching	It is my camera and my record maker
Derek	0	Needed tech to teach	Volunteer teaching overseas	Spouse, children	Positive since retiring	Writing/teaching	It is a vehicle for expression

		Web page, word processing, i-phone Skype with sister in Australia	Writer <b>Social Contacts</b>				
Susie	0	email, search engines, GPS  email, e-reader  email, on line banking, search engines	Triathlon, biking, hiking  Book club  <b>Social Contacts</b>	met new people doing these activities  Past colleagues  Spouse, siblings, children, friends	Felt good and enjoyed not having structure	Planning	I would feel isolated if I did not use technology
Trisha	0	email, music software  broadcasting and music technology Has web page  Skype, Twitter, email	Ran music school  Local radio announcer Volunteer jail chaplain  <b>Social Contacts</b>	students, parents  Staff/colleagues on program  Church friends, art group, gym, god-daughter	More positive after stopping teaching - received accolades   never looked back	Music skills  ability to put things together	I am constantly learning new digital technology
Dean	0	web page, email   email, Facebook, e-movies, You tube, Instagram	Motor sports with son  Gym, hockey, fitness  <b>Social Contacts</b>	   spouse, children, friends	Stressful last year - feels liberated and satisfied	Social skills transferred	I am the technical expert at home
Bert	0.25	Entertainment tech, email  Email, Facebook, landline, entertainment tech	3 months relaxing  Labourer	spouse, son  Spouse and friends	Burnt out/bored  More motivated to interact	  Physical activity	Technology is liberating

		Google drive, email, google, entertainment tech					
		Facebook, landline	Political involvement	Colleagues	Content – values freedom:	Political involvement/skills	
			<b>Social contacts</b>				
David	0.5	Cell phone, computer	Volunteer – non-profit art groups, food bank	Colleagues	Teaching stressful - felt fulfilled as volunteer	Uses skills - still hard on himself and has high standards. Encourages others to look beyond.	Without technology, I would be back to licking envelopes and making phone calls
		GPS, i-pad photos	Travelling	fellow travellers			
		WhatsApp daily email, phone	Social network	Son in Panama members of gourmet dinner club, neighbours, daughter, grandchild			
			<b>Social Contacts</b>	Spouse, friends			
Noelle	1	Groups mostly e-mail. Word processing. Managing music, editing slide shows, managing photos	wanted to be sequential - physical activities while she could  After spouse died, made a concerted effort to be constantly active, including travelling. Wrote family history	spouse (died after 9 years retirement), friends, children, grandchildren  Walking club.	Not the person you felt you were - felt loss of identity  Feeling of contentment - busy with friends. Activities require planning  Becoming more confident with age - took a while to not react to others expectations.	Planner then and now, physical activity then and now  but I now know I'm blessed to have been born with an outlook that is positive	I think I spend too much time on the computer. You use tech because of motivation – if you want to do something you do  Without technology, I'd be horrified. I gave my iPad to one of my kids and bought a mini-iPad to travel I wake up in the middle of the night and listen to streamed radio or things I have put on.

		email - friends and family	<b>Social Contacts</b>				
Pat1	2	Facebook, messenger, email  WhatsApp, messenger, email Skype, text	illness, forced to retire - rehab for 6 months  Volunteer as teachers aid for immigrants  Kayaking, hiking, skiing <b>Social Contacts</b>	Colleagues  Cross section of friends - retired teachers  Children	Needed completion - found first 6 months lonely  Made concerted effort to join groups - feels satisfied.	teaching skills - extrovert  Still want to be in learning situation	without technology, it would be another chore to get on the phone and organize things because it's so streamlined".
Pat2	2	LinkedIn to stay in touch. email, Skype, Search engines. On-line meditation routines  Dropbox, word processor, email  email, Skype	Meditation, travel - loved freedom  Book reviewer  <b>Social Contacts</b>	past colleagues, friends and family  Friends, family	Loved freedom. Had the time to reflect on who she was  "My identity did not change, but i have had the luxury of being able to appreciate and develop my true self	Teachers are always learners, meditated. Transferred professional collaboration skills	I can't function without technology! I really value it for basic simple use, but I don't care to use Ppt or spreadsheets anymore.
Heather	2	Long distance relationship with spouse - email. Tried to keep up with urban friends via Facebook and email - missed personal contact.  email, Skype	year 1: moved to rural area - gardening/organized community project  Year 2: bought cottage, kite surfed and entertained; kite surfed in Baja	Spouse, community members  friends in many places	Solitary/Low self esteem initially - gained 50 pounds	had been abused as a child - returned to home town	Without technology to stay in touch, I would go back to the city



		GPS, email, Skype, i-phone - dependent and would move back to city if no IT	Rug hooking, kite surfing	community of 'sisters and mothers'	Positive identity/satisfied	Always artistic - continues with rug hooking	
Jackie	2	None	Care-giving nephews family for 2 years - then friend followed by other nephew. In total 5/6 years caregiving.	Nephews and families	Low	Always low since childhood - loner	if you are not hooked up, you are the last person on the list. When your confidence is a bit lower, you think Damn – maybe if I was on internet I would know about things.
		None	Member of book club	retired teachers	low - feels she is an imposition as she needs to be phoned for information - feels that lack of confidence may be because of no IT usage	Never used IT - even when introduced at school. As a child, there was no TV. Always a loner with low self-esteem.	
			<b>Social contacts</b>	Mother, sister			
Nancy	2	email, Google, texting	Volunteer teaching 2 years	Spouse, teachers, 4 sisters, 2 brothers	Needed this for identity 1st year - not after 2nd year. Needed recognition	Feeling of being productive as a teacher Always did community work Desire to analyze	Without technology: Oh my lord, I would be very lonely and isolated.
		Facebook for advances in quilting world. Follows blogs of other creators	Sewing/quilting - works in store	Women at work	New identity		
		Blog technology	Attends lectures				
		Technology is needs based: email, Facebook, Pinterest	Has blog under different name		Projecting herself to readers		
		email - prefers text to phone	<b>Social contacts</b>				

Mark	4	<p>email, Skype</p> <p>Graphic software for presentation at golf club: . Skype, email, social media, twitter and research related software for research. Email, Facebook</p> <p>word processing</p> <p>email</p>	<p>Gradual transition - taught overseas and was then a literary coach</p> <p>Chair of golf club/member of band/volunteer in seniors home</p> <p>Writing a book about his father</p> <p><b>Social contacts</b></p>	<p>Staff at seniors home, band members, golf club</p> <p>wife, 2 sons, 2 brothers</p>	<p>helper</p> <p>helper/entertainer. Feels a positive identity as he is so busy</p>	<p>In band, directed school plays - self-image: helper. Teachers are entertainers</p> <p>Transferring skills - as a teacher he taught teachers to use technology</p>	<p>I mostly use email to stay in touch. I don't like the phone. I feel that it puts people in a position of having to respond even if they don't want to.</p>
Donald	Not yet	<p>Facebook, email, google for info (movies), WhatsApp (German friends)</p>	<p>Bridge, cycling, hockey</p> <p><b>Social contacts</b></p>	<p>Spouse, children</p> <p>Bridge, hockey, colleagues</p>	<p>Needs teacher status</p>	<p>Teaching, technology</p>	<p>I get notification of possible jobs.</p>
Sheryl	Not yet	<p>Reading newspapers on-line</p> <p>e-mail, web-sites</p> <p>Skype, WhatsApp, email, on-line theatre booking</p>	<p>Supply teaching/tutoring</p> <p>Gym, book club, volunteer</p> <p><b>Social Contacts</b></p>	<p>Made friends at gym, book club members</p> <p>Spouse, daughter, friends</p>	<p>Low as lost teacher identity and perceived self-respect</p> <p>Confident with social network -</p>		<p>Well, I suppose in a way I take technology for granted. If you don't use it you will drop off the face of the earth. It's necessary for everything.</p>

Ninette	Not yet	Tech to organize festivals. I listened to CD's on the computer – assigned groups and seating. We were in touch by email 4-5 times a day.	work with NS festival of music		Different identities with changes in circumstances - always felt positive	Music skills - work ethic	You really can't avoid technology in today's world. I consider myself in grade 1 with tech but can do what I need to do. In this day and age, you need to have at least a passing knowledge of technology whether you are dealing with finances or other things.
			Board of Canada Council for music				Today your correspondence is assumed to be by computer.
			Travelling/swimming	Travelling friend			
			<b>Social Contacts</b>	Family	Felt she was viewed more positively when she retired		Today your correspondence is assumed to be by computer.

During the interviews, each respondent was explicitly asked how they would feel if they did not have access to technology and whether this had an impact on their non-work identities and feelings of self-worth. The responses are contained in the table above. All but one, indicated that they felt that it was essential to their retirement experiences. The outlier felt that she was regarded as a 'nuisance' and would be included more in social activities if she used IT. The remaining 18 all frequently used IT for their activities, maintaining or creating new social contacts and access to information.

Table 4.21 shows the specific usage of IT in relation to the activities undertaken. As their activities and social networks evolved during transition, their usage of IT adapted to become purpose specific. Although Trisha felt transitioned immediately and initially used communication technology such as e-mail and Skype, she became a radio broadcaster 6 months after retiring and learned current broadcasting and music tools and has a web site. Initially Pat2 used tools for communication to stay in touch with friends and family, especially while travelling. A year into her 2 year transition, she became a book reviewer and learned to use Dropbox to collaborate with other reviewers. While Ninette does not feel retired, she bought a computer as soon as she stopped teaching, which she uses several time a day to stay in touch with friends and family and for activities such as organizing concerts.

IT was a facilitator for the activities and social networks that the respondents felt were meaningful and that contributed to their identities for those circumstances. With the exception of the outlier, Jackie, all the respondents believed that the usage of IT was a contributor to their positive feelings of self-worth. The outlier had an overall low sense of self-worth. She attributes this to not being connected and to causing additional effort for her social network to stay in contact with her.

With the exception of the outlier, all the respondents felt an overall positive sense of self-worth at the time of the interview. Of the 7 who felt transitioned as soon as they stopped working, 6 felt immediately satisfied and were avid users of IT. The exception, Liz, was initially apprehensive. She ran a B&B for a year and found this stressful, but as soon as she sold the business and became a lay preacher, she felt content. Initially she used hotel related software for her B&B but later she emailed

her clients to organize weddings and funerals. Of the 3 who took up to a year to feel fully transitioned (Bert, David and Noelle), all felt initially stressed or discontent. This could explain their need to take time to fully adapt. However, within a year, they were all engaged in other activities and their sense of self-worth was positive. All maintained or enhanced their social networks, engaged in new or existing activities and used purpose specific IT such as entertainment technology, GPS software and music applications. All used email and other communications technology to stay connected. Of the 5 who required 2 years to transition, initially 4 (Pat1, Heather, Jackie and Nancy) had a low feeling of self-worth, perhaps explaining why they needed 2 years to adapt. All took on new activities and with the exception of the outlier (Jackie) now feel that they have positive identities and avidly use appropriate tools and applications. All but Jackie found the need to stay in touch with friends and family through IT, especially if they were engaged in activities that took them away from home. Pat2 enjoyed the freedom and the time to reflect. However she only felt fully transitioned when she became a part-time book reviewer and felt that she had a meaningful identity. Learning skills such as Dropbox for collaboration helped with her confidence.

Mark took 4 years to feel fully transitioned. He always saw himself a 'helper'. He only felt fully transitioned when after a year of not teaching, he became involved in a senior's home and felt that he was 'giving back'. The use of search engines and email added to his positive identity and sense of self-worth. A year later, he became the president of the local golf club and used presentation software at meetings. These new identities enhanced his feelings of self-worth. The remaining 3 respondents still do not feel fully transitioned. Ninette has always felt a strong sense of self and does not feel transitioned as she is actively volunteering, which she regards as work. Since stopping teaching she is heavily involved in music related activities and uses available applicable IT such as scheduling and music software. She stays in touch with family and friends by using communications software. Both Donald and Sheryl are missing their roles as teachers and are still supply teaching. While they have not accepted losing their teaching identities, both are socially engaged and take part in activities, which give them positive identities for those circumstances and a general positive sense of self-worth. Since stopping work, both

frequently use IT to stay connected and tools such as theatre booking software to facilitate their activities.

Past experiences may also have an impact on the usage of IT. All the respondents were asked what personal or professional attributes and skills they carried through their transition to retirement. The specifics of these are contained in Table 4.13. The respondents' perception of their past selves had an impact on their current self-worth. Those who felt they left their careers on a 'high' were more likely to feel a positive retirement (Beverley and Susie ), while some of those who were forced out or under stress felt the loss of their teacher identity (Bert, Heather). Conversely, some who were under duress, immediately adapted to a positive retirement (Dean). Some of the characteristics were evident for specific activities (eg. Ninette and Trisha still use their musical abilities), and some carry through their personal attributes (Pat1 is an extrovert, Noelle is a planner). It was difficult to ascertain whether the outlier's low self-esteem was due to lack of communication or a carry forward of her past perception of herself, which may have resulted in the lack of confidence to use IT. As she was the only respondent who was not technologically active, it is not possible to generalize. Section 4.4 is focussed on Jackie.

From examining the responses of those interviewed, it would appear that they are a population that relate their feelings of self-worth to having activities that they perceive as useful and that are facilitated by technology. The next sections contain a more detailed analysis of the impact and influence of each of the elements contained in the conceptual model (Fig 2.1) and Table 4.4, followed by Section 4.5, the conclusion of this chapter, which includes a discussion which links the findings of the research to the conceptual model.

The following table, which was used as a reference for the factors discussed in the subsequent sections, is a summary of the interviews, showing the research sample, their demographics and how they responded to the questions.

Table 4.5 Summary of Results of Interviews

Name	Age	Involuntary/ Last years' experience	# years to transition	Age at retirement	# Years Retired	Description	Activity Change	Tech while Socially Active	Ties	Friend/Family	Good Last Year	Continuity	Social Identity	Financial Issue	Help Others
Anita	58	vol good	0	57	1	Retired teacher	n	y	y	b	y	y	n	b	
Bert	65	vol admin issues	3 months	62	3	Lower of leisure	y	y	m	b	y	n	maybe	b	
Beverley	71	vol good	0	57	14	Teacher/councillor	n	y	y	b	m	?g	y	n	b
Dean	50	invol - health	0	49	1	Retired teacher	y	y	m	b	y	n	n	n	
Derek	74	vol good	0	57	17	Teacher/ Writer	n	y	y	b	m	?g	y	n	b
Donald	65	vol good	6 - ready in 1 year?	59	6	Retired teacher	n	y	m	b	y	y	n	n	
Heather	60	vol difficult last year	2	55	5	Arts Administrator	n	y	y	b	m	b	y	n	maybe
Jackie	59	vol moderate	2	45	14	Retired teacher	y	n	m	w	m	y	n	n	b
Liz	65	vol tired of admin	0	50	15	Retired	y	y	y	b	y	g	y	n	b
Mark	69	vol staggered/moderate	4	65	4	Helper	n	y	y	b	n	m	y	n	b
Nancy	60	vol good	2	55	5	teacher	y	y	m	b	m	g	y	n	
Ninette	82	vol moderate/system changing	27	55	27	Arts Education Consultant	y		y	w	n	m	y	n	b
Noelle	1	vol good	1	73	15	Retired teacher	y	y	y	b	y	g	y	n	n
Pat1	69	vol resented admin	2	67	2	Teacher/book Reviewer	y	y	y	b	m	g	y	n	b
Pat2	69	invol - health	2	67	2	Teacher	n	y	m	b	m	m	y	n	n
Sheryl	74	invol - stress	8 (still not)	66	8	Retired teacher	n	y	y	b	y	m	y	n	b
Susie	60	vol good	0	58	2	Retired teacher	y	y	y	b	y	g	y	n	n
Trisha	74	vol not good	0	70	4	'Music expert'	y	y	m	w	n	?	y	n	y

Pension:

f = full; p = partial; d = disability

Ties s = strong; w = weak; b = both

Help: o = others; s = self; b = both

Friends/Family Social Identity y = yes; m = moderate; n = no

Friends/Family Social Identity y = yes; m = moderate; n = no

The following sections examine the individual elements and the relationships between them, if any, are identified.

### **4.3.2 FACTORS THAT IMPACT IDENTITY**

Identity, social identity and consumerism have been described in Chapter 2. While identity and social identity were not directly addressed in the survey, related questions dealing with social networks, activities, health and financial constraints were addressed. The identities of the nineteen respondents were explored during the interviews. With the exception of the outlier, all the respondents felt an overall positive sense of self at the time of the interview, which they attributed to a large extent to the usage of IT as a facilitator.

#### **4.3.2.1 Identity and Social Identity**

Despite the recognition that there are differences in Identity and Social Identity (Stets and Burke 2000), they are dealt with together as it is difficult in this case to distinguish between them based on the responses of those interviewed. Even some who answered that they have no social identity related to their profession, identified themselves as teachers, retired teachers or teachers combined with another designation (e.g. teacher/councillor).

During the interview, I addressed both individual and social identity. I used the theoretical foundation described by Stryker and Burke (2000) and Stets and Burke (2000), which provided an outline of what is meant by identity in the context of the research and asked all the respondents how they described themselves. To explore their identities, I enquired about their social networks and activities both while they were working and during retirement. All were dedicated to their careers and felt that while teaching, their identity as a teacher was the most salient. Many had challenging administrative and political issues during their careers and while they may not have felt a strong sense of loyalty to their institutions, a role which gave them a strong sense of self-worth was that of a teacher.

I also explored whether the respondents had a sense of Social Identity, valued interaction with past colleagues, and exhibited behaviours that were influenced by



their profession. While this is not a comprehensive indication of Social Identity, it does show whether there is some feeling of importance in keeping in touch and maintaining a teacher identity.

Although only 8 (42%) stated during the interview that they felt a sense of social identity, in their description of their current designation, 12 (63%) used the word 'teacher' (including retired teacher or teacher + other descriptor), indicating a strong teacher identity. The following table shows the breakdown of the descriptions and the corresponding number of respondents.

Table 4.6 Designation and Number of Respondents

<b>Retired</b>	<b>Retired Volunteer</b>	<b>Teacher</b>	<b>Retired Teacher</b>	<b>Teacher + Other Descriptor</b>	<b>New Designation</b>
1	1	2	7	3	5

There was variation among the respondents in how they chose to identify themselves. The majority, 12 (63%), used the word "teacher" when they described themselves and only 7 (36%) wanted to be identified as individuals. Some included additional descriptors (such as teacher councillor or retired teacher). A teacher designation was important and there also appeared to be some interest in maintaining their social identities. During the interviews, some of the respondents who included 'teacher' in their description of themselves also identified a sense of social identity and wanted the feeling of belonging to a group while they were transitioning to retirement. These results are consistent with the survey where 41% of the respondents indicated that work colleagues were important or very important and 21% interacted at least weekly.

The following are excerpts from the interviews which illustrate the respondents' perspectives on their identities while they were transitioning from not working to feeling fully retired. The descriptions of themselves ranged from teacher to teacher + other, teacher + social identity, no social identity and no teacher identity

For most, keeping the designation of teacher appeared to be important. In addition, 3 (16%) added descriptors to the term 'teacher' (councillor, book reviewer and writer) and indicated a strong sense of teacher identity, although other designations were salient and afforded positive identities.

Pat1 described herself as a 'teacher/book reviewer' and Beverley as a 'teacher/councillor'.

*"... teachers die teachers". – Pat1*

*"I will always be a teacher councillor". – Beverley*

Only 2 (10%) chose to be identified only as a teacher, a designation that indicated that even though they may be happily retired and fully transitioned, they still felt a need to identify with their profession.

Pat2 describes herself as a teacher and also feels a sense of social identity, indicating that her identity remains associated with her profession. She regularly meets with past colleagues and they go and visit the school where they taught.

*"Teachers are sociable, interested in research and ideas – even after stopping teaching. Even when you have stopped teaching a long time, you are still interested in learning". – Pat2*

Of the sample, 8 (42%) felt some limited form of social identity, were members of their RTO, and occasionally met with past colleagues, although their primary focus was on non-teaching related activities and networks. Pat 1 describes herself as a teacher/book reviewer. When asked if she has a social identity, she replied:

*"I feel I have a foot in both camps" – Pat1*

indicating that while she has embraced her new situation, she is reluctant to completely give up the status of being a teacher.

Some of the respondents still maintained 'teacher' in their designation, but seemed to feel no sense of social identity. This seems to indicate that they feel the need to maintain the status of having been a teacher, but have fully embraced their new situation. Nancy works at a fabric store and also has an on-line blog documenting her fabric creations. Even though she has adopted a new identity, including giving herself a new name and email address for her vocation related activities, she still describes herself as a teacher.

Only 5 (26%) gave themselves a new designation and felt no sense of social identity. Some of the respondents took on new roles, associated with activities that became salient and do not associate their identity with teaching. Through a difficult transition, Heather went from being a very committed teacher to adopting a completely new identity. She describes herself as an arts administrator. Although it took 2 years to transition, she feels that she has left teaching behind, even though she had been previously awarded educator of the year.

*"I did not feel like I had lost my identity as a teacher. I felt that the system had changed and I no longer belonged. I found myself exhausted and 50 pounds heavier in retirement and I did not know who I was. I have an identity now, but I didn't during the transition to retirement. I have now left my identity as a teacher". – Heather*

Both Bert, who describes himself as 'a lover of leisure' and Ninette, an arts education consultant, feel that they have distanced themselves from their profession and associate their current identities with other activities.

*"I do not identify as a teacher and have no social issues with identity now that I am retired" – Bert*

*"My social network is primarily family and friends. If I socialize with teachers it is because they are part of a different network that we share" – Ninette*

The interviews showed a range between having a strong social identity to wanting to be identified as an individual. The majority still used the word 'teacher' in their designation.

Although only 8(42%) claimed no salience in maintaining contact with colleagues, 12 (63%) kept 'teacher' in their designation, leading to speculation that, independent of their current salient activities, the majority still felt that the status of their profession was an important component of their identity. As an example, Pat2 feels that she still retains the status of having been a teacher but now has the freedom to engage in whatever situation she chooses.

*".. my identity did not change, but I have had the luxury of being able to appreciate and develop my true self". – Pat2*

Only 2 respondents have not yet adapted to retirement and maintain a strong sense of social identity as a teacher, despite the number of years since retiring from full time teaching and are still supply teaching. (Sheryl, Donald). They both described themselves as 'retired teachers' perhaps suggesting that they were not fully satisfied with their interim roles and wanted to be identified with when they were full-time teachers. They seem to feel they need the status of being a teacher. Donald is struggling with the idea of losing his identity if he retires completely and indicated the importance of his identity associated with maintaining the status of teaching, relative to other activities.

*"I sometimes feel I am judgemental of myself. I am afraid of having a void. Having a few days (supply teaching) a week keeps me going. I know a teacher who is beyond retirement age who said – 'I'm not retiring'. If you retire, you are nothing! My status is gone' ". – Donald*

Donald still visits the school where he taught.

*"Teaching is part of my identity. When I'm in there I like talking to the secretaries and have a connection with the past. Teaching was really good to me. I got a lot of confidence and got a lot of compliments". - Donald*

Sheryl is struggling to maintain her primary identity as a teacher and is reluctant to give up her supply teaching, even though it does not give her a positive feeling of self-worth.

*“I have always had a lot of self-confidence because of my success in that field and I carried that confidence with me. As a supply teacher you are not given much respect so I have always worked very hard in the classroom to establish my authority to maintain that identity”. – Sheryl*

While the majority of the respondents reported a positive identity, had strong social networks and have fully embraced new activities, the need to identify with their profession remains and their identities are a combination of both their past status and their current situation. According to Stryker and Burke (2000), the roles that individuals find most salient is related to their being successful in that role. In the case of the retired teachers interviewed, the majority wish to keep their teacher designation as they likely feel that they had been effective educators. Where they included an additional descriptor, they could be indicating a feeling of self-worth in another role. The two who had not yet accepted retirement were likely to feel that their current situation was not meaningful or socially accepted. The few, who did not describe themselves as teachers, felt that they had moved on and that their non-teaching role currently gave them a stronger feeling of self-worth. Belonging to and identifying with a group is important to some individuals if they perceive that the group contributes positively to their identity (Tajfel 1972). In the case of the retired teachers, those that maintain a social identity are likely to do so because it re-enforces a positive sense of self.

In addition to identity and social identity, individuals can feel a sense of self-worth by what they have, rather than from their emotions.

#### **4.3.2.2 Consumerism**

Identity related to consumerism is based on how individual's feeling towards themselves and is influenced by what they have, not by what they do (Gilleard 1996) I did not explicitly address consumerism during the interview, but from the life-

styles and steady income it can be deduced that the respondents could continue with a satisfactory level of consumerism, which had a positive impact on their identity. With two exceptions, all felt that they had sufficient income. The activities they pursued involved acquiring consumer products, travelling, entertainment and the arts. All the homes I visited when interviewing in BC were extremely comfortable and contained many consumer products.

The survey results confirmed the trend. 82% of those surveyed felt that their financial status did not prevent them from pursuing the lifestyle they would like during retirement. 92% travelled, 82% joined or participated in club activities, 78% were engaged in some form of the arts and 90% in entertainment. Having the financial resources to consume products and engage in activities has an impact on self-worth. As all the respondents had financial security (including the two interviewed who said that, as well as wanting to maintain their teacher identity, they still work to supplement their income), consumerism can be assumed to be a positive component of their self-worth.

In summary, although it is difficult to identify a trend with a relatively small number of respondents, it would appear that the majority perceived their self-worth and identities as being positive. The one exception, Jackie, is dealt with later in the chapter as an outlier, as she was recruited for the research because of her differing perspective in many aspects of the study. The majority of respondents maintained a form of teacher designation and described positive identities and feelings of self-worth. There was a spectrum between those who felt a sense of social identity and those who saw themselves primarily as individuals. Those who did not feel a group identity deliberately chose not to participate in teacher related activities and did not feel that maintaining the connections would have a positive impact on their self-worth. All the respondents had the financial ability to continue being consumers during their transition to retirement.

#### **4.3.2.3 Social Networks**

There is a need to maintain social networks during the transition to retirement, as a senior's perception of themselves and their feelings of self-worth is closely tied to social interaction (Kloep and Hendry 2006, Atchley 1971). To explore factors that

impact identity, respondents were asked about their social networks and activities during the transition to retirement. During the interview, I explored in more detail how socially active the respondents were and with whom they interacted. All were socially active, which they related to their feelings of self-worth. With the exception of the outlier, they all relied on the tools and applications they used to retain existing and establish new social networks

The following tables, derived from the survey questions, illustrate the frequency and salience of the social networks engaged in by the respondents.

Table 4.7 Social Networks - Importance

Answer Options	Very important	Important	Neutral	Un important	Totally unimportant	Not Applicable	Important and Very Important	Response Count
Friends	75	21	2	0	0	0	96	98
Family	81	13	2	0	1	1	94	98
Individuals of like interest	30	45	11	3	1	2	75	92
Neighbours	11	51	28	5	1	1	62	97
Club members	10	38	18	4	2	18	48	90
Work Colleagues	7	34	31	10	3	10	41	95
Acquaintances	2	38	40	4	2	1	40	87
Students	6	19	23	10	5	25	25	88

Table 4.8 Social Networks - Frequency

Answer Options	Daily	More than once a week	Weekly	Monthly	More than once a year	Yearly	Not applicable	Daily + more than weekly	Response Count
Friends	27	40	17	5	1	1	0	67	91
Family	39	21	21	4	5	0	1	60	91
Neighbours	18	29	25	5	10	0	3	47	90
Individuals of like interest	4	22	31	19	5	1	3	26	85
Club members	2	16	23	15	0	1	25	18	82
Acquaintances	5	12	16	21	12	5	12	17	83
Work Colleagues	2	7	12	24	19	5	16	9	85
Students	3	5	7	5	13	3	41	8	77



While there are not sufficient numbers for statistical analysis, there appears to be a trend that a significant majority are socially active. From the results of the ninety eight who responded to the survey questions on social networks, the majority indicated that interaction with friends was slightly more important and frequent than with family (Important and very important: 96% vs 94%; daily vs more than weekly 67% vs 60%). As could be anticipated, there is a strong correlation between salience and frequency, friends and family being the most salient as well as having the most frequent interaction. At the other end of the spectrum, 2% interact with friends and 1% with family less than annually. None indicated that friends are unimportant and one ranked family unimportant and one not applicable.

Less than half stayed in touch with colleagues after they retired. 41% regard them as important and very important and 31% as neutral although 21% see them weekly or more. Although they see their neighbours often, respondents ranked them as less important than family and friends. Club members are relatively unimportant but individuals of like interest rank third highest next to family and friends (75% important and very important). These categories are not mutually exclusive.

These results indicate a respondent population who are socially active, mostly with family and friends, although there is extensive interaction with others. The trend of interacting frequently with friends and family during the transition to retirement is consistent with the findings of Hogg et al (1995) and Reitzes and Mutran (1996). The caution is that it is possible that only those who are socially active would respond to the survey and therefore the results may not be an accurate reflection of the wider Canadian teacher population.

During the interviews I explored the social networks of the respondents in more depth, including ties, the contacts formed with individuals who have like interests or characteristics. While the social networks were consistent with the survey, the ties gave a more in depth picture of social interaction. I asked with which family members, friends and others they mostly interacted. When I felt

that there were sensitivities, for ethical reasons I did not probe, with the result that the following is not an exhaustive representation of social networks, rather an identification of those that were described. All the respondents are to some extent socially active. Interaction ranged between families, friends and members of groups. Strong ties were mostly with family and friends, while weaker ties tended to be formed with members of groups.

The 15 who were parents mostly had a good relationship with their children, 12 had strong ties, 2 weak and 1 no interaction. Of the 16 married respondents, 15 had strong ties and one weak tie with their spouse. Spouses and children played an important part in many of their daily lives. For example, Susie goes on many hiking trips with her husband and children as well as with friends. Nancy comes from a large family of teachers and they form much of her regular social interactions. Beverley and Derek volunteer together and worked on collaborative projects.

Over 70% felt that having and maintaining close friends was important to maintain their feeling of self-worth, although this appeared to be more difficult following retirement, as illustrated by the following interview excerpts. Of those interviewed, 14 had strong ties and 5 had weak ties with friends.

*"I have not a lot, but enough friends. They are long standing and were formed while I was teaching and during my political activities. I stay in touch with past colleagues but don't meet with them regularly." - Bert*

*"It's easier to form superficial relationships – what is harder is making stronger relationships. If I had to say something about the difference between my work and retirement relationships I'd say I now have fewer friends I feel close to than when I was teaching. " – Pat1*

Although 15 indicated that they were in contact with their colleagues from the schools where they had taught, only 5 had strong ties. The 2 who were single (Ninette and Trisha) were socially active, but their networks were primarily those who shared in their activities, rather than friends and family.

These results are consistent with the findings of Licoppe and Smorede (2005) and Hogeboom et al (2010) that if a relationship is important, ties will be maintained. Most of the respondents mentioned strong ties with their family members. Some had weaker ties with siblings due to distance. Ties with colleagues tended to be weaker. These social networks likely gave the retirees independence during the transition, which contributed to their feelings of self-worth (Kloep and Hendry 2006). During their transition to retirement, the strong ties with family and friends were important during the period when the retirees could form weak ties, such as with club members, who would broaden their experiences (Granovetter 1973).

There is evidence that friends and family become more important during the transition to retirement (Salovaara et al 2010) and that retirement is an opportunity to apply skills from previous roles to new situations (Kim and Feldman 2000). Overall, the trend from the survey and interviews is that of an engaged and active population who value social interaction during the transition to retirement. This is a significant factor in their self-worth. Their positive identities are likely related to their regularly engaging in social networks. They rated friends and family as significantly more important than past colleagues. Many were also engaged in group activities and formed both strong and weak ties with group members. Social Networks are also important for maintaining and creating contacts that facilitate activities, which together impact the identity and self-worth of the individual.

#### **4.3.2.4 Activities**

According to Nuttman-Shwartz (2004), Gall et al (1997) older adults will engage in activities that interest them, either those they had undertaken prior to retiring and/or new undertakings. Identities and their salience are influenced by roles and their associated networks (Atchley 1971). Questions in the survey addressed both the salience and frequency of the activities and networks of the respondents. The interviews explored these in more detail. All the respondents were involved in at least 3 activities which contributed to their salient identities. All but the outlier relied on IT to facilitate these activities.

The following tables from the survey show the results regarding the activities undertaken by the respondents.

Table 4.9 Activities - Salience

Answer Options	Very important	Important	Neutral	Un-important	Totally Un-important	Not applicable	Important and Very Important	Response Count
Studying/Reading/Writing	62	25	3	0	0	1	87	91
Travelling	35	43	10	1	2	1	78	92
Entertainment (Movies/TV/Theatre/Concerts/on-line games)	31	47	8	3	0	1	78	90
Sports/Fitness	46	30	4	3	2	2	76	87
Club/Organization Membership	33	37	6	2	1	3	70	82
Volunteering	28	39	11	1	0	6	67	85
Arts (Photography/Art/Music/Crafts)	30	31	12	1	2	2	61	78
Book Club	15	19	4	2	3	30	34	73
Teaching/Instructing/Coaching	13	19	9	1	0	23	32	65
Baby-sitting/Caregiving	13	19	3	0	1	32	32	68
Cards/Bridge	10	11	11	4	7	23	21	66

Table 4.10 Activities - Frequency

Answer Options	Daily	More than once per week	Weekly	Monthly	More than once per year	Yearly	Not applicable	Daily + Less than weekly	Response Count
Studying/Reading/Writing	72	12	3	0	0	0	1	84	88
Sports/Fitness	38	35	7	2	0	0	0	73	82
Entertainment (Movies/TV/Theatre/Concerts/on-line games)	26	16	15	19	10	1	1	42	88
Club/Organization Membership	8	26	21	20	0	1	1	34	77
Arts (Photography/Art/Music/Crafts)	15	18	17	15	4	0	2	33	71
Volunteering	6	19	19	18	12	2	4	25	80
Baby-sitting/Caregiving	4	13	3	7	7	0	9	17	43
Teaching/Instructing/Coaching	4	12	5	10	5	1	5	16	42
Cards/Bridge	1	7	8	6	11	2	6	8	41
Travelling	0	1	6	17	46	14	1	1	85
Book Club	0	1	0	33	0	0	8	1	42

Additional activities that were not specified in the survey that were identified by the respondents were: shopping (4 participants), entertaining (3 participants), pets (3 participants), gardening (7 participants), home maintenance (5 participants), Church (7 participants), cooking (3 participants), fishing (2 participants), appointments related to health (2 participants), cottage, camping, sewing group (2 participants), spirituality, political activism, tutoring/teaching, safari guide, educational writing (1 participant each).

The tables are sorted according to salience and to frequency of activities. Although there is not always a direct correlation between the salience and frequency of specific activities, the results are consistent in that they demonstrate that being active plays a significant role in the identity of an individual. However, the results indicate that the most salient activities are the most frequently undertaken (studying and sports/fitness). Other activities that are highly ranked as important, occur, by nature, infrequently (travelling, entertainment and volunteering). At the lower end, activities that are ranked as less than 30% salient, as could be anticipated, occur infrequently (care-giving, playing cards).

The results of the survey show a population that both value their diverse activities and engage in them frequently, suggesting that the demographic are generally active and their identities for these activities are positive. The activity that was mostly undertaken by the respondents, often on a daily basis, is studying/reading/writing. The survey question made no distinction between the 3 activities or whether they were for pleasure or self-development. This result could perhaps be anticipated as the teacher demographic have dedicated their working lives to learning and teaching.

*“We are teachers which means life-long learning”. Derek*

While these are solitary activities, the survey indicates that the respondents were also heavily engaged in many other activities that involved social interaction. Sports/fitness, entertainment and arts were ranked second and third and fourth. Other activities included volunteering, club membership and

travelling. The frequency was dependent on the activities. Volunteering was mostly weekly, travelling more than once per year, while participation in sports activities was mostly at least once per week. Activities that anecdotally were anticipated to be high, but were ranked low, were caregiving, teaching, playing cards and book clubs.

The interviews confirmed the trend of an active and engaged demographic and allowed for specific activities to be identified. Many interviewees indicated that more than one activity was salient. The most popular activity was participation in the arts (70%), including rug hooking, music administration, radio announcing, fabric making, sculpture and photography. Over half (58%) were engaged in sports activities that varied from hockey, motor bike racing, kayaking, biking, gym and fishing. An equal number valued volunteering (58%), ranging from political activities, senior's homes, music festivals and education. While the salience and frequencies of activities between the survey and interviews differed, possibly due to the small number interviewed, there was a consistent pattern of active older adults, a major factor that has an influence on identity (Atchley 1971).

Some of the respondents are currently engaged in activities that could be solitary, but none are isolated or disengaged. For example, even those who garden are engaged in at least two other activities. Donald, who bought a dog and walks him daily, enjoys meeting and talking to people on these walks. He likes to bike on his own, but he also plays bridge and hockey, where he has social networks. Those who kayak, hike and meditate, do so as group activities.

In summary, those I interviewed are involved regularly in at least three activities. While some were solitary, others involved group activity and none of the respondents were socially isolated or disengaged. Although there is a difference in the salience and activities between the survey and interviews, the numbers are not sufficient to be meaningful. It is likely that being active is an important factor in their positive identities. The caution in deducing a



generalizable trend is that those who are not active would perhaps not participate in the research.

### **4.3.3 FACTORS THAT IMPACT TRANSITION**

The transition experience of the retirees was explored during the interviews. Transition was defined to the interviewees as the time from when they stopped working to when they fully accepted the status of being retired. The semi-structured interviews focussed on the factors that impacted the respondent's transition to retirement experience (conditions of retirement, last years at work, health, financial security, continuity and disengagement), how this impacted their identity and how they used IT to facilitate the transition. After I explained the purpose of the interview, that it was being recorded, that it would be confidential and that they could stop at any time, I asked the general open ended question, "Tell me about your retirement"? This generally led to a description of their transition and changes in identity.

#### **4.3.3.1 The Transition Experience**

The description of transition to retirement being a spectrum, not an event, and that the time taken to acceptance of retirement varies according to several circumstances (Nuttman-Swartz 2004, Atchley 1976), is contained in Section 2.4. This was useful in understanding the responses to the questions during the interviews. For example, during the interview, I asked the respondents how many years it took them to feel fully retired. The following table shows a breakdown of the responses.

Table 4.11 Number of Years to Transition

<b>Immediate</b>	<b>Up to 1 year</b>	<b>Up to 2 years</b>	<b>4 years</b>	<b>Not Retired</b>
8	3	5	1	2

As I interviewed only 19 respondents, it is not possible to establish a trend, but 11 (58%), over half, felt that they had transitioned within a year and 16 (84%) within two years.

Whilst there was no apparent pattern for transition, those who were interviewed could be categorized as part of a spectrum. Some stopped teaching completely and focussed entirely on non-work related activities. Some took on pseudo employment, paid or as volunteers, and some continued to teach after they had retired from the school system. For their primary activities, there was a large variation among the respondents. Of those interviewed 9 (47%) maintained the same primary non work related activity into retirement. These ranged from the arts, physical activities and political activity. The activities of the 10 (52%), whose primary activity had changed, included a variety from kite surfing to rug hooking; owning a book store to meditation; running a B&B to becoming a lay preacher and kayaking to working in a fabric store. The results are consistent with Hogg et al (1995), who reported that individuals put an emphasis on activities which interested them and that their behaviour was dependent on the salience of those activities, including those transitioning to new situations. Some older adults seem to need structure (Paul and Batnick 2010), and engaged in activities such as joining clubs, while others value their freedom and flexibility (Kloep and Hendry 2006) and took up activities such as kite surfing and motor bike racing.

Consistent with the finding of Nuttman-Swartz (2004), while the outcome of the transition was generally positive, the time-frame varied. Some transitioned almost immediately and generally had a positive experience. While Liz initially felt apprehension, her transition was immediate.

*“My initial feeling was that it would take 2 years to transition, but I have found it’s not the case – maybe due to long summer holidays” - Liz*

The majority felt fully retired within one year. Noelle, felt fully retired after a year, likely as she is active with a positive sense of self-worth.

*“I felt angst before retiring and felt that you are not the person you introduced yourself to be”.*

Once she retired, her attitude changed.

*“I figured that, unlike some others, if I am retiring, I am retiring – I don’t have to be a supply teacher. I don’t need to go back (to school) for lunch. That was then, this is now. There are so many things in this world to explore. Here I am 15 years later, having broken an ankle in Poland, and mucked up my knee in Yosemite”. – Noelle*

Consistent with the findings of Paul and Batnick (2010), Pat2 took two years before she had accepted her retired state and found that creating a structure for herself eased the process.

*“I found the first 6 months quite lonely. Then I felt better because I was starting to make better connections and felt attached to groups. I am an extrovert. I like to be with people and I like to see someone at least every other day, so I set up a structure and that sets up my social needs”. - Pat1*

Although Mark only felt fully transitioned after four years, he found the experience positive, likely because he became an active volunteer, which has also given him a new social network.

*“Transition to retirement has been good for me because I have been so busy”. - Mark*

Two of the respondents have not yet transitioned and feel that they need the identity of being a teacher. Sheryl is still supply teaching and has not accepted that she does not have the recognition she felt when a full-time teacher. Donald feels that he will have no status if he stops teaching (see section 4.3.2)

Overall, with the exception of the two still supply teaching, the transition appeared to be successful for most of those interviewed and all but 1 (who is dealt with as an outlier) have a positive feeling of self-worth. As all the respondents were active and socially involved, it seems that these are significant factors that lead to a successful retirement while age and age at retirement appear to have little impact. A factor may be that all teachers have

extended summer holidays and become accustomed to not teaching for an extended period. In addition, while they are dedicated to their students, each year the teachers lose the previous year's cohort. Over the years, they had learned to accept this loss, which may be a factor in the ease of the transition to retirement.

#### **4.3.3.2 Conditions of Retirement**

There seemed to be no consistency in the reasons for when and why retirement of the respondents occurred and how long they took to transition. According to Jensen and Øverbye (2013), retirement can occur according to one of three categories, push, pull and jump, which have been described in Section 2.7.1. From the interview, 16 (84%) indicated that they retired voluntarily and 3 (1.6%) were not ready to stop teaching. Given the small number of interviewees, these percentages are consistent with the survey, in that the majority retired voluntarily.

During the interviews, I asked the respondents about their last years at work as well as the conditions of their retirement. Of the 3 that retired involuntarily (push), 2 were due to health and 1 due to stress. Sheryl was not ready to retire but was forced to do so as she had suffered from stress and the union negotiated that she would receive a pension if she took early retirement. She did not leave teaching but, unsuccessfully, ran a tutoring business for two years and is still supply teaching. Dean was forced to retire due to ill health. His last years of teaching were stressful, but he felt transitioned immediately and is enjoying being retired. Pat2 was 67 when she retired involuntarily, due to health issues, had a moderate last year and felt she had transitioned within 2 years. These examples demonstrate that there is not necessarily a correlation between the last years of work experience and the time taken to transition. This is discussed further in 4.3.3.

There are many reasons why employees will want to leave their employment voluntarily (pull). Except for those whose occupation is of high salience, there is not necessarily a correlation between the commitment to work and attitude towards retirement (Glamser 1976). In the case of teachers, while they are

respected by the general community, their profession is not regarded as being of high salience (such as being an ambassador) and they can maintain their status but still feel committed to their new situation. For teachers, work satisfaction is intrinsic. They enjoy their students but often, due to administrative issues, have no loyalty to their institutions. When they stop teaching, they will miss their students, but will likely not miss their status. Their self-worth likely does not only come from having the standing of being a teacher. When they retire, they usually find other social networks and activities which give them satisfaction and positive identities in new roles.

Nancy had a good last years' experience and felt fully transitioned in 2 years. She retired when she felt the time was right and she wanted to leave with a positive feeling of self-worth.

*"I retired after 33 years of teaching. I was 55 and I could have worked another year but wanted to retire while I still loved it". – Nancy*

For some, the last years of teaching is stressful and they are no longer feeling satisfaction with their day to day teaching and they will feel relieved when they choose to retire (Quick and Moen 1998). Bert's job teaching youth with psychiatric needs was stressful, although he enjoyed it. His retirement was voluntary, precipitated by administrative changes and he looked forward to retirement and it took only 3 months for him to transition. Although he was teaching during the labour disputes in BC (Chapter 1) and was politically active, this did not impact his retirement. His retirement was precipitated by stress and he wanted to leave while he still felt that he could still be a contributing member of society.

*"The management of the hospital went sideways and instead of 4 teachers, I was the only one. I did not have enough gas in the tank and energy needed to take on a job like that. I couldn't go back to work – I value my freedom. I have 30 more years". – Bert*

Two examples of voluntary retirement, although for different reasons, are Ninette and Beverley. Ninette's last few years at work were extremely difficult, which impacted her emotionally and although her retirement was voluntary, she left while under stress and immediately felt relieved and fully retired.

*"I was ready to retire – it was time and the school system was changing. I did not have the energy to stay until I saw the benefits". – Ninette*

Beverley's reason for voluntary retirement was pressure of 'ageism' from colleagues and employers (Rudman 2006). She retired voluntarily, enjoyed her last years of teaching and felt transitioned as soon as she retired.

*"It was time to retire and make place for younger teachers. There is resentment for those who stay too long". – Beverley*

While Ninette and Beverley both felt retired as soon as they stopped teaching, their last years of work experience were completely different. The relationship between the conditions of the last years of work and time to transition is discussed in 4.3.3.

Some teachers have planned for retirement, feel that this will be an opportunity to explore and enjoy new opportunities and leave employment with a feeling of satisfaction and accomplishment (jump) (Reitzes and Mutran 1996). Consistent with Continuity Theory, skilled employees, such as teachers, may have the attributes and attitude to transfer their skills to new ventures (Kim and Feldman 2000). While some teachers enjoyed their working experience, they are able to retire with a pension at a relatively young age and still use their teacher specific skills to enter into new ventures.

Derek enjoyed teaching English and was a writer before he completed a Doctorate in Education a few years before retiring and wanted a new experience. He felt transitioned immediately.

*“My shift into retirement came naturally from finishing teaching to getting a PhD and then being accepted to University of Victoria as a sessional teacher. I felt that I was ready to retire and try something new”. –*  
Derek

He now continues to use his writing skills and together with Beverley has published a book.

On the other hand, Liz wanted to try something other than teaching, retired early at age 50 and felt transitioned immediately. She was tired of the bureaucracy in BC and was running a B&B part-time while teaching. She was looking forward to being able to devote herself full time to what had previously been a hobby. Although she received a reduced pension, she had sufficient income from running the B&B and felt refreshed and a sense of freedom.

The examples described show that there is no consistency in either the reasons for retirement or the length of the transition period. The following section examines the relationships between the last years of work, length of transition and voluntary vs involuntary retirement

#### **4.3.3.3 Last Years of Work**

How the last years at work impacts the retirement experience differs according to personal circumstances. According to Kloep and Hendry (2006), some who have been forced to retire will be more likely to have a negative retirement experience. On the other hand, if work conditions are stressful, retirement could be a relief (Quick and Moen 1998). Those who have a positive attitude are likely to have the same attribute when they leave work (Armstrong Stassen 2008). Conversely, if an employee feels their work is of importance, retirement can be difficult (Kloep and Hendry 2006). The following tables, deduced from the interviews, show the relationship between whether retirement was voluntary or involuntary and whether the last years' experience was good, moderate or unsatisfactory, as well as the amount of time to transition.

Table 4.12 Last years of work experience vs. Conditions of Retirement

	Last Years' Experience		
	Good	Moderate	Unsatisfactory
Voluntary	8	3	5
Involuntary		2	1

Table 4.13 Last years of work experience vs.  
the number of years taken to transition.

	Last Years' Experience		
	Good	Moderate	Unsatisfactory
Within 1 yr	6		4
Within 2 yrs	1	2	2
>2 yrs	1	3	

It would appear that none of those who retired involuntarily had a good last years' experience. For those who retired voluntarily, the last years' experience was equally split between good and a combination of moderate and bad. There also appeared to be no relationship between how long it took to transition and the last years at work for those who felt fully retired within a year. For those who took longer to transition, there was a small bias towards a moderate to bad experience, but the numbers are too low to establish a trend.

As described in Chapter 1, Teachers from BC experienced the most political turmoil during the years they were teaching and the ongoing dispute was only settled in 2017, after the respondents had retired. Of the 9 BC respondents, only 1 retired involuntarily and that was due to ill-health. Less than half (4), had a good last years' experience, 1 moderate/satisfying and 4 bad. However, only 1 of these 4 resented the administration issues. Of the 5 NS teachers, 2 had a good last years' experience, 2 moderate and 1 difficult. Only 1 identified administrative issues. Similarly of the Ontario teachers, 2 had good last years, 2 moderate and 1 stressful. Despite the small number of respondents, these findings indicate consistency between the Provinces in that there is no easily identifiable trend. This perhaps means that the labour disputes were not a significant factor in the teaching experience as the teachers were dedicated to their students, even if not to the institutions.



#### **4.3.3.4 Health**

Not being inhibited by health issues is a significant factor during the transition to retirement. According to Salovaara et al (2010), provided retirees remain in good health and are able to manage financially, they have the time to become socially connected, interact more with family and friends and enhance their social networks. From the results of the survey and interviews, health was not a significant issue that impacted a satisfying transition experience. Of those surveyed, 85% indicated that health did not prevent them from engaging in activities that they had planned for during retirement, 8% were inhibited and 6% had problems periodically. Five respondents skipped the question.

None of those interviewed indicated that they were currently constrained by health issues. One is anticipating problems, being pro-active and has made plans for the future

*“I took piano lessons. I have an inherited degenerative eye condition and will likely lose my sight if I live as long as my mother, I can play piano when I can’t see”. Noelle*

Some of those who retired involuntarily did so because of health reasons. However there is no evidence of a relationship between the health of the respondents and the ease of transition as none of them are currently restricted. Even though the three who retired involuntarily did so for health and stress related reasons, they are now in good health. However, this is not an entirely accurate indication as 2 survey respondents indicated that they were willing to be interviewed, but could not within the time frame, due to ill health. It is also unlikely that anyone with significant health issues would respond to a survey or agree to be interviewed.

#### **4.3.3.5 Financial Security**

Financial security is a significant factor contributing to a positive feeling of self-worth (McNair 2006). Teachers in general have a flexible pension plan which eliminates a major stress factor during the transition. The majority (82.5%) who

completed the survey indicated that they were not financially constrained following retirement, 9% felt that their financial situation was an issue and 8% were in a stable financial position but would like to be able to engage in more costly activities such as travel.

Most of the respondents interviewed were on full pensions (11). Only 7 were not eligible for full pensions and 1 is on disability insurance until he is eligible for full pension in 2017. Of those who did not receive a full pension 3 retired involuntarily due to health and/or stress (Dean, Sheryl, Pat2). Only 1 of these (Sheryl) indicated the need for additional financial security. Voluntary early retirement was taken by 4, due to stress and/or administrative issues (Bert, Heather, Liz, Pat1) and one felt that it was time to try something new (Derek). With the exception of Derek, those who did not receive full pensions retired due to some precipitating factor.

Although not constrained by lack of finances, some expressed that they needed to be careful.

*“I knew I would not be getting a full pension so prepared myself that I would not be going to Paris or Rome” -Bert*

Respondents tended to retire when they felt it was the right time, but mostly with a full pension. David believes that he was an effective teacher, but that teaching takes its toll. He retired at 60 with a full pension. Trisha retired voluntarily at age seventy, with maximum pension, as she felt that she would feel more satisfied running a music school.

Only two of those interviewed indicated that they were somewhat constrained by lack of financial resources and both are still supply teaching. While Donald gets a full pension of 60% of his salary, he still teaches so that he can afford to go on family holidays. Sheryl, who has a limited pension due to teaching in Canada for only a few years, is still teaching to supplement her income.

#### 4.3.3.6 Continuity

According to Continuity Theory, retirees will maintain the same characteristics and attributes they exhibited while still working. This helps them to cope with the transition (Parker 1995). While the survey did not address continuity, those interviewed were asked if they felt that they maintained the same characteristics through the transition to retirement. All but one respondent felt that their behaviour had been consistent and they utilized the same attributes during their retirement activities. These included common themes such as administration, planning and organization skills, compassion, work ethic and belief in education. The exception was Bert, who used the people skills he learned while teaching when he canvassed for a political party. However, he does not think he has transferred many professional skills as he taught youth with special needs.

*"I left my teaching skills behind when I came home". - Bert*

The following table shows the attributes and skills of the respondents which they carried through to retirement. It also shows their salient non work related activities pre and post retirement, indicating a range between the continuation of activities to undertaking something completely different. The respondents felt that they maintained their behavioural characteristics, and some were able to apply them to different activities.

Table 4.14 Attributes, Skills and Activities

Who	Attributes/skills that have been continued	Activities Before Retirement	Current Activities
Anita	Always do well – don't give up	Family focus	Hockey/skating/quilting/knitting
Bert	People and computer skills	Political activist	Gardener and leisure lover/Home theatre/movies
Beverley	Shifting of political and volunteering skills	Politics	Politics/art/volunteer
David	Optimist – encouragement of others.	Volunteer/Local Politics	Volunteer/Local Politics
Dean	Social skills – transferred to current hobby	Golf	Motor sports
Derek	Shifting skills/IT	Local politics	Local politics/writing
Donald	Member of community/needs something to do	Consumed with work	Hockey/Bridge/Biking
Heather	Arts skills/Play, pleasure, healing	Consumed with work	Arts administration/Kite surfing/Rug hooking
Jackie	Lack of IT/Low self esteem	Physical activities	Gardening/Book club
Liz	People skills/ Helping, compassionate activities	Ran B&B	Lay chaplain/Clothing group
Mark	Volunteering/Helper and organizer	Band/School plays	Band/Volunteer/Golf
Nancy	Tenacity. Did not give up on things.	Kayak competition administration	Quilt shop volunteering/gardening/ studying
Ninette	High work ethic/ Teaching and administrative skills	Volunteering for music festivals	Volunteer adjudicator/Arts administrator
Noelle	Planner	Hiking, reading	Hiking/Piano/Quilting/ Reading
Pat1	Extrovert/ Curious, forceful and strong belief in education	Focus on family	Kayaking/Volunteering/Book club/Hiking/Teaching new immigrants
Pat2	Curious/Learning/ Understanding humanity/Spiritual approach	Ran bookstore part-time	Meditation, Book reviewer
Sheryl	Status of being a teacher	Focus on family	Gym/Book club/Volunteer
Susie	Planner	Sports	Sports/Book club/Travelling
Trisha	Music skills/Good listener	Music activities/Volunteer in jail chapel	Broadcaster

The table indicates that, consistent with the findings of Atchley (1989), the respondents all felt that they had not inherently changed who they were but that their identities may have changed, based on the salience of their current activities. Some of the respondents have maintained similar activities to when they were teaching. Both Beverley and Derek were politically involved and continue to do so. They now use technology such as signing petitions on-line as well as participating in volunteer activities. Some have applied their skills to activities that are related to their teaching experience. Heather was a school administrator and taught art. She is now an arts administrator. Pat1 is now a volunteer teacher with new immigrants, and describes herself as having the same characteristics as before retirement. Pat2 always had a spiritual approach to teaching and now feels that she has time to focus on meditation.

Many of the respondents expressed that they have been able to transfer their attributes and skills. Ninette talked about having a “high work ethic”, which she still applies as a volunteer mentor. She still uses her administrative skills. Trisha has transferred her skills. She was previously a volunteer in a jail chapel and still believes that she is a good listener and has applied this skill to conducting radio interviews.

Susie is now a dedicated triathlete. She describes the continuity of her skills by saying

*“As a teacher I was a planner. I now have a goal oriented schedule for triathlon”. – Susie*

Nancy feels that while she has not changed her behaviour, the application is different.

*“My characteristic is that I don’t give up on things. Previously I enjoyed the product. Now I can enjoy the process”. – Nancy*

Noelle feels that she has the same characteristics and interests as before she retired. She now plans activities for the groups she belongs to.

*“I was a planner then and now – physical activity, reading, then and now. I think that as we get older, we get more so. With age and more time to think, one becomes more confident”. - Noelle*

All the respondents continue to be active and even though the activity may not be the same as before retirement, each gives a sense of self-worth, resulting in a positive identity. There does not appear to be a significant difference in self-worth whether respondents continued with previous non-work activities or found new endeavours. All but one felt that they exhibited the same characteristics as before, which appears to support the theory that continuity is a factor in the ease with which older adults transition to retirement.

#### **4.3.3.7 Disengagement**

Section 2.6 describes Disengagement Theory. Consistent with the findings of Rudman (2006), disengagement is unlikely to occur with the majority of those transitioning to retirement. The results of both the survey and interviews provided little evidence of disengagement. This is possibly due to self-selection of the respondents.

It is unlikely that anyone who is disengaged would volunteer to be interviewed or even fill out a survey. This was re-enforced by comments from the respondents. During the interview, I asked if any had experienced disengagement by any of their colleagues. When asked if she knew of any retired teachers who were disengaged, Noelle responded

*“People self-select. I thought that what you are doing sounds interesting and fun. If I was miserable and moldering at home, I don’t think I would want anyone to know”. Noelle*

Pat 1 felt that

*“Even spending time on a survey is too much work for someone who is not active”. - Pat1*

Pat1 has not experienced disengagement among her colleagues. Her RTO meets 4-6 times a year and they experience between 60% and 90% turnout.

*“Teachers are by nature not disengaged”. Pat1*

None of the respondents experienced disengagement from any of their colleagues. David did not know of any retired teachers who were not engaged at some level. He believes that when they retire, teachers either become involved in self-indulgent activities or give of themselves. Bert has not seen disengagement among most of his friends and colleagues. Even Jackie, who was recruited as an outlier and does not have a positive identity, has some level of engagement and participation.

While the opinions of the respondents are anecdotal, none felt that disengagement was an issue among their colleagues during the transition to retirement. Even though disengagement among single retired teachers could be expected, the results of the survey and interviews showed an insignificant number who were not socially engaged. One of the fourteen widowed survey respondents ranked friends and family as neutral although he communicated with them weekly and participated regularly in activities, indicating that he was socially active and not really disengaged. As the majority retired voluntarily, it could be assumed that teachers who felt that they would become disengaged, would continue teaching as long as they were able.

The above sections address the identities of the respondents and also explore the factors that impact the transition to retirement. The relationships between them are examined in the section below.

#### **4.3.3 8 The Relationships between Identity and the Transition to Retirement**

Although the majority of respondents appeared to have a positive feeling of self-worth, there are complex multi-factor relationships between identity and the transition to retirement. While it is not possible to determine an exact

relationship between identity and retirement, some factors have a clear impact. It would appear that continuity is a major factor. All but one of the interview respondents felt that they exhibit the same characteristics as while they were working and all have been continuously active and maintained or created new social networks. Other factors which appear to have a large impact on transition that influence identity are health and financial status. As the large majority retired voluntarily, it was not possible to ascertain whether involuntary retirement impacted identity during the transition. It was also not clear whether voluntary retirement and/or a positive last years' experience reduced the time to transition.

In this research, the transition experience appears to be independent of demographic variables such as age, gender, marital status, level of education taught, rural or urban or place of residence. Age at retirement is dependent on personal preferences and appears not to impact transition. Whether the respondents describe themselves as retired teachers or some other designation does not seem to have an impact on their feelings of self-worth. While being active matters, what the activities are and whether they are a continuation from the past, are for pleasure or to help others, is likely not significant. Having a social identity also appears to be unimportant, as long as the retirees are actively and socially engaged.

In summary, the first part of the research question addressed the relationship between identity and retirement. From both the survey and the interview, the retired teacher population appear to be mostly active, socially connected and have positive identities following their transition to retirement experience. There is continuity in both the behaviour and characteristics of the respondents during the transition. The second part of the research question addresses how the use of IT facilitates their transition to retirement. The following section focusses on the results of the research on the use of IT.



#### **4.3.4 TECHNOLOGY**

In order to explore how the use of IT facilitates the transition to retirement, the respondents to the survey and interviews were asked to identify the technologies they utilized for interacting with friends and family and for the activities they engaged in. During the interviews, how these facilitated their transition to retirement was explored in more detail. The results showed a frequent usage of IT for both creating and maintaining ties as well as for facilitating activities. Usage was mostly purposeful and directly related to social engagement or facilitating undertakings.

##### **4.3.4.1 Social Engagement**

Social networks are the means through which individuals interact. To keep the survey short and not risk the respondents losing interest, for ascertaining the use of IT for their social networks, the general category “Friends and Family” was used to capture all personal communications. The interview explored their specific contacts in more depth. Respondents to the survey were asked which technologies facilitate their interacting with family and friends. To provide a more comprehensive picture of the usage the questions referred both to the salience as well as to the frequency of use.

The following two tables summarize the results of the survey. The tables have been sorted, in the case of *salience*, by a combination of: Important and Very Important and for *frequency* by a combination of Daily and More than Once Per Week. Tools (such as Skype) and devices (such as a personal computer) are both included as the objective is to ascertain IT usage.

Table 4.15 Information Technology - Importance: Friends and Family

Answer Options	Very important	Important	Neutral	Unimportant	Totally unimportant	Not applicable	Important + Very Important	Response Count
email	76	17	0	0	0	0	93	93
Personal Computer	59	24	7	0	0	0	83	90
Google/other search engine	49	31	5	0	2	0	80	87
Telephone	44	33	7	6	1	2	77	93
Tablet (iPad)	43	16	3	2	2	14	59	80
Texting	25	25	12	4	6	15	50	87
Word Processor/ Spreadsheet/Powerpoint	17	30	13	3	2	12	47	77
Facebook	14	28	17	5	5	13	42	82
Smartphone	23	12	0	2	1	12	35	78
Cell Phone	16	17	15	4	0	0	33	52
Skype	7	25	21	8	4	14	32	79
e-Reader	9	13	5	6	2	33	22	68
WhatsApp	2	5	3	2	7	45	7	64
MeetUp	2	4	1	3	6	45	6	61
Twitter	1	4	4	7	12	38	5	66
Instagram	0	5	3	6	8	41	5	63
LinkedIn	0	1	12	6	14	33	1	66
None	0	0	1	0	0	17	0	18

Table 4.16 Information Technology - Frequency: Friends and Family

Answer Options	Daily	More than once per week	Weekly	Monthly	Several times a year	Yearly	Daily + More than once per week	Response Count
email	77	9	4	0	0	0	86	90
Telephone	56	18	10	3	3	2	74	92
Personal Computer	60	14	9	3	1	0	74	87
Google or other search engine	48	26	4	2	3	0	74	83
Tablet (iPad)	44	12	3	1	1	2	56	63
Texting	26	22	8	4	2	2	48	64
Facebook	29	15	11	2	2	1	44	60
Smartphone	27	8	1	3	4	2	35	45
Cell Phone	16	13	0	3	4	3	29	39
Word Proccessor/ Spreadsheet/Powerpoint	8	19	14	5	10	0	27	56
e-Reader	11	2	2	4	9	4	13	32
Twitter	2	2	3	2	2	5	4	16
Skype	2	2	9	13	22	6	4	54
Instagram	0	4	4	2	1	3	4	14
MeetUp	0	4	1	1	2	0	4	8
WhatsApp	1	2	2	2	2	2	3	11
LinkedIn	0	2	5	4	3	4	2	18
None	0	0	0	1	0	1	0	2

From an analysis of results of the survey, interaction with friends and family through IT is almost universal. The most utilized means for communication, both by importance and frequency is by e-mail, followed by land-line telephone, a combination of cell and smart phone and then texting. Search engines (Google) are the most commonly used application, likely more by using a personal computer (the most frequently used device) than a cell phone or tablet. There is a strong correlation between importance and frequency of usage.

The respondents were also asked the general question: To what extent does the use of IT enhance interacting with friends and family during your retirement? The results of this question, illustrated in the following table, verify that there is a wide usage of technology to maintain social networks.

Table 4.17 Importance of Information Technology for Social Interaction

<b>To what extent does the use of IT enhance interacting with friends and family during your retirement?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Very significant	66.7%	64
Significant	27.1%	26
Neutral	4.2%	4
Insignificant	1.0%	1
Totally insignificant	0.0%	0
Other (please specify)	1.0%	1
answered question		96
skipped question		4

From an analysis of the individual results of respondents, those who responded that the use of IT was “neutral” for friends and family (4%) indicated that they used the telephone more than cell phones or smart phones to communicate, but also used email either daily or more than once per week and a PC or tablet daily. One respondent indicated that the use of IT for friends and family was insignificant. This individual, a divorced female who lives in a city, did not use a cell phone or smart phone but ranked email and a PC as very important and used it more than once per week and used a PC daily, possibly indicating that activities were more important than friends and family.

During the interviews, the respondents were specifically asked to describe who constituted their social networks, whether these were strong or weak ties and what IT was most commonly used. Guided by the descriptions of Granovetter (1973), I described strong ties as frequent contact with homogeneous individuals or groups with like interests and weak ties as connections outside the usual social group, even though they may occur often (e.g. weekly interaction with acquaintances at the gym). The results showed several cases where, although the contact was with family and friends, their relationships were not strong and could be considered weak ties.

The following show how IT facilitates the social networks of the 19 respondents.

Table 4.18 Technology and Social Networks

<b>Category</b>	<b>Strong Tie</b>	<b>Weak Tie</b>	<b>Prevalent Technology</b>
Spouse	15	1	Phone, email
Parent	1		Phone
Children	12	2	Texting, email, Skype/FaceTime (if remote)
Grandchildren	3	2	Texting, Skype/FaceTime (if remote)
Siblings	5	4	Phone, email, texting, Skype/FaceTime (if remote)
Friends	14	3	Phone, email, texting, Skype/FaceTime (if remote)
Colleagues	5	10	email
Niece/Nephew	2		Texting
Neighbour	2	1	Phone, email

The frequent usage of technology was consistent among all the respondents (with one exception), mostly for specific purposes. As described in Section 2.3, friends and family become more important during transition (Kloep and Hendry 2001, Lancee and Radjl 2012). . The following examples show that, the tools that were most prevalent among the respondents were those that facilitated communications.

The phone and email are the pre-dominant technologies utilized indicating the need to maintain social networks, whether for keeping in touch with family and friends or to facilitate activities. Which technology was used for communicating was a combination of where the respondents felt the most comfortable as well as the preference of the recipients. Email was used by almost all those interviewed (with the exception of Jackie), but it was not always the application of choice and many preferred to use a land line telephone.

Trisha uses e-mail, not the telephone, for personal contact. She does not text and uses the cell phone for emergencies only. She does not have strong family ties and mostly communicates with her volunteering colleagues. Susie is not adept with IT in general but uses a combination of telephone and email to communicate with her personal contacts as maintaining her social network is important to her. She has strong friend and family ties and also uses email to arrange her sports activities and Google to check on schedules for triathlons.

*“Sometimes I need help, but I rely on the telephone as well as email for communication with friends and family”. - Susie*

Many of the respondents felt most comfortable using a landline for personal contacts as it was cheaper and familiar, although they would use other applications for specific purposes. Jackie will only communicate by means of the telephone. David only uses his cell phone for safety but uses the landline frequently. He has a son in Panama and uses WhatsApp to talk to him daily. He talks to his daughter by landline. He does communicate with friends by email but prefers the personal contact of a telephone. Bert does not use a smart phone as it is too expensive. He mainly communicates with friends and family through a landline and has a cell phone for emergencies. He is mostly at home and has access to technology through his PC and laptop.

Not all the respondents felt that the phone was the most effective form of communication. Although she has strong family ties, Nancy uses IT to keep in touch with others.

*“I prefer to text than phone any day. Sometimes I think it’s terribly anti-social but it’s so much more efficient for me. Without technology, Oh my lord, I would be very lonely and isolated” – Nancy*

Not all the respondents are limited in their use of IT and adapt, depending on the recipient. Noelle uses many means, depending on her current needs and on the preferences of family and friends.

*“My kids and grandkids don’t respond to emails so I text them and email friends. If there is something that’s long I put it in an email and send a text saying I’ve sent an email. A lot of friends don’t text at all and a few that like the phone and don’t use email at all. That’s OK”. – Noelle*

Many of the respondents have family and friends who are not physically close. For them, technology such as Skype, FaceTime and WhatsApp is a useful means of being ‘virtually there’

*“Without technology, it would be another chore to get on the phone and organize things because it’s so streamlined. I use tech all the time. I rely heavily on communications technology to keep in touch with my children as they do not live in Victoria and cannot visit often. - Pat 1*

Liz uses IT extensively to keep in touch with her family who are living in different cities. Although she feels that Skype keeps her in contact with her grandchildren, she misses the body contact.

There is ubiquitous use of the telephone, email, texting and tools for remote and local connections. Social media was not commonly used by the respondents. Texting is mostly used to communicate with the younger generation and tools such as Skype and Face Time are used for remote contact. Which tools were used was driven by the need to maintain social networks. Even those that are not adept feel that some use of IT is necessary, and the generation and/or location of the recipient has an impact on what tools

and applications are used. Most of the respondents used limited and familiar technology. There was a predominance for communicating, but this included keeping in touch with contacts for facilitating activities. There was a general consensus that using IT was an important part of a successful transition to retirement.

#### **4.3.4.2 Activities**

I explored the usage of IT for activities separately from communicating with friends and family. Technology is a facilitator both for maintaining ties as well as for investigating and getting involved in activities that lead to new networks. According to (Atchley 1971) strong ties with family are effective in helping retirees through transition while they form new ties as they engage in existing or new non-work related activities. The following will not only explore what IT is used to facilitate activities, but whether there is a difference in the usage between communicating with friends and family and for facilitating activities.

For the survey, the respondents were asked to rank the IT they utilized for their activities.



Table 4.19 Information Technology – Importance: Activities

Answer Options	Very important	Important	Neutral	Unimportant	Totally unimportant	Not applicable	Very Important + Important	Response Count
email	71	14	0	0	1	0	85	86
Personal Computer	49	25	4	1	0	2	74	81
Telephone	46	20	8	2	3	0	66	79
Google or other search engine	40	24	10	0	0	1	64	75
Tablet (eg. iPad)	39	12	2	1	0	9	51	63
Texting	23	17	8	3	2	8	40	61
Word Processor/ Spreadsheet/Powerpoint	15	22	8	0	0	9	37	54
Facebook	16	20	12	3	2	9	36	62
Smartphone	22	11	4	0	1	16	33	54
Cell Phone	14	14	11	3	0	9	28	51
Skype	7	17	9	3	3	12	24	51
e-Reader	9	14	6	3	0	15	23	47
WhatsApp	2	3	3	0	1	29	5	38
MeetUp	2	3	0	0	1	31	5	37
Twitter	1	3	3	3	3	27	4	40
Instagram	0	3	3	1	3	26	3	36
LinkedIn	0	0	6	5	3	26	0	40
None	0	0	0	0	0	12	0	12

Table 4.20 Information Technology – Frequency: Activities

Answer Options	Daily	More than once per week	Weekly	Monthly	Several times a year	Yearly	Daily + More than weekly	Response Count
email	73	10	0	0	0	0	83	83
Telephone	50	20	4	0	1	0	70	75
Personal Computer	54	12	8	2	1	0	66	77
Google or other search engine	38	20	6	3	0	0	58	67
Tablet (eg. iPad)	45	5	2	1	0	0	50	53
Facebook	30	8	7	1	2	0	38	48
Texting	22	13	5	4	5	0	35	49
Smartphone	23	10	1	2	0	0	33	36
Word Processor/ Spreadsheet/Powerpoint	7	16	4	8	8	0	23	43
Cell Phone	14	7	8	7	5	0	21	41
e-Reader	12	4	5	6	2	2	16	31
Twitter	4	0	2	2	4	0	4	12
Instagram	0	4	0	2	1	2	4	9
Skype	3	0	6	10	13	3	3	35
MeetUp	2	1	2	0	0	1	3	6
WhatsApp	1	1	2	1	1	0	2	6
LinkedIn	0	0	5	5	1	1	0	12
None	0	0	0	0	0	0	0	0

Results show that the significant majority find IT important or very important for their activities and that the more familiar tools are used most frequently. The most common applications are email (85%) and Google (66%), the former likely to keep in touch and the latter to get information about activities such as club membership and travel. The landline is used extensively (66%), more than the cell phone (28%), smart phone (33%), or texting. (40%). While Social Media was not extensively used, Facebook (36%) was the most prevalent, likely to keep in touch with family and friends. For 'virtually there' connection, the use of Skype was low (24%). Devices that were extensively used were PC's (64%) and tablets (51%), more than the smartphone (33%).

Although the survey did not explore a direct correlation between specific activities and IT usage, from previous questions the respondents indicated that the participatory activities that they mainly found important or very important are travelling (78%), entertainment (78%) and sports (63%) and club membership activities (70%). The most likely usage of IT is that which facilitates these activities e.g. emails (about events social interaction) and search engines that provide information (e.g. schedule of events and travel information). Even though reading/writing is the most common activity (87%), the use of e-readers is low (23%) although it was not specified whether a PC and/or tablet was used for reading, writing or other purposes.

The respondents to the survey were also asked the general question: To what extent does the use of IT enhance your retirement activities? The results of this question, as shown in the following table, indicate that there is a wide usage of IT.

Table 4.21 Importance of Information Technology for Activities

To what extent does the use of IT enhance your retirement activities?		
Answer Options	Response Percent	Response Count
Very significant	62.8%	59
Significant	28.7%	27
Neutral	7.4%	7
Insignificant	0.0%	0
Totally insignificant	0.0%	0
Other (please specify)	1.1%	1
answered question		94
skipped question		6

From the survey 90% of the respondents felt that IT enhanced their retirement activities (very significant or significant) and 7% were neutral. The individuals who responded that the use of IT was neutral for their activities were not the same as those who ranked it neutral for interacting with friends and family. All were socially active but used different means for communication.

The interview respondents were asked about the IT that facilitated specific activities. The following table shows the pre-dominant activities during retirement and the associated facilitating IT. The results are consistent with the survey in that there is a ubiquitous use of IT and email is the tool most used.

Table 4.22 Information Technology Utilized During Retirement.

Activities	IT
Clubs	email, web sites
Sports, Bridge, Spiritual, Book Club	
Sports	email, GPS, web page
Hockey, motor bike racing, hiking, kayaking,	
biking, gym, fishing	
Studying/Reading/ Writing	PC, word processor, publishing tools, e-reader
Travelling	email, GPS, e-banking, web-sites, Skype,
Arts	on-line patterns, arts/photography related tools, music IT, search engines, web pages
Rug hooking, music administration, radio announcing,	
fabric making, band, sculpture, photography	
Cards, Bridge	email for schedule, on-line games
Book Club	e-reader, email for schedule
Volunteering	email for schedule, search engines for information
Education, Politics, Seniors home, museum, church, festival	
Teaching/Instructing	on-line courses
Church/Spirituality	on-line prayers ,routines for meditation on-line; email for schedules
Lay preacher, meditation	
Meditation	

The table shows that the IT utilized is varied, used flexibly and is context specific. The usage of email is almost universal, mostly for communication to facilitate activities. Information through search engines is gathered for a wide variety of purposes such as travel, meditation routines and knitting patterns. PC's, tablets and e-readers are the devices used to enable the above.

#### 4.3.4.3 Purpose Driven Use of Technology

Following retirement, all but one of the respondents are frequent users of IT, both for maintaining their social network and to facilitate their activities. All but Jackie responded that IT was an integral and useful part of their retirement. While teaching, the respondents mostly used IT for specific purposes.

Consistent with Continuity Theory, this trend has continued. Usage is mostly daily and purpose driven and a variety of applications such as email, search engines, Skype and texting were utilized for specific purposes.

Many of the respondents used IT for general communications. The following examples show that the respondents were involved in diverse activities, but that the IT utilized was specifically to facilitate them. Despite not using IT at all until she stopped teaching in 1987, Ninette (82) bought a computer as soon as she retired to stay in touch with her social network. When asked if her retirement would be as fulfilling without IT, she replied

*“No it would not be. Today your correspondence is assumed to be by computer”. - Ninette*

As Heather lives in a rural area, she feels that if she did not have access to IT to stay connected, she would move back to the city. She relies on IT for keeping in touch, both when she is at home and when she is travelling.

*“I believe that IT is a useful tool but it is important to understand how to use social media. I love it when I use it. – Heather*

At the end of the interview she illustrated this by saying

*“I was in a camper van when I received your email asking for respondents. Shows what IT can do”. - Heather*

Many of the respondents use IT to facilitate their volunteer or pseudo-occupation activities. Trisha is constantly learning new digital IT that relates to music. As a volunteer local radio announcer, she does interviews via Skype. Pat2 uses Skype, email and search engines to keep in touch and find information. She is a book reviewer and uses a word processor and Dropbox to collaborate with others.

David now uses a computer and cell phone to facilitate his volunteer activities. When asked what he would do without IT, he responded

*“lick envelopes and use the phone”. - David*

Beverley resisted IT while teaching. She is now an artist and uses graphics tools on her PC. She uses an iPhone as a camera and ‘record maker’, as well as a phone. Derek and Beverley both set up web pages – she hired someone to do it for her. They are now motivated to use IT differently, based on their interests. Derek is a writer and uses word processing tools. Together Beverley and Derek published an on-line book. He wrote the poetry and she put the pictures together and did the layout.

Nancy has used IT to give herself a new identity for the pseudo-occupation activities she has embraced as a retiree. She volunteers at a local sewing store and has a web page that documents her sewing activities.

*“My use of technology is need based. When I started going on-line I changed my name to Lucille for anonymity. I think everyone should have an on-line identity..... It’s fascinating, in my job, to see women in their 80’s doing these things with computers for their sewing”. – Nancy*

All the examples above seem to indicate that IT is used by the respondents mostly when it has a specific purpose and facilitates either their social interaction or activities.

#### **4.3.4.4 Comparison of Usage for Social Networks and Activities**

Atchley (1971) reported that during the transition to retirement, older adults relied on their existing social networks while finding new networks and activities. Both social networks and activities are integral components of identity (Atchley 1971). In this study, the results of the survey indicated that there was frequent usage of devices and application both for networking and activities. I compared the use of IT for maintaining social networks and for

facilitating activities to determine whether there was a predominance of one over the other.

The following figures on priority and frequency of IT show the IT usage for both categories.



Figure 4.3 Technology and Priority – Friends and Family and Activities

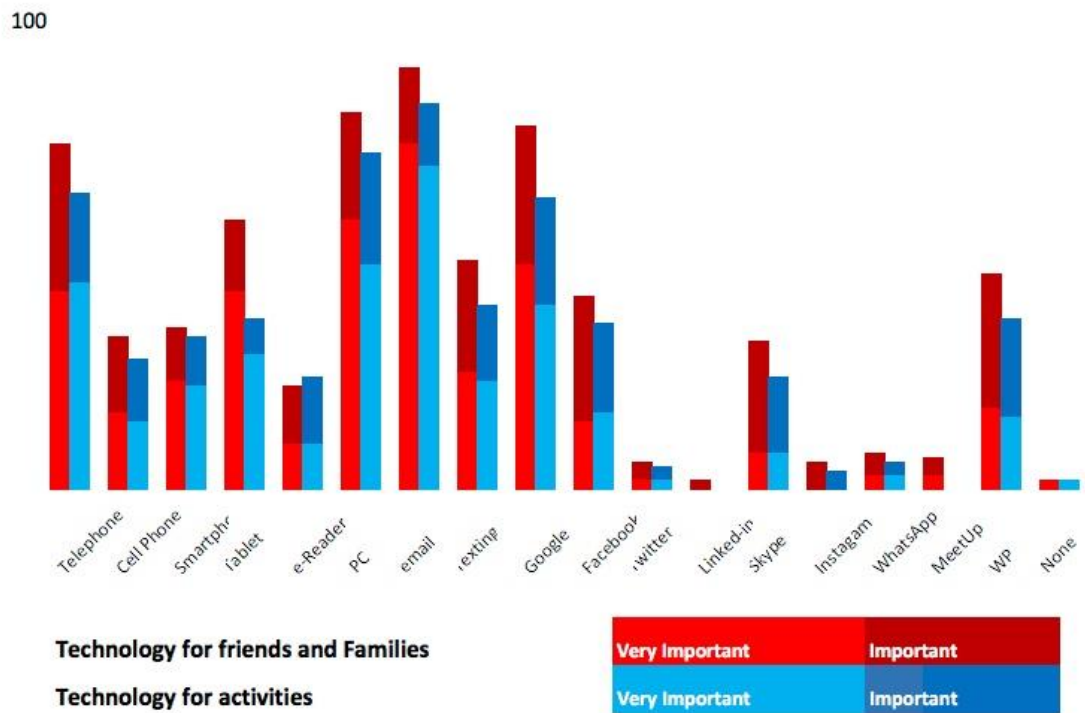
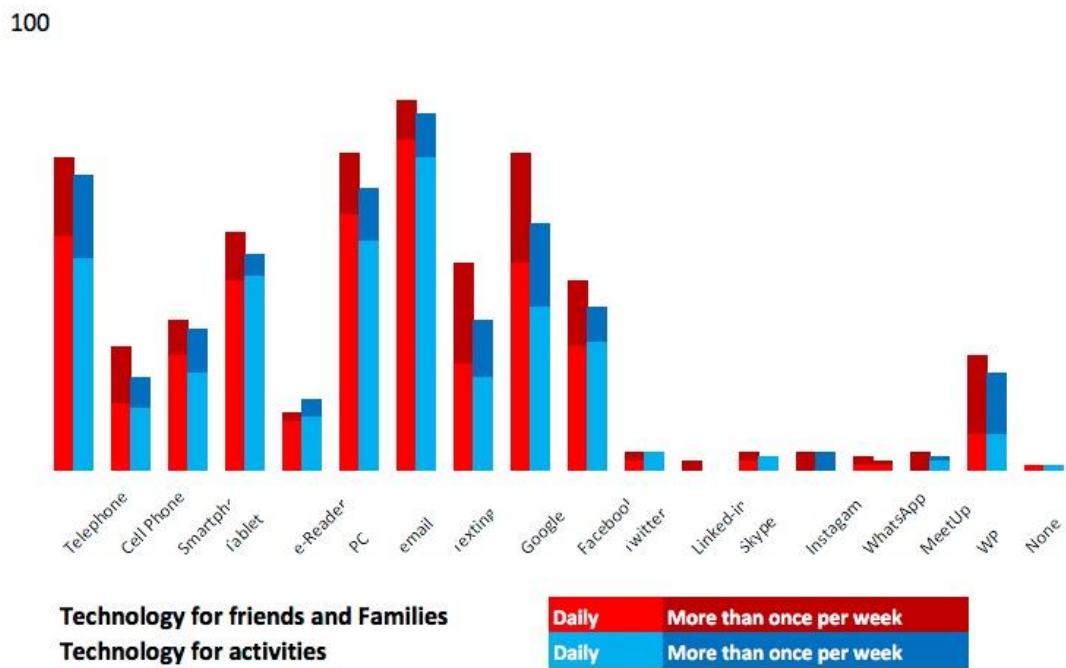


Figure 4.4 Technology and Frequency of Use



There appears to be a trend that IT is used slightly more frequently and was ranked more important for social networks (e.g. email 93%) than for activities (e.g. email 85%). There is also a correlation between frequency and priority of use. While the usage is ubiquitous and the difference is not extensive, it is consistent and it appears that the respondents put a higher priority on communicating with friends and family, which is mostly to maintain strong ties rather than for facilitating their activities, which tend to facilitate maintaining and creating weaker ties.

#### 4.3.4.5 Technology and Transition

How IT facilitates the transition to retirement was addressed in depth during the interviews. There appeared to be continuity in the usage of IT in that the respondents used only purposeful technology both while working and during the transition to retirement. They also carried forward their attributes and skills. The respondents were asked about the technology they used when they were teaching as well as their current usage.

The following table gives the distribution of usage at school.

Table 4.23 Technology used at School

Usage	Number	Comment
Expert/pioneer	4	Early adopters - ages: 74, 65, 60, 50, (no age relationship)
Admin tools	6	Marking
Only if needed	3	
Context specific tools	4	Disabled, library, music, web site
None	2	82 year old – IT not available;
		Refused to use IT as she was against its usage
Total	19	

Most of those interviewed used some form of IT while teaching, which was basic and specifically designed for school use. Although 4 felt that they were pioneers and even taught some computing to colleagues, the tools and applications used by all were functional and not innovative. Examples of the IT used was software for marking papers, class websites and email for

communication. Games and social media were not part of their daily experience. Daily social networking with friends and family and social media were not a part of their activities while they were teaching (with the exception of Dean, who was forced to retire early at age 49).

The respondents differed in their use of and attitude towards IT while they were teaching. Nancy had a class website while she was teaching. Heather learned IT while she was a school principal and liked how it facilitated administration. Sheryl felt that “she was a pioneer at school” and taught other teachers and Trisha used available technology to record her music students.

Not all of the respondents felt that IT was an asset at school.

*“I found it added an unnecessary administrative burden”. - Liz*

At school David was too busy to learn to do much with IT. If needed, he used email. He does not regret that *“he was not a techie”* as he felt he needed to be available to his students. He would write out documents by hand and his wife would type them.

One of the retirees, Pat2, was a library teacher and valued the relationship with her students and the books they read. She became disillusioned when the focus became the students and the IT, which was one of the factors that triggered her retirement.

*“Teacher librarians – we spend most of our lives dealing with IT. That was another reason I felt free when I retired. Teacher librarians did the job because they loved the kids and they loved books. Nowadays, you need to love the kids and love technology”. Pat2*

While all but one of the respondents are currently avid users of IT, the functionality has completely changed from when they were teaching, but the trend of purposeful usage has continued.

The following table show the IT pre-dominantly used by each respondent, both while they were teaching and currently.

Table 4.24 Change in usage if Information Technology from Teaching to Retirement

<b>Name</b>	<b>Use of IT while working</b>	<b>Use of IT when retired.</b>
Anita	IT for disabled – read/write	Communicates with friends and family
Bert	Apple IT	Email, search engine, home entertainment
Beverley	Asked what kind of computer she had and answered “beige”	Uses it to keep in touch and for arts related tools.
David	Did not like IT. Only used it if needed.	Uses it for communication and volunteer work, but has reservations about effects
Dean	School technical resource	Social media – for communication and contact
Derek	Used IT just before retiring for school related activities	Constant use for writing.
Donald	Taught IT	email, Google, FaceBook
Heather	Used IT extensively for administration	Extensive use for keeping in touch as lives in rural area, and Facebook for disseminating information (arts admin related). Facebook, Skype, email
Jackie	Did not use IT	Made a conscious decision not to use it, even though it means being left out.
Liz	Administrative tools	email, texting, iPhone, iPad, eReader
Mark	Administrative tools	Skype, social media, twitter, research related software, graphic software (all for volunteer activities)
Nancy	Web site for class and email parents. Pioneer with Apple 2	Blog (under different name), email, Google for patterns, Facebook to keep up with others, text (better than phone), on-line shopping for patterns, Pinterest for sewing
Ninette	Did not use IT at school	Finds IT essential for her volunteer work
Noelle	Had Apple IT at home. Used administrative applications at school	Considered a ‘teckie’ by her friends. Uses communications tools.
Pat1	For administration	WhatsApp, messenger, email for meetings and activities. Texting and Skype for contact

		with family
Pat2	As a library teacher, constantly used IT	Now only for communications
Sheryl	Pioneer at school	Skype, word processing, email.
Susie	Used IT for administrative purposed	Uses IT to keep in touch
Trisha	Tape recording music and some computing for personal use	email, Skype, specialized IT for radio

Despite the fact that some were early adopters of IT while they were teaching and used specialty tools, after retirement the current dominant usage is either for contact with friends and family or specific applications that facilitate activities. The exception is Dean (50) who is active on social media and is up to date with current IT. As the majority were familiar with the tools and applications, it was an easy transition for them to utilize available IT when they retired. Being of the demographic that only used IT for a specific purpose (with the exception of Dean), this trend has mostly carried through. IT is currently used to facilitate social networks and activities, but is not an integral part of daily life, such as regular Facebook and Instagram postings. Social media is used only to maintain contact with friends and family.

In summary, the usage of IT is ubiquitous among the respondents. The most prevalent activity is reading/writing/studying. This relates to the high usage of the PC (80%). Search engines (Google) and email are the most used applications for facilitating activities and social networks. The respondents mostly used more established tools (e.g. texting instead of WhatsApp; Facebook instead of Instagram). Social media usage is relatively low but is used by half the respondents, mostly to communicate with and observe the activities of family and friends who are of the younger generation. Other applications are only used to facilitate specific activities. The respondents are not likely to post general information about themselves or photographs on Instagram. They probably will not play computer games. It is likely that the next generation, who have been computer literate since childhood will exhibit a different pattern of IT usage.

The trend of being functional has been continued with the use of IT following retirement. There are a large number of specific technologies utilized, which are directly related to activities. Age and fear of IT is not a detractor to usage while the ability to achieve a goal by using IT appears to be the motivator (Saalovara et al 2010). Currently all but one of those interviewed are using IT extensively to facilitate their activities and to communicate. The applications and equipment used are directly related to the needs of the respondents. Communication applications are the most utilized, slightly more for friends and family than for activities.

Having outlined the trends and tendencies for the sample as a whole, the following section explores the implications of not utilizing IT by examining a selected outlier case study.

#### **4.4 OUTLIER CASE STUDY**

I have included a more detailed description of the interview with Jackie as she is the only person I interviewed who does not use IT, although she believes that this choice has had a negative impact on her sense of self-worth. She was married for seven years, divorced and is now in a relationship, but describes herself as a 'loner'. She is also moderately social active, has weak social ties and had a moderately good last year of teaching. Jackie has been retired for 14 years and left teaching voluntarily as she felt that IT was becoming pervasive.

*"I was glad to leave because they were pushing IT at us. The word was not only in our school, but parents and kids expected to be able to contact me about this and that"*

While teaching, Jackie reluctantly used IT only when needed. She resisted, as she felt that "eye to eye" contact was missing and that the teachers did not communicate with each other but spend their time looking at screens.

*“For the last years at school, IT came in and everything was by internet. I used it only when I had to and it meant that I was staring at a screen, by myself, cursing and I resented the time I was not connecting with the kids or out there with the other teachers. The school became very much compartmentalized. Everyone was in their little office, tapping away, less and less people in the classroom and less and less people in the halls. They were always behind the machines”.*

Upon retirement, she attempted to use IT but found that she could not operate on the same level as others in her social network. She now feels that people use social media for trivia and despite being knowledgeable, is not motivated to use any applications.

*“I can’t believe what people are putting on Facebook – I’m knitting a sweater”*

Although Jackie consciously does not use IT, she does feel that this has had a negative impact on both her social network and activities, contributing to her low self-esteem. After living in Ottawa for many years, her nephew’s family, who she had been looking after when she retired, left the city without informing her or saying goodbye. She blames this lack of communication on her not using IT.

*“When your confidence is a bit lower, you think damn – maybe if I was on internet I would know about those things”.*

Jackie completed my survey with the help of Susie, a former colleague, friend and member of her book club. When I asked her how she felt when completing the survey her response indicated her insecurity.:

*“I felt very diminished in what I do and I especially felt diminished in front of Sue who is so connected. When I say I felt diminished, it was not because of the questions. I just felt I was not well rounded. Sometimes not having IT gives you a sense of no purpose. If you are going to use*

*IT to become well rounded, I'm not sure that that is sincere anyway.  
You can have tons of people as so-called friends."*

Jackie describes herself as a retired teacher. She does not feel that she has a social identity as a teacher and rarely attends association meeting. Although she does belong to the local RTO, she does not feel a sense of belonging.

*They send me a written newsletter and it's quite onerous for me to get back to them. I finally got a phone number and can call them and tell them what I am missing. They put the stamp on, probably cursing all the way".*

During the transition to retirement, her social network consisted of family and friends, mostly those who needed care and her major activity, aside from care-giving was gardening. Now, Jackie communicates regularly by telephone (the only form of technology she uses) with her sister, who also does not use IT. Aside from belonging to a book club of former teachers, Jackie does not interact with colleagues. Members of the book club all communicate by email with the exception of using the telephone if they need to contact Jackie. She feels that she is a nuisance which has had a negative impact on her self-esteem.

Jackie feels that she has the same characteristics as when she was young. She grew up in a household with no television. Like her mother, she has always been involved in caring for others. She was known at university as being "too picky and accused of being stuck-up", which "crushed her sense of self-worth". While she felt fully transitioned to retirement within 2 years, her feeling of self-worth is low. This is consistent with how she felt while employed. She also exhibits similar characteristics to when she was a student and a teacher.

Jackie is the only retired teacher I interviewed that expressed some isolation and was not happy with her retired state. While she does not feel connected, it is not possible to know if that is because of her lack of use of IT or her



personality and attitude, which perhaps results in her adamantly not wanting to engage in many of the tools and applications that would enable connectivity.

The interview with Jackie re-enforces the argument that IT can be a facilitator during the transition to retirement. Jackie's history demonstrates a trend of low self-worth and lack of strong social networks. She also feels that not using any form of IT is a factor in her low self-esteem. The remaining respondents all had strong social networks, frequently utilized some form of ICT and had a positive feeling of self-worth. Jackie's experience is also a demonstration of continuity in that her reluctance to use IT, current behaviour and negative self-worth are a reflection of the past.

The case history of Jackie is an illustration of Continuity Theory. As a child, she did not have access to a television. She struggled with a low self-esteem as a student and did not utilize IT when she was teaching. Her self-esteem remains low, which likely means that she does not have the confidence to try new endeavours, such as utilizing the features of IT. She clearly wants to maintain contact by regularly talking to her sister, joining her local RTO and being a member of a book club, but is adamant about not using tools such as email for contact, even though she knows that this is inconvenient for others. She stays with her level of comfort, a land line phone. Jackie's current situation is very much that of her past. She has low self-esteem, a limited social network and is unwilling to use new technologies.

While I did not probe the past personalities of the recipients, generally they appeared to be well adjusted, willing to try new endeavours, were socially and physically active and had used some form of IT while teaching. Again, according to Continuity Theory, they continued with their positive identities, and mostly had an easy transition to retirement. The exceptions were the 2 who were still teaching. In both cases, they cited financial reasons. Both seemed to need the status of being a teacher, but they were socially active and engaged in activities which gave them positive identities for their non-teacher roles.

As Jackie was the only respondent who mostly did not use technology, I do not know whether her experience is representative of others who do not use IT. I did ask those I interviewed whether they know of any former colleagues who did not use IT and none of them could find an example.

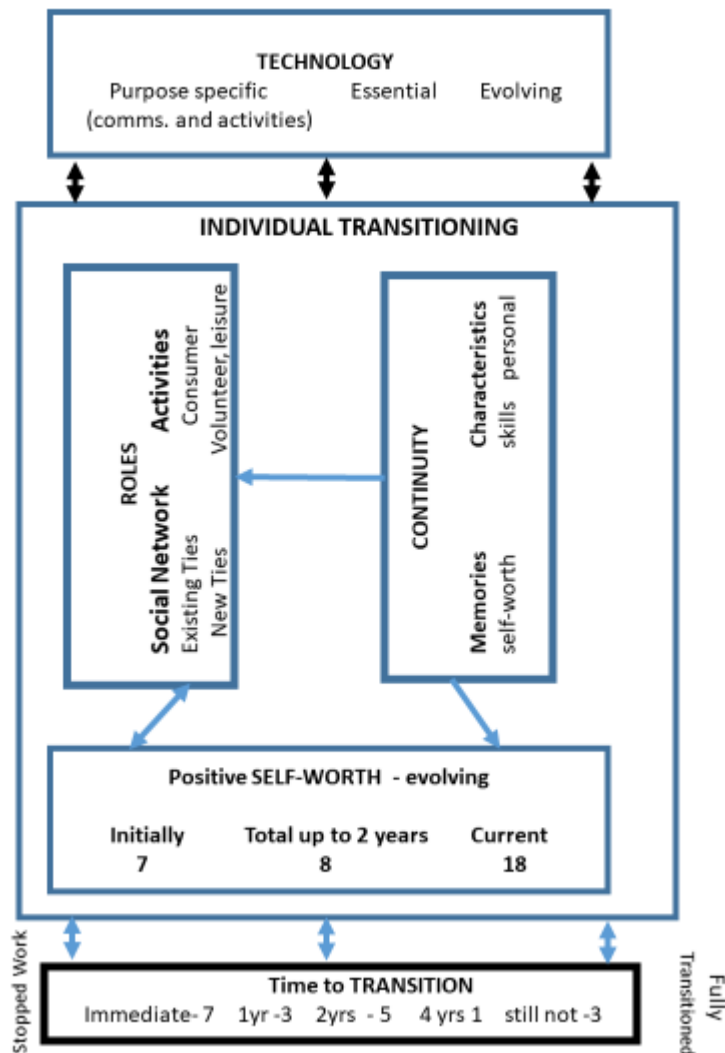
## **4.5 DISCUSSION AND CONCLUSION**

### **4.5.1 CONCEPTUAL MODEL**

During the interviews, Identity Theory, Social Identity and Continuity Theory were explained. The respondents were asked about their feelings of self-worth regarding their salient identities during transition and whether the usage of IT had an impact. Their responses are contained in Table 4.4. Identity work and identity play were not included, but as they deal with self-worth, including them could have been an appropriate option. Consumerism was not explicitly discussed, but from the lifestyles and especially when I visited the homes of the respondents, I could speculate whether consumerism was a factor. Respondents were also asked if they felt that they carried through characteristics from their past while they were transitioning to retirement and what the impact was on their current identities and roles.

The following is the Conceptual Model which has been adapted to include the results of the research. The results, for the demographic researched, appear to be consistent with the proposed theoretical model as well as the literature on the components of the research question.

Fig 4.5 Conceptual Model Results of Research



Technology facilitates communication between family and friends it is also a facilitator for activities as well as for acquiring information (Saalovara et al 2010, Hogeboom et al 2010). It appeared that the tools and applications used by the respondents were all purposeful and specific to their activities and social interaction. The usage developed with evolving activities and social networks, which appeared to result in positive identities and increasing self-worth among the recipients. While there is no 1-1 relationship and the sample is relatively low, there appears to be a trend. From Table 4.4 there appears to be a relationship between the usage of IT, evolving positive feelings of self-worth and the time to transition. Initially 7 had a positive self-worth, 8 at 2 years and

18 at the time of the interviews. Initially 7 felt fully transitioned, 3 within a year, 5 within 2 years, 1 in 4 years and 3 who still have not fully accepted retirement (but have a positive sense of self). As roles increased, the usage of IT evolved and new identities developed, leading to enhanced feelings of self-worth, which in turn appeared to accelerate transition. Even for those who transitioned as soon as they stopped working, new identities were formed, facilitated by applicable usage of tools and applications. These new positive identities gave the respondents the confidence to become involved in new roles, which were facilitated by new usage of IT.

The current roles of those transitioning to retirement is impacted by their memories and attributes (Parker 1995). All but 2 of the respondents had used purposeful IT while they were teaching and they all felt that the usage of IT to facilitate their current roles would contribute to their feelings of self-worth. They also felt that, since they stopped working, their characteristics and memories were a factor in sustaining and developing new roles.

#### **4.5.2 RELATIONSHIP TO LITERATURE**

Two major changes in society today are the number of active aging adults (Rudman 2006) and the ubiquitous use of IT (Smith 2014). The current research is important as it examines both these changing phenomena at a particular moment in time and derives the relationship between them. The previous generation consisted of many adults who viewed retirement as a period of old age and disengagement from society (Cornwall 2008). Today's retirees are not only active but are also at a unique stage in terms of the use of IT. When they started their working lives, IT was used for specific purposes and social media was not part of the culture. Even the most commonly used tools such as email and word processing were being developed.

The previous generation did not have IT to enable social networking and activities. They were also of a generation that were less active following

retirement. While they may have been socially engaged their experience would have been different to the current generation. Communication and the search for information would have been less accessible and therefore carried out at a different pace.

The current trend is that older adults are contributing members of society and frequent users of IT. This is likely to continue to a larger extent in the next generation. Research on the next generation of retirees will give totally different results as the current working demographic are totally involved in daily usage of social media and innovative tools that facilitate their daily lives such as Instagram and on-line banking.

Results of research on the elements of the research question, identity, transition to retirement and the use of IT by seniors has been described in the literature and is discussed in the Literature Review chapter. The research on teachers in NS, Ontario and BC directly address the research question and examines the relationships between these elements. The results are an indication of identity of current retirees, how they transition to retirement, their usage of IT and the relationship between these elements.

From the results of this study, I ascertained that the retired teachers in this study used IT for specific purposes. This was a continuation of their previous pattern while teaching, where the usage was geared towards the classroom and general purpose applications for the pursuit of leisure were not available. This is consistent with the findings of Duxbury and Higgins (2013) who found that teachers in Canada needed IT for their work. Their current usage of IT is to facilitate their retirement activities as well as to maintain contact, either for social purposes or to enable their pastimes. These findings are consistent with the literature. In today's society, IT usage is ubiquitous and necessary (Mitzner et al 2010) and is an important means for older adults to communicate and obtain information (Smith 2014). All but one of the respondents were motivated to use IT for the purpose of enhancing their experiences. The factors that likely give the respondents the incentive to make use of available IT have been

described in the literature as the desire to learn, the ability to communicate in order to not feel isolated from friends and family, social pressure, the need to keep up with others and familiarity with and the ability to use the tools (Hogeboom et al 2010). While the previous generation had access to the telephone, the power of IT was not available as an enabler to transition to retirement. While they transitioned to and coped with not working, their experience was likely different.

From the research, I deduced that having an accessible and powerful enabler such as IT was a significant factor in giving the respondents a positive self – worth. This view is consistent with results reported in the literature. For those transitioning to retirement, IT and social media can provide dual functionality, both as the means to facilitate activities and for communications, to give the feeling of being connected (Saalovara et al 2010). According to Rudman (2006) while the retirement experience has changed over the past 15 years, the retirees need to maintain identities which give self-respect remains.

The respondents maintained both being active and socially engaged, factors that contribute to their identities, through tools that are familiar such as email and texting. The use of social media was limited and used for specific purposes only such as engaging with grandchildren. Unlike the current working generation, the respondents generally do not utilize social media such as face-time and Instagram to post information about themselves.

For this specific research population related factors were found to be relevant to the research question. As all teachers receive a pension and are able to retire relatively young and generally while healthy, they can enjoy their retirement situation. This is consistent with Gall et al (1997) who reported that elements such as health and financial security contribute to adjustment during the transition to retirement. As teachers are also well educated, they have the ability and knowledge to have easy access to IT, which facilitates their way of life.

A major predictor of identity and the ease of transition appeared to be continuity of characteristics and behaviour. Whether the respondents maintained the

same activities or engaged in new ones, they carried forward their skills and characteristics such as planning ability and optimism. Their attitude towards IT was also continued. This is consistent with the results of the research by Mitzner et al (2010) on adults over 65 in North America. They reported that is likely that older adults who are pre-disposed to having a positive attitude are more likely to have a positive experience with IT.

The time to transition varied but over half felt retired within a year and almost all were fully transitioned within 2 years. This is consistent with studies of 1 year post retirement by Nuttman-Shwartz (2004 ) and Gall et al (1997) who found that the majority of retirees will have fully accepted their status, will have positive identities and will lead happy and productive lives. The factors that appeared to influence a positive retirement are a strong social network, perceived meaningful activities and a positive sense of the past, all enabled by IT.

#### **4.5.3 SUMMARY**

Overall, a salient theme that has emerged from this study, based on the examination of retired Canadian teachers, is that the usage of IT has a significant impact as an enabler for the situations that impact identity during the transition to retirement. Today's retirees are mostly active, socially connected and have a positive identity. Although they are involved in a variety of activities, not related to their profession, their identity as a teacher remains important and they value the status of their profession. They use IT extensively, but only purposefully. They successfully transitioned to retirement partly due to the continuity of characteristics, skills and the purposive use of IT. Significant demographics that have an impact are that the respondents are well educated, financially stable and generally healthy. Demographics such as age, location, gender and marital status appeared not to be significant. The examination of a different population will likely give different results. In general, these findings are consistent with what has been described in the literature examined.

The one outlier who did not use IT, did not have a positive feeling of self-worth or an active social network. As she was solicited for the research, it is possible that there are many others with her disposition but they either chose not to participate or were unaware of the research.

While there is a consistency in the results of the research, these conclusions apply only to a subset of the retired teacher demographic in Canada and this is not an indication of the experience of the general population. In general, retired teachers are well-educated, financially stable and were familiar with some form of IT before they retired. Without repeating the same research on a different demographic, with less education and financial security, it is not possible to make generalized conclusions about retirement and IT. A population of blue-collar workers would likely give different results as, according to Gall et al (1997), following retirement white collar workers are likely to experience a more positive sense of well-being than blue collar workers.



## 5.0 CONCLUSION

### 5.1 INTRODUCTION

This study focused on 3 aspects of how older adults experience retirement; identity, transition to retirement and the usage of information technology (IT). The main contribution of the study is the result of examining the role of IT in facilitating identity transitions during retirement and thus bringing together three areas of literature (transition to retirement, identity and IT), which were previously dealt with individually. The study is time sensitive and relevant as the previous generation were less active, IT was in the formative stage and retirement was regarded as a time when older adults ceased to be useful members of society. While it is not possible to predict the experience of the next generation and what the results of the same research question would be, the retirement experience is likely to be completely different and the population will be impacted by technology such as self-driving cars and artificial intelligence (AI).

### 5.2 SUMMARY OF THE STUDY

The research question that was studied is ***“What is the relationship between identity and the transition to retirement and how is the transition facilitated by technology?”*** The study was undertaken to investigate, for a current cohort, the identity of retirees, how they transition to retirement and the role of IT. The contribution of this study to the literature about the components of the research question is that, while there is extensive literature on the parts, the relationships between them have not been widely investigated. It is also an examination of the individual components of the research question, based on a specific demographic (school teachers in Canada) at the present time.

The literature review addressed research about the identity of older adults by examining their identity, social identity and consumerism. The relationship between transition to retirement and identity was deduced and how older adults utilize technology to facilitate retirement investigated. The literature reviewed explored how identity evolves during the transition to retirement and identified

its dependence on many variables such as financial security, health, the strength of social networks and participation in activities. Characteristics of past behaviour are likely to be carried through to the transition to retirement. Demographics, final years teaching experience and conditions of retirement appear to have little impact on the time to transition or the retirement experience, but the majority of older adults will feel fully retired within two years. The usage of technology is ubiquitous, valuable and readily available to facilitate the activities and social networks which influence identity.

The study provided some answers to the research question as applied to the research sample, 100 school teachers from NS, Ont. and BC. Mixed methods were used to investigate the factors that relate to the research question; quantitative methods for demographics and qualitative methods for emotional aspects as well as to obtain some more detailed information from the respondents.

In general, the results confirm what has been previously reported in the literature. The teachers were mostly socially active, had a positive identity, and, felt fully transitioned to retirement, usually within two years. They have transferred their skills while working and applied them to their current activities. Factors that influenced their transition were their financial stability, health, social interaction and being active. The ease of transition appeared not to be influenced by demographics, conditions at work or final years of work experience.

It was found that there is ubiquitous usage of technology, particularly email and search engines as well as land-line phones. The usage of IT was extensive, although purpose specific, to facilitate particular activities or to communicate with friends and family. In addition, the frequent usage of the tools and devices in itself became a salient activity, which contributed to the identity of the respondents. There are implications of the ubiquitous usage of IT, which will likely be exacerbated in the future. The conceptual model described in this thesis was supported by evidence resulting from the research and could potentially be used as a framework for other studies in this area.

## **5.3 IMPLICATIONS**

### **5.3.1 TECHNOLOGY AND BEHAVIOUR**

As older adults transition to retirement, new roles become salient. The technology they utilize has an influence on their behaviour, which in turn, has an impact on their self-worth and identity. Marshall McLuhan (1964) wrote that “The medium is the message”, which launched an innovative way of thinking about the impact of technology on behaviour. At that time, the reference was applicable to technology such as television, radio and telephone. The basis of his argument is that the carrier has a bigger impact than the content. The fact that individuals were watching TV had a greater influence on their thinking and behaviour than the content. TV changed social behaviour as it required being indoors and sitting in front of the box. This brought family and friends together, as contrasted to the radio, where portable devices existed and solitary listening was possible.

While McLuhan developed the concept well before the ubiquitous usage of IT, “The medium is the message” is more relevant in today’s technological environment and can be applied to older adults who are transitioning to retirement. From the respondents surveyed for this research, over 90% ranked the usage of IT as Important or Very Important. The most common media used were email and Google search engine. The landline telephone (another medium) was also commonly used. Just as the introduction of TV encouraged changes in the behavior of families, from these results, it can be deduced that tools and devices have a significant impact on changing the retirees’ behaviour as they transition to retirement. Examples are emailing to communicate with friends and family, texting to connect with the younger generation and search engines to obtain information. The lifestyle of the respondents are impacted by the medium. They have the ability to communicate and obtain information from anywhere and at any time. Feedback can not only be instant but there is an expectation of immediacy. They no longer need to stay at home to make phone calls, write letters to communicate or visit libraries or make numerous time-consuming phone calls to obtain information, but can use portable devices

such as cell phones while in a car or a foreign country. The changes to lifestyle and thinking, facilitated by IT, has a significant impact on the transition to retirement, which differs significantly from the previous generation.

While the respondents were, in general socially engaged and active, the specifics of their activities and behaviour differed. There were many examples of how their actions were driven by the medium. One of the respondents, who lives in rural NS, would reluctantly move to a city if she did not have access to the devices that enabled her to maintain contact. Several were involved in special interest groups through social media and chat groups (knitting clubs, meditation). Others felt free to travel as they had the tools to keep them in touch with family and friends back home. Without the technology, although contact would exist in some form, access to IT has had a significant impact on their day-to-day lives. The outlier, who did not use IT, felt that her self-esteem was low and she had a feeling of not belonging because she did not use any IT. This example reinforces the argument that the carrier is more influential than the content

The impact of IT in this study has generally been shown to be positive. The respondent demographic were an appropriate test case to illustrate the trend as they are well educated and have the means and experience to regularly use IT. Some of the negative aspects of utilizing IT were not emphasized, in part perhaps because the participants were overwhelmingly IT users. However, not all older adults will feel as comfortable. While there are many benefits to the usage of IT, some come at a personal cost. The advantages are not uniformly positive for the general population and some level of sophistication may be needed to take advantage of the features.

### **5.3.2 USAGE OF TECHNOLOGY**

Already there are many frustrating aspects of using IT and the trend is increasing rapidly. The cost of using available technology is also likely to rise and there will be social implications for those who cannot afford to participate,

which will likely have a negative impact on their self-worth and identity. Electronic surveillance is becoming more common. Many older adults are already somewhat suspicious of IT and do not entirely trust the technology. This trend may increase in the future. Similarly, although there may be no direct financial cost for access to some of the features of the internet (e.g. Google), each time a site is accessed, personal information is gleaned, giving a feeling of being watched and manipulated. As an example, each time a travel site is accessed, advertisements for hotels, car hire and local events at the destination site will appear. This may be also worrisome to some older adults and could create suspicion and insecurity, which can have an impact on their feeling of self-confidence. While having these features available may be useful and convenient, there is a breach of privacy. Governments, businesses and other bodies are constantly scouring the internet for meta-data. While we are assured that there is no infringement on our personal security, many, especially older adults (who grew up before these technologies became ubiquitous) may be suspicious. There have been several security breaches where hackers have accessed the personal data of consumers, such as their credit rating information, which may make some older adults reluctant to use on-line banking.

The ability to remain a consumer is an important factor in maintaining a positive identity during the transition to retirement. Technology can provide opportunities but also problems. Consumers may be reluctant to shop in a store as there is surveillance. Having credit cards or customer loyalty cards reveals privacy information (Cromby and Standen 1999). The alternative is on-line shopping, where information is gleaned over the internet, which implies lack of privacy, which could re-enforce the suspicion of older adults when using IT for financial transactions.

The recent release of the new iPhone X is an indication of how technology is moving forward and impacting our behaviour. It has face-recognition to gain entry and a camera with many sophisticated and complicated features. Money transfers are available and the AI voice recognition features of Siri have become more comprehensive. Other manufacturers are likely to follow suit

with more sophisticated versions of their products. For older adults, keeping up with technology is a daunting task, which can make them feel less adequate. The cost of these devices is high and this might make it inaccessible to older adults who do not have financial resources, which could further impact their feelings of insecurity and self-worth.

The choice that some older adults may need to make, which is likely to be even more difficult for the future cohort who will be transitioning to retirement, is to either reluctantly access information or products or to limit the usage of technology. The former, although providing useful information and is already a common form of behaviour, can have an impact on feelings of adequacy and self-worth, as keeping up with advancing technology is daunting and there is a growing feeling of suspicion. The latter can result in a sense of being left behind, which again impacts feelings of adequacy, as demonstrated by the outlier case study. Either choice will have an impact on older adults' confidence and feeling that they can fully participate in society, which will directly impact their identity.

Despite these barriers, the usage of IT is pervasive and mostly regarded as the norm. Consistent with Continuity Theory, those with the disposition to be innovative, willing and motivated to keep up with changes, could be more likely to adapt more easily. The more the appropriate IT advances are accepted during life changes (such as the transition to retirement), the more the older adult demographic will benefit.

## **5.4 APPLICATION**

From the findings and analysis of the results, it appears that retirement can be a satisfying experience for those with a positive attitude and who remain active and engaged with family and friends. This conclusion could be beneficial to those who are still working and who are apprehensive about retiring as well as to those transitioning or who feel fully retired

The ubiquitous usage of IT and the aging demographic, as well as the rising proportion of retirees, their identity and how they function and contribute in society, are topics that have been extensively researched, as well as anecdotally discussed and reported upon. This research brings together the components of the research question and provides not only a snapshot of the current demographic, but a roadmap for future research,

There is a personal aspect to my undertaking this research. I am a retiree who, while transitioning to retirement from the IT industry, was looking for something that I felt was meaningful. I soon realized that what I was pursuing was the need to find an identity that gave me a feeling of self-worth. Also, this thesis could not have been written without the facilitation of IT. I initially identified the availability of the Doctoral program at the University of Leicester through a Google search. The majority of references were through the university virtual library. I regularly had Skype calls with my supervisors. All documents were regularly backed up using Dropbox. The initial connection with the respondents was by email and the survey conducted by using an on-line survey product. Many interviews were conducted using Skype. The thesis was submitted through an on-line printing and binding service.

My experience, the methodology used, tools developed and the investigation of the factors that can contribute to a positive identity could be applied to investigating other groups who are planning for retirement. The mixed methods utilized, including the design of the survey and the semi-structured interview questions could be applied to future research on either a similar or totally different respondent demographic and/or generation.

The results of the research could be usefully applied by diverse organizations. For professional organizations with a similar demographic (well educated, financially stable and relatively healthy) who wish to prepare their employees for retirement, the results could be used as material for training courses, including the specific usage of IT for activities appropriate for older adults. Examples of professions that could apply the results are academics, nurses, physiotherapists, occupational therapists, civil servants and engineers. Many

of their organizations give seminars to their members who are about to retire. Knowing that the majority of respondents felt fully transitioned within 2 years and were leading fulfilling lives, could be a significant factor in removing apprehension among those who are facing retirement as well as removing the expectation that there will always be an immediate transition. Courses can be specifically tailored to emphasize social networking skills and how to engage in activities. An IT component can be tailored to how to become socially involved and explore and engage in salient activities (e.g. email, Google, Skype and Facebook). A section of the course could be on how identity evolves during transition and the factors that have an impact. Having an understanding of what may have a positive influence could help improve the retirement experience and accelerate the transition.

There is also a commercial opportunity for individuals or organizations that are interested in giving courses to seniors who are about to or have retired, using the same principles as described above. Private companies, seniors' organizations or municipalities could run transition seminars. As the research has shown that salient activities and social networks are important factors that contribute to a positive identity, and that technology is a facilitator, these aspects can be included in course material. Courses designed to address IT that facilitates seniors' activities and social networks (eg, Skype for remote communications) can be included. As there is a relationship between the usage of IT and the lifestyle of older adults, courses could be customized to incorporate both factors. Courses on such activities as knitting could include how to search the web for patterns. Similarly courses on outdoor activities such as kayaking and hiking could incorporate the usage of GPS, fitness and trail map software.

Municipalities and city planners may be able to utilize the results when planning facilities for the older generation. Understanding which activities can be undertaken by older adults (such as sports and arts), and including the use of IT, may be useful in setting up clubs and facilities for that demographic. Governments and policy makers are aware that the retirement age is increasing and that following retirement, older adults are active and relatively



healthy. The results of the research can be applied, for the appropriate demographic, to planning for health facilities, pensions as well as for making decisions regarding the suitable age for retirement. According to the Canadian Government census of 2016 (statscan.ca no date c), for the first time seniors outnumber children. There are now 5.9 million Canadian seniors, compared to 5.8 million Canadians 14 and under. This can cause a serious financial problem for governments and organizations who provide pensions and services to older adults. The results of the research could be useful for future financial planning. As older adults of retirement age are active and healthy, increasing the minimum retirement age could be a feasible option.

## **5.5 RECOMMENDATIONS FOR FUTURE RESEARCH**

While the results of the study are focused on the current period of time, have addressed limitations in the literature and deduced the relationship between the components of the research question, they are limited to a narrow portion of the population - financially stable, well-educated teachers in Canada. These characteristics can be regarded as a baseline. The following are some recommendations for future research, which although not exhaustive, would broaden the findings. The survey and interview questions from this study could be used as templates among different demographics for future research

It could be interesting to conduct a similar survey and ask the same general questions to compare a similar demographic group in Canada, such as nurses, engineers and civil servants. They are well educated, have pensions and are generally healthy and are likely to have been exposed to IT during their working life, which are similar attributes to teachers. It could be anticipated that the results would be similar to the current study.

As the research question captures a snapshot of the retirement and IT experience at the current time, it could also be worthwhile researching the same demographic, teachers, but in different countries such as the UK, EU, China and other eastern and western countries. The objective would be to ascertain whether cultural differences have an impact on a well-educated,

financially stable group and if their experience and attitude towards retirement was similar.

It could also be interesting to investigate whether generational factors have an impact by investigating the attitudes of Canadian teachers who are about to retire and also those who have been retired for a long period of time. While they would have had similar education and financial status, their experience with IT and how it facilitates the transition to retirement would likely differ significantly.

A limitation of the research is that during the interviews, respondents were asked to think back to their experiences when they retired and during transition, requiring them to rely on their memory and perceptions. The ideal method of understanding the changes in identity as well as the usage of technology would be to undertake a longitudinal study. Suggested time frames, based on the trend from the study, would be the time of stopping work, 1 year later, 2 years later, 5 years later and 10 years later. A longitudinal study would be ideal not only for the well-educated, financially stable demographic, but others such as blue-collar workers.

A further limitation of the study is that it applies to a demographic that have particular attributes. While the above describe possible areas of research for the well-educated and financially stable demographic, asking the same questions, but to a less educated and less financially stable group, but of the same age demographic, such as blue collar workers, would likely show a different retirement experience. They may not have the education, experience, financial means or motivation and opportunity to pursue diverse activities or embrace IT. It could be expected that their transition experience would be very different and the usage of IT would have a lesser impact. It would be interesting to investigate whether this would have a negative impact on their feelings of self-worth, given that they can still have a strong social network and be involved in many activities.

A non-homogenous group, but with a common interest, such as members of a sports team or knitting club, could be worth investigating. While they would have some common interests, their educational background, financial circumstances and usage of IT would likely differ. They would have some common social networks and share in an activity and likely use tools such as e-mail to communicate, but other commonalities and differences would need to be investigated.

Another group that could be worth investigating would be those with poor health and/or lack of financial stability, regardless of their level of education. It is likely that they would be limited in their activities and would have a low sense of self-esteem.

Further work could be done to refine and enhance the conceptual model proposed in the previous chapters. This would not only apply to the demographics suggested for further research above, but could also be explored for different elements such as the relationship between self-worth and confidence with using new technologies.

## **5.6 COMMENTARY**

While IT is an enabler and plays a large part in facilitating the transition to retirement, some older adults are ambivalent about its usage and with the fast growing advances, are likely to become more so in the future. The internet is pervasive and companies such as Google, Facebook and Amazon may make those using their applications become addictive. Consumers are likely robbed of choice. As an example, Facebook can influence news feeds by the prominence and frequency of display, which, as an example, may result in shaping political election results by giving priority to preferred candidates (Foer 2017).

In the world of the dominance of 'mega' technology companies, there is less privacy, less independence, less imagination and less compassion (Foer 2017). Users of the new technology are likely to become less analytical and want

instant gratification. Having constant access to the internet and IT has resulted in a generation who want instant results and there is no time for or desire for contemplation. This behaviour will likely carry through to when they become retirees, and have an impact on their actions. On the other hand, the technology being developed is becoming more and more of an enabler for communicating as well as improving the efficiency of our day to day lives.

Google has invested heavily in AI. Future behaviour patterns can be envisaged as a blend of humans and machines, such as transportation by self-driving cars, which, in some cases, can have the effect of diluting the human spirit and identity. Currently people can already be regarded as cyborgs to the extent that we use aids such as eye glasses to improve our vision, chairs to assist in sitting, shoes to assist in walking and phones to communicate over long distances. In the future, a more sophisticated use can be envisaged such as embedding communications devices under our skin. The more we accept the usage as normal, the more technology will transform our day-to-day experiences, whether we are conscious of this or not. According to Harari (2017), in the future older adults will be to a large extent cyborgs as the objective will be to have body parts and minds that will not wear out.

Having technology that ensures that our bodies are resilient and are cosmetically pleasing can have a positive impact on identity (Cromby and Standen 1999). Aids that assist physically and mentally challenged individuals to use IT devices are readily available today and are becoming more available and accessible. The result is an aging generation that will be able to continue to use the evolving IT tools and devices. The features of social media allow for an individual to project themselves with an identity of their choice. This is an important aspect for those with low self-esteem as they grow older and they may be able to satisfy their social needs by participating in social media sites (Cromby and Standen 1999).

In conclusion, today's older adults are contributors to society and generally lead a fulfilling and busy life. In future, these attributes will likely be enhanced. For the next generation of retirees, and even more for future generations, the

expectation is that adults will be retiring later, living longer after retirement, and will have the physical and mental ability to maintain their position as useful members of society. This will be augmented by technical advances and AI. Those transitioning to retirement in the future may look forward to a long and purposeful retirement, rich with extensive social networks and multiple engaging activities, which they would likely enjoy with their positive identities.

## APPENDICES

### APPENDIX 1 - TEACHERS IN CANADA

Table A.1 Labour Disputes in Nova Scotia

Date	Event	Comments
July 2015	Collective agreement expired	
December 2015 – October 2016	Offered 3 new contracts	Initial rejected by 61%. Others voted down to send a message that classroom size was a priority.
October 2016	Strike vote	Voted by 96% majority
February 1 2017	Govt. bill imposing contract	Public protest – bill withdrawn
February 17 2017	One day walkout	First strike in 122 years
February 21 2017	New legislation passed	Teacher gained 3% over 4 years. Government claimed that there had been misunderstandings – teachers countered that funds had been inappropriately allocated and there was no allowance for special needs students.

Based on research by MacNeil (2017), Dingwall and Boon (2017), Gorman (2017) and Auld and Tutton (2017).

Table A.2 Labour Disputes in Ontario

Date	Event	Comments
May 2012	Forced collective agreement - Strike of three regional Secondary School Teachers Federations	Collective agreement imposed labour contracts and limited the ability to strike. This was the first full-scale walkout since 1997. There had been previous work-to rule campaigns
December 18 2012	One-day walkout by several school districts, following a series of rotating one-day strikes	The Bill imposing the collective agreement was later repealed
April of 2014	New collective negotiating system through central bargaining for teachers	
April 2015	Government proposed to eliminate caps on class sizes and give teachers additional non-class activities	Several school districts staged a work-to-rule campaign
May 28 2015	Government legislated the teachers back to work	

Based on research by Edwards (2015), CTV staff (2015) and Sherwood (2015)

Table A.3 Labour Disputes in British Columbia

Date	Event	Comments
Fall 2001	Limited job action by teachers	All extra-curricular and administrative services withdrawn
January 2002	Minister of Education nullified the teachers' collective agreement	\$336 million cut from the public education budget.
March 2002	Bills removing the BCTF's ability to bargain class size and composition, support for special needs students and collective bargaining rights.	
April 2002	BCTF initiated legal action through the BC court system against the government	Argument - removing teachers' right to collective bargaining unconstitutional
March 2004	Expiry of Contract	Dispute with the government continued
Sept 2005	Teachers voted 90.5% in favour of a strike	No success in negotiating a new contract
October 2005	Government legislated 3 years of no pay increase; extended existing contract to 2006.	
October 11 2005	Teachers on strike for 10 days - found in contempt of defying the Labour Relations Board (LRB) and ordered to return to work.	Three days later, they returned to the classrooms
October 2006	Contract expired. Agreement reached offering 16% salary agreement over 5 year period.	BCTF and BC government reached first ever negotiated collective agreement
April 2011	BC Supreme Court ruled BC Government's legislation to prevent workers' rights to collectively bargain class sizes and support for students with special needs unconstitutional	Nine years after the initial court action was initiated. Government given one year to reinstate the bargaining rights
February 2012	Government introduced a new bill suspending the ability of teachers to strike	
April 2012	One-year period imposed by the BC Supreme Court for the government to reinstate bargaining rights passed	No remedial action by the government
April 2012	BCTF launched a complaint to Supreme Court of BC	
June 2013	BC Teachers contract expired	Teachers again left without a contract and no collective agreement, but continued to work
January 2014,	Supreme Court of <b>BC</b> re-affirmed that limiting bargaining rights for classroom size by the government unconstitutional - were directed to pay \$2 million in damages to BCTF.	
February 2014	Government appealed decision to the Court of Appeal of British Columbia and won - teachers	

	on strike from March to September 2014	
	BCTU appealed to the Supreme Court of Canada.	
September 2014	Agreement reached between Government and BCTF	On average teachers lost \$10,000 - all union funds were used to fight the court action. A small pay increase was awarded
September 18 2014	Collective agreement between the BCTF and the government signed (retroactive from July 1 2014 – June 30 2019),	Addresses salaries, classroom size, work hours, sick leave and the grievance procedures
November 2016	Supreme Court of Canada ruled in favour of the teachers	Government ordered to pay damages to BCTF

Based on research by Kalfa (2014), Woo and Giovannetti (2014), Mason (2014), Shaw (2014), Lintz and Sherlock (2016), and Croll (2014)

Table A.4 Median Salaries for Canadian Teachers

All K-12 Teachers Median Salary by Job

Category	National Median Salary Data
1. Elementary School Teacher	C\$51,734
2. High School Teacher	C\$55,023
3. Secondary School Teacher	C\$57,496
4. Middle School Teacher	C\$54,520
5. Primary School Teacher	C\$49,611
6. Kindergarten Teacher (but not Special Education)	C\$47,682

(payscale.com no date)



Table A.5 Variation amongst Canadian Teachers' Salaries

<b>Province/Territory</b>	<b>City/District</b>	<b>Minimum Salary (\$)</b>	<b>Maximum Salary (\$)</b>
North West Territories	Yellowknife	71,007	108,533
Yukon	Whitehorse	68,362	98,754
Alberta	Edmonton	61,489	95,354
Alberta	Calgary	61,038	95,073
Manitoba	Winnipeg	55,689	84,681
Ontario	Ottawa	53,551	88,816
Ontario	Toronto	51,738	89,614
Newfoundland and Labrador	St Johns	51,166	67,001
Nova Scotia	Halifax	50,205	71,654
Prince Edward Island	Charlottetown	49,045	70,878
New Brunswick	Fredericktown	48,793	75,241
British Columbia	Victoria	48,626	74,353
British Columbia	Vancouver	48,083	74,353
British Columbia	Prince George	45,909	74,353
Quebec	Montreal	41,451	74,244

data extracted from White (2014),

Table A.6 Teachers Pensions

	<b>Pension Calculation</b>	<b>Eligibility</b>	<b>Age of Retirement</b>	<b>Comments</b>
Nova Scotia	2% x average highest salary over 5 years x no. years' service (up to a max. of 70%, with at least 35 years of service).	Total service age is at least 85, where service age = number of years worked x age	Minimum 55	Teachers who worked for 35 years, or are at least 60 with 10 years of service, or are 65 with at least 2 years of service, - eligible to receive a full pension, regardless of their service age. Pensions for years of service are a right while pensions for disabilities are at the discretion of the school board - require medical certificate.
Ontario	2% x no. years' service x average 5 best years' salary,	Age x no. years' service. Must be a minimum of 85	No specified age, as long as eligibility criteria is met	Those under 65 receive a supplement to compensate for the Canadian Pension Plan (CPP), which is payable after the age of 65. At 65, the bridge CPP benefit removed.
British Columbia	Average of the highest five year salary years (HAS). Prior to age 65 the formula is (2% x HAS x total pensionable service).	Combination of age and years of service totals must be 90	No specified age, as long as eligibility criteria is met	If a teacher wishes to retire before meeting the criteria, a reduced pension will apply. At 65, teachers become eligible for an unreduced Canadian Pension Plan (CPP), which averages approximately \$10,000 pa. If a teacher becomes disabled while teaching and is eligible to receive disability benefits, they are still entitled to receive their pension

## APPENDIX 2 - EMAIL TO PROSPECTIVE RESPONDENTS

### PLEASE HELP MAKE THE TRANSITION TO RETIREMENT EASIER FOR TEACHERS BY PARTICIPATING IN MY RESEARCH.

I am a retiree living in Ottawa and am working towards my doctorate as a distance learning student with the University of Leicester in the UK. Spurred on in part by my own experiences, and wanting to understand the bigger picture around how we look at ourselves and how social media and information technology influence our lives in retirement, I am exploring the following questions in my doctoral thesis: "What is the relationship between identity and the transition to retirement and how is the transition facilitated by the use of technology?"

As part of my research, I am planning to survey retired teachers using a brief 10-minute, anonymous, on-line questionnaire. Following this initial survey, I would like to interview willing participants to obtain more in-depth information. All information will remain completely confidential.

I am hoping be that you will agree to be part of my research by participating in the survey and by answering a number of questions, including those looking at:

- activities you have taken part in during your retirement (eg. volunteering, travel, sport)
- social networks in which you engage (eg. family, friends, social clubs)
- forms of technology you use to facilitate these activities and connections (eg. email, Skype)
- conditions around your retirement

All those who complete the online survey will be eligible to participate in a draw for \$100.

It would be very helpful to my research and much appreciated if you would also agree to a one hour, one-on-one interview with me about whether and how you feel your identity has changed since you have retired. As well, I will gather more details about your social networks, the specific communication and social networking technologies you find most useful, and both what motivates and what discourages you from using them.

All those who have been interviewed one-on-one will be eligible to participate in a second draw for \$100.

There has been extensive research on how the identity of seniors changes as well as on how older adults use technology. What has not been well documented is how identity evolves during the transition to retirement and the role that technology plays. I have obtained approval from the Ethics Board at the University of Leicester for my study and my intent is to conduct meaningful research that will benefit retirees. As I share in this demographic myself, I look forward to talking with you and learning from you.

If you are willing to participate in my research, please contact me at:  
[research@barwin.ca](mailto:research@barwin.ca)

Please indicate whether you are willing to complete the on-line questionnaire only, or whether you also would be willing to be interviewed. Once I receive your response, I

will send you a *Consent Form*, a *Participant Information Sheet* and instructions on how to access the on-line *Survey*.

I am hoping to conduct the interviews in person, but some may be by Skype or phone. If you wish to see the transcript of your interview, I will be happy to send it to you. Please note once again, that there will be no identifying information included in the transcripts. Once the survey and interviews are completed, the data will be stored in a secure, password protected back-up site where it will be kept for two years, accessible only to me, and then deleted.

I very much look forward to working with you and gaining useful insights into our retirement years. If you are interested, I will gladly send you the results of my research when my thesis is finished.

Sincerely,  
Myrna Barwin

## APPENDIX 3 - EMAIL FROM NOVA SCOTIA RETIRED TEACHER'S ASSOCIATION TO THEIR MEMBERS

**From:** Jim Kavanaugh [<mailto:jkavanaugh@ns.sympatico.ca>]

**Sent:** April-06-16 11:42 AM

**To:** 'Ambrose White'; Alex & Debbie; ANDRE TURBIDE; Bernadette Hollohan ([bm.hollohan58@hotmail.com](mailto:bm.hollohan58@hotmail.com)); bgmahaney; 'Brian Faught'; 'Cathy Anderson'; David Jones ([davejones@bellaliant.net](mailto:davejones@bellaliant.net)); djtrask-cushing; 'Don Campbell'; Frances MacEachern ([franme@ns.sympatico.ca](mailto:franme@ns.sympatico.ca)); Glen Demone ([glenndemone@gmail.com](mailto:glenndemone@gmail.com)); 'John Donovan'; 'Judy Knowlton'; 'Marlene Boyd'; 'Mary Hammond'; [mbraymond@eastlink.ca](mailto:mbraymond@eastlink.ca); 'Peter Mattatall'; Phil Van Zoost; 'Reg Johnston'; 'Ross Thompson'; 'Shirley Jeffery'; 'Vicky Parker'; 'Wayne LeBlanc'

**Cc:** 'Vic Fleury'; 'Norbert LeBlanc'; 'Annette Petrie'; 'Debbie McIsaac'; 'Al MacKinnon'; bberryman; Bill Wagstaff; [fredjeffery@eastlink.ca](mailto:fredjeffery@eastlink.ca); Gary Archibald; Herbert Seymour; [hillieac@gmail.com](mailto:hillieac@gmail.com); 'Jack Boyd'; Jim Kavanaugh; [rholm@ns.sympatico.ca](mailto:rholm@ns.sympatico.ca); [wwoodwor@staff.ednet.ns.ca](mailto:wwoodwor@staff.ednet.ns.ca)

**Subject:** Research Facilitation

Hi All,

The RTO Executive has agreed to help facilitate a doctoral research project by Ottawa retiree Myrna Barwin. Ms Barwin is investigating how we look at ourselves and how social media and information technology influence our lives in retirement. Her project is titled "What is the relationship between identity and the transition to retirement and how is the transition facilitated by the use of technology?" We agreed to help because Ms Barwin will be sharing her findings with us and her investigation is in line with the work of our Research/Review Committee who have been examining the whole area of wellness and they will be putting particular emphasis on the problem of social isolation. Also, her work could be very helpful as we plan our new program of "Facilitating the Transition to Retirement".

Therefore we ask your assistance in distributing Ms Barwin's letter to your members and, hopefully, some of them will respond and participate. Also attached is Ms Barwin's Ethics approval letter from the University but you need not pass that along. Thank you for any assistance you can provide.

Jim Kavanaugh  
3238 Nicholson Ave  
New Waterford, NS B1H 1P1  
h 902 862 3833  
c 902 371 3075

## **APPENDIX 4 - GUIDELINES FOR SEMI-STRUCTURED INTERVIEW**

The following is the information that will be contained in the semi-structured interview: Questions from the survey will be used as a guideline.

Opening questions:

“Tell me about your retirement experience”.

What needs to be addressed by the end of the interview?

What is the relationship between identity and the transition to retirement?

What will be ascertained (in any order)?

What are the specific activities of the respondents and with whom do they frequently interact?

How the respondents feel when interacting and with participating in those activities (ie. their identity)?

What technology was used to facilitate each activity? Was it useful and what would the consequence be of not using technology?

Is there a difference in how they use technology between interacting with contacts and for facilitating activities?

Have there been significant changes in activities and identity since retirement?

Have activities changed?

Have social networks changes?

**HAS THE FEELING TOWARDS ONESELF CHANGED – ie. IDENTITY?**

What were the circumstances of retirement and did they influence post-retirement identity?

Did the last years of work have an impact on when retirement took place?

Are any of the skills acquired while working being utilized during retirement?

Do the respondents have the same characteristics as they did while working (e.g. optimistic, hard-working, need for structure, planning ability)?

Do the respondents identify as being ‘retired teachers’, or just retirees (how often mix with past colleagues)?

Is there a sense of group identity?

Technology usage: motivator and detractor

## APPENDIX 5 - SURVEY QUESTIONS

### Retirement and technology

**Thank you for participating in this brief survey containing questions about the activities, social networks and technology in which you engage during your retirement. The survey should take approximately 10 minutes to complete.**

1.

I hereby give consent to Myrna Barwin to use me as a respondent for her research. I have been given full information, understand the purpose of the project and that there will be complete anonymity, I will not be identified and I can withdraw from the study at any time. My information will be aggregated with others and solely used for the purpose of a doctoral thesis and academic publications.

☐ Yes

☐ No

## Retirement and Technology

2. What is your age?

- ☐ under 50
- ☐ 50-54
- ☐ 55-59
- ☐ 60-64
- ☐ 65-69
- ☐ 70-74
- ☐ 75 or older



3. What is your gender?

☐ Female

☐ Male

☐ Other (please specify)

4. What is your marital status?

- ☐ Single
- ☐ Married/Partnered
- ☐ Divorced/Separated
- ☐ Widowed
- ☐ Other (please specify)

5. How many years have you been retired? If not retired, please indicate the year when you plan to retire.

6. What is the highest level of education you have completed?

- ☐ Bachelors
- ☐ Masters
- ☐ Doctorate
- ☐ Teaching Certificate
- ☐ Other (please specify)

7. At what level did you teach?

- ☐ Pre-school
- ☐ Primary
- ☐ Secondary
- ☐ Other (please specify)

8. Which subject(s) did you teach

9. In which province did you teach?

☐ British Columbia

☐ Nova Scotia

☐ Ontario

☐ Other (please specify)

10. Did you teach in an urban or rural area?

☐ Urban

☐ Rural

11. Was your retirement voluntary or involuntary?

☐ Voluntary

☐ Involuntary

☐ Other (please specify)

12. Does your health prevent you from engaging in activities you had planned for during your retirement?

☐ Yes

☐ No

☐ Other (please specify)



13. Does your financial status prevent you from engaging in activities you had planned for during your retirement?

☐ Yes

☐ No

☐ Other (please specify)

The following questions address how you interact with family, friends and acquaintances.

14. Rank the importance and frequency of interaction with the following. **RESPOND ONLY WITH RESPECT TO THOSE THAT APPLY TO YOU.**

	Importance	Frequency
Neighbours	<input type="text"/>	<input type="text"/>
Friends	<input type="text"/>	<input type="text"/>
Work Colleagues	<input type="text"/>	<input type="text"/>
Family	<input type="text"/>	<input type="text"/>
Club members	<input type="text"/>	<input type="text"/>
Individuals of like interest	<input type="text"/>	<input type="text"/>
Students	<input type="text"/>	<input type="text"/>
Acquaintances	<input type="text"/>	<input type="text"/>
Other (please specify)	<input type="text"/>	

15. Which technologies facilitate interacting with family, friends and acquaintences? **RESPOND ONLY WITH RESPECT TO THOSE TECHNOLOGIES THAT APPLY TO YOU.**

	Importance	Frequency
Telephone	<input type="text"/>	<input type="text"/>
Cell Phone	<input type="text"/>	<input type="text"/>
Smartphone	<input type="text"/>	<input type="text"/>
Tablet (iPad)	<input type="text"/>	<input type="text"/>
e-Reader	<input type="text"/>	<input type="text"/>
Personal Computer	<input type="text"/>	<input type="text"/>
email	<input type="text"/>	<input type="text"/>
Texting	<input type="text"/>	<input type="text"/>
Google or other search engine	<input type="text"/>	<input type="text"/>
Facebook	<input type="text"/>	<input type="text"/>
Twitter	<input type="text"/>	<input type="text"/>
LinkedIn	<input type="text"/>	<input type="text"/>
Skype	<input type="text"/>	<input type="text"/>
Instagram	<input type="text"/>	<input type="text"/>
WhatsApp	<input type="text"/>	<input type="text"/>
MeetUp	<input type="text"/>	<input type="text"/>
Word Proccessor/ Spreadsheet/Powerpoint	<input type="text"/>	<input type="text"/>
None	<input type="text"/>	<input type="text"/>
Other (please specify)	<input type="text"/>	

16. To what extent does the use of technology enhance interacting with friends and family during your retirement?

- ☐ Very significant
- ☐ Significant
- ☐ Neutral
- ☐ Insignificant
- ☐ Totally insignificant
- ☐ Other (please specify)

16. To what extent does the use of technology enhance interacting with friends and family during your retirement?

- ☐ Very significant
- ☐ Significant
- ☐ Neutral
- ☐ Insignificant
- ☐ Totally insignificant
- ☐ Other (please specify)

The following apply to your retirement activities

17. Rate the importance and frequency of the following. **RESPOND ONLY WITH RESPECT TO THOSE THAT APPLY TO YOU.**

	Importance	Frequency
Club/Organization Membership	<input type="text"/>	<input type="text"/>
Sports/Fitness	<input type="text"/>	<input type="text"/>
Studying/Reading/Writing	<input type="text"/>	<input type="text"/>
Travelling	<input type="text"/>	<input type="text"/>
Arts (Photography/Art/Music/Crafts)	<input type="text"/>	<input type="text"/>
Cards/Bridge	<input type="text"/>	<input type="text"/>
Book Club	<input type="text"/>	<input type="text"/>
Entertainment (Movies/TV/Theatre/Concerts/on-line games)	<input type="text"/>	<input type="text"/>
Volunteering	<input type="text"/>	<input type="text"/>
Teaching/Instructing/Coaching	<input type="text"/>	<input type="text"/>
Baby-sitting/Caregiving	<input type="text"/>	<input type="text"/>

Other (please specify)

18. Which technologies facilitate your retirement activities? RESPOND ONLY WITH RESPECT TO THOSE TECHNOLOGIES THAT APPLY TO YOU.

	Importance	Frequency
Telephone	<input type="text"/>	<input type="text"/>
Cell Phone	<input type="text"/>	<input type="text"/>
Smartphone	<input type="text"/>	<input type="text"/>
Tablet (eg. iPad)	<input type="text"/>	<input type="text"/>
e-Reader	<input type="text"/>	<input type="text"/>
Personal Computer	<input type="text"/>	<input type="text"/>
email	<input type="text"/>	<input type="text"/>
Texting	<input type="text"/>	<input type="text"/>
Google or other search engine	<input type="text"/>	<input type="text"/>
Facebook	<input type="text"/>	<input type="text"/>
Twitter	<input type="text"/>	<input type="text"/>
LinkedIn	<input type="text"/>	<input type="text"/>
Skype	<input type="text"/>	<input type="text"/>
Instagram	<input type="text"/>	<input type="text"/>
WhatsApp	<input type="text"/>	<input type="text"/>
Word Processor/ Spreadsheet/Powerpoint	<input type="text"/>	<input type="text"/>
MeetUp	<input type="text"/>	<input type="text"/>
None	<input type="text"/>	<input type="text"/>
Other (please specify)	<input type="text"/>	

19. To what extent does the use of technology enhance your retirement activities?

- ☐ Very significant
- ☐ Significant
- ☐ Neutral
- ☐ Insignificant
- ☐ Totally insignificant
- ☐ Other (please specify)



**IF APPLICABLE, please indicate, in order of importance to you, additional retirement activities that have not been mentioned.**

20. Additional activity 1

21. Additional activity 2

22. Additional activity 3

23. Additional activity 4

24. Additional activity 5

25. Are you willing to participate in a one-on-one interview. **IF YES, PLEASE SEND AN EMAIL to:**  
research@barwin.ca

☐ Yes

☐ No

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