



Occupational Identity in Later Life

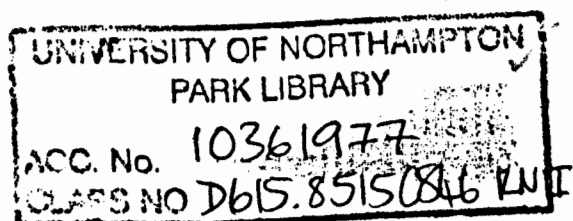
Submitted for the Degree of Doctor of Philosophy
At the University of Northampton

Year
2013

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Abstract

Occupational identity in later life represents a lifetime of occupational choices which encapsulate multiple meanings derived from the past and interpreted as a source of being in the present. Engaging in meaningful occupations has the potential to promote successful ageing, but health and declining capacities can influence that choice. The aim of this study was to explore the occupations that older people have engaged in during their lives, in particular, to discover how this influences occupational choice in later life.

Ninety six people, aged 55 and over were recruited using local groups, organisations and communities of, or for older people. A survey questionnaire ascertained demographic and occupational data from this sample, which, largely concurred with national data. From those in the sample who had agreed to be interviewed, five women and three men aged between 64 and 92 were selected to reflect its diversity. A biographical approach was adopted and two to three in-depth interviews explored occupational life stories and the growth of occupational identity. Life chronologies provided a framework for narrative analysis of each biography which was followed by horizontal analysis to identify emerging themes.

The findings demonstrate the considerable social changes that have occurred during the participants lives. Values, customs and occupational meaning gained early in life contributed to evolving occupational identity. Various factors such as family, class, gender and education for a young person in the 30's, 40's and 50's had a strong influence on opportunities and attainment in life. The gender imbalance in the years up to retirement, with men afforded greater opportunities than most of the women, was redressed after retirement with women having equal or greater occupational opportunity and choice than the men. Meaningful connection was the predominant form of meaning in both key occupations and daily routine, either through connection with the past self or 'being with' others in the present. A loss of occupational meaning, a state of 'being without' was identified following a major bereavement and new meaning was sought through occupations involving 'being with' others in an endeavour to accommodate a changed occupational identity. Finally the current conceptualisation of occupational identity reflects a western, but non-European, perspective, which this study demonstrated only pertained to the male participants, while the women demonstrated connectedness and interdependence. It is therefore important that the theoretical concept of occupational identity should in future include a notion of gender difference within it. A further study could explore a European perspective to ascertain if a gender difference exists in occupational identity for a younger cohort. Meanwhile, the findings from this study suggest that there is necessity for occupational therapists to promote occupation as part of the current drive for healthy ageing.

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CHAPTER 1

Introduction

1:1 Background to the study

The study reported in this thesis has been conducted in the context of a worldwide ageing population (WHO, 2002) and potential current and impending global economic and social challenges which may result (Hutchinson *et al.*, 2006). In the United Kingdom (UK) the population is growing older and the number of people over the age of 75 is growing particularly fast (McCormick *et al.*, 2009). One of these challenges is the demographic change in population with people living longer, but with fewer children being born. This is thought to have created a growing dependency ratio which, in Europe, is becoming acute (Storrie, 2011). One strategy, he suggested, is for employers to adopt a more active and inclusive policy for the older worker, who will also be required to work additional years before he or she can retire. Another government led strategy in the developed world has been to encourage older people to lead healthy, active and productive lives (WHO, 2002; Mills, 2007) once they have retired. According to Stegeman (2012), healthy ageing promotes quality of life and includes ensuring that conditions and opportunities are created for older people to engage in regular physical activity and social relations, participate in meaningful activities, have a healthy diet and financial security. For example in the UK, healthy active ageing became one of the guidance standards in the National Framework for Older people (DH, 2001). As well as promoting exercise and physical activity such as walking, household chores and gardening, it acknowledged that education, creative and social pursuits were also beneficial. In addition, it was recognised that access to the facilities in the wider community, which enable older people to participate in and contribute to society, was a necessary condition. Some of the research in the field of gerontology which has contributed to active ageing policies has demonstrated that activity in various forms contributes to successful ageing (Mannell, 1993; Horgas *et al.* 1998; Menec 2003; Godfrey & Denby 2004; Litwin & Shiovitz-Ezra 2006; Chipperfield, 2008) with each study adopting a specific focus of enquiry. However, they all leave questions about the real nature of activity and its relationship with those who engage in it and the context in which it occurs. These are all questions which fall within the domain of occupational science.

Occupational science is the study of humans as occupational beings and the relationship between occupation and health (Yerxa *et al.* 1990, Zemke and Clark, 1996; Wilcock 2001, Hocking, 2008). Here the term occupation is not confined to paid employment, but refers to all that people do in their daily lives within the context of their changing and complex environments. One of the early definitions of occupational science is offered by Zemke and Clark (1996:7).

Occupational science is the study of humans as "occupational beings". As used here, the term "occupation" refers to the goal-directed activities that characterize daily human life as well as the characteristics and patterns of purposeful activity that occur over lifetimes as these affect health and well-being.

The study of occupational identity lies within the sphere of occupational science. The association between occupation and identity was first proposed by Christiansen (1999) and the concept was further developed as a theory by Kielhofner (2002) and Unruh (2004). Christiansen (1999) suggested that occupational identity provides a coherence, meaning and purpose to the life narrative and is thus central to promoting well being and life satisfaction. Occupational identity, as outlined by Kielhofner (2002), encompasses constructs such as capacities and interests, roles and relationships, routines and obligations and is influenced by environmental contexts and expectations. Further, he proposed that the occupations most likely to be central and sustaining to an individual's identity are interesting, satisfying and associated with competence and social valuation within one's environment. This view is supported by Unruh (2004) who suggested that people give up or modify occupations that are less central or significant in shaping identity, but persevere with those occupations more interwoven with their sense of self. This is particularly important when considering older people who may be encountering declining abilities, or changing financial, social or environmental circumstances associated with ageing.

Research into the nature of occupational identity was conducted by Christiansen (2000), Laliberte-Rudman (2002), Howie *et al.* (2004), Vrkljan and Miller Polgar (2006) and Griffiths *et al.* (2007) to inform the development of the theoretical concept. Almost all of these studies investigated occupational identity in relation to older people who engaged in a single occupation either in groups or as individuals, for example a creative arts group or driving. Other studies have focused on the changing sense of self that occurs with chronic illness or disability, for example (Charmaz, 2002), who found that self concept is threatened as a result. Findings suggested that identity is not only shaped by a relationship with others (Christiansen 1999, Howie 2004), but by what the

individual does and how this is interpreted in the context of relationships. Such thinking is derived from the traditions of symbolic interactionism (Christiansen 1999). They have argued that individuals both shape identities through the occupations they engage in (Howie et al., 2004) and receive a view of themselves as others see them (Christiansen 2000). Laliberte-Rudman (2002) proposed that occupations can both promote growth and a sense of self, and also peoples' identities can determine their occupations. Howie et al. (2004) found that whilst there is a consistent core of enduring qualities and characteristics within an individual, occupational identity was dynamic and open to change. However, more recently, the concept of occupational identity has been criticised for its western perspective, one that is likely to have little relevance in the non western world (Phillips, 2007; Laliberte-Rudman and Dennhardt, 2008; Phelan and Kinsella, 2009) and they suggested alternative theoretical frameworks to ameliorate the difficulty.

Later life can span thirty years or more and individuals will experience inevitable changes during that time. Howie et al. (2004) suggested that during these later years people have a changing self-awareness with the self experienced as a process subject to change comprising declining abilities and environmental contexts. At the same time some enduring qualities are retained with certain aspects of the self remaining constant over time. If, as Unruh (2004) suggested people give up or modify occupations that are less central to identity in the face of change, but persevere with occupations that are key to their sense of self, it is possible that occupational identity might not change significantly. On the other hand unwelcome changes caused by declining abilities or unexpected life events, such as having to give up driving, bereavement or having to move home may mean the loss of valued occupations that have shaped the sense of self and thus inevitable changes will occur to their occupational identity (Mishler, 1999). Little is known about whether these changes are perceived negatively or positively although it could be expected that voluntary changes are perceived more positively than involuntary ones. It is possible, as Laliberte-Rudman (2002) suggested, that an individual's occupational identity will also influence how they respond to involuntary change in terms of what they choose to do. Further research is required to explore if changes occur to occupational identity and if they exist to investigate the nature of these changes.

Therefore the key questions for this research study were firstly, whether changes to occupational identity occur in later life and, if this does take place, what is the nature of the change? A further question is whether occupational identity developed throughout the life course is influential in the choices that are made regarding occupational engagement later in later life? The third question concerns the current western concept

of occupational identity and asks whether this is a concept which fits with a UK population of people in later life at the current time?

Previous research on occupational identity in later life has been studied either from the perspective of single occupations, or from the perspective of illness or disability. This indicated a need to investigate occupational identity from a whole life perspective, which would include all relevant occupations. It would encompass the evolving occupational identity from early life until the present and capture the major changes that occurred during the life course, which should lead to an understanding of the choice of current occupations. This approach was also likely to reveal the rich contextual material concerning occupations, external influences and events which had contributed to shaping lives and identity. The aims and objectives of this study encapsulate this position.

1:2 Study aims and objectives

1:2:1 Aims

There are three aims to this study. The first is to explore occupational engagement over the life course. The second is to understand the development of occupational identity and explore how this influences occupational engagement in later life. The third is to contribute to the theory base of occupational science.

1:2:2 Objectives

The study will:

1. Define occupational identity
2. Trace the development of occupational identity over the life course.
3. Explore how occupational meaning influences occupational identity.
4. Investigate the impact of sociocultural influences on the development of occupational identity.
5. Make gender comparisons and explore ethnic and cultural differences.
6. Discover the influence of occupational identity on people's occupational engagement in later life
7. Explore the influence of occupational identity on people's response to the ageing process.
8. Integrate what is found with the theory base of occupational science.

1:3 Outline of the thesis

The thesis begins with three chapters to review literature relating to occupational identity in later life. In Chapter 2 gerontology literature is reviewed to explore ageing in a western society and the associated concerns, myths and stereotypes of ageing in this context. Some theories of ageing are introduced and critiqued and their influence on subsequent research and policy considered. The concept of successful ageing is introduced and research relating to the contribution of activity in many forms to successful ageing is investigated. Chapter 3 continues the review of the literature, first from occupational science, which explores the development of the discipline and some of the underlying principles and key concepts such as occupation, health, and occupation and health, before offering a brief outline of some of the other core concepts. Second, theories arising from the social sciences are reviewed that have relevance to this study, namely the genes versus environment debate, social constructionism and structuration theory. Finally Chapter 4 reviews the literature on the formation of identity from various psychosocial perspectives including individual and social aspects of identity, theories of social interactionism, self schema, Erikson's life span development theory and self efficacy. The function of narrative identity in later life is presented, as is the literature suggesting that identity is socially constructed, particularly by culture and gender. Various aspect of the ageing self and the identity issues that must be negotiated in later life conclude the first part of the chapter. The second section focuses on how occupational identity has developed as a theoretical concept with the literature indicating it is still evolving. Research relating to the nature of occupational identity is reviewed and critiqued.

Chapters 5 and 6 are devoted to the method used in this study. The study is divided into two phases and a mixed method is used as one approach alone would not completely address the complexity of occupational identity and the possible changes that occur in later life. In Chapter 5 the mixed method approach taken for this study is discussed before both quantitative and qualitative approaches are outlined and critiqued and a rationale is provided for the selection of the methods used in this study, namely a survey questionnaire, life history narrative interviews and time use diaries. Issues of ensuring quality in research, reflexivity and ethics are addressed. Chapter 6 outlines the procedure followed in Phase One, the design of the questionnaire, choice of sample and method of data collection and analysis. It then goes on to present the findings from this phase and outlines how these findings were used to select the Phase 2 sample. The second part of the chapter is devoted to Phase 2 procedure of data collection using two or more narrative interviews with each participant and collecting time use data using 24 hour time use diaries on two separate days. Details of the management and transcription of the main body of the data are outlined before

describing the analysis of the data. This was divided into first a vertical analysis of each biography followed by horizontal analysis across the narratives to discover common themes and concepts. The chapter concludes with an reflexive analysis of the performative aspects of the interview process and how this impacted on the analysis.

Chapter 7 presents findings from Phase 2 of this study in two different formats. Section One commences with a table of relevant demographic details before presenting biographical data from the vertical analysis of the narratives in the form of participant chronologies. Section Two goes on to provide data from the time use dairies in the form of tables and figures. Chapters 8, 9 and 10 focus on the horizontal analysis of the narratives. Chapter 8 focuses on the many contextual issues which impacted on the participants lives and shaped their identities. This includes a time line showing major socio-historical events in the six decades from 1910 to 1970. The contextual influences discussed include World War 2, childhood opportunities and corresponding attainment in later life; family, gender and cultural issues and finally the influence of societal and religious values gained in early life on their continuing contribution to society following retirement. Chapter 9 explores the meaning of occupations as this is central to self identity. The focus of the discussion centres first on the participants key occupations following retirement which included, voluntary work, sport, gardening and socialising with others. The meaning associated with these occupations emerged and are discussed in order of frequency. These comprised, meaningful connection, with others and with the past self, meaning through work, meaning in place, creativity and spirituality and finally sport. Secondly, occupational meaning that participants found through engaging in daily life and routines is then discussed. Themes to emerge here comprised meaningful connection once again, preserving capacity and the tensions between obligation and fun.

Chapter 10 is committed to an exploration of occupational identity over the life course. It commences with a section on the participants self perception in the form of personal qualities, occupational skills and various other beliefs about the self related to family, religion, spirituality and ethnicity. These are discussed in relation to the literature in terms of the strong occupational focus demonstrated in the participants self concept, their current occupational roles and how these relate to the ageless self, and concepts of coherence, continuity, self efficacy inherent within self concept. The major part of this chapter goes on to discuss occupational identity in relation to the literature and draws together findings from the two previous chapters. The findings upheld the view that occupations frequently embody the core characteristics of a person and overall the narratives in this study suggested that while the self demonstrated continuity and an

unchanging sense of self, within a changing world, the realities of ageing were, to some extent acknowledged within it.

Chapter 11 is devoted to a discussion of the findings from this study and includes the occupational engagement of participants in this study in relation to various theories of ageing. In answer to the criticism that the current concept of occupational identity has arisen solely from a western perspective, the theoretical concepts of social constructionism and structuration theory were evaluated. While neither theory provided a definitive theoretical framework for understanding occupational identity, it was thought that Giddens's structuration theory was the most useful of the two for those in later life. It was identified that the western view of occupational identity has adopted the dominant male perspective which did not represent the experience of the women in this study and distinct differences were found between men and women. Finally the many factors impacting on occupational choice in later life, which were evident in this study, were discussed. Chapter 12 concludes the thesis with an evaluation of how the research aims have been addressed, a consideration of the limitations of the study and an evaluation of the contribution of the study to future policy, research and practice.

CHAPTER 2

Ageing well in a western society

2:1 Introduction

This chapter will explore various aspects of growing old in the Western world. It will first consider the concept of ageing, from what is considered to be 'old' in this context, through retirement issues, myths and stereotypes of ageing to the impact ageing has on people in the United Kingdom (UK). This will be followed by considering four theories of ageing which are assessed for their relevance to ageing today. Various aspects of successful ageing in the literature is then investigated. These include biomedical, psychosocial and activity approaches to ageing together with notions of resilience, adaptation and the coping strategies employed. The literature will be critiqued from an occupational science perspective and a further early definition from this discipline is offered here. Wilcock defined it as:

"the systematic study of all aspects of the relationship between humans and occupation, occupation encompassing people's goal directed use of time, energy, interest and attention in work, leisure, family, cultural, self-care and rest activities" (Wilcock, 1991:297)

2:2 The concept of ageing

There is an increasing recognition that physical and mental decline is not an inevitable part of later life, indeed it is difficult to categorise what constitutes 'old' as there is no consensus on this complex phenomenon (Bowling and Dieppe, 2005), which varies widely depending on perspective (Degnen, 2007). Society's view of ageing and older people in the west has been ambivalent for many centuries with both positive and negative images being portrayed (Wellcome Focus, 2006; Gilleard, 2007). People are living longer in the United Kingdom (UK), (DoH, 2001; Wellcome Trust, 2006) and there is an interest today in ensuring that these extra years of life are as healthy and productive as possible. Whilst this phenomenon is currently more noticeable in the western world it could be said that we live in an ageing world, where globally more

people are living longer and there are fewer early deaths (World Health Organisation (WHO), 2007; Wilson, 2000). The proportion of people aged over 60 is likely to double across the world by 2050 (Wellcome Focus, 2001) and as more people live longer views on what constitutes 'old age' have developed.

Life stage theory has clearly defined old age as a separate stage of life (Erikson, 1963; Brown and Lowis, 2003; Dunkel and Sefcek, 2009). In the developed world more people are living longer, life expectancy now extends into the 8th or 9th decade and the majority of the population can expect to experience old age (Hicks and Allen, 1999). Classifications using the term 'old' can be an arbitrary and pointless gauge of a life-stage (Bostock and Millar, 2003), but inevitably attempts have been made to define some guiding parameters. Neugarten (1975) believed that old age encompassed two stages. The 'young old' were those aged between 55 and 75 as she anticipated that the retirement age would reduce to 55. However, Mulley (1997), two decades later suggested that people in this age group were no longer considered old. Neugarten's second stage, the 'old' old were those aged 75 and over, a term redefined recently as the 'older old' (McCormick, 2009). Neugarten emphasised that chronological age was less important than lifestyle in these definitions and it could be expected that there would be a wide diversity of both behavioural patterns and health status amongst individuals of any given age (Neugarten, 1975). Laslett (1991) characterised old age as first, a 3rd age that is independent and comfortable which is followed second, by a more dependent 4th age (Smith, 2001). These evolving definitions reflect changing demographics and interpretations of ageing, a process which is likely to continue.

At the beginning of the 21st century, the Department of Health (DoH) (2001) in the UK viewed the period of later life in a not dissimilar way, although the use of age brackets appears to have become irrelevant. Their three phases are categorised as 'entering old age', the 'transitional phase', and 'frail older people' and their definition of these categories appears to hinge upon the degree of dependency people have on health and social care services. For example, those entering old age are seen as people who have completed their career in paid employment, child rearing or both and could include people as young as 50. Essentially people in this phase are described as 'active and independent' and they may remain so in later life. Those in the 'transitional phase' are seen to be in transition between leading a healthy, active life and frailty and this process is most likely to occur in the 7th or 8th decade of life. People who are categorised as frail, a condition most likely to be experienced in late old age, have multiple health problems, serious chronic illness or disability. It is interesting that in both the Neugarten and DoH definitions, retirement age is used as a marker for entering 'old age' and WHO acknowledge that retirement either at the age of 60 or 65

has become, by default the definition for entering old age (WHO, 2001a). WHO have adopted the age of 60 for use worldwide, but acknowledge that in some developing countries this is not appropriate.

Retirement is one of society's more recent constructs as people have continued to live longer over the last century and is now a major transition for people in mid to later life. However, although people are often living longer in the developing world, retirement is an option available to only a very few until physical capacity renders a person unable to work (Edwards, 2002). In the UK, and in the developed world generally, it marks the onset of old age, but the idea of retirement has changed considerably over the last 60 years, (Leeson, 2007). In the years after World War 2 retirement in the UK was regarded as a well earned rest. By the 1970's, it came to be seen more as a reward for service, which in turn, during the next two decades, translated into a right, a time of funded leisure. This was to some extent fuelled by the governments of the day who encouraged early retirement in the light of high youth unemployment. Recently government policy for older people appears to have demonstrated a considerable shift in thinking. There is now a significant focus on keeping older people in work longer and for retired people to remain active and involved in their communities (Department of Work and Pensions (DWP), 2005; Mills, 2007). Thus, perhaps as a result of concern over the potential cost of an increasing number of retired people, retirement age is set to rise and the concept of retirement has changed to one of responsibility (Oxley, 2009). Jonsson *et al.* (2000) discovered, in their in-depth longitudinal, qualitative study of retirees that while some people managed a satisfactory transition into retirement others found the ongoing process to be frustrating and dissatisfying. Possibly the emphasis on continued engagement and community involvement may have a beneficial effect for the latter group during the transition to retirement in a western society. Certainly the decade following retirement is a period when the contribution of retirees to society can be significant and as Carr (2009) suggested social policies need to facilitate this process.

In many western societies, services are provided, often by the state, to support and care for older people. Family responsibility for older relatives has consequently reduced and a strong tendency to equate old age with mental and physical incapacity has developed (Leeson, 2007). There tends to be a cultural prejudice against old age with older people seen as being dependent, non contributors to society which can lead to negative stereotypes of older people as less worthy individuals who are a burden on society (Wilson, 2000). She asserted that while some aspects of ageing and becoming closer to death might be unpleasant, in a non western culture growing old can indicate that a person acquires greater respect for their wisdom, knowledge and experience.

However, she argued, a well functioning family is important for providing an environment in which the older person can thrive in cultures without welfare resources, such as the age related benefits, tax allowances, and a well developed health and social care services common in the UK. Without family or state support and resources older people, particularly the very old, are likely to be amongst the most vulnerable in society (WHO, 2009).

Myths of ageing and stereotypes of ageing individuals exist in western societies and unless these are challenged they will continue to reinforce society's view of ageing (Thornton, 2002). As simplistic generalisations, stereotypes do not allow for the wide diversity that exist amongst people in later life. Common stereotypes of old age portray it as a period of poor health and diminished function. In the UK, with a well developed health and social care system, Mulley (1997) argued that old age is still regarded as a time of frailty, decrepitude and senility. Prevalent myths in western culture centre around ideas that to be old is synonymous with being sick; learning of new knowledge or behaviour is unlikely and sexual activity has ceased; mental deterioration should be expected and depression and loneliness are likely (Thornton, 2002; Ory *et al.*, 2003). Stereotypes are culturally driven (Thornton, 2002) and an occupational stereotype in western societies, suggested by Wilcock (2007), is one of slowing down and having a reduced interest in doing. On the other hand, in some eastern cultures to be old is to be both wise, tolerant and saintly, even where health is poor and function reduced (Wilson, 2000) and ageing is likely to be viewed in terms of the ability of the family to meet the older person's needs (Keith *et al.*, 1990, Yoon, 1996). Ory *et al.* (2003) suggested whilst such myths of ageing persist a more recent stereotype has evolved in the United States (US) of the 'young old' as healthy and wealthy. A view also burgeoning in the UK is that many of the 'young old' are perceived as receiving quite generous occupational pensions which allows an active enjoyment of leisure pursuits (Leeson, 2007), although in general older people often continued to be viewed as being generally dependent and a burden on society (Wilson, 2000) whereas the WHO (2007) hold the view that older people are a resource not only for the family and the community, but also the economy..

Stereotypes of older people are not solely negative; some positive attitudes about older people, such as experienced, generous, patient and knowledgeable were accessed by participants more readily than negative ones in a Canadian quantitative study by Chasteen *et al.* (2002) of age based stereotypes held by both younger adults with a mean age of 18 and older adults with a mean age of 70, so demonstrating positive stereotypes of old age do exist. Possibly, any more positive stereotype of ageing merely serves to defer what might be seen as inevitable to the 'old old'. However,

challenging myths and stereotypes is important and may be effected through the dissemination of the realities of ageing. Such action has the potential to allow people in later life to access the health interventions they need, but perhaps even more importantly it permits development of a concept of people remaining healthy and active in later life within an environment which allows them to flourish. Indeed active ageing has become a health promotion issue both in the UK and internationally (Edwards, 2002; NHS, 2008).

Most recently, the WHO (2009) described 'active ageing' as 'the process of optimising opportunities for participation, health, and security...to enhance quality of life as people age' (WHO, 2009:12) and Hutchinson *et al.*, (2006) proposed this term should be adopted universally over other similar terms, successful, productive, positive or healthy ageing. However active ageing, according to the WHO (2009) definition, appears to relate to facilitating the process of ageing well by enabling and supporting people throughout life, rather than focussing on the actual attributes which result. Broad determinants of active ageing, according to WHO (2009) are culture, gender, economic determinants, health and social services, social and physical environment determinants and finally personal characteristics and health related behaviours.

Much of the developed world is faced with a shrinking workforce together with increased longevity and expanding healthcare demands and needs (Hutchinson, *et al.*, 2006). This is clearly of concern within the UK and discussion on how these needs and demands may be met continues to occupy government and public alike. One recent outcome of government policy is that the retirement age is being deferred to later in the sixth decade and the possibilities for part time or flexible working are being extended beyond normal retirement age (Cann, 2006). Leeson (2007) argued that resources, even in a relatively affluent society, are finite and priorities for government may not always reflect their rhetoric. For example, although government policy supports active ageing and promotes engaging in new learning, recent adult learning policies where the focus is now on skills for work, has had a negative impact on older people effectively disenfranchising them from the right to further education in a formal sense. But as Carr (2009) and McCormick (2009) have suggested, older people need opportunities to learn if they are going to continue making valuable and meaningful contributions to society. Possibly the government is relying on the voluntary sector and organisations such as Age UK, the University of the Third Age and the University of the Fourth Age to fill this need. On the other hand government policy has not only been influenced by economic factors. There has also been an increased understanding, arising from research, about the biological and psychosocial aspects of the ageing process in the second half of the last century.

2:3 Theories of ageing

Many theories of ageing have been proposed over the last half century or more. Four of the major theories will be discussed here. These are the *disengagement theory*, *activity theory*, *the theory of gerotranscendence* and *continuity theory*, which will be considered in the order they first arose. The *disengagement theory* proposed by Cummings and Henry (1961) suggested that growing old involves a gradual and "inevitable mutual withdrawal or disengagement, resulting in decreased interaction between an aging person and others in the social systems he belongs to" (Cumming & Henry, 1961:14). Their theory centres on the notion that as people progress towards old age, they experience multiple role loss with a consequential decreased interaction between the individual and others in the social systems to which he or she belongs. On the one hand it is part of the complex fabric of social life outside the control of the individual and can be seen as society making way for the next generation. Equally the individual with declining capacities chooses to disengage, thus making this process mutually beneficial. Commensurate with the decreased involvement with others is an increased preoccupation with the self. Their theory attracted early critics for its negative view of ageing, one of whom was Maddox (1964). Later studies by Tailmer & Kutner (1969) and Maddox (1970) cited in Khullar & Reynolds (1990) demonstrated that many older people did not withdraw from society but rather continued to lead active and engaged lives. More recently Khullar & Reynolds (1990) surveyed 1,111 men and women over the age of 60 living in urban and rural locations in Arkansas, (USA) to explore the relationship between quality of life and activity in order to test the activity versus the disengagement theories. They demonstrated that there was no positive relationship between disengagement and quality of life.

Another line of enquiry among gerontologists during the 1950s and 1960s was the association between social activity and a positive adjustment to ageing as first proposed by Havinghurst and Albrecht (1953). This culminated in the formal proposal of an *activity theory of ageing* by Lemon *et al.* (1972). They proposed that activity theory holds that people construct ideas about themselves from two major sources: the things that they do and the roles that they fill in life. According to the theory people give up many roles as they age; they retire from work, become widows or widowers, drop out of professional and other organizations, leave clubs and unions, and so on. These changes challenge the ideas that people hold about themselves; they may create a reduced sense of identity and weaken the strength of one's inner "self." For this reason people need to, and most actually do, engage in activities that develop substitute roles for those that have been abandoned. Hence, activities in late life are essential to restore self identity and boost a sense of wellbeing, or life satisfaction. To test this theory Lemon *et al.* (1972) hypothesised first, that informal, formal and

solitary activity are directly associated with life satisfaction. They also proposed that informal activity was more highly associated with life satisfaction than formal activity and formal activity was more highly associated with life satisfaction than solitary activity. The theory was tested with 411 people moving into a retirement community. Data collected in interviews included demographic details, life satisfaction and self reported activities, however the findings were inconclusive, it was thought because the group was too homogeneous, or the nature and quality of the data was inadequate.

Knapp (1977) tested the activity theory against an English context through interviews with 51 men and women in the South of England between the ages of 62 and 86 years old. Data collected related to activity, retirement, psychological well-being and certain biographical aspects. They found that the felt level of life satisfaction was positively associated to the level of activity, but thought that personality was also an influencing factor which should have been tested. Also the sample was small in relation to the original sample. Later, in a formal replication of the Lemon *et al.* study Longino and Kart (1982) presented findings which largely support activity theory. Longino and Kart's study sampled three distinct types of retirement communities to address potential homogeneity problems with the original study. The sample comprised 662 retired men and women with a mean age of 68. They found that informal rather than formal activities in age segregated community settings gave the most life satisfaction. Both Lemon *et al.* and Longino and Kart tested activity theory in retirement communities which are not representative of the older population in general and this is likely to have influenced the results. Indeed Longino and Kart found that continuous interactions within an age segregated community allowed stratification to emerge between those who were most independent and functional and those who were least functional and independent with the latter displaying lower self-concept. Finally, Khullar & Reynolds (1990) tested the activity theory against the disengagement theory and established that the type of activity individuals engaged in was an important factor and benefits varied between groups with different characteristics. They suggested that the form the activity takes requires further investigation; a potentially rich area for further research by occupational scientists.

However, it might be said that the positive portrayals of ageing demonstrated in the activity theory are perhaps as detrimental to older people in society as are the more negative view provided by the disengagement theory which was perceived as threatening and unappealing by many gerontologists who held that old people were treated badly by society (Tornstam, 1989). It could also be thought that both theories are quite narrow in focus and appear to be unrealistic about the actual experience of ageing which is more likely to be a multidimensional experience. Powell & Longino

(2001) argued for the 're-territorialisation of the ageing body by society and by social gerontology' (Powell & Longino, 2001, p.206). Activity theory has a somewhat restricted focus on individual identity and adaptation while disengagement ignores the part that power plays in fostering ageism, social inequality and structured dependency. Nevertheless activity theory accords with some beliefs that are central to the philosophy underpinning occupational therapy for example, occupation, occupational roles and occupational identity (Kielhofner, 2008).

A more recent theory developed from *disengagement theory* is *gerotranscendence*, which Tornstam (1989), a social gerontologist writing from a European perspective, describes as the contemplative dimension of ageing. He criticised the disengagement and corresponding theories as belonging to a positivist framework where the individual is regarded as an object directed by internal and external sources and an assumption of a shared reality. In order to reach an understanding of the sometimes conflicting hypotheses of these theories, he proposed a new meta-theoretical paradigm which rejects positivist thinking and adopts a more eastern approach similar to Zen Buddhism. He also suggested that gerotranscendence shares some similarities with Erikson's state of ego-integrity, or wisdom versus despair in the eighth stage of life. Tornstam proposed that the process of living into old age and facing its challenges together with the hope of acquiring the accompanying wisdom bring about a 'shift in meta-perspective from a materialist and rational vision to a more cosmic and transcendent one which is normally followed by increased life satisfaction' (Tornstam, 1997:147). It implied an increased interest in what might be termed spiritual ideas and less concern with the material world and relationships. He argued that the effects of increased transcendence in the personality are often misinterpreted as negative disengagement, but when the observation paradigm changes then the picture also changes. Tornstam believed that gerotranscendence is the concluding stage in a progression towards maturation and wisdom (Tornstam, 1997). His theory regards older people as becoming more contemplative, withdrawing from unfulfilling social relationships and able to select only those activities that are meaningful (Adams, 2004). Tornstam (2003) referred to previous studies which confirm the theory and reported findings of a large study of 1,771 Swedish respondents aged 65-97, which referred to how age development is influenced by social factors and life crises. This study demonstrated the tendency for cosmic transcendence to increase with age as social factors and life crises seemed to be of minimal importance in 'old old' age. Gerotranscendence possibly has greater accord than disengagement with the underlying values of occupational therapy and occupational science, but might have greater relevance to eastern cultures than those in the developed world.

Another theory proposed at the same time as gerotranscendence was the continuity theory (Atchley, 1989), a development of the opposing activity theory and which currently possesses greater popularity today (Bowling, 2007). 'Continuity theory holds that, in making adaptive choices, middle-aged and older adults attempt to preserve and maintain existing internal and external structures' (Atchley, 1989, p. 183). Rather than placing an emphasis on the volume of activities undertaken he argued that people have a preference to use strategies gained from past experience to adapt, substitute or redistribute activities in the face of declining abilities in older age. Continuity and stability he argued, emerged over time in internal constructs such as self confidence, emotional resilience, personal goals, and beliefs. The continuity theory of ageing is based upon research he began in 1975 (Atchley, 1998; Atchley, 1999). The Ohio longitudinal study of aging and adaptation followed a group of retired people over the age of 50 for twenty years. They were surveyed six times using a variety of measures including postal questionnaires, structured interviews and observation in formal and informal settings until 1995. At the beginning the group comprised 1,274 and at the end, 335. Findings suggested that health variables had surprisingly little effect on mental constructs in that structures of ideas are resistant to the influence of health changes, except when they involve severe disability. External continuity was found to be prevalent in the social arrangements people create to meet their needs. Atchley (1999) considered living arrangements, household composition and marital status, community, income adequacy, transportation and activity (Atchley, 1999). Adaptation, in the face of changes in capacity as people age, is an important aspect of the theory. However, the findings from a qualitative study by Aberg *et al.* (2004) of persons aged 80 and over receiving care in Sweden, suggested that continuity of self remained an important aspect of the individual. Interestingly, Pushkar *et al.* (2010) conducted a large longitudinal quantitative study with 368 retired men and women in Canada to measure activity and affect, and found that there is some support for both the activity theory and the continuity theory (Pushkar *et al.*, 2010).

The continuity theory has significance for occupational science as it not only focuses on occupation as it occurs within an individual's environment, but also provides some idea of the mechanism of adaptation in the face of change. Evidence of the benefits of learning new occupations in later life was highlighted recently by Nimrod and Kleiber (2007) who, when considering the activity theory, studied the characteristics, meanings and perceived benefits of a wide variety of innovative activities. Their findings suggested that such activities preserved a sense of inner continuity as well as allowing people to develop in new directions which was described as both growth producing and liberating. These four theories of ageing have contributed to what might be considered the perception of successful ageing today, although possible the activity and continuity

theories have greater relevance to both UK and international policy (Edwards, 2002; DWP, 2005).

2:4 Successful ageing

2:4:1 *Successful ageing in the post modern world*

The term successful ageing is prevalent in the literature, reports and government policy documents on people in later life. At its most basic 'successful ageing' is a measurement of 'staying alive' (Wellcome Focus, 2001). However Bowling (2005) and Leeson (2007) argued this is insufficient as additional years may not be considered a benefit unless quality of the life is also present. The term successful ageing could be said to carry with it a pejorative meaning as it implies that it is quite possible to age unsuccessfully and certainly many measures of successful ageing proposed by academics, from a range of health, psychological and sociological disciplines, demonstrate that only a minority of people do age successfully (Bowling & Dieppe, 2005). Challenges to the overall concept of successful ageing have been proposed. One, the model of productive ageing (Morrow-Howell *et al.*, 2001) focused on the continuing contribution that people make in later life such as paid employment, volunteering, caring and education and therefore has a rather too narrow focus for consideration here. Another response to successful ageing has been put forward more recently by Cruikshank (2003) and stems largely from the experience of ageing women. This is conceptualised as 'comfortable' ageing and emphasises ease rather than external measurement. This of course addresses the notion that it is all too possible to age unsuccessfully as it is measured objectively, whereas comfort is constructed and perceived subjectively by the individual.

For the purpose of the study reported in this thesis, the literature reviewed on successful ageing largely represents a western cultural perspective and various academic perspectives are considered. Bowling (2007), who has published extensively on successful ageing, undertook a systematic review of the literature between 1957 and 2004 on successful ageing with 170 articles being reviewed. Bowling (2007) suggested that models of successful ageing represented either a biomedical perspective, which emphasise mental and physical function as influential factors in successful ageing; a psychosocial perspective emphasising social function, life satisfaction and psychological resources or finally the lay perspective presented in a small number of studies. One concept she does not fully explore is how 'activity' contributes to the process, except in relation to the multidimensional nature of Rowe &

Khan's (1997) influential model of successful ageing and briefly in her consideration of social functioning. However the contribution of 'activity' is evident in some of the literature reviewed, for example the studies by Everard *et al.* (2000), Menec (2003) and Godfrey & Denby (2004). Additionally the data bases she used did not yield the data from the Well Elderly Study (Carlson *et al.*, 1998) on the contribution of occupation to successful ageing although it was compatible with her search terms. However, it is possible that Bowling's search terms were insufficiently inclusive to retrieve the first publication of the results from this study (Clark *et al.*, 1997) in a journal which would, almost certainly, have been yielded by her databases, the Journal of the American Medical Association. Occupation as it is studied in occupational science is a somewhat recent discipline, but the term activity has been in widespread use in gerontology literature and its omission is a significant weakness of this review.

Bowling favoured a multidimensional, lay model of ageing as defined by a national, random population survey of 854 people over the age of 50 who were living at home (Bowling & Dieppe, 2005). This survey arose from the belief that people in later life were in the most advantageous position to accurately describe the phenomenon of successful ageing. A view energetically endorsed by Wilcock (2007), writing as an occupational scientist and who is herself in later life. Bowling & Dieppe's lay model was subsequently tested alongside biomedical and psychosocial models in a cross sectional survey of 999 people aged 65 plus and the lay model emerged as the strongest (Bowling & Iliffe, 2006). This much broader, multidimensional model allowed more people to be classified as ageing successfully than did either the biomedical or psychosocial models and predicted quality of life more convincingly than the other unidimensional models. The lay model included most aspects of the unidimensional models, but also encompassed accomplishments, financial security, the neighbourhood, productivity, contribution to life and spirituality amongst other factors and has a much greater occupational focus than the biomedical or psychosocial models. Interestingly Bowling and Iliffe (2006) argued that there needs to be a clear and accurate multidimensional definition of successful ageing if health promotion for older people is to be effectively incorporated into health policy.

Other lay models have emerged from studies which have adopted qualitative methods. Bryant *et al.* (2001), in their qualitative grounded theory study of 22 disparate older people, used a semi-structured interview. This revealed a model of successful ageing where health involved 'doing' something meaningful, which was sufficiently challenging. Social engagement, a positive attitude and external resources to support active engagement were also central to their model. A more recent study in a retirement community in the USA by Reichstadt *et al.* (2007), using twelve focus groups of people

between the ages of 60 and 99 years, largely supports the findings of Bryant *et al.* (2001). Other themes included financial security, seen in the Bowling and Iliffe model, and the ability to adapt. In another recent quantitative study in Canada by Bassett *et al.* (2007) 3,334 people aged 75 and over were asked about longevity and wellbeing. Keeping active was a major theme, as was the will to adapt to and avoid further physical decline for as long as possible. It would appear from these studies of the lay perspective on successful ageing that older people seem to assume that they are active contributors to this process.

A further extensive and in depth qualitative study by Laditka *et al.* (2009) focuses on the cognitive aspect of ageing well. They conducted 42 focus groups with 396 older adults from 6 different major ethnic groups living in the community in the United States. What emerges is a lay perception of successful ageing which emphasises an appreciation of the need to remain socially, physically and cognitively active in later life. A wide range of leisure pursuits, voluntary, church and community involvement were seen as a means of achieving this. A positive attitude together with an acceptance of the ageing process were thought to contribute. Interestingly one of the coping strategies to deal with stress amongst white participants was the ability to engage in activities that required a high level of commitment and passion. Although this study has a smaller sample than Bowling's random survey (Bowling and Dieppe, 2005), it is well described and provides qualitative experiences from a large and racially diverse group of older Americans, which perhaps offers greater insight into lay perceptions of ageing in the United States than does Bowling's lay model.

2:4:2 Biomedical approaches to successful ageing

Some of the literature from the biomedical field will now be discussed. Apart from considering the contribution of chronic disease to the ageing process, biomedical theories focus on extending life expectancy and optimising physical and cognitive function. Some studies refer to factors which are constituents of successful ageing and others as predictors, although many lack clarity (Bowling, 2007). One of the major premises of these models is that physical activity and remaining physically active has major health benefits (Glass *et al.*, 1999; Schroll, 2003; Crombie *et al.*, 2004; Berger *et al.*, 2005; Manini *et al.*, 2006; Newsome & Kemp, 2007; Watson, 2008, Newman *et al.*, 2010). Interestingly, Manini *et al.* (2006) suggest that not only physical exercise, but sufficient energy expenditure in daily activity also demonstrated health benefits. Both Glass *et al.* (1999) and Schroll (2003) made the association between remaining physically active and independence in daily living. Others placed an equal emphasis on maintaining cognitive function in later years (Hultsch *et al.*, 1999; Hogan, 2005; Tyas *et al.*, 2007; Williamson *et al.*, 2009). Although Hultsch *et al.* (1999), from their in

depth analysis of data from the Victoria Longitudinal Study, argued that while their findings suggested engaging in intellectual activities shield individuals from cognitive decline their results were equally consistent with the premise that high-ability adults lead intellectually active lives until cognitive deterioration limits activities at the end of life. On the other hand Williamson *et al.* (2009), in a pilot randomised study of 102 sedentary persons with increased risk for disability, aged 70-89 years, demonstrated support for the premise that physical activity is beneficial for the cognitive functioning of older adults. Although many of these studies are of high quality they appear to only address one aspect of successful ageing which suggests that biomedicine alone cannot fully illuminate the complex subject of successful ageing.

Some authors speculated on the potential and actual barriers to older people engaging in physical exercise (Crombie *et al.*, 2004; Berger *et al.*, 2005; Newson and Kemp, 2007). Crombie *et al.* (2004) were concerned that insufficient people engaged in physical leisure time pursuits. While most of the 409 randomly selected respondents in their cross sectional study of people over 65 in Scotland knew that physical exercise and activity was beneficial over 50% had no or very limited engagement. The most powerful deterrent was lack of interest followed by lack of access to a car, physical symptoms, dislike of going out alone, not belonging to a group, and doubting that meeting new people was beneficial. In a different, perhaps more exercise aware, culture a study of 217 older Australian men and women aged between 63 and 86 lack of interest was not a problem and most people were fairly well motivated to exercise (Newson & Kemp, 2007). In this study physical ailments were cited as the most common barrier to exercise. Findings from these two studies suggest that engaging in physical leisure pursuits is a complex process which requires an in depth understanding from those trying to promote it because of the particular combination of barriers that might exist for any one individual.

Finally Rowe and Khan (1997) proposed a model of successful ageing which has been influential in this field. It was the most complex model of its time to be proposed in this field and was based on the central findings from the MacArthur Research Network on Successful Ageing between 1988-1996. The model suggested that there are three predictors of successful ageing. The first being the absence of disease and disease related disability; the second high cognitive and physical functional capacity with the proposal that plasticity persists into old age and therefore learning and positive change remains possible. The third predictor was active engagement in life both in terms of continuing to engage in personal and social relationships and in contributing to society in the form of productive activities. This latter aspect was particularly influential as it appears to have been included in subsequent studies by other authors. However, in

spite of this model being the most multidimensional of the biomedical models it has been criticised for being too narrow as very few people achieve advanced old age without some form of disease or disability and it neglects life course dynamics and the ability to adapt to or manage disease (Bowling, 2007).

2:4:3 Psychosocial approaches to successful ageing

This approach to ageing not only offers insight into the social and psychological characteristics of ageing, but perhaps also offers some understanding of personality factors and motivation for an active engagement in life which is of interest to occupational science. In this approach, life satisfaction is the most regularly investigated and cited measure of successful ageing. Factors considered by Bowling and Dieppe (2005) to be constituents of successful ageing include social functioning and psychological resources, such as self worth, a positive outlook, self-efficacy, autonomy, independence and effective coping or adaptive strategies. In addition, personal growth and creativity are also deemed relevant by Costa *et al.* (1992). Two studies, which illustrate the psychosocial approach will now be discussed.

Baltes & Baltes (1990) cited in Baltes and Carstensen (1996) proposed a meta-model of successful ageing which is derived from psychological theory Selected Optimization with Compensation. The model builds on what is known about the nature of development and ageing with attention on successful adaptation. They argued that there is sufficient evidence from both the social and biological sciences to confirm that latent potentials can be triggered to compensate for possible losses in old age. They wanted a model which would express the dynamics between the losses arising from the ageing process on the one hand and the potential for growth and plasticity in later life on the other. Thus, the model focuses on *how* people age successfully and can themselves contribute to the process. They suggested that a process orientated approach allows people to select goals, compensate and optimise to ensure maximum goal attainment. There are three aspects of this process. First individuals are able to select personal goals free from universal standards and values; second it focuses attention onto the strategies people use to overcome difficulties and master personal goals and finally it considers and optimises the interplay between the gains and losses of old age. Supportive evidence from the Berlin Aging Study suggests that people, who use the model's strategies in dealing with life, experienced higher levels of life satisfaction and well-being, more positive emotions and were less lonely than those who did not (Baltes & Mayer, 1999; Freund & Baltes, 1998).

This model, described as having a strong theoretical basis by Bowling (2007), also has relevance to occupational science. Individuals are seen to be capable of change and development and the model acknowledges that it is possible for individuals to contribute to their own successful ageing. Although the model is founded on psychosocial theory, it is inextricably linked with occupation; what people do and how they do it in the broadest sense. Moreover, Baltes and colleagues (Baltes & Carstensen, 1996; Freund & Baltes, 1998), believed that the three aspects of the model are activated most readily when the resources in which they operate are most rich. This suggests an appreciation of the importance of the environment in facilitating goal achievement.

The second and third studies on successful ageing to be discussed were subsequent to those in the Bowling (2007) review. The first of these, Warburton and Pinsker (2006) discussed involvement with family and community in developmental terms as generative acts. Their qualitative study is founded on the framework of Erikson's theory of psychosocial development and includes a late addition to the 7th stage of generativity versus stagnation, the concept of grand-generativity. This large qualitative study was conducted using 26 focus groups of 148 older participants aged 55-93 years old. Considerable detail is provided about how the groups were recruited in order to access a diverse range of individuals who lived in and around the Brisbane area of Australia. Representation criteria included area of residence and ethnicity. Information on data collection and analysis is also provided in some detail. Rigor was achieved through the use of two experienced and trained group facilitators conducting the focus groups thus ensuring consistency. The data was co-coded by the same two researchers and was followed by a period of cross checking to ensure inter and intra rater reliability. The truth value was ensured by incorporating a range of different viewpoints within the discussion and the data was presented in consistence with qualitative research and phenomenology.

Warburton and Pinsker (2006) proposed that the process of generativity occurs beyond middle adulthood and progresses into old age thus encompassing the tasks of grand parenting while also accepting assistance from others (grand-generativity). Successful resolution of the generativity versus stagnation conflict was seen to have a beneficial contribution to the positive experience of ageing. They also commented on the evidence that self reported generative concern 'shares a significant positive relationship with measures of life satisfaction, self-esteem, happiness and a sense of coherence. Another aspect of generativity explored was story telling and passing on knowledge about a culture from one generation to another which was recognised by the participants as an important aspect of this life stage. In occupational terms, the study

provided a fruitful understanding of the meaning of generative occupations for older people with related concepts of reciprocity, altruism and identity. This is confirmed by the findings of the Knight *et al.* (2007) study of 70 adults with a mean age of 72, who found that the primary motivation was altruism when engaging in productive occupations. Warburton and Pinsker (2006) argued for the need to incorporate generativity and motivation to perform beneficial community activities into a model of successful ageing. Interestingly this aspect of successful ageing forms part of the lay models of successful ageing as defined by Bowling and Dieppe (2005).

In their review of the literature Sadler and Biggs (2006) introduced a different dimension, spirituality, into the debate on successful ageing. Spirituality is included in the lay model of successful ageing (Bowling and Dieppe, 2005) and also forms an aspect of theory underpinning human occupation, for example the Canadian Model of Occupation (Townsend, 2002). Sadler and Biggs are writing from a UK social work perspective which often places considerable emphasis on spirituality and they argued that spirituality is a key dimension missing from physical, psychological and social models of successful ageing as proposed by Rowe and Khan (1997). Interestingly neither is spirituality included in the occupational model of successful ageing proposed by Carlson *et al.* (1998). Sadler and Biggs (2006) provided an interesting critique of current models, particularly Rowe and Khan (1997) and Baltes and Baltes (1990) and highlighted that a very low percentage of people achieve 'successful ageing' according to any of the academic models. However, the lay model proposed by Bowling and Dieppe (2005) reports a much higher percentage of people identifying themselves as ageing successfully. They discussed the influence and relevance of Tornstam's theory of gerotranscendence to spirituality and they conclude from the limited amount of literature on this subject that it supports the notion that spirituality was positively associated with successful ageing.

2:4:4 'Activity' approaches to successful ageing

Lay models of successful ageing, as already discussed, all have a strong focus on active engagement in life and the importance of internal and external resources required to facilitate this (Bryant *et al.*, 2001; Bowling & Dieppe 2005; Basset *et al.*, 2007; Reichstadt *et al.*, 2007). Indeed there is a body of literature which has focused on the contribution of activity to successful ageing, some approaching the subject from a psychological perspective while others focused on the association between activity and well-being. However it is possible that, in most research related to activity and the active engagement in life, the remit of the subject has not been fully understood or explored. Katz (2000) introduced an interesting discourse on the nature of activity and

criticises the current focus on activity in the healthcare and lifestyles industries to the detriment of the inner life and personal development. None of the authors appear to come from an occupational science background but the focus of their research is of relevance to the discipline. Many of the concepts that are introduced form some part of the theoretical base of occupational science, but these are limited by a reductionist approach which examines the parts rather than the whole. Some of this research will now be outlined and critiqued from occupational science perspective.

Godfrey and Denby (2004) regarded being actively engaged in life as central to successful ageing, and they argued that being actively involved with meaningful activities may be facilitated or constrained by the resources and opportunities that are available, a concept familiar to occupational science. Participation in the tasks of daily life were thought by Harlow and Cantor (1996) to give meaning and satisfaction while engagement in community and civic pursuits following retirement could provide structure to daily life. Mannell (1993), Horgas *et al.* (1998), Menec (2003), Godfrey & Denby (2004), Litwin & Shiovitz-Ezra (2006), all write from a psychological perspective and the premise that there is association between activity and well-being and life satisfaction, as proposed in activity theory (Lemon *et al.*, 1972) and it would appear that quality of life is also associated with successful ageing (Bowling, 2005). Quality of life has been equated with a perceived subjective sense of well-being in terms of happiness and pleasure and the absence of negative affect, sometimes known as hedonic well being (Deci and Ryan (2006). It is also thought to be associated with a deeper, more fundamental sense of eudaimonic well-being, which leads to satisfaction with the overall life experience (Bowling, 2005). Eudaimonic well-being is concerned with living life to the full, in a deeply satisfying way (Deci & Ryan, 2006), where activities feel congruent with fundamental values, but which may not directly engender happiness (Hayward & Taylor, 2011). Dolan (2011) suggested that eudaimonic well-being arises from underlying psychological needs for things such as, autonomy, meaning, control and connectedness.

Mannell (1993), argued that in essence a person needs to have some commitment or sense of obligation, extrinsic motivation, to freely chosen activities that are most challenging to experience the greatest amount of flow. These he regarded as high investment activities, again a well-known concept in occupational science. His study used an experience sampling method with personal interviews of 92 retired older adults. It revealed that this form of high investment in activity yielded a greater degree of flow than those activities which are intrinsically motivated and may be more immediately meaningful and involving. He considers the notion of freedom to choose what to do is important when considering older people as they possibly have more

freedom of choice than in previous life stages, except perhaps adolescence. Some form of compulsion or obligation may be useful to overcome the 'psychological inertia' some older people may experience at retirement when activities require an investment of effort. He concluded that his analysis of his findings support the hypothesis that older adults who invest the most effort in their daily activities experience most life satisfaction. It is also possible that they are most likely to experience eudaimonic well-being.

Horgas *et al.* (1998) reported on both the types and context of activities engaged in by those over the age of 70 in a large study of 516 participants responding to interview questions on the activities they had engaged in the previous day. Here the frequency, duration, variety of activities and the physical and social contexts in which they occur were considered. They found that both obligatory and discretionary activities declined with age while resting increased. However within these groups time spent on personal care increased with age and watching television increased for those between 70 and 90, but declined thereafter. They proposed that as the very old decline in capacity, the spheres of activity they engage in are limited to those which are essential to maintaining independence in order to optimise their performance. Leisure activities, as least relevant to this goal are normally the most vulnerable to curtailment. The ability to adapt in this way, they argued, is a key element of successful ageing. From an occupational science perspective this is one of the most comprehensive studies to emerge from gerontology as it considered a wide range of daily activities in relation to their social and physical contexts.

Menec (2003), in her longitudinal quantitative study, analysed data from the Canadian Ageing in Manitoba (AIM) Study in 1990 and 1996. Interviews were carried out on a one to one basis by AIM using measures to assess happiness, function, quality of life and mortality. The number of respondents varied according to the measure but in all cases it was over 1,000 older people living in the community and in residential care. Menec used the data to specifically consider the relationship between 18 'everyday activities' and successful ageing and reported on the benefits of different types of activity. A cross sectional analysis of the factors associated with activity levels revealed that productive and social activities were generally positively related to happiness, function and mortality, whilst more solitary activities, for example reading, only offered happiness, but, it was argued, they may offer a greater sense of engagement with life. This is a detailed study and findings support the activity theory. However, the environmental context in which activities occur is absent and as Menec herself acknowledges, sometimes it is also important to capture the nature of the activity.

An alternative argument is made by Litwin and Shiovitz-Ezra (2006), who write from a sociological perspective and are critical of activity theory. Findings of their large, quantitative study of 3,500 households in Israel of people aged 60 or more years, demonstrated that the quality of social ties mattered more than activity participation as predictors of well-being in old age. When the quality of the social relationship was taken into account the amount of activity had no independent effect on well being. However, limitations of this study are that Litwin and Shiovitz-Ezra used a rather restricted number of activities, groups of four informal, formal and solitary activities, twelve in total. They assessed the quality of the social relationships, but not the activities and there was no concept of meaning associated with the latter. Overall this study appears biased in favour of the importance of social relationships. Occupational science would regard both activity and social relationships as being important to occupational life, where the balance of importance may vary between them according to the nature of the occupation and the social relationship.

A similar association between activity and well-being is made by others who are writing primarily about quality of life (Khullar & Reynolds, 1990; Bowling and Gabriel, 2004; Bowling, 2005; Garcia *et al.*, 2005; Victor *et al.*, 2005). Different aspects of quality of life in older age are thought to be having a positive outlook on life, better health and functional status, having more social activities, reported social support, good local facilities and perceived safety in the locality (Bowling & Gabriel, 2004). Khullar & Reynolds (1990) surveyed 1,111 men and women over the age of 60 living in urban and rural locations in Arkansas, (USA) to further understand and explain the relationship between quality of life and activity. They explored a range of different forms of leisure which included visiting theatres and places of interest, visiting with friends and relatives, participating in church services and activities, and attending clubs and societies. All were found to have a positive influence on quality of life. Those which had little or no influence were passive leisure activities which were largely solitary. It would appear that all those cited, which had a positive association with quality of life, were activities done in company with others.

An association between life satisfaction and leisure participation was also demonstrated more recently in a study of 383 retirees aged 50 and over by Nimrod & Adoni (2006) in Israel. Semi-structured interviews focused on leisure participation, attitudes to work and leisure and life satisfaction. They established that people who were actively involved in leisure had significantly higher levels of quality of life and life satisfaction than those who participated less frequently in leisure pursuits. A weakness of this study, however, is that they did not consider the social aspect of any leisure activities discussed. Bowling (2005) also found a highly significant association between quality of

life and the amount of social activities people engaged in, but did not explore whether the nature of the activity or that it was done with others was the most important aspect. Similar findings about social relationships and participation (Victor *et al.*, 2005) and social networks (Garcia *et al.*, 2005) have been reported. Another aspect of active leisure which, in the United States of America Elderhostel (2007) argued, contributes to successful ageing is a sustained commitment to learning, blending intellectual stimulation, social engagement and creative expression. The positive health benefits of lifelong learning for older people are recognised by the United Kingdom government's Foresight Study (Tuckett and Aldridge, 2009). However, continuing to engage in active learning and engagement in life had been demonstrated considerably earlier to be effective in successful ageing within the discipline of occupational science (Clarke *et al.*, 1997).

2:4:5 Resilience, adaptation and coping strategies in successful ageing

It is clear, from the many theoretical perspectives on successful ageing that have been considered, how people adapt or adjust to the challenges of ageing is a key dimension of success. Adaptation is central to the Selective Optimization with Compensation model of Baltes & Mayer (1999). It is also a vital aspect of Atchley's (1999) study on adaptation and coping strategies in relation to continuity theory where both proactive and reactive coping strategies are seen as mechanisms for preserving a sense of continuity and act as motivators for change. Moreover adaptation and the necessary coping strategies to accomplish this was a central theoretical concept in the design of the Well Elderly Study (Carlson *et al.* 1998). Moos *et al.* (2006) also focused on the coping strategies that are adopted in response to stress. As part of a large quantitative, longitudinal study of 1,291 individuals over a ten year period, stressful life episodes that occurred for 297 older participants were assessed whilst also measuring the chronic stressors they were exposed to. The rather unsurprising findings from their study indicated that positive reappraisal and problems solving coping strategies promoted positive outcomes whereas avoidance coping produced negative ones. It is possible amongst the oldest old that many may sustain a sense of positive well-being, in spite of severe life restrictions, through a gradual and ongoing adaptation whereby comparison standards change and aspirations are lowered (Smith *et al.*, 1999).

Rowe and Khan (1997), in their influential paper on successful ageing, proposed the concept of resilience as a response to stressors as described by Moos *et al.* (2006), such as bereavement, sudden retirement and loss of income or acute episode of serious illness. Resilience refers to 'the rapidity and completeness with which people recover from such episodes and return to meeting the criteria for success' (Rowe & Khan,

1997: 439). They do not elaborate on this concept and it is uncertain as to whether it is regarded as primarily a physical, or a psychological process or possibly a combination of both. Hogan (2005) in an extensive review of the literature considers the concept of resilience in terms of lifespan development theory where biological and psychological resources in later life are diverted from growth and used increasingly to maintain resilience and function. He discussed potential benefits of cognitive and physical activity in old age to promote multiple system resilience and proposed the practice of Tai Chi as a practical, enjoyable and motivating activity. This one activity he argued promotes resilience in the musculoskeletal and cardiovascular systems while simultaneously engaging cognitive processes.

On the other hand Staudinger *et al* (1999) took a specifically psychological view of the role of resilience in coping with ageing which is based upon the work of Garmezy (1991) resilience in to child development. This focused on the capacity for recovery and maintained adaptive behaviour that may follow initial retreat or incapacity upon initiating a stressful event. This mechanism assists individuals to respond to stress and adversity in a positive adaptive way and they described this process as forming two types of phenomena. The first was the maintenance of normal development regardless of risks and impairments and the second referred to the recovery of normal function in the face of traumatic life events. They suggested that there are protective factors related to personality characteristics, emotions, coping styles, goal systems and experience over time, which together with psychological resilience of aging satisfaction and depressivity, protect the individual from socioeconomic and somatic risk factors in the ageing process. Resilience can be regarded as a process, a behavioural response to stress and is not a personality trait (Harris, 2008). Hogan (2005) called for more research on different interventions to promote resilience in older adults. Occupational science might contribute to this as an appreciation of the complexity of the activities or occupations and the role they play in promoting resilience could greatly facilitate research in this area.

2:5 Summary

This chapter has reviewed some of the literature from the discipline of gerontology and covered various aspects of ageing with a particular focus on successful ageing. Ageing in a western society has been explored and the concerns, myths and stereotypes of an ageing population were considered. Four theories of ageing were introduced and critiqued. Two theories postulated a gradual withdrawal from society as an individual ages, the first, disengagement theory and second the theory of gerotranscendence,

which is a development of the former. Two opposing theories of activity and continuity were also presented which proposed that older people engage in activities which allows them to achieve satisfaction in later life. These latter theories appear to have proved more attractive to gerontologists attracting a variety of research relating to activity and successful ageing. Possibly this is owing to their more positive nature, which makes the ageing process more palatable to researchers and those who fund it. Finally the concepts of resilience, adaptation and coping strategies were considered.

Some of the studies related to activity and successful ageing have been presented and critiqued from the perspective of occupational science. The majority of the studies were quantitative and proved that there is an association between engaging in activity and successful ageing, with each study adopting a specific focus of enquiry. However they leave questions about the nature of activity and whether it is really possible to classify activity categories meaningfully as individuals regard what they do in many different ways. Occupational science would contend that activity occurs only in an interaction between the person, the activity and the environment which may lend itself to other research methodologies than those adopted in the gerontology literature. The following chapter will present a review of the literature relating to occupational science and its underlying principles.

CHAPTER 3

Occupational science, successful ageing and related social theories

3:1 Introduction

This chapter proposes to review literature from two disciplines that have the potential to further understand and extend the knowledge base related to identity and growing old in the western world. The first of these to be considered will be occupational science and the second, some aspects of sociology. The chapter will begin by presenting an overview of occupational science and will trace its development to the present day. Various core concepts of occupation will be examined including the link between occupation and health. The second part of the chapter will review two well known sociological theories, social constructionism and structuration theory and assess their value to the topic.

3:2 Occupational science

Occupational science is a new science that is struggling to establish both a knowledge base and an identity (Yerxa *et al.*, 1989). They asserted the need for such a knowledge base arose from the practice of occupational therapy which traditionally drew upon knowledge from a variety of health and social sciences disciplines to support practice. During the 1970's and 1980's some occupational therapy educators at the University of Southern California began to believe that this was not enough and that the profession required its own unique knowledge base (Yerxa *et al.*, 1989; Clark *et al.*, 1991; Wilcock, 1991). Occupational therapy as a profession had been at that time in existence for at least 60 years. The development of occupational therapy grew out of a belief that purposeful and meaningful activity had health enhancing benefits (Wilcock, 2001). The therapeutic use of activity for physical disabilities and psychiatric conditions became established in the United States in the 1920s and then gradually around the world (Kielhofner, 1997). Initially it relied largely on knowledge from biological, anthropological and psychosocial disciplines and lacked an evidence base to support its most central premise, that what people do influences health (Yerxa *et al.*, 1989). For this reason occupational science sought to provide the missing foundational knowledge base that would address this deficit (Hocking, 2000).

Some early definitions of occupational science by Yerxa *et al.* (1989) suggest that:

'Occupational science is an emerging science which supports the practice of occupational therapy', (p.1)

and is further defined by them as:

'the study of the human as an occupational being including the need for and the capacity to engage in and orchestrate daily occupations in the environment over the lifespan' (Yerxa *et al.*, 1989:6).

At its most simple the central concept of occupational science has been described by Hocking (2000) as occupation itself. One of the difficulties with such a definition is that the term occupation is itself ambiguous and will be defined in detail later in this chapter. Meanwhile it can be said that occupation has a particular meaning in occupational science which views occupation as all things that people do in their daily lives (Hocking, 2000).

It is argued by a number of academics that some of the concepts underlying the discipline of occupational science are not new (Wilcock, 2001; 2003; Turner, 2002; Christiansen, 2006, Rowles, 2008). For example, Wilcock (2001) traced beliefs about occupation and health back to ancient times. She also suggested that Locke, an English philosopher writing in the second half of the 17th century, proposed a science he named ethics which bears some resemblance to modern day occupational science (Wilcock 2003). In the early 20th century Adolf Meyer maintained that people could be best understood by the study of the activities they engaged in on a daily basis and over the life course (Christiansen, 2006). While Rowles (2008) contended that Victor Frankl's classic work *Man's Search for Meaning*, originally published in 1946, contains the notion, recognised in occupational science that meaning in life arises through the course of one's actions and the choices we make. It would appear that there is some truth in the contention that various concepts relating to the study of what humans do have been existent for many years. Certainly occupational therapy was founded upon the philosophy that the 'activities' or occupations an individual engages in has an effect upon his or her health (Wilcock, 1991). However, the profession of occupational therapy lacked empirical evidence to support this philosophy and consequently for many years tended to be strongly influenced by other more powerful disciplines within health, particularly medicine. Thus it was that towards the end of the 20th century occupational therapy sought to establish a unique identity which, it emerged, required its own supporting knowledge base. The early proponents of occupational science endeavoured to provide this. Gradually international recognition increased, assisted by

Ann Wilcock who founded with others the Journal of Occupational Science in Australia in 1991.

3:3 The nature of occupational science and how it has developed

Yerxa (2000) believed that part of the process of developing occupational science would be discovering and synthesising ideas from other pertinent fields of study and creating a new configuration which would further the understanding of occupation and people as occupational beings. In a critical analysis of occupational science literature from 1990 to 2000 Molke *et al.* (2004) concurred with this view and argued that there had been considerable growth in occupational science. They proposed that the discipline should now progress from being one which existed solely to support occupational therapy practice to one that should be enriched by a multi-disciplinary perspective which explores occupation in its entirety. Clark (2006) believed that the discipline is entering adolescence; beginning to emerge from the protective security of occupational therapy to expand and explore in order to forge its own identity. And most recently Jonsson (2008) suggested that occupational science is being diverted by political and societal needs from its attempt to relate occupation to human development, personal well-being and health. He argued that it is important to go back to studying how people experience occupation and proposed a theory, based upon an analysis of his longitudinal study of people experiencing retirement, of an occupational pattern significant to well-being which will be discussed more fully later in the chapter.

Hocking (2000) sought to ascertain the nature of the knowledge that was being generated in the field of occupational science up until 2000 and at that time established three main strands; understanding the purpose or goal of occupation within temporal cultural and ecological contexts; the complex processes inherent in occupational performance; and examining occupation's contribution to health and well-being. More recently she has noticed an increasing depth in the research base (Hocking, 2008). This has been marked by a change from theorising about occupation to knowledge derived from empirical research, some of which has challenged some initial understandings and contributed new knowledge. Similarly she noted the growing body of evidence regarding the relationship between occupation and health; and concepts new to occupational science such as occupational deprivation and injustice. In addition, research encompasses both a static and a dynamic perspective and uses concepts grounded primarily in occupation rather than in ideas generated from other disciplines.

3:3:1 Criticisms and weaknesses of the science

From its inception until quite recently argument has persisted regarding the nature of occupational science. Initially this centred upon whether the science underpinning occupational therapy practice should be a basic, occupational science or an applied science which advances knowledge of the use of occupation in treatment (Mosey, 1992; Lunt, 1997). While this discussion may have assisted proponents of either discipline to clarify thinking in the early days, in the longer term such debate can lead to wasted effort. It would appear that both have a contribution to make. However, Kielhofner (2002), a leading occupational therapy author, criticised the claims made by occupational scientists as over ambitious and argued that more real knowledge about occupation comes from within the profession, than from occupational science. A view refuted by Clark (2006); however she did argue for closer links between the basic science and the occupational therapy profession. It would certainly appear that some uncertainty still exists, for example Molke *et al.* (2004) have critiqued occupational science literature from 1990 to 2000 and concluded that confusion persists as to the purpose of occupational science and argued for its independence from occupational therapy. A view supported by Yerxa (2000), Wicks (2004) and Townsend (2004). More recently Laliberte-Rudman *et al.* (2008) have questioned whether occupational science should be limited by the current politically and technically defined needs of occupational therapy practice or whether it should encourage a broader conception of practice.

Dickie *et al.* (2006) criticised the science as being too focussed upon the individual and the first person perspective. They argued that this focus arises from dominant social values prevalent in the United States. Indeed other recent criticism of occupational science agreed that occupational science may be limited by being based predominantly on Western values (Hocking *et al.*, 2008; Hocking, 2008; Laliberte-Rudman *et al.*, 2008). Dickie *et al.* (2006) suggested that, although the place of context for the individual engaged in occupation is recognised in occupational science, they believed this creates a dualistic view of the person and the environment which in turn causes problems for the understanding of occupation. Rather, they proposed that occupation should be viewed as a transactional experience where occupation is one important means by which human beings function within a complex environment as a whole. They argued that Dewey's transactional view of the importance of continuity, where concern is focused on persons and the contexts *through* which they live, has much to offer occupational science. However, an authoritative rebuttal of this position is offered by Barber (2006) who argued that Dickie *et al.* (2006) have given insufficient weight to the significant body of sociological and philosophical theory which underpins occupational science, which has evolved from an interpretive tradition of the first person perspective. In this, the meaning of actions for the individual are considered

together with how they experience themselves to be affected by environmental contextual factors in which their actions occur.

However the transactional view point proposed by Dickie *et al.* (2006) continued to be supported by Aldrich (2008) and Cutchin *et al.* (2008) who believed it has more to offer occupational science than the complexity theories on which it is currently based. They argued that transactionalism allows greater opportunity for exploring and theorising the complexity of occupation than the behavioural applications of complexity theory. The most recent counter theoretical proposal by Sellar (2009) concerns the contribution of DeLanda's assemblage theory to the complexity of human agency as it accounts for both human and non human processes. In a sense the details of such debates are to some extent irrelevant, as it could be argued that what is developmentally significant here is that occupational science has reached a stage in its development where such theoretical debates are conducted. In which case perhaps it should be perceived as a strength rather than a weakness.

In spite of the intention for occupational science to be interdisciplinary the majority of the researchers publishing in this field are occupational therapists (Hocking, 2008). It is possible that other disciplines are also conducting similar research in isolation from occupational science. For example in the field of gerontology there has been considerable interest over many years concerning the lives that older people lead and the things that they do, which could be deemed of interest to occupational scientists. The general lack of recognition by occupational scientists of the rich vein of theory and research that flows from gerontology may be regarded as a further weakness. As long ago as 1972 the activity theory of ageing was proposed by Lemon *et al.* (1972), followed by Atchley's continuity theory in 1989 (Atchley, 1989) and it can be argued that both these theories have had some relevance to the study of occupation, but have been paid little attention in occupational science literature. In recent years such concepts have been linked to healthy or successful ageing, for example, Katz (2000) who examined the theoretical and practical aspect of activity in the management of everyday life; and Horgas *et al.* (1998) who attempted to describe the daily lives of older people in terms of frequency, duration, variety and social and physical contexts of activities. Warburton and Pinsker (2006), were concerned with meaning and generativity in the lives of older Australians and Menec (2003) explored the relationship between activity, well-being and successful ageing.

It would appear that, as Hocking (2008) suggested, parallel forms of research are occurring without cross communication. The potential contribution of gerontology to occupational science should not be ignored and it has made a significant contribution to

this study. Perhaps one notable recent exception in the field of gerontology is Rowles (2008) who acknowledged the discipline of occupational science through an insightful autobiographical reflection on the inter-relationship between person and environment in the individual search for meaning. He concluded that a greater understanding is required of this complex interface and emphasizes the importance of creating facilitative environments to enable the continued search for meaning in later life. In speculating why research in the field of gerontology has not captured the interest of occupational science to date, reasons of ageism cannot be ignored. It could well be possible that concepts related to occupation and ageing may inform other age groups too. As Laliberte-Rudman *et al.* (2008) have intimated, connecting in a meaningful way with other disciplines to enable collaboration remains difficult, but it could be unwise to ignore one with whom occupational science appears to have shared values and beliefs.

3:4 Key concepts in occupational science

Before turning to exploring the evidence from gerontology and occupational science concerning occupation and healthy ageing it is necessary to discuss some of the key terms and concepts of occupational science. Occupation and health will be discussed first, and the relationship each has with the other will be developed. Secondly several of the fundamental terms and ideas underlying occupation science that are pertinent to the study will be explored briefly.

3:4:1 Occupation and health

3:4:1:1 Occupation

Wilcock (1998a) asserted that occupation is more than just doing, rather 'occupation is a synthesis of doing, being and becoming which is engaged in not only by individuals but also at community, national and international levels for cultural, social and political purposes' (Wilcock, 1998:341). 'Doing', she proposed is generally purposeful and has enabled the human species to survive. It can provide satisfaction but it can also frustrate; it provides the mechanism for social interaction, societal development and growth; what people do creates and shapes societies. 'Being' is the process of discovering the self, thinking, reflecting or simply existing, while she considers 'becoming' encapsulates the potential for humans to grow, transform and self actualise (Wilcock, 1999). Pierce (2001), in her definition ignored the socio-political context of occupation and focuses on the individual. She suggested that occupation is an individual experience which is personally constructed; it structures both time and space and can only be interpreted by the individual. A far more concrete view of occupation

is proposed by Yerxa (1998) who asserted that occupations are organised into patterns or daily routines and as such are commonly known as activities of daily living, namely play, work, rest, leisure, creative pursuits and other activities which facilitate response to environmental demands. This view of occupations has sometimes been simplified within the profession of occupational therapy to productivity, self-care, leisure and rest (AOTA, 1974; Turner *et al.*, 2002). Kielhofner (1983) had already argued that this form of categorisation is difficult as some occupational categories overlap, while Turner (2002) proposed that individuals tend to think of some occupations residing in more than one category. Weinblatt *et al.* (2000) highlighted some of the potential flaws in using such concrete and uniform categorisation, particularly for older people who are no longer in paid employment where the term work becomes superfluous or at best ambiguous. It can be argued that retired people substitute compulsory or obligatory activities related to the home or garden for work as was demonstrated by Knight *et al.* (2007). However, this does not address the problems of this overall form of categorisation.

A more recent view is proposed by Whalley Hammell (2009), who criticised the simplistic categorisation of productivity, self-care and leisure as arbitrary and lacking in supportive evidence. Her argument centred on the premise that the focus should rather be on the actual, subjective experience of daily life where people are able to define their own occupations in terms of the meaning they hold, as suggested by Jonsson, (2008). She argued that attempts to categorise occupations into pre-determined occupation groups or hierarchies imposes non universal social and cultural values upon them. Instead she drew on a body of recent qualitative literature on the subjective experience of occupation and identified repeated themes or experiential categories namely; restorative occupations, ways to connect with others and contribute to society, engagement in doing and ways to connect the past and present to a hopeful future (Persson, Eklund & Isacsson, 1999; Thompson & Bundersson, 2001; Nagle, Cook & Polatajko, 2002; Eklund & Leufstadius, 2007). These categories, she suggested, address the four intrinsic needs in occupation for meaning, purpose, choice and control and a positive sense of self worth (Whalley Hammell, 2004) and while they are as yet untested, they do appear to have more to offer in understanding the experience of occupation for older people than any previous view. However she acknowledged that the literature on which her argument is founded is neither exhaustive nor comprehensive. In addition the research studies she draws upon focus on people with identified impairments as well as those without. For example possibly the term 'restorative' might have rather different meaning and form for those who considers themselves to be healthy than those with some form of disability or impairment.

A different, and potentially even more relevant, way of regarding occupation for this study is that proposed by Jonsson (2008) as his theory arises from upon his longitudinal study of people between the ages of 63 and 73. This qualitative study explored retirement from anticipation whilst still working to actual experience of retirement for 32 men and women living in Sweden. He argued that the individual experience of an occupation is far more important than the form it takes (Pierce, 2001). He set out the principles of flow theory (Csikszentmihalyi, 1975) where a person may experience a state of flow, a complete absorption to the exclusion of time or place where the high challenge of the occupation is matched by the person's skill. He went on to draw parallels with occupations which his participants found engaging, which in turn led to further analysis of the narrative data. He and colleagues defined a range of seven different ways that occupation was experienced ranging from the positive experiences of engagement to the largely negative experience of killing time. The former had a high significance for well-being whilst the latter had low significance, although the frequency and mix of occupational experiences also contributed to well-being. Whilst he built quite a convincing argument for the ways in which occupation might influence health he has created a further set of categories which although less concrete than, for example, self care, work and leisure, still pose the problem of difficulty of fit between different people.

Possibly Whalley Hammell (2009) is right in arguing that occupations should only be defined in terms of the meaning they hold, whether at an individual or community level. If occupation is viewed in this way it is possible to see that the same occupation will have different meanings for those that experience it. Meaning within an occupation has both personal and shared dimensions (Hasselkus, 2002); for example, attending an art class in retirement has a shared meaning for all who attend, but the personal meaning for each person will depend upon many factors related to their previous experiences of both art and attending classes. Meaning is thus derived from how the occupation is perceived by the individual. Sources of meaning develop over the life course and have the potential to be rich and complex in later life as a result of the lived experience. Over time meaning becomes personally, socially and culturally defined. On the other hand this alone does not explain why different potency of meanings are experienced. Perhaps Jonsson's (2008) concept of a range of occupational experience from engagement to killing time explains why engaging occupations will be imbued with far greater meaning than those that kill time.

3:4:1:2 *Health*

Turning now to definitions of health, an international and well established definition of health is the one by WHO first established in 1948, 'Health is a state of complete

physical, mental and social well-being and not merely the absence of disease or infirmity' (Grad, 2002:984). The later International Classification of Functioning, Disability and Health (ICF) recognises that every individual may experience some form of disability as a result of health decrements and refocuses attention from the cause to the impact of disability. It also acknowledges the contribution of contextual and social factors to the experience of disability and no longer views it in terms of medical and biological dysfunction (WHO, 2001b). An occupational science view of health has much greater affinity with this latter definition than the former. Two rather different, but complimentary occupational views of health has been proposed by two early theorists in occupational science, and are outlined below.

3:4:1:3 Occupation and health

First Yerxa (1998) believes that health should not be viewed as the absence of organ pathology but rather as a repertoire of skills which enables humans to set goals and meet aspirations within the context of their environment. She explored how certain concepts about health and occupation have developed during the 20th century. For example, people who pursue solitary creative interests can receive as great health benefits as those who have interests which include social engagement. She drew attention to the work of Meyer, an early pioneer in occupational therapy, to the way in which health can be closely related to a person's capacity for satisfaction that arises from the occupations they engage in. It is also understood that there needs to be a balance between perceived capacity and the demands required by the occupation for promoting health (Meyer, 1977)

Yerxa also acknowledged the importance of paid employment as an occupation where the latent consequences are of particular importance. These include how work imposes a level of activity and structure to the day; she also proposed that employees are linked to goals and purposes which transcend their own; it confers status and identity and provides a shared experience with others outside the immediate family. Another product of work for some people is an autotelic satisfaction in just doing the work as described by Csikszentmihalyi (1975) in his work on flow. If work comprises so many significant benefits retirement may pose a considerable loss to many people. For example, Jonsson *et al.* (2001) demonstrated in a seven year longitudinal study of 12 retirees in Sweden that whilst the transition into satisfying patterns of retirement was uncomplicated for some, others experienced an ongoing process of frustration and dissatisfaction. Prior to retirement the majority wished to continue some form of paid or voluntary work not only for financial reasons, but also for a sense of social utility and contact with fellow workers (Jonsson and Anderson, 1999). Yerxa argued that work is fundamentally more important to health than leisure, citing the example of the

frequent health consequences of unemployment. However this is unlikely to be the case when considering people in later life. It is far more likely that it is the meaning people are able to find in the occupations they do that is the significant contributor to health. Finally, Yerxa proposed that research from other disciplines also contributes to the understanding of occupation and health, for example adaptation and resilience as discussed in the previous chapter. Here, perhaps of particular interest to occupational science are three personality characteristics of commitment, control and a positive response to challenge. The presence of these characteristics enables people to resist stress and remain healthy (Kobassa 1982). However a potential weakness of this proposition is that her view of health is medically rather than occupationally orientated.

Second Wilcock (1993a) theorised about the human need for occupation. She explored the concept of homeostasis and the biological need for occupation in primitive man, later modified by socio-cultural needs as society developed, that has led to man engaging in purposeful occupations. She argued that 'occupation is the fundamental mechanism by which people realise aspirations, satisfy needs and cope with the environment (Wilcock, 1993b). Such engagement promotes both health and well-being, however, she believed, society has changed the occupations people do so that humans have now become the products of society which serves to conceal biological needs. She believed modern society inhibits balance in occupations as the need to use human capacities is ignored. This theoretical viewpoint has undoubtedly influenced later thinking and subsequent research regarding the link between health, occupation and well-being. She criticised medical science in the post modern society as promulgating views about health which focus largely on the absence of disease or infirmity (Wilcock, 1998b), although the recent World Health Organisation (World Health Organisation, 2001) ICF demonstrates a move away from this narrow view. Rather she argued for occupational indicators of health. For example, as indicators of good health, she cited engagement in a range of activities, commitment, energy, flexibility and interest. Also a sense of having to strive to continue to meet occupational potential can be viewed as healthy, even in later life. Occupational risk factors detrimental to health she noted as occupational stress, injustice, alienation, deprivation and imbalance. Here a lack of occupation or the wrong form or mix of occupations is considered to seriously damage health leading to illness, isolation and despair. However, she considered that the concept of occupation influencing health status is poorly understood within the medical model in which occupational therapy overwhelmingly operates, but occupational science has the potential to increase understanding (Wilcock, 2004).

3:4:1:4 Evidence for the link between occupation and health in occupational science

Following the early theoretical debates about occupation led by theorists such as Yerxa (1989), Wilcock (1991) and Clark *et al.* (1991) it was recognised that there was an urgent need for research evidence concerning the claims that were being made. One of the most pressing was the notion that health and well-being were influenced by occupation, as this was of prime importance to support the practice of occupational therapy. According to Wilcock (2004), one of the early most influential and respected pieces of evidence from within occupational science is the study by Clark *et al.* (1997). Here they demonstrated in a randomised control trial of three groups of community living older people that an occupation based intervention programme improved health, function and a sense of wellbeing, while those in the two control groups showed an overall deterioration during the study period.

Law *et al.* (1998) conducted a critical review of the evidence between 1980 and 1996 concerning the relationship between occupation and health and concluded that there was at that time strong to moderate evidence to support the claim that occupation influenced health and well-being. The first part of the review concentrated on defining terms before examining 23 research studies from a range of health literature including occupational therapy and occupational science. A limitation from the occupational science perspective was that the majority of the studies related to people with some form of physical or psychological dysfunction, particularly from occupational therapy literature and reflected upon either occupation as part of life, or the effects of either withdrawal or addition of occupation as a result of the dysfunction. Again the study by Clark *et al.* (1997) stands out as addressing the effects of occupation on health for those who consider themselves to be well.

Creek and Hughes (2008) writing a decade later also acknowledged that evidence for the relationship between occupation and health comes from a wide range of disciplines. They conducted a detailed literature review using several relevant databases for literature published between 2000 and 2006. Search terms included synonyms for occupation and health. A citation search then revealed further research published before 2000. They were primarily interested in the effect of occupation on health and not the influence of health on occupation. Studies on the effectiveness of occupational therapy interventions were excluded as were those which used self-rated health measures. To exclude all studies which reported on the effect of occupational therapy interventions, particularly when offered to people who were suffering occupational dysfunction as a result of occupational or environmental disruption rather than illness or disability, imposed a considerable limitation on the review. These concepts are often referred to as occupational risk factors and will be discussed in more detail later in the

chapter. This led, for example to the exclusion of the important Lifestyle Redesign randomised control study by Clark *et al.* (1997). Similarly they excluded self rated health on the grounds that it was too subjective, which meant that the work of Erlandsson and Eklund (2006), on how frequent disruption of complex patterns of occupation reduced perceived levels of health and well-being, was also excluded. Yet the view that subjective measures of health are less reliable than objective ones has been refuted by Winter *et al.* (2007) who asserted that there is a strong body of evidence to support the view that self rated health is known to predict mortality and other health outcomes better than objective health ratings.

However Creek and Hughes' (2008) review raised the issue of terminology and the need for occupational therapists to be able to clearly define terms for health and occupation. It could be suggested the definition of health should attempt to accord with definitions of health across all disciplines. A more difficult enterprise would be to promote a wider understanding of the meaning of occupation as it is viewed in occupational science. They also provided a considered view of different relationships between occupation and health. These include the health benefits and health risks of occupation, the characteristics of occupation that bring health benefits and factors mediating the health effects of occupation. They suggested that the actual nature of the relationship between occupation and health is still poorly understood and requires further research to test hypotheses and establish causal relationships.

Gutman and Schindler (2007), although both occupational therapists, took a very different approach to Creek and Hughes in their survey of literature which explored the neurological basis of occupation. Through this approach they sought to explore the link between occupation and health through research conducted largely in the disciplines of gerontology, neuro-sciences, psychology and medicine. Whilst the literature surveyed is extensive they provide no indication of method. However the approach is scholarly and reviews the evidence of the effect of occupation on the reward pathways in the brain, the increased dopamine and improved response to stress that can occur with certain types of occupation. They provided a strong case to support the link between occupation and health, particularly in relation to the ability of certain forms of occupation that engender either flow or relaxation to promote improved adaptive responses to stress. They also highlighted a considerable body of research that suggests that cognitively stimulating activity acts as a protection against age related dementia. It appears that Yerxa (1998) was correct in her assertion that research from disciplines outside occupational science have much to contribute to the understanding of occupation and health, but it appears that there is very limited cross communication between the different disciplines. Whilst occupational science synthesises ideas from

diverse fields it may still have a very limited penetration into other disciplines (Hocking, 2008).

3:4:1:5 *Evidence from other disciplines*

Various, often large, studies of how lay people view health strongly suggest that lay people tend towards a tacit understanding that engagement in particular occupations can have positive health benefits (Bryant *et al.*, 2001; Bowling and Iliffe, 2006; Bassett *et al.*, 2007; Reichstadt *et al.*, 2007; Laditka *et al.*, 2009), but this does not provide sound evidence of actual links between occupation and health. Whilst there is a recognition that being physically active throughout life has a generally positive health outcome and that the work people do may have an impact upon their health it appears that a knowledge of how to be healthy is not generally viewed in occupational terms. However research literature on ageing and remaining healthy in later life has a much greater occupational focus and this will be discussed in more detail later in the chapter.

3:4:2 *Other core concepts*

3:4:2:1 *Habits and routines*

Habits have been defined by Kielhofner (2008:17) as 'acquired tendencies to respond and perform in certain and consistent ways', which Clark (2000) suggested can be habits of thought as well as habits of doing. Habits influence how routines develop, which provides structure to daily and weekly life. They serve to locate the individual within a stream of time. Therefore routines are the structure through which occupations are organised (Clark, 2000) creating an overall pattern of occupational engagement. Disruption to habits and routines may pose problems, particularly for older people. For example the longitudinal study by Jonsson *et al.* (2001) found that one of the greatest challenges for people was establishing new routines after retirement. Habits can be difficult to change and additional effort and concentration are needed to form new habits and routines, which can initially have an impact on the ease and efficiency with which they are performed. Additionally Clark (2000) proposed that habits and routines allow optimal conditions for people to set aside daily living concerns and function with both creativity and innovation. She saw designing habits and routines which are health promoting as an essential element of ageing successfully (Clark, 1997). Ludwig (1997) found in a small qualitative study of seven older women over 70 that the meaning and purpose of their routines were linked to their ability to meet obligations; maintain activity levels; anticipate or look forward to things; maintain control over their lives; balance work, rest or play; accomplish and achieve; feel good about the self and provided continuity. Interestingly these women sought less obligation and more freedom as they aged (Ludwig, 1998).

3:4:2:2 *Time use and temporality*

Various studies of time use have shown that the use of time changes over the life span. In daily routines people have been found to engage in not just one activity at a time, but often in parallel activities such as eating a meal while watching the television or exchanging news with the family (Bendixen *et al.* 2006; Erlandsson and Eklund, 2006). Cross national studies in the western world found that for people in later life time previously spent in work is transferred to leisure pursuits (McLennan, 1997; Gauthier and Smeeding, 2003). With increasing age, Stanley (1995), an Australian occupational scientist, found that most time was spent on passive leisure, for example watching television, reading and listening to the radio, personal care and housework. Also older people were most likely to spend more time alone than younger adults (Stanley, 1995; Fricke and Unsworth, 2001). An interest in time use is not of course restricted to occupational science as several studies on time use have been conducted across the world, for example, the Australian (Trewin, 1999), the American (Kranz-Kent, 2007) and the North American and European (Gauthier and Smeeding, 2003) time use surveys of older people. An in depth time use study by Fortuijn *et al.* (2006) looked at the activity patterns across six European countries and concluded that as people age activity patterns change with peripheral activities outside the home declining and showing a corresponding increase in core home based activities. Temporality, on the other hand, is a term which refers to 'a dynamic shifting of time perception in occupation' (Larson, 2004:25). It refers to how people experience time and she suggested that this may be experienced in different ways, for example, it may be perceived as longer or shorter than actual elapsed clock time, or as flow, a sense of timelessness.

3:4:2:3 *Flow*

Jonsson and Persson (2006) proposed that the concept of flow, as described by Csikszentmihalyi (1975), contributes towards an understanding of the relationship between health and occupation as people appear to benefit from flow experiences leading to a sense of satisfaction and enhanced well-being. For example Griffiths (2008), in a grounded theory study of adults with mental health needs attending community creative activity groups, described how people reported feeling less tense, more relaxed, refreshed and at peace after experiencing flow. Flow is not just experienced through creativity of course, but may be found in many daily activities where a high level of engagement engenders a complete absorption in the task in hand to the exclusion of time and place and where the challenge of the occupation is matched by the person's skill (Rebeiro and Polgar, 1998). No evidence has been found regarding the experience of flow in later life, but it is possible that opportunities to experience flow may reduce with age where skills diminish through the ageing process.

This phenomenon may be offset however by the individual's ability to adapt and change.

3:4:2:4 *Occupation and environment*

Another key concept in occupational science is how people, carrying out occupations, interact with the environment in which the occupation occurs (Law *et al.*, 1996). The ICF definition of functioning, disability and health sees the environment as having three aspects, physical, social and attitudinal (World Health Organisation, 2001b). The physical and social environments are widely recognised in occupational therapy (Duncan, 2006) while other occupational therapy models of practice regard environment as more complex, encompassing not only social and physical aspects, but also cultural, socio-economic, political and institutional ones (Law *et al.*, 1996; Kielhofner, 2008). Again it is widely acknowledged that any of these environments can act either as a barrier or a facilitator to occupation (Law *et al.*, 1996; Turner, 2002; Letts *et al.*, 2003; Atwal *et al.*, 2005; Duncan, 2006; Kielhofner, 2008) and an affirming environment is an important aspect of enabling healthy occupation (Rebeiro, 2001). Environments can also present a range of opportunities which enable choice, although this can reduce with age. Interestingly the ICF now recognises a similar range of environments to occupational science and are also aware that environmental factors interact with the person and what they do.

3:4:2:5 *Competence*

Occupational competence can be equated with a sense of being effective in dealing with the challenges that occur during the life course (Christiansen, 1999). The experience of success serves to enhance self efficacy and encourages further engagement and exploration. Engaging in occupations is viewed by some occupational therapists as a means for building competence through the acquisition of skills and meeting identified challenges (Mee *et al.*, 2004). Again competence may diminish with age as performance capacities decline, but these age related changes may be mitigated by remaining physically active, and adapting habits, routines and environment (Kielhofner, 2008). There appears to be a strong association between occupational competence and occupational identity (Christiansen, 1999; Kielhofner, 2008).

3:4:2:6 *Occupational risk*

In recent years occupational therapists have been able to reframe physical, psychological or social dysfunction, which impairs the ability to carry out desired occupations, as occupational dysfunction (Quality Assurance Agency, 2001; Molineux, 2004). It is thought that occupational dysfunction may be caused by disruption either within the person, in their occupations, or environmental events. Personal disruption

tends to focus largely on ill health and disability and has been the traditional remit of occupational therapists. However in more recent years the focus of the profession appears to have broadened to include both occupational and environmental disruption, most likely as a result of research in occupational science.

Some of the most researched risk factors to date are occupational imbalance, occupational deprivation, occupational alienation and occupational apartheid, which will be defined briefly. Occupational balance is thought to be an internally defined 'perceived state involving attitudes, goals and perspectives, interacting with time and expectations of the socio-cultural environment (Backman, 2004:203). Occupational imbalance is characterised by a loss of balance between work, rest, self care and leisure and between those occupations we choose and those that we are obliged to engage in (Wilcock *et al.*, 1997), which can have a negative impact upon health. The causes of occupational imbalance are thought to be both intrinsic and as a result of societal pressures. Imbalance may also occur through a lack of variety of occupations and it is possible that the very old may be vulnerable here. As people age the range of occupations tends to narrow, with a reduction in the number of leisure occupations (Stanley, 1995; Van der Meer, 2008) and a corresponding increased focus on self care. Essentially, however, it can be associated with a persons ability to live in integrity with his or her personal values and strengths and find meaning in what they do (Pentland and McColl, 2008).

Occupational deprivation has been defined by Wilcock (1998a) as 'the deprivation of occupational choice and diversity due to circumstances beyond the control of the individual' (Wilcock, 1998a:257). It is associated with being unable to engage in occupations that are normal to the life stage and which are meaningful to the individual (Whiteford, 2000). Turner (2007) argued convincingly for the case that occupational disruptions which often lead to occupational deprivation can occur not only from disability but also from life events, changes to environments in which occupations occur, or from the introduction of new technologies. Environmental disruptions, she suggested are on a much larger scale, for example as a result of wars, changes in global markets, famine, floods, earthquakes and other natural disasters. Wilcock (1998b) also proposed a further term occupational alienation; an experience which she believed is embedded in current society. She argued that a growing reduction in the use of human survival capacities, particularly in a post industrialist society, has changed how people act in many societies today leading to occupational alienation characterised by a sense of powerlessness, isolation, loss of control, frustration or estrangement from our human nature and basic human needs. This may lead to a sense that many occupations are unfulfilling and meaningless (Hagedorn, 2001)

Finally the term occupational apartheid refers to the 'premise that some people are of different economic and social value and status than others' (Kronenberg, 2005:209). Groups of people may be 'segregated through the restriction or denial to dignified and meaningful participation in occupations of daily life' (Kronenberg, 2005:209). Apartheid is socially and politically driven and is a term usually associated with the dominance of one racial group over another. However Kronenberg suggested that when viewed occupationally it can refer to any vulnerable group in society. Its systematic and pervasive social, cultural, and economic consequences threaten health and well-being for individuals, groups and communities as it limits occupational choices to those which are unhealthy or maladaptive. Many would suggest that older people could be vulnerable to occupational apartheid, particularly some of the very old, the frail and those living in residential care. However it could also be argued that any older person lacks equality of status with the general adult population.

3:5 Summary

Successful ageing is a complex matter as can be seen from the previous chapter, but there is a general agreement that activity in various guises contributes to this process, for example, from the lay perspective, Bryant *et al.* (2001), Bowling and Dieppe (2005) and from the psychosocial perspective, Baltes and Baltes (1990), Horgas *et al.* (1998), Victor *et al.* (2005), Litwin and Shiovitz-Ezra (2006) and Chipperfield (2008). Those in the field of gerontology appear largely to have been influenced by the activity theory (Lemon *et al.*, 1972) which supports the premise that activity is beneficial for health. However, Stephen Katz (2000) provided a useful discourse on the nature of 'activity'. He challenged the current emphasis on active ageing from government and general social pressure. He believed that activity as a term has many sometimes contradictory meanings. If activities are imposed, choice becomes more limited and reduces the possibility of individuals being open to new opportunities. He suggested there was a tension between what is expected of a retired older person in terms of being active in order to age successfully and what one chooses freely to do. He argued against the use of quantitative methodologies and for the use of narrative which facilitated understanding of activity and how older people perceive it. He believed it allowed the narrator to qualify meanings of what they do in personal terms and understand its place in the wider social and political context. A premise that reflects the position of many in occupational science. However, Katz (2000), in his critique of prevailing politically and socially driven attitudes to active ageing, did not refer to the work of Atchley (1989) on continuity theory which might have elucidated some of the

underlying complexities and contradictory meanings of the term activity to which he alluded.

It is clear from these studies, and from those in the previous chapter, that gerontology and associated disciplines have a belief in the relationship between activity and health and well-being in the ageing process. However, the evidence within occupational science still requires some development. Some occupational scientists, such as Clark *et al.* (1997), Nilsson *et al.* (2012) and Tatzer *et al.* (2012) have considered the importance of active engagement in a range of occupations that challenge and fulfil the individual is as important in later life as it is at any other life stage, through research evidence. The randomised control study by Clark *et al.* (1997) has already been mentioned. The other two studies were both qualitative. Nilsson *et al.* (2012) interviewed 48 men and women between the ages of 90 and 98 years living in both rural and urban areas in Northern Sweden. The interview questions centred on which occupations contributed to the participants sense of well-being and why and which of these occupations were most important. They found that contact with friends, family and society and being independent all contributed to well-being as did aspects of 'being' described by Wilcock (1999) through thinking, planning and meditating. A limitation however, was no data was ascertained concerning the participants health and it was not known the degree of healthy ageing experience by the participants. Tatzer *et al.* (2012) used a qualitative life history method in a multiple case study of four women between the ages of 75 and 80 years. Two interviews were conducted, the first focused on changing occupations over the life course and the second, on current occupations and continuous occupational threads throughout life. Engaging in occupation, they found, supported continuity theory (Atchley, 1999) as it was the means to continue, test and adapt to the ageing self, but there was also a sense of limited occupational potential as described by Wick (2005). Others, such as Carlson *et al.* (1998), Hugman (1999) and Wilcock (2008), have acknowledged as scholarly opinion the relationship between occupation and successful ageing. However, it appears that the established association between health and activity has remained, to some extent untapped, by those in occupational science who are not concerned with the lives of older people.

An alternative viewpoint is to question whether occupational science is able to contribute a wider understanding of occupation than that arising from the gerontology literature, or from other disciplines such as anthropology, geography or behavioural studies. On balance, it appears that occupational science comprises a more comprehensive knowledge base than any of these other disciplines alone, each of which tends to have a specific, but relatively narrow focus on occupational issues. An association has been established between activity and health, life satisfaction and well-

being in gerontology, often in quantitative studies, while occupational science appears to be concerned with a far more complex and multifaceted understanding of occupation, which is attempting to comprehend the subjective experience of occupation in its many forms and which is beginning to establish its own evidence base. It also fulfils one of its other stated aims of providing a research knowledge base for the profession of occupational therapy.

3:6 Sociology

3:6:1 Introduction

Occupational science views environment and context as integral to occupation (Yerxa, 1989; Law *et al.*, 1996; Rigby & Letts, 2003; Dickie *et al.* 2006; Duncan, 2006) and therefore some sociological theory is likely to inform the understanding of people as occupational beings. Two major approaches of sociological enquiry in the twentieth century, which are thought to be relevant to the current study, have been structuralism on the one hand and agency on the other (Rose, 1998). These had been seen as incompatible by some (Giddens, 1984), although George (1998) has argued that the self can be viewed as a bridge between social structures and human agency. Sewell (1992) considered that the term structure in the social sciences has been an notoriously difficult term to define, however a recent definition offered by Barker (2005:448) believed it is 'recurrent patterned arrangements which influence or limit the choices and opportunities available' to people, while agency implies the 'capacity of individuals to act independently and to make their own free choices'. Broadly speaking structuralists consider social behaviour is constrained by social forces, while in hermeneutics and phenomenology the human agent is seen as the primary actor and interpreter of social life (Rose, 1998). Another theoretical perspective which holds similarities with the duality of structure and agency is the genes versus environment debate. Here the interaction between the innate qualities of the participants and the environmental influences they encountered have been debated for some considerable time. Ridley (2003) has challenged this debate by arguing that the discovery of the human genome has revealed that human genes are fundamentally designed to respond to environmental cues, which suggests that genes and environment, rather than being regarded as opposing forces, in fact interact with each other in the process of development. However, evolutionists such as Dawkins (2009) would argue that genes are not designed, but have evolved over time.

In order to resolve the incompatibility of structure and agency Giddens (1984) proposed his theory of structuration which Sewell (1992) argued is particularly sympathetic to the social historical perspective which will be adopted in the current study. Structuration theory developed by Giddens (1984) arises from the social sciences and is a social theory concerning the formation and reproduction of social systems where both structure and agency are given equal weight. Another relevant and major psychosocial theory is social constructionism, which is primarily concerned with the ways in which phenomena are socially constructed (Larkin, 2000). Social constructionism arises from the disciplines of psychology and social psychology and in essence attempts to place knowledge within the process of social interchange (Gergen, 1985), where human behaviour should not be viewed as fixed or permanent, but rather as something which culturally constructed (Gergen & Gergen, 2003). These theories accord in many ways with an occupational science perspective, where the environment has long been acknowledged as a vital interactive aspect of occupation. For example, Dickie *et al.* (2006) have argued that the study of occupation should be inclusive of context as individual lives are inevitably shaped by both historical time and location. In addition, Yerxa (1989), Law *et al.* (1996), Rigby and Letts (2003) and Duncan (2006) have all stressed the importance of the environmental context in which occupation occurs where different environments may inhibit or facilitate occupation, sometimes in interconnecting and complex ways. Environmental contexts here include the physical environment as well as the social, economic, cultural and political environments.

3:6:2 Social constructionism

According to Burr (1995) social constructionism encapsulates four key precepts and emerged in the post structuralist or postmodern era as a discipline in the 1970s. It has taken a critical stance towards taken-for-granted knowledge, is historically and culturally specific, it posits that knowledge is sustained by social processes and finally, knowledge and social action go together. It is concerned with how knowledge of the world is created and interpreted and arose, Larkin (2000) suggested, from the work of Berger and Luckmann in 1967. The latter argued in the social construction of reality humans create and maintain all social phenomena through social practices. A concept further developed by Gergen in 1970's. Social constructionism aims to explain how phenomena are socially constructed, focusing on meaning and power, because Gergen and Gergen (2003) argued, from its epistemological position, meaning and power are the only things one can claim to know. Human behaviour should not be viewed as fixed or permanent, but rather as something which is culturally constructed.

Wittgenstein cited in Gergen and Gergen (2003) claimed that knowledge is language in its infinite variety, and language, Burr (1995) argued, is the basis for selfhood, where identity might be seen as constantly contested, validated and maintained through the use of language. In the construction of identity various threads, such as age, class, gender, education, ethnicity and so on are entwined to produce the fabric of identity. Each thread is the product of discourses present in the culture, of age, class, gender and so on, which surround events and interactions. According to Gergen and Gergen (2003) these discourses shape people's vision of what they can and should do. For example a traditional discourse on femininity might include such constructs as nurturing, emotional, empathic and vulnerable. This can lead to women being deemed suitable for child rearing; are emotionality unsuitable for too demanding career positions and should avoid potentially dangerous activities. Such discourses are closely connected with the way society is organised and tend to preserve the dominant position. As Foucault (1991) claimed construction of truth and knowledge within a group leads to an emergence of power and control. For example, Hugman (1999) has argued that old age is a social construction which is rapidly undergoing change but, while many older people are healthy and have access to adequate economic resources, ageing and disempowerment also exist.

On the construction of personality, social constructionists would argue that attitudes and personal characteristics do not really exist (Burr, 1995). Burr (1995) argued people are constructed socially, out of social encounters that make up relationships and different aspects of personality come into play in relation to social context and interactions with others. She proposed 'a self which is constantly on the move, changing from situation to situation' in contrast to the 'traditional view of the stable, unchanging personality' (Burr, 1995:29). This indicates there are a multiplicity of potential selves which are not necessarily consistent with each other. However she suggested that feelings of consistency and continuity in time are provided by the memory which allows people to look back and select behaviours and experiences that appear to form a coherent narrative. She argued for the use of the term identity rather than personality and asserts that identities arise from interactions with other people which are based on language.

Human agency is a potentially difficult concept for social constructionists in terms of the relationship between the individual and society. Individuals could be seen as either entirely the product of the society into which they are born or society becomes the product of all decisions and choices people have made. However, Sampson (1989) has argued that the individual and society should not be seen as separate units, but rather as an eco-system of both the individual and its society, which Burr (1995) suggested

meant that social constructionists could resolve the problem of agency. She reflected on the work of Gilligan (1982) and Chodorow (1988) in which they suggested differences between women and men's societal experience and the formation of identity. A woman's daily experience tends to be more focussed on family than a man within a network of interconnected relationships based on mutual care and co-operation. Burr (1995) believed the individual self is therefore intimately connected to the kinds of social conditions in which they are embedded and therefore individuals, their social practices and structures together with the discourses which organise their experiences and thoughts may be regarded as different aspects of one phenomena. However it is doubtful from this explanation that social constructionism would accept other theory bases within or alongside it, such as those that come from social learning theory concerning agency. For example, Bandura's widely used theory of self efficacy, which will be outlined in the next chapter. Finally, apart from potential difficulties regarding the interpretation of personal characteristics, lack of continuity of identity and aspects of agency, social construction theory appears to offer a useful understanding of how identity might be constructed through interactions with society.

3:6:3 Structuration Theory

Structuration theory has relied in part on concepts of symbolic interactionism (Lamb, 2006), but according to Turner (1986) Giddens was also critical of symbolic interactionists for ignoring social structure and underemphasising motivational forces. Giddens (1984) argued from a sociological perspective that human agency and social structure form a relationship with each other. Accordingly structure and agency do not constitute two independent sets of phenomena, but represent a duality (Busco, 2009) where the repetition of the acts of individual agents reproduce the structure (Gauntlett, 2002). His theory sought to demonstrate how the informed actions of human agents both discursively and recursively, form a set of rules and resources over time and space. Giddens (1984) asserted that structure was not only external to human activities but also internal and thus is both constraining and enabling. This allows people to use their capacities in creative and constructive ways and in this manner they may at times be powerful enough to change the structures which had provided them with the capacities to act. Rose (1998) coming from the perspective of management and IT summarised Giddens' (1984) structuration theory as having four interrelated propositions. The first that social practices lie at the root of both the individual and society. Second they are accomplished by knowledgeable human agents with causal powers, which are bounded on the one hand by the unconscious and on the other by the unintended consequences. These social practices are not arbitrary, rather they are ordered and stable across space and time where agents draw upon the society's

institutionalised features, the rules and resources. Finally, these resources Busco (2009) reminds us, facilitate the exercise of power and may be unequally distributed. Therefore, Giddens (1984) argued, structure is activity dependent, where individuals have control over their own bodily actions which are organised into predictable daily routines.

In terms of personality, Giddens (1984) drew on the Freudian perspective of personality and Erikson's ego-psychology to ground his theory of the subject or agent in the interaction between the development of personality, the processes of daily routines and the reflexive monitoring of action. Ontological security acting as an anxiety controlling mechanism, is developed very early in life and is sustained as the child develops through the enactment of predictable routines in social interaction. Feelings of trust in others, found at the deepest level of ontological security, depends largely on predictable and caring routines. As Busco (2009) summarised, through routinised practices individuals satisfy their need for ontological security, while reproducing the wider organisational and societal order. When behavioural routines are drastically disrupted in critical situations they become flooded with anxiety which may threaten and demolish the sureness of these institutionalised routines and create possibilities for change. Giddens (1991) argued that a person's identity is not to be found in behaviour, nor in the reaction of others, but in the capacity to keep a particular narrative going. A sense of being arises from behaviour, but the sense of self comes from the ability to construct coherent narratives about the self which can act as a specific form of defence mechanism.

Giddens (1984) theory of structuration has been widely used and critiqued from a variety of perspectives including management, information technology, psychoanalysis in social theory, and social history. According to Sewell (1992) the theory of structuration holds considerable appeal to social historians. He asserted that in recent decades they have in fact widely demonstrated duality of structure in terms of how cultures and institutions into which people are born are reproduced by the structurally shaped and constrained actions of these individuals. Further, in some circumstances agents may innovate or improvise in structurally shaped ways to reconfigure the structures that formed them. However, he criticised Giddens' lack of clarity over his definition of structure, although he acknowledged that he provided more than most sociologists who, he asserted, leave a definition entirely to the reader's imagination. Rose (1998), coming from the perspectives of management and information technology, cited the work of Stinchcombe (1990) to question how the theoretical base of structuration accurately explains and accounts for historical change. Groarke (2002) using a psychoanalytical perspective, contested that the distinction between narrative

and behaviour in structuration theory could not be upheld in a breakdown of self-identity. For occupational scientists one appeal of this theory is its focus on human doing within a social context. As Giddens said, 'Society only has form, and that form only has effects on people, in so far as structure is produced and reproduced in what people do' (Giddens & Pierson, 1998:77)

3:7 Summary

This chapter has traced the development of occupational science over the last twenty five years as a discrete discipline and critiqued some of its strengths and weaknesses. Specific key concepts in occupational science have been outlined, namely occupation, health and occupation and health, and the evidence supporting the link between occupation and health have been presented. Some of the other core concepts of occupational science were also outlined before assessing the contribution of occupational science to extending the knowledge base concerning occupation and successful ageing. The second part of this chapter has introduced the theoretical concepts of structure and agency and outlined two theoretical approaches from sociology relevant to occupational science and the study of ageing, namely social constructionism and structuration theory. The following chapter will examine literature relating to the core principles of identity and of the identity which arises from engaging in occupation, occupational identity.

CHAPTER 4

Identity and occupational identity in later life

4:1 Introduction

In this chapter the related concepts of the self or identity, and occupational identity are examined. First a brief exploration of some of the basic theoretical concepts underlying identity are outlined from a psychosocial perspective, including historical development, the individual and collective self, social identity, symbolic interactionism, self schemas or multiple identities and threats to self concept. Related theories of life span development, narrative identity and self efficacy are considered in more depth. Issues related to ageing and psychosocial identity are investigated and critiqued before moving on to a consideration of occupational identity. Here considerable attention is paid to its inception both as a concept and a term, before its theoretical development and supporting research studies are explored. In conclusion the development of occupational identity is critiqued and current concepts evaluated.

4:2 A psychosocial perspective of identity

Notions of self and identity have been a relatively recent concept historically. When people lived in a structured or restricted way, remaining in the same location, with a fixed place within the family and within an hierarchical society this was an alien concept (Baumeister, 1987). As people began to be more mobile and ideas arising from industrialisation and the enlightenment together with increased secularisation influenced how people were able to construct identities outside society's norms, with increasing degrees and varieties of individual differences being tolerated. In recent years, self and identity have become central concepts in the behavioural and social sciences (Hogg & Vaughan, 2005). The self is viewed as a bridge between social structures and a person's attitudes and behaviour, as a keystone for well-being and as a central motivating force in human behaviour (George, 1998).

4:2:1 Individual versus collective self

There has been considerable debate amongst social psychologists for many years as to whether the self is an individual or a collective phenomenon (Hogg and Vaughan,

2005). They contended that the advocates of the individual self have prevailed as social psychologists generally concur that groups are made up of individuals who interact with each other rather than individuals who have a collective sense of a shared identity. However, different forms of identity are said to exist including first, the individual self, which comprises attributes that make one unique relative to other people with idiosyncratic personal traits and relationships (Hogg & Abrams, 1988). Second, the relational self comprising the relationships that one has with specific other people and third collective or social identity where attributes are shared with ingroup members and are distinct from outgroup members (Brewer & Gardner, 1996). Brewer (2001) went on to propose that as a member of a group one has a collective relational self either with other ingroup members or all outgroup members. She argued the individual relational self refers to a set of attributes which specify the relationship between self as an unique individual and others as individuals.

4:2:2 Social identity

Social identity, viewed by Citrin *et al.* (2001) as a significant aspect of a person's self concept, defines the self in terms of group membership. Characteristics of social identity include group behaviours such as group bias and solidarity, intergroup discrimination, conformity, normative behaviour, stereotyping and prejudice (Turner *et al.*, 1987). Individuals hold as many social identities as the groups they belong to and different situations influence which social identity is most salient at any one time (Hogg and Vaughan, 2005). However, they argued, belonging to a group for some people may have dangers as people's perception of themselves and others can become depersonalised. They cease to be a unique, multidimensional self, becoming the embodiment of the group prototype, for example as a stereotypical older person (McAdams. 1990). It follows that an individual's self concept is influenced by the prestige and status awarded by society to the groups to which they belong (Hogg & Vaughan, 2005).

A sociological perspective on identity could be said to stem from a central premise that meaning is socially constructed, where social reality is, to varying degrees, the product of interactions between individuals and groups, and where identity identifies the similarities and differences between self and others in social interactions (Jenkins, 1996; Giddens, 2009). Giddens (2009), who has written extensively on sociological theory, argued that all human identities must be social identities comprising the central aspects of personal or individual, collective or social and embodied identity. Primary identity, he asserted, is formed early in life concerning gender, race or ethnicity and possibly impairment or disability. Secondary identity follows and is concerned with

social roles and achieved status. He sees social identity as complex and fluid where new roles may be taken on and others abandoned.

4:2:3 Symbolic interactionist self

Symbolic interactionism addresses issues related to the relational self and arose initially from the work of Mead in the 1930s and was further developed by Blumer (1969). Here Mead's proposition was that the self emerges and is shaped by social interaction which is largely symbolic in nature with shared meaning (Blumer, 1969). Reflexive, or self knowledge allows the social subject 'I' to be aware of the social object 'me', sometimes thought of as the 'looking glass self' (Hogg and Vaughan, 2005). Interaction may occur within the person, thinking, creating and perceiving, or between the person and others (Griffith *et al.*, 2007). Human interaction principally occurs in terms of language, role taking and modelling other's minds which starts in childhood play with interactions becoming increasingly complex as the individual matures (Thomas, 1996). In this way society influences individuals' self concept which is modified repeatedly through interactions between people involving symbols with shared meaning (Hogg and Vaughan, 2005); thus promoting societal and cultural norms (Denzin, 1992; Karp, 2000). Denzin (1992) suggested symbolic interactionism has been subject to criticism since its inception, principally in relation to theory and method, politics and the neglect of emotion, which has led through developments and refinements to strengthening its contribution to understanding identity interactions.

Indeed Hogg and Vaughan (2005) believed this model to be both sophisticated and complex. However they argued that evidence suggests people do not really see themselves as others see them but rather see themselves as they think others see them; the latter being a generally a more favourable image. This may be because an individual does not actually take the role of the other when constructing a sense of self, or possibly the social interaction process is too intricate and inaccurate to allow a correct image to be formed. Objective self awareness, when attention is focussed on the self as an object, is possible but potentially stressful, but a distinction can be made between the private and public selves (Christiansen, 1999). It may be said that symbolic interactionism, as a theory of human agency, has relevance to the discipline of occupational science and has been used to inform research methods in some studies (Wright-St Clair, 2003; Griffiths *et al.*, 2007).

4:2:4 A psychoanalytical approach to identity

According to Erikson's influential life span theory of human development, psychological development unfolds in a sequence of predetermined stages from birth (basic trust versus mistrust) to old age (ego integrity versus despair), where the form of resolution of each stage greatly influences the outcome of succeeding stages (Dunkel and Sefcek, 2009). Identity is seriously addressed in the fifth stage, ego state of identity versus role confusion in late adolescence or emerging adulthood (Schultz & Schultz, 2005). They argued, the adolescent is confronted with the task of developing a sense of self continuity. Identity provides the answer to two questions, Who am I? and How do I fit into the adult world? The development of identity emerges from a unique pool of resources and handicaps together with the individual's strengths and weaknesses. Thus the past shapes the future, but although the past cannot be changed, the meaning of what has happened to some extent can be (Dunkel & Sefcek, 2009). Physiological and physical changes of adolescence contribute to identity formation in the context of the society in which the person lives (Dunkel & Sefcek, 2009). Role confusion in this developmental stage has been associated with, amongst other, low levels of parental and adolescent connectedness, lack of parental and adolescent communication and family cohesion (McAdams, 1990; Dunkel and Sefcek, 2009). Erikson's final eighth stage of integrity versus despair occurs in late adulthood where the individual looks back upon their lives with either a sense of satisfaction or regret. A successful resolution of this phase Dunkel & Sefcek (2009) suggested is that it is then possible to accept the inevitability of death without fear.

However, when Erikson was himself in his 80's he began to acknowledge the possibility of further personality development, which was explored posthumously by his wife and collaborator Joan, who added a new, ninth stage (Brown and Lowis, 2003). This stage was based upon Tornstam's theory of gerotranscendence where he proposed a looking forward, beyond the self, moving past a fear of death rather than merely accepting its inevitability, as Erikson had suggested (Tornstam, 1989). Brown and Lowis (2003), in their quantitative evaluation of the existence of this last phase used a self report survey of 70 women either in their sixties or 80 and over. The survey, which included statements related to both the eighth and ninth stages, was used to explore the possibility of a difference between the responses of both groups of women. There was no significant difference between the two groups for statements related to stage eight, but for participants aged 80 and over, the stage nine scores were significantly higher, supporting the existence of a ninth stage of development, which is relevant to the older participants in this study. One of the major criticisms of Erikson's theory is that it tends to follow a model of male development leading to independence and autonomy and ignores the female perspective, which some feminist theorists suggest has several

points of difference, such as development that reflects connectedness to, and responsibility for, others (Gilligan, 1982; Miller, 1991).

4:2:5 Self schemas

People have self schemas on aspects of self that are important to them and are aschematic on dimensions that are not important to them which contribute to the overall self-concept. People also tend to hold a large number of discrete self schemas (Markus, 1977). Markus and Herzog describe them as 'packages of self-knowledge that derive from past experience (Markus and Herzog, 1991:113), such as "I'm a good father", "I'm hopeless at sport" or "I like a challenge". These self schemas influence information processing and behaviour and not only describe the present self, but also possible future selves which may be desired or feared. It follows that in fact people hold *multiple identities* where a range of contexts bring about different selves because self conception is thought to be very much context dependent (McQuillen, Licht and Licht, 2001; Hogg and Vaughan 2005:126; Norrick, 2009). Self-conceptual integration and coherence are achieved through weaving the many identities and selves together into the life story or personal narrative (Markus and Herzog, 1991). They proposed, strategies for creating coherence can include restricting life to a limited set of contexts and reducing the possibility of self-conceptual clashes; constantly revising the autobiography to accommodate new identities or attributing changes in the self to changing circumstances rather than within the self. Developing a self schema is embodied in a core set of attributes which distinguishes a person as unique. Markus and Herzog (1991) also asserted that individuals integrate conceptualization about past and possibly future life with self appraisal of the current life, which in light of new experiences the conceptualization is revised; thus identity both changes and remains essentially the same through time.

Failure, positive and negative inconsistencies and stressors which appear to exceed the perceived capacity to cope, such as bereavement or the sudden onset of illness or disability, can all act as threats to self concept (Charmaz, 2002; Hogg and Vaughan, 2005). They proposed that people deal with these threats in various ways, for example, physical escape, denial by taking excessive alcohol or drugs, or selective perception. People may downplay the threat, which is rather more constructive, by re-evaluating the aspect of self that has been threatened and reaffirming the positive aspects of self. George (1998) suggested that perhaps the most positive and effective response to threat is through self-expression where people write or talk about their response to self-conceptual threats, which she believed, had the most direct physical effect on health. This is of course a psychosocial perspective and other responses, for example

through art or music or other meaningful occupation may be as valid. A significant threat to self concept in later life can be the death of a partner and Markus and Hertzog (1991) have suggested that this loss is easier to adjust to if a person's self structure is complex, allowing them to refocus on alternative aspects of their identity.

4:2:6 Narrative Identity

McAdams (1990) described a narrative identity based upon Erikson's concept of identity. Here he suggested that identity itself is a life story or narrative that begins in early childhood and continues to evolve throughout the life course. Narrative identity integrates disparate roles and comprises the reconstructed past, perceived present and anticipated future. Everyday behaviour and attitudes form patterns or habits which shape the emergence of personal identity as a narrative interpretation of life (Brockelman, 2002). It arises from a need for meaning in individual lives within a temporal world and Atkins (2004) argued that this narrative approach is philosophically most responsive to the ambiguities and complexities of human lives. The narrative is framed by the culture in which it takes place; the gender, social structure and material or ideological givens of the particular society (McAdams, 1990). Atkins proposes that within the narrative, openness to new experience is largely perceived as a desirable trait. It encompasses aspects of personality related to cognitive functioning such as imagination, creativity, broad minded, intellectually daring, non traditional and complex. A person is flexible in response to life-challenges, but may also be culturally defined.

There may be multiple narrative identities, those told by the individual and those that others tell (Meador, 1998). Telling the story is the performative and interactive aspect of the narrative through which individuals make sense of past and existing lives and possible futures lives can be explored (Phoenix and Sparkes, 2009), which may exist in different ways depending on context and listener. They suggested that such ontological narratives define who we are as a necessary precursor to inform action on what to do. A study by McAdams *et al.* (2006) of college students demonstrated both temporal continuity and developmental change between the first and fourth year of study. Kaufman (2000) contended that the creation of self is an ongoing process and events and experiences are constantly being reinterpreted in light of the present. She asserted that in later life rebuilding the past and interpretations of oneself alters as experiences increase, providing more for selection and a greater distance to review and evaluate them from. It would appear that telling the life story allows for the opportunity of shaping identity anew through the continuous process of restructuring which maintains a sense of unity and a connection with relevant aspects of the past which have current

meaning. Support for this premise comes from social psychologists Burr (1995) and Gergen and Gergen (2003), who argued from a social constructionist perspective that narrative serves to provide consistency and continuity in time, where identity might be seen as constantly contested, validated and maintained through the use of language. In the construction of identity various threads, such as age, class, gender, education and ethnicity are entwined to produce the fabric of identity. On the other hand, Giddens (1984) and Giddens (1991), writing from a sociological perspective simply believed that the sense of self comes from the ability to construct coherent narratives about the self where they act as a specific form of defence mechanism.

4:2:7 Self efficacy

George (1998) suggested that perceived self efficacy is a key aspect of identity. This concept was first introduced by Bandura in 1977 as an aspect of social learning theory concerning knowledge and skill acquisition and it has been widely applied in the fields of psychology, communication and education. Schieman and Campbell (2001) have argued that it is also a very relevant concept in the field of health, and there is evidence to suggest this is the case for those working with older people, largely within healthcare systems other than in the United Kingdom (Langan & Marotta, 2000; Stretton, 2006; Burnett, 2011; McCauley *et al.* 2011). Bandura (1989) argued that self efficacy beliefs are cognitive processes in which individuals have beliefs about their ability to exercise a measure of control over events which affect their daily lives. This sense of personal agency was neither entirely autonomous nor mechanistic, but was rather, a reciprocal causation of action, cognitive, affective and other personal factors, and environmental events interacting together; Bandura referred to this as emergent interactive agency. As a result of several large control trials of college students and other groups (Schultz & Schultz, 2005), Bandura developed the concept of perceived efficacy as a mechanism used to initiate goal directed behaviour which encouraged persistence until the goal was accomplished. People with high perceived efficacy were more likely to initiate action, overcome obstacles and achieve the desired goals than those with low self efficacy. The latter were far less likely to initiate action, sustain effort and were easily influenced by failure (Bandura, 1977; Bandura, 1982). Therefore he argued that a belief of personal efficacy, or personal capabilities is a core belief which is the cornerstone of human agency. People must have the belief they are able to achieve the effects they desire while avoiding any undesirable ones as without this belief they have a minimal incentive to act (Bandura, 1997a; Bandura, 2000).

Bandura (1997b) advocated that beliefs concerning self efficacy are based upon a sense of personal mastery of experiences, with success raising mastery expectations

and failure reducing them. Self efficacy beliefs, he argued, appear to relate to specific activities, but a belief of mastery in one activity can lead to willingness to take on new challenges. On the other hand a fear of failure will lead people to avoid those experiences in future where failure has occurred. This fear in turn can be generalized to an avoidance of new experiences and challenges. A degree of self efficacy can also be derived through vicarious experience from the observation of the success or failure of others (Bandura, 1989). In a self perpetuating cycle, judgments about perceived capabilities inform decisions about activity choices, the rate of skill acquisition and eventual mastery, which in turn, enhances perceived self efficacy. Choices made during formative periods of the life course shape selective development of competencies, interests and connected preferences (Bandura, 1982). It could be said that as a theory of learning it does not appear to address fully what occurs when mastery gradually decreases through the decline in physical and mental capacities as a result of ageing. It is perhaps likely that those individuals with high self efficacy will continue to be open to challenge and will tolerate minor setbacks better than those with low efficacy. Nevertheless it has been shown that self-efficacy declines in later life (Schieman & Campbell, 2001).

The relevance of self efficacy theory to rehabilitation from illness or disability for older people has also been widely realized (Gage & Polatajko, 1994; Schieman & Campbell, 2001; Voigt-Radloff *et al*, 2004; Stretton, 2006; Boehmer, 2007). Gage and Polatajko (1994) explored the concept of perceived self efficacy and evaluated its underlying theory in terms of its relevance to the practice of occupational therapy. For example they cited research conducted by Ewart *et al.*, (1986), which had demonstrated that the acquisition of skills during a cardiac rehabilitation programme were generalized effectively only to a similar setting. They believed this suggested that rehabilitation within a community setting is likely to be more effective than an institutional one. They also thought a lack of self efficacy belief in self care, home management or work skills might be a reason why some patients appeared fearful of returning to live independently in the community. These findings have implications for the location of occupational therapy services in the United Kingdom, many of which are, even now, still institutionally based. Gage and Polatajko (1994) also pointed out that self efficacy is an independent construct from self esteem. The latter relates to a negative or positive sense of self dependant on the individual's evaluation of overall competency with factors which are perceived to have social value and relevance and in general people are strongly motivated to think well of themselves (Hogg & Vaughan, 2005). It is considered that a person can perceive him or herself to be highly competent at several things, but may have low self esteem because these competencies are believed to be socially irrelevant, while another might express very

low perceived self efficacy for some occupations, but still retains high self esteem if these occupations are not deemed socially relevant by them.

4:2:8 Culture and gender

According to social psychologists cultural influences on identity are strong and reflect cultural values and norms (Stevens, 1996). In western cultures self and identity is largely individualistic whereas most other cultures tend to be collectivist where the self is inter-dependent, grounded in connections with others. Conversely the independent self is founded upon ideas of separation from others, is consistent across different situations and is autonomous with the self revealed through inner thoughts and feelings (Stevens, 1996; Wetherell & Maybin, 1996; Moghaddam, 1998; Hogg & Vaughan, 2005). The independent self emphasises the uniqueness of the individual with strong boundaries between the self and others whereas the interdependent self, which emphasises social relations and group characteristics, has much less well defined boundaries (Moghaddam, 1998). However, across most cultures people develop a continuous sense of self by the age of two years, which arises through social interactions (Moghaddam, 1998) and seek a coherent sense of who they are (Hogg & Vaughan, 2005). People who have reached later life, as Westerhof (2010) acknowledged, will have experienced a vast amount of cultural change throughout their lives.

Hogg and Vaughan (2005) also suggested that both forms of self give rise to different behaviours. They argued, the independent self is likely to act upon internal beliefs and feelings, promoting individual goals directly and assertively, emphasising difference from others. On the other hand, the interdependent self is concerned with belonging, acting in accordance with role and group norms, promoting group goals and group harmony in an indirect and non confrontational way. However, it could be argued that the behaviours that are assigned to the independent self are largely dominant in nature reflecting aspects of male identity and some women might align themselves more closely with the behaviours of the interdependent self suggesting that gender as well as culture creates differences in identity. Indeed, gender differences in identity are generally recognised (McKinlay & McVittie, 2008; Moghaddam, 1996), but female identity may not be portrayed in the dominant view of identity development (Woodward, 2002). McKinley and McVittie (2008) suggested that differences in gendered identities are shaped by the broader historical context, with masculine identities being concerned with traditional notions of the male role as the provider with power, authority, leadership and invulnerability. Whereas women's identity is developed in relationship to others (Miller, 1991; Petersen, 2000) and through

connection and responsibility for others (Gilligan, 1982). On the other hand Moghaddam (1998), while agreeing that there are gender differences believes that they have become gradually less pronounced since the early 1970s, but recent research would assert that this is not necessarily the case (Peterson, 2000; Abrams, 2003; Giddens, 2009, Simonton, 2011). However Becker and Wagner (2009) presenting a European perspective proposed some women still choose to adopt a traditional gender role while others reject being maintained in a subordinate role and adopt a progressive identity. This suggests an element of choice, or it may be in response to the wide variety of social and cultural contexts within Europe.

Giddens (2009) supported the view that gender identity varies across culture, asserting it is both biologically determined but also largely socially constructed. Theorists such as Freud and later Chodorow (1988) argued that very young children learn gender roles and behaviour from interactions with significant others. Freud's theories of gender difference were built upon the biological sexual differences where the father plays the most significant role. On the other hand, Chodorow (1988) believed that the relationship with the mother was most important in developing gender identity. She argued that following close attachment to their mother children need to achieve a separate sense of self. The break in relationship for a girl occurs slowly and as a result the girl develops a sense of self which is more continuous with others and tends to be merged with or dependent on others. However, traditional qualities inherent in the roles of helpmate and care taker are also frequently devalued by men (Gilligan, 1982). Boys on the other hand, Chodorow (1988) argued, develop a sense of self through a rejection of closeness with the mother and create an understanding of what it is to be masculine from what is not feminine.

Peterson (2000) contended that issues of female identity development for women from ethnic minorities have generally been subsumed into the study of racial identity overall. However she asserted that black women learned to define themselves in connected interdependence where their world view was centred on "the cultural precept of collectivism" which insulates the individual from the negative cues of racism (Peterson, 2000: 68) and can lead to high self esteem. Conversely, Hooks (1991) and Brewer (1993) took the view that apparent confidence might mask feelings of inferiority and the interplay between race, gender and class has the potential to multiply disadvantage Black women.

Overall it can be argued that in nearly all cultures women are perceived to be subordinate to men who hold greater power in society. Various socialist (Mitchell, 1966), radical (Firestone, 1971) and Black (Hooks, 1991; Brewer, 1993) feminist

theorists over the last 150 years have sought to explain this in order to promote greater equality for women. Woodward (2002) suggested that there were two main strands of feminist theory. The first was the feminism of difference which asserted the embodied experience of being a woman informed identity. The second, material or radical feminism professed that men's domination of women is socially constructed, based on patriarchy and not on pre determined sexual difference. However, post modern feminism, according to Giddens (2009), promoted the idea that there are many different theoretical standpoints that are equally valid, believing that there are numerous kinds of womanhood all of whom have a wide variety of different experiences which no one theory can explain. They seek to deconstruct the masculine worldview and create a more fluid and open one, which more accurately reflects women's experience and identity. This, Gilligan (1982) has proposed, is one where women define themselves in terms of personal relationships and judge their achievements in relation to their ability to care for others.

Finally the western, male dominated view of self requires people to be autonomous with relative freedom to make choices on life goals. Presenting an existential perspective Stevens (1996) suggested that autonomy exists within a structure determined by particular cultural and historical contexts so that choices are made in circumstances where the individual had little or no control over the original conditions of the experience. The opportunity for choice also implies being responsible and accountable for such decisions. However, because many women occupy a subordinate position in both western and non western societies (Giddens, 2009) they lack the degree of autonomy and opportunity to make choices experienced by men.

4:3 Ageing and identity

Age identity or subjective perception of age is seen as essentially different from chronological age (Phillipson and Biggs, 1998; Bowling *et al.*, 2005; Nikander, 2009). It is likely that age identity is considerably more complex than just physical, mental and functional health of an individual, other factors may also be influential. For example, Phillipson and Biggs (1998) suggested that political, economic and cultural factors together with the personal narrative form a social identity and posited an increasing disjunction between ageing from within the individual and ageing within society. Karp (2000), Nikander (2009) and Phoenix and Sparkes (2009) also emphasise the interactional nature of age identity where individuals create meaning through interactions within a wide variety of social contexts. Karp (2000), in a qualitative study of 72 professional men and women between the ages of 50 and 60 years using semi

structured interviews adopted the premise that all meaning arises out of the process of interaction. He found an emergence of a subjective sense of ageing arises from a range of interactions with those around them as well as in the wider culture generally and the messages referring to ageing increased in intensity and frequency throughout the 50's decade. A powerful effect of age identity is suggested by Charmaz (2002) who asserted that age identity associated with a perceived image of the body's capacity would determine response to illness and disability in later life. The changing nature of age identity and its increasing disjunction with chronological age has possibly resulted in the potential for less predictable and sometimes negative age identity than in previous decades. Some potentially more fruitful ways of exploring identity in later life can now be explored.

A social science, life course perspective of ageing is advocated by Wilson (2000). She asserted that people are not just 'old', but have both a past and a future that are very personal to them. Their experiences have created the people they have become; these experiences may have limited some opportunities, created others, or stopped them living in the way they would have chosen. She concurred with the notion of multiple identities and suggested that some are personally constructed while others are imposed. She believed that older men and women tend to see themselves in relation to family, lineage or community, although in Western countries a trend towards individualisation has led to an increasing number of individuals, largely men, who to a greater extent construct their own life course. As Markus and Herzog (1991) have asserted self concept is constantly re-evaluated, but often over the lifetime evolving identities, Norrick (2009) believed, can make a sense of coherence difficult to achieve. Multiple identities are apparent in narratives of older people, past selves and selves from another perspective being classed, for example as spouse, child, traveller, bridge player, or being fit and healthy and as such appear to be what occupational scientists would define as occupational roles (McQuillen *et al.*, 2001; Norrick, 2009; Phoenix and Sparkes, 2009). This would strongly support the notion of an occupational identity which will be discussed later in the chapter.

Kaufman's anthropological perspective of identity also appears to have associations with occupational science. Kaufman (1993), a medical anthropologist, described her study on identity in later life. She interviewed 60 white, middle class Californians aged 70 and over who lived in residential care, retirement communities and those living in the community through a variety of older people's groups. Some had physical health problems, but all were mentally alert. The sample comprised a variety of economic, educational, social and occupational backgrounds who had been exposed to the same broad cultural influences, social trends and national events. She then completed

intensive systematic interviews with a sub sample of 15, two of whom she uses to illustrate her findings.

Kaufman suggested that when older people are telling their life stories, they do not identify themselves as being old although they acknowledge the physical and intellectual limitations brought by age. Some of her key findings related to this concept of an ageless self. First, continuity, not randomly occurring but actively sought, is maintained through a symbolic and creative process where meaning is derived from the past and is interpreted as a source for being in the present. Second, Kaufman suggested values act as a resource for meaning and identity in later life. These moral values, according to Mead's theory of the social self are formed in childhood (Giddens, 2009) and act as guidelines for behaviour and as standards for decisions on goal choice. They also inform adaptive dilemmas that occur throughout life. Third, shared values of achievement, success, productivity, work, progress, social usefulness, independence, self-reliance and individual initiative had a strong underlying activity orientation. The latter had the greatest influence on the formation of identities in later life.

Kaufman's theory of an ageless self, with its strong focus on what people do and the concomitant influence on identity, has been referred to by McHugh (2000) as a seminal work and some of the underlying principles have a strong accord with an occupational science perspective. However it has also attracted some criticism. Widdershoven (1994) asserted that Kaufman's theory of the Ageless Self represents a closed form of narrative identity which is largely discredited today and instead prefers open or post modern theories of narrative identity which infer less predictability. Tornstam (1997) argued that the theory of the Ageless Self has introduced a separation of the body and mind in the ageing process and McHugh (2000) contended that while the concept of the Ageless Self has done much to counteract the negative stereotypes of ageing, it conveys little of the real experience of growing old. However, it may be that in later life people have the perspective to see their lives as having logic and patterns which form a coherent whole and have accepted the choices that have been made along the way.

Kaufman (2000) also suggested it is the themes we create which are central to identity and even though they may not be supported by reality the theme cannot be discarded. Some themes may cause a dichotomy between a past, but desired, self which is no longer relevant in the current reality of self. This may cause a sense of frustration and pointlessness. Conversely successful adaptation occurs when individuals can conflate meaningful past experiences and current circumstances. Adaptation in later life is not just striving for contentment but is also dependant on how the past is organised,

meaning is created, events are explained and communicated to others (Kaufman, 2000). All her participants found ageing too abstract a concept to be part of identity, rather they dealt with specific problems that occurred as they aged, in the same way they had dealt with problems throughout their lives.

Continuity and adaptation are themes which arise relating to identity in some of the literature (Kaufman, 1994; Atchley, 1998; Atchley, 1999; Coleman *et al.*, 1999; Sneed and Whitbourne, 2001) and continuity is actively sought by individuals to preserve existing identity (Kaufman, 1994; Atchley, 1999; Coleman, 1999). Sneed and Whitbourne (2001) argued successful ageing can be experienced through maintaining a positive view of oneself using identity assimilation, or identity accommodation. Experiences can generally be assimilated within the existing sense of self but when dissonance occurs accommodation or changes to identity must be made. They asserted that ability to accommodate change, or adapt allows for goals and aspirations to be adjusted to match age-related abilities. They also found strong self esteem was associated with a flexible balance between identity assimilation and identity accommodation, while Bandura (1997) suggests that high self efficacy is an effective adaptive mechanism.

Atchley explored the concept of both continuity and adaptation in the ageing process in depth in his continuity theory of ageing as outlined in Chapter 2 (Atchley, 1989; Atchley, 1998; Atchley, 1999). He argued that inner continuity and stability emerge over time with health except severe disability, having surprising little effect on mental constructs. External continuity, he believed, encompassed social arrangements and interactions and focussed largely on what people did in terms of 'activities', such as community participation, hobbies or physical activities. In later life adaptive choices are made in an attempt to safeguard and sustain existing internal and external structures. They are generally effected through the use of strategies associated with past experiences. Overall the theories of continuity and adaptation to change appear to suggest a strong occupational perspective to identity.

Finally, one particular life event requiring a major adaptation, which is experienced by many in later life is the bereavement of a spouse. This usually acts as a serious threat to identity which requires significant adaption. Van den Hoonaard (1997) explored the widow's sense of identity through analysis of autobiographical accounts of 10 North American widows. The transition from wife to widow had several phases starting with the loss of the existing identity. Social interactions suddenly lost their usual meaning and the validation of a sense of self was lost at every level which she described as identity foreclosure forcing the person to see themselves differently. Identity

foreclosure happened on three levels, the widows lost a sense of who they were personally, who they were in relation to close friends or how to fit into society. She argued this was exacerbated if much of the wife's identity was gained from her husband. Identifying moments, such as doing things for the first time alone reinforced the loss of the old identity and the shocking realisation of a new identity as a widow. However, she acknowledged that the widows who wrote the autobiographies did not represent a cross section of widows; they were all highly educated and had had satisfying marriages. The autobiographies that informed van den Hoonaard's study were written between 1960 and 1990 and it is also possible that fewer women today would derive so much of their sense of self from their husband.

Van den Hoonaard found there was also a more gradual change to identity through the loss of old friendships which occurred when married friends slowly dropped the widow from their social circle. Many also experienced a sense of stigma in their new situation, a loss of intimacy with old friends as the widow became an altered person, living in a different social world (van den Hoonaard, 2001). As the bonds with the deceased are loosened the process of constructing a new identity begins as the widow takes on new responsibilities and makes emotional and social adjustments. The reconstructed identity Bennett (2010) suggested is no longer that of wife but rather an augmented identity of wife/widow which can cause tensions if society only recognises the widow. It is likely that the process of identity loss, transition and reconstruction for widowers is somewhat similar, although Stroebe *et al.* (2001) found in a review of the literature that men suffered high consequences from the loss of a partner than do women. Van den Hoonaard (2001) suggested that widowers found that being busy with activities outside the house requiring social interaction was an effective strategy in the transition period for dealing with feelings of sadness and loneliness.

4:4 Occupational perspective of Identity

The occupational nature of some aspects of identity found in the literature has already been highlighted. Discussions began amongst occupational science theorists concerning the occupational nature of identity in 1999. In this section theory development of the concept 'occupational identity' will be discussed first, followed by a consideration of the relevance of some of the research underpinning theory development to the current study. Finally a critique in the literature of the concept in its current accepted form is considered including suggestions for future development.

Christiansen (1999) was the first to make a direct link between identity and occupation. In his influential scholarly paper he examined the nature of personal identity as a psychological concept and suggested that people develop and express their identity largely through occupation. He made four propositions and examined them in light of relevant psychosocial theoretical contexts. First he argued that 'personal identity is an overarching concept shaped by our relationship with others' (Christiansen, 1999:548). Citing the work of Baumeister (1982; 1997) and others, Christiansen asserted that a sense of self, initially perceived through the body is augmented by an awareness of a sense of self being able to make choices and initiate action. He argued that self concept is developed to encompass social roles and relationships, personality traits and characteristics where a perceived discrepancy between the actual and the ideal self motivated change. He also proposed beliefs concerning self efficacy are incorporated where efficacious action lead to social approval and enhanced sense of self. He concluded, overall personal identity encompasses a sense of who one is and has been, but also a sense of who one might become.

Second, Christiansen (1999) argued that identity is linked with what we do, our occupations, and how we interpret our actions in the context of our relationships with others. Citing Piaget (1954), Kagan (1981) and Keller, Ford and Meacham (1978) he asserted that children develop as active agents in the world exerting influence on both objects and people developing the ability to manipulate their environment intentionally to exert change. Social approval of themselves as an individual, he argued, is recognised as contingent upon what they do and over time an understanding of the interdependence between the self and connected others is built. He proposed that personal identity continues to be influenced by social relationships as the child matures with comparisons being made concerning competencies and capabilities with peers, family and others. He argued, in adolescence the focus is on more abstract concepts such as values, beliefs, preferences and interpersonal traits until in adulthood identity becomes more goal orientated and centred upon developing as a particular kind of person.

Third, citing Moore (1997) and others Christiansen proposed that people develop identity through a framework or life story of life events and situations which are interlinked with the life stories of others, thus if change occurs it will affect not only the self, but also the interconnected others. His fourth and final proposal is that identity is essential in promoting well being and life satisfaction. Life roles and occupations, according to Christiansen, are imbued with meaning and weaving the many, sometimes disparate, strands of life together to form a coherent whole, is an important aspect of identity. A sense of coherence, meaning and purpose is created which allows an

individual to interpret and derive meaning from experience and provides for future possibilities.

Christiansen (1999) also explored the notion of social constructionism and distributed selves where it is argued that it is not easily possible to separate the person from his or her social context, rather selves are multifaceted and distributed throughout the various social environments within which interaction takes place to form a comprehensive and intelligible identity (McQuillen *et al.*, 2001; Hogg and Vaughan 2005; Norrick, 2009; Giddens, 2009). The occupational aspect of his argument related specifically to the evolving narrative of the life story where life events are systematically related within a temporal order (McAdams, 1990). Christiansen (1999) suggested that reflexive dialogue shapes identity through daily occupations and believes that there is an important relationship between occupation, competence, meaning and identity.

However, it can be said that his theoretical arguments are not exhaustive as he does not address, for example the psychoanalytical approach to identity developed by Erikson's life stage theory, Atchley's continuity theory or Bandura's theories related to self efficacy although he does mention the latter concept. However, Christiansen, (2000) later went on to acknowledge the influence of Erikson's development theory in terms of mastery in constructing social relationships, building caring capacity for self and others and acquiring wisdom and understanding of one's place in life. Additionally, Christiansen did not apply his arguments to people in later life who may be experiencing some degree of declining capacity, but he did reflect on the impact of chronic illness and disabling conditions where capacity declines abruptly. The notion of competence is particularly relevant when considering the evolving identity of people in later life when declining abilities might be said to indicate an expectation of reduced competence in occupation which may be perceived as a threat to identity requiring a process of adaptation and change. Christiansen (1999) argued that the role of identity in the process of adaptation is the sense of coherence or continuity over time that it creates.

Kielhofner (2002) was one of the first to use the term 'occupational identity' when revising his well-recognised Model of Human Occupation. At this time he suggested that occupational competence and identity are interrelated and influence the success of occupational adaptation together with the construction of a positive identity. He argued that for occupations to be central to occupational identity they must be associated with competence, be interesting and satisfying. Based on the work of Christiansen, Forsyth and Kielhofner (2006) expanded on this view of identity. They asserted that,

essentially, occupational identity is integral to the story of one's life or a life narrative. It develops over time, building up a history of occupational participation in the form of this life narrative. They argued that identity is distributed across different roles and relationships, is clearly subject to change as individuals take on or lose roles and relationships and respond to events that occur in life. Occupational identity is defined as:

"a composite sense of who one is and wishes to become which is generated from one's history of occupational participation. It includes one's sense of capacity and effectiveness for doing" (Forsyth and Kielhofner, 2006:78)

and

"occupational identity contributes to a sense of personal identity and provides meaning to daily activities" (Duncan, 2006:339).

However Kielhofner (2008) subsequently included competence within occupational identity in a later definition.

It could be concluded that this sense of effectiveness and capacity for doing, which enables occupational participation, allows individuals to pursue occupations that are valued through motivation to achieve desired outcomes. By participating in a range of occupations individuals may acquire a belief in their ability in, and control of, those occupations he or she engages in. Participation may then give rise to a sense of satisfaction and achievement if internal and external expectations have been met. This allows individuals to fulfil both societal and personal expectations and values in a variety of different occupational roles. Additionally, individuals create and maintain routines of occupations to meet role responsibilities and maximise occupational competence. It could follow that disruption of routine could temporarily reduce competence.

It is interesting to note that Duncan (2006) explicitly stated that occupational identity is just one aspect of identity, whereas other authors appear to implicitly regard occupational identity as replacing other forms of identity. However neither definition acknowledges the contribution of the interpersonal nature of occupation and identity, of symbolic interactionism. More recently Kielhofner (2008) expanded his view of occupational identity to comprise many aspects of his model of human occupation including capacity and effectiveness for doing, which Christiansen (1999), Christiansen (2004) and Mee *et al.* (2004) regarded as occupational competence. Kielhofner (2008) continued to see occupational competence as the ability to put identity into action

through sustaining occupational participation to reflect identity. Differences in the use of terms serves to confuse understanding of the overall concept, occupational identity.

In a valuable and much cited scholarly contribution to the development of the occupational identity theory base Unruh *et al.* (2002) considered the concepts of spirituality, occupation and identity and endorsed the work of Christiansen (1999). They also proposed the term occupational identity, which, they suggested, should be used to convey the core concept of a person as an occupational being. They saw occupational identity as 'a fabric of occupational choices that convey something about who a person is at particular points in his or her life' (Unruh *et al.*, 2002:12). They also emphasised the interrelationship between aspects of the person, occupational identity and the environmental context in which occupation occurs. Collins (2007), again in a scholarly article, reflected upon this proposition and appeared to accept the notion of occupational identity in this context as a valid concept, but argued that the transpersonal dimension also needed to be considered in order to both widen and deepen understanding of identity. This transpersonal perspective recognises that a spiritual reality exists beyond the self and includes experiences that transcend a person's boundaries. Unruh (2004) added that occupational identity may have both conformist and individualistic components based upon subjective experience, which allows individuals to adapt or reject social norms in constructing identity.

Kielhofner (2002) and Unruh (2004) discussed the influence of health and life crises on the continuity of occupational identity. Kielhofner (2002) found that people were more likely to give up or modify occupations that were less central or significant in shaping identity, but persevered with occupations interwoven with their sense of self. Unruh (2004) examined the concept of occupational identity both from her previous research concerning the meaning of gardening in daily life and the work of Kielhofner (2002) and agreed with this premise. She suggested that occupation identity is 'unified and balanced' comprising all an individual's occupational roles. This implies a sense that occupational lives are balanced which is often not the case and perhaps unified and interconnected would be more appropriate. The life event of retirement, she argued, can be a time of loss and change particularly for people where work occupations have been central to identity. She also proposed that leisure occupations in early life can indicate enduring personal characteristics, and may be seen as restorative often having a sense of pleasure and rejuvenation, which may serve to ameliorate stress when dealing with serious life crises.

Various research studies have further explored the nature of the link between occupation and identity (Christiansen, 2000; Laliberte-Rudman, 2002; Howie *et al.*, 2004; Vrkljan and Miller Polgar, 2006; Griffiths *et al.*, 2007). The first three will be

outlined in detail as they encompass many aspects of occupational identity and appear to have been most influential in the theory development of occupational identity. First, Christiansen (2000) conducted a quantitative analysis of archival data from 120 adults between the ages of 19 and 79 years living in the United States of America to test the hypothesis that personal project ratings would demonstrate the key influence of identity within the projects and significantly predict subjective well-being. His findings differed across the young, middle and older adults groups. Only those relating to the older age group will be discussed as they are most relevant to this study. In contrast to the other two age groups, social significance and project challenge were significant predictors of subjective well-being for older adults as were integrity of self identity, value congruency, and efficacy. This, he suggested, fits well with Erikson's developmental theory where older adults may be facing a decline in physical function or health, and integrity and efficacy are recognised and appreciated. He concluded that his findings support the vital link between identity and goal directed behaviour and that personal projects play a crucial role in predicting subjective well-being in later life; a factor pertinent to the study reported in this thesis.

Second, is a frequently cited study by Laliberte-Rudman (2002) who is an important contributor to the theoretical development of the concept of occupational identity. She reported on the secondary analysis of data drawn from three of her qualitative studies, which led to the development of five common themes demonstrating a link between occupation and identity. Each of the studies had different research objectives, but two out of the three related to people over the age of 65 and all explored how individuals' perspectives of everyday activities contribute to an in-depth understanding of occupation. Secondary analysis of the data from these three Canadian studies revealed new emerging themes specific to occupational identity.

First, she found that some occupations appear to encapsulate the core characteristics of an individual, reflecting the essential person they believe themselves to be. A second finding was, declining health or abilities may limit certain occupations which in turn limits how people see themselves and manage their social identities. Conversely, she also found a possibility to engage in occupations which provide opportunities for growth and re-construction of identity. Her third finding was that occupational choices appeared to be made in ways that allowed the individual to maintain an acceptable and satisfying sense of personal identity. This was frequently linked to consistency or continuity of identity, although the actual occupations may change. Fourthly, she found occupational choices were made in ways that facilitated managing social identity. Occupations were often either engaged in, or avoided, in an attempt to avoid stigmatising labels. For example, older people made occupational choices to distance

themselves from the social stereotypical identity of old, dependent, incompetent, socially disengaged and inactive. Her final finding was a need for control over occupational engagement in order to achieve the positive benefits of personal and social identity. This secondary analysis of three qualitative studies offers useful evidence relevant to the current study concerning key occupations reflecting core characteristics of the individual, the relevance of declining capacities due to ageing and factors influencing occupational choice.

The third study to be discussed was by Howie *et al.* (2004). They conducted a small, in depth qualitative study of six older people between the ages of 78 and 87 in Victoria, Australia. Data was gathered in one or two in depth interviews which focused on how a specific art or craft occupation engaged in over the life span was considered to influence older people's occupational identity. Analysis of the data revealed four major themes. First relational practice demonstrated that as a child, encouragement by others in the performance of the craft was influential. Later creating in the company of ones peers allowed evaluation of performance against others and the opportunity to affirm a sense of self. In adulthood and in current life, recognition of their work also appears important although Howie *et al.* (2004) do not name it as such. Second, a sense of the changing self was apparent as people were influenced by interaction with others and the environment and with the changing abilities and capacities of the self. But as well as the changing sense of self there was third, an awareness of a consistent core of enduring qualities and characteristics. Finally created objects allowed people to reflect on what they had done and how the object revealed a sense of the person they were at the time it was created.

A possible weakness of this study is that it focused solely on the influence of creative occupations on occupational identity, but this is acknowledged. Howie *et al.* (2004) advocated more research on how occupations in a wider sense influence identity and additionally how people maintain occupational identity in the face of declining abilities, or changing social, financial, or environmental circumstances typical of normal ageing. However their findings appear to have relevance to the study reported in this thesis. Additionally, the studies by Vrkljan and Miller Polgar (2006) and Griffiths *et al.* (2007) demonstrated a critical link between meaningful occupations and identity as an occupational being and the loss of autonomy and choice occasioned an identity adjustment.

All three of these studies were carried out in either North America or Australia, as were the studies by Vrkljan and Miller Polgar (2006) and Griffiths *et al.* (2007) and present a western perspective of occupational identity. Awareness has developed that the

resulting conceptualisation of occupational identity promotes very western perspective, which is now subject to criticism (Phillips, 2007; Laliberte-Rudman and Dennhardt, 2008; Phelan and Kinsella, 2009). They argued that western cultural assumptions and values have shaped the evolving concept of occupational identity and suggested that none of the perspectives proposed by Christiansen (1999), Kielhofner (2002) or Unruh *et al.* (2002) and Unruh (2004) are responsive to cultural differences. However it has also been widely argued that the persistent focus upon the individual in the study of occupational science as a whole has the potential to limit theory development and is likely to alienate diverse non western cultures (Iwama, 2003; Molineux and Whiteford, 2006; Laliberte-Rudman and Dennhardt, 2008; Hammell, 2009, Phelan and Kinsella, 2009; Hammell, 2011). The arguments in this debate resemble those in social psychology concerning identity (Stevens, 1996; Wetherell & Maybin, 1996; Moghaddam, 1998; Hogg & Vaughan, 2005). The question is raised by Laliberte-Rudman and Dennhardt (2008) whether 'occupational identity can be understood as a shared, collective identity tied to occupations based on tradition, familial relationships or collective functioning' (Laliberte-Rudman and Dennhardt 2008:159.) They proposed an interesting and potentially useful framework for informing the concept of occupational identity across cultures based on the work of Kluckhohn and Strodtbeck (1961). This allows for three different forms of value variation in relation to occupation and occupational identity according to cultural orientations such as, the relationship of man to nature and human occupation with nature; time and the temporal focus of life and occupational identity; the best mode of activity to be use for self expression and finally relational, the relationship of the individual with his or her collective.

In a valuable critique Phelan and Kinsella (2009) challenged the notion of the individual at the core of identity formation with the concomitant assumption of potential for autonomy and free choice over occupations. Reflecting on post modern and poststructuralist thinking on identity where the self is seen as unstable, sometimes contradictory, constantly changing in response to language and relationships, they argued for the inclusion of social dimensions and the collective identity. In addition, they challenged the concept of free choice over occupations, which is prevalent in the westernised conception of occupational identity and suggest that in many situations this choice may be limited. This may be through occupational apartheid as suggested by Kronenburg and Pollard (2005), through marginalization as a result of chronic illness or disability (Charmaz, 2002), or, from a feminist perspective, where autonomous choice is restricted by power differentials in a society (Sherwin, 1998; Moghaddam, 1998). Sherwin (1998) proposed instead the notion of relational autonomy where the social world shapes peoples' identity and choice and suggested that it is necessary to develop skills in making choices in a context that respects and values those choices.

Phelan and Kinsella (2009) also discussed society's influence on the formation of occupational identity and question whether social approval from parents, peers and society in its formation, as posited by Christiansen (2000), Unruh (2004) and Kielhofner (2008), is sufficient. However, looking back to the work of Christiansen (1999) it is possible to see that identity formation relies not only on social approval. His exploration of the interpersonal nature of identity and the associated concept of symbolic interactionism suggests that individuals develop identities which are both socially formed and culturally sensitive and he suggested that his view of identity formation sits largely within the theory of social constructionism which generally accepts his proposition of the 'distributed self' (Christiansen, 2000:551).

When reflecting on the limitations of the current concept of occupational identity, Phelan and Kinsella (2009) endorsed this view and proposed the theory of social constructionism to replace the limitations of social approval alone. From this position, Phelan and Kinsella argued that involvement in society and culture together with social relationships may actually construct or fashion occupational identity. This they believe is in line with current thinking on identity and they call for a need for occupational scientists to conceptualise occupational identity in a way that acknowledges the complexity of widely different social contexts where choice is relational and is sometimes either very limited or non existent.

A more isolated and possibly less useful critique of the current theoretical conceptualisation of occupational identity is that of Phillips *et al.* (2007). Although the main author does have a degree in occupational therapy as well as ones in human movement and psychology they appear to approach this critique from a psychological perspective and may lack a deep understanding of occupation. Indeed when outlining the underlying ideas of occupational scientists and occupational therapists they fail to mention occupation. The primary author conducted an ethnographic study of the experience of living in a different culture for just over a year. The findings, they believed, suggested that identity was constructed in a dynamic process that involved people's agency, or capacity to act independently in power relationships, with other peoples' agency and had little to do with identity constructed through occupations external to the individual and relationships. Their argument is based upon a rejection of role theory as an intermediary between actor and action and instead proposed the concept of agency, a concept, which is recognised in both symbolic interactionism (Blumer, 1969) and by Bandura (2000). They posited an alternative theory of constructed identity which is developed through a person's agency and others' acknowledgement of it. This they believed was similar in several respects to the theory

of one self in social constructionism, but different in that there may be two or more selves in constructed identity theory.

Their argument, that occupational identity existed solely as an entity external to the individual, to relationships and society, appears to deny the individual subjective reality of occupational identity. It would also appear that the theory of constructed identity is being proposed to replace current notions of occupational identity. However discussion has taken place over many years about the nature of identity from different theoretical perspectives (Hogg and Vaughan, 2005) and it is likely that most occupational scientists would agree that the emerging concept of occupational identity is a particular dimension of identity rather than encompassing all aspects of it (Laliberte-Rudman and Dennhardt, 2008). As such, it has had a vital role to play in recognising and understanding the role occupation plays in individual lives and continues to promote further exploration, discussion and debate.

4:5 Summary

This first section of this chapter has focussed on the formation of identity from various psychosocial perspectives. Individual and social aspects of identity have been considered and have included theories of social interactionism, self schemas and potential threats to overall self concept, Erikson's life span development theory, and theory relating to self efficacy. The function of narrative identity has been explored in relation to later life and the argument that identity is socially constructed, particularly in relation to culture and gender has been considered. This section concludes by focusing on the various aspects of the ageing self and the identity issues that may be faced in later life. This includes continuity of identity and the process of adaptation to illness, loss and declining capacities. Theories related to these concepts appear to have a strong occupational focus.

The second section focuses on the development of the theoretical concept of occupational identity and has examined supporting research and critique. In conclusion it would appear that identity does have a strong occupational aspect which can be termed occupational identity. However this does not appear to explain the whole complex embodiment of identity, particularly in relation to social constructionism and concomitant cultural and gender differences. It appears that as a theoretical concept occupational identity is still under development.

CHAPTER 5

Methodology

5:1 Introduction and rationale for method chosen

This chapter evaluates different methods of inquiry that are relevant to the study of occupational identity in later life and justifies the methods chosen. Molineux and Rickard (2003) considered that the empirical study of occupation is complex. Not only does it require investigation of occupation itself, but also the context in which it occurs and the subjective experience of the participants, so that the meaning and purpose of engaging in occupations can be understood. When engaging in research an understanding of the epistemological position, on who can be a knower and what can be known, is desirable (Guba and Lincoln, 1998). Creswell proposed the view that 'epistemology is a theory of knowledge embedded in a theoretical perspective' (Creswell, 2003:4), which studies the foundations, scope and validity of knowledge. It addresses how knowledge is created with the epistemological stance laying the foundation for knowledge building in which the conscious and unconscious beliefs, questions and assumptions of the researcher underlie the research endeavour (Hesse-Biber & Leavy, 2006).

Robson (2002) argued that there are two main current approaches to social research, post positivism and constructivism. A positivist epistemology maintains that a knowable reality exists independent of the research process and seeks to describe phenomena that can be observed and experienced (Hesse-Biber & Leavy, 2006). The social world, like the natural world is thought to be governed by rules with causal relationships between variables (Creswell, 2003). Positivism, often thought of as scientific research, implies that objectivity is exercised from the inception of the research idea, with attempts being made to minimise sources of bias that could threaten reliability and validity of the research throughout (Bowling, 1997). Post positivism, on the other hand, accepts that the researcher's theories, hypotheses, background knowledge and values can influence what is, although there is still a commitment to objectivity (Robson, 2002). Hesse-Biber & Leavy (2006) contended post positivists maintain that reality does exist but, because of the researcher's limitations, it can only be known imperfectly.

This kind of knowledge, with its reliance on objectivity, engendered increasing resistance from some researchers culminating in the growth of relativistic, qualitative approaches to social research since 1980 (Flick, 2006; Hesse-Biber & Leavy, 2006; Morgan, 2007). Relativism believes that reality, rather than existing objectively, is subjective and constructed and experienced by individuals. Robson (2002) preferred to label qualitative research constructivism because, he asserted, a basic tenet of the approach is that reality is socially constructed. This form of research requires collaboration between the researcher and the research participants, where the researcher is not expected to be value neutral and objective, but to be an active participant together with the participants in the building of knowledge (Hesse-Biber & Leavy). They suggested qualitative research employs inductive reasoning where theory develops from the data, while quantitative studies use theory deductively where it is tested or verified. A further research paradigm is that of critical theory (Guba & Lincoln, 1994) or critical realism (Robson, 2002) which is relevant to this study. Guba and Lincoln proposed that critical theory takes the ontological position of historical realism where virtual reality is shaped by social, political, cultural, economic, ethnic and gender values which crystallise over time and uses a dialogic and dialectical methodology to inform change of historically mediated structures.

Previous research experience inclined the researcher towards the selection of a qualitative method. However it was important to consider the contribution other traditions could bring to the study. A positivist, or post positivist quantitative method was thought to be unlikely to capture the complex nature of occupational identity in later life. The ideal of establishing causal laws of behaviour in this form of research was inappropriate in a study of human behaviour where perceptions are often ambivalent and contradictory and subject to change according to social circumstances (Finlay 1998). This would suggest that a qualitative approach was needed and it is widely agreed that it is best suited to this form of enquiry (Bailey 1997, Finlay 1998, Molineux and Rickard 2003, Barber 2004). However, certain discrete aspects of occupation may be more effectively explored using a quantitative approach, for example the amount of time spent on any given occupation (Ujimoto 1998, Farnworth 2003, Erlandsson, Rögnvaldsson & Eklund 2004). Also quantitative methods could provide useful data related to such variables as age, health, quality of life and occupations engaged in currently. A further, mixed method of research has been recognised in recent years largely arising from the pragmatic paradigm (Ormerod, 2006; Morgan, 2007; Metcalf, 2008; Cameron, 2011).

A mixed method using both qualitative and quantitative methodologies was selected for this study as one approach alone would not have completely addressed the complexity of occupational identity and the nature of possible changes that occur

within this in later life. A combination of qualitative and quantitative methodologies can be regarded a sound choice of method (Rudestam and Newton 1992, Bailey 1997) and can be seen as complimentary (Flick 2006). An essentially pragmatic view suggests that the choice of method should be linked to the research purpose and the issue under study (Miles & Huberman 1994); a view endorsed by Robson (2002). Issues related to the use of a mixed methodology will be considered first in the next section, followed by a consideration of the philosophy underlying quantitative and qualitative approaches.

5:2 Mixed methodology

Mixed method research is a growing area of methodological choice which has acquired its own formal methodology that rejects the 'either or choice' of quantitative against qualitative approaches (Cameron, 2011) and has been referred to as the third methodology (Tashakkori and Teddie, 2003; Cameron, 2011). Mixed method research has both philosophical assumptions as well as methods of inquiry and has the principal premise that qualitative and quantitative approaches when combined can offer greater understanding of a research problem than when either approach is used alone (Creswell and Plano Clark, 2007). Johnson and Onwuegbuzie (2004) regard mixed methods research as an attempt to amalgamate the insights that qualitative and quantitative research have provided and recommend taking a pragmatic and pluralist position which should help to enhance communication among researchers.

It is generally agreed (Johnson and Onwuegbuzie, 2004; Ormerod, 2006; Metcalf, 2008; Cameron, 2011) that pragmatism is a school of thought which arose from the work of Peirce and others in the 19th century following the bloodshed of the American Civil War. It was conceived in a critical reaction to the structure and privilege of European society as a search for a better method of reasoning which emphasised progressive humanism and it was argued that logical reasoning of science should be interpreted through concepts or ideas (Ormerod, 2006). Subsequently, Metcalf (2008) argued that pragmatism has come to recognise multiple rational truths which acknowledges that individuals will each undergo different prior experiences and therefore the interpretation of physical events is also likely to differ and will be guided by what 'fits best' any particular situation. A pragmatic view of knowledge recognizes that different communities or groups will frame problems in accordance with their worldview, rather than knowledge being regarded as universal (Creswell, 2009). Their approach is likely to be egalitarian, where those being enquired about will be viewed as experts in their understanding of the world, rather than as research subjects (Metcalf,

2008). Essentially, Ormerod (2006) argued, pragmatism is a practical and commonsense scientific approach which combines the use of both quantitative and qualitative approaches in the best way in order to address complex research issues (Flick, 2006; Hesse-Biber and Leavy, 2006; Creswell, 2009). At its simplest, Cameron (2011) asserted, pragmatism is seen as a practical approach to a problem where it acts as a bridge or interface between philosophy and methodology.

Morgan (2007) promoted the pragmatic approach to methodology in the social sciences as an alternative to the currently dominant metaphysical paradigm promoted by Guba and Lincoln (1994) which emphasises ontology, epistemology and methodology as the defining characteristics. However, he believes, this paradigm is limited by a belief system which is often disconnected from the practical decisions made by researchers concerning how the research should be conducted. He promoted an alternative pragmatic approach to methodology in the social sciences which puts methodology at the centre of research, where it acts as a bridge between epistemology and the actual methods used. He offered new concepts in an organising framework for understanding the pragmatic approach of abduction, intersubjectivity and transferability. He proposed the concept of abduction for the connection between theory and data which, in the pragmatic approach, is able to move between qualitative induction and quantitative deduction. One of the most frequent uses of abduction in the pragmatic approach, he argued, is when qualitative and quantitative approaches are used sequentially, where the results of the first inform the second. Similarly he proposed the concept of intersubjectivity to address what he believed was the false dichotomy between objectivity and subjectivity. He suggested that in the real world working between different frames of reference is the norm. This enhances mutual understanding and emphasises the processes of communication and shared meaning, which he argued, are vital in any pragmatic approach. Finally he proposed that the term transferability should be used to indicate that the pragmatic approach rejects the need to choose between knowledge being specific and context dependent or universal and generalised.

The rationale for using a mixed method design in this study was the need for complementarity and facilitation to address the complex issue of occupational identity in later life (Hesse-Biber and Leavy, 2006). It was important to gain a fuller understanding of the research problem than would have been achieved by using a single qualitative or quantitative design. It was also possible for the results of one aspect of a study to inform the development of the next phase (Creswell, 2009). When using a mixed methodology Hesse-Biber and Leavy (2006) have suggested there are four different research design possibilities. In these four designs, each using one quantitative and one qualitative method, one method is primary and the other secondary. In two designs the primary method is preceded by the secondary and in the

second two the primary method is used first. In the case of this study, the secondary quantitative method was adopted first to identify a specific population and was followed by the primary qualitative method which facilitated interpretation of the data allowing an exploration of occupational identity related to this population in greater depth. This, Creswell (2009) described as the sequential use of mixed method. He also discussed concurrent mixed methods which are used in order to provide a comprehensive analysis of the research issue and this strategy has been adopted in the second phase of this study. Here the primary method was qualitative, but, as a minor note, quantitative data was collected during the interview process in the form of a time use diary to provide a more complete understanding of current occupational engagement. This, Creswell (2009) described as the concurrent embedded approach where the primary method guides the project and a secondary database has a supporting role.

Cameron (2011) has suggested that mixed method research can lead to epistemological relativism and short sighted practicalism and argued that it is necessary to be familiar with the literature and debates in the methodology in order to justify all the choices that are made. A further concern, she believed, was that through attending inadequately to philosophical traditions and ideas the researcher may be insufficiently reflective. Certainly, Hesse-Biber and Leavy (2006) suggested there is a need for training and knowledge building in both methodologies and this can take time. Writing from a qualitative viewpoint, they warned that it is quite possible for the qualitative aspect of a mixed method study to be paid insufficient attention. Some of the challenges and limitations associated with a mixed method methodology particularly relevant to this study are that the use of a sequential strategy requires a considerable amount of time to complete both data collection phases (Creswell, 2009). He also argued that key decisions need to be made about how findings from the first phase will be used as a focus of the second, as occurred in this study. With regard to the use of the concurrent embedded strategy, he argued, it is important that data is transformed in a way that enables integration during analysis. Also, because the two methods are unequal in their priority, this approach results in unequal evidence with the study. This could be a disadvantage when interpreting the final results.

5:3 Quantitative

The quantitative approach developed from natural science is founded on the premise that all knowledge should come from direct observation and the logical inferences that can be made from this (Rudestam and Newton 1997). In this tradition a deductive approach is used typically to generate and test an hypothesis or theory (Hesse-Biber

& Leavy 2006). This scientific approach involves a search for empirical regularities which can be said to have a causal relationship and where validity can be established. However within the field of social science, where people are the focus of study, establishing validity and causal relationships is difficult to achieve (Robson 2002). In positivist research there is a rigid division between the researcher and the researched with the researcher on a different hierarchical plane. The researcher occupies the privileged position of being the 'knower', while the human subjects become the 'objects' of study (Hesse-Biber & Leavy, 2006). Post positivism recognises that when studying social reality, researchers cannot be absolutely positive about the knowledge claims that they make (Creswell, 2003). However it continues to be concerned with building evidence to support an existing theory and assumes that an objective reality exists independently from the researcher. Whilst a post positivist approach was inappropriate as the sole method for the study of occupational identity it required further investigation to discover any potential contribution as part of a mixed method.

Experimental designs using two or more groups have been criticised within the field of social research by those working within the qualitative design tradition as it is too focussed and precise for most purposes (Robson, 2002). However they are generally held in highest regard within health research because they can provide best evidence of effectiveness (Bowling, 1997), particularly when the groups are randomised and findings can be generalised to the population at large. Similarly a single case or quasi-experimental design in which findings cannot be generalised (Bailey, 1997) would not have been fitting for the purpose of this study. There remained the several forms of non-experimental design that have no manipulation of a dependent variable (Bailey, 1997). This form of fixed design is perhaps the one most favoured in social research as the phenomena studied are not deliberately manipulated or changed in any way in the research process (Robson 2002). The one most suited to the study of occupation and people in later life was a descriptive, cross-sectional study where the focus is on the relationship between and among variables in a single group and where the measure is taken at the same time or over a short period of time (Robson 2002). Methods of data collection included survey questionnaires and time use diaries, both of which were appropriate for this study.

Social surveys as they are known today originated in Victorian Britain when there was great enthusiasm for collecting and enumerating social information (Bowling 1997). This enthusiasm was founded on the development of a science of society in the late eighteenth and early nineteenth centuries (Tonkiss, 1998). However, the general concept can be traced much further back, for example to the economic survey of feudal estates in England by William I in 1086 as the Domesday Book. Today surveys are a

common marketing strategy and a widely used method in the social sciences (Robson 2002). In a cross sectional survey, a group of people are studied at one point in time and may encompass information on attitudes and values, opinions, motives and behaviour (Bailey 1997). Such a survey can be said to be descriptive in that it describes the phenomenon of interest and observed associations between variables (Bowling 1997). What it is unable to do is determine causal relationships. Surveys may be carried out by face to face or telephone interviewers, by a postal questionnaire or in the form of a diary. The characteristics of a survey are that they have a fixed quantitative design and collect a relatively small amount of information from a large number of people (Bowling, 1997). Ideally data is collected from a probability or representative sample although Robson (2002) suggested that in the real world such a sample is very difficult to achieve. A research study using a probability sample is likely to have greater external validity and generalizability than one using a non probability sample. The design of a survey is of crucial importance with poor designs being open to error and misinterpretation which poses a great threat to validity (Bailey 1997, Robson 2002).

It was decided that a survey was the most appropriate method of enquiry in Phase 1 of this study as it would provide valuable data about a specific group of people, namely people over the age of 55 living within a defined geographical area. It could comprise a range of variables relevant to the study of occupational identity in later life including those already mentioned, but also others such as previous or current paid employment, financial status, ethnicity and social contact with family and friends. Whilst random sampling is seen to allow inferences to be made about a wide population (Bowling 1997, Hesse-Biber and Leavy 2006) this form of sampling was thought to be difficult to achieve for the study age group and nature. A non probability or purposive sample was chosen as the next best means of increasing the possibility of generalising the findings from this study (Kielhofner *et al* 2006). A questionnaire rather than a face to face or telephone interview was thought to be more ethically sound for adults in later life as they might be more vulnerable to coercion to take part than a younger age group. This view is based on the notion that as people age they may become less familiar with current practices, but feel that they should comply because it is asked of them.

5:4 Qualitative

In contrast to the positivist epistemology, the interpretive epistemology is founded on the interpretation of interactions and the social meaning attached to them (Hesse-Biber and Leavy, 2006). Social meaning is created not only during interaction, but

also in the interpretation of the interaction. It acknowledges that different individuals and groups might understand reality differently. This qualitative approach allows researchers to be more spontaneous and flexible in exploring phenomena as they occur in their natural environment (Rudestam and Newton, 1997). Indeed Robson (2002) preferred to use the term, flexible rather than qualitative. This naturalistic form of enquiry is in contrast with the tight, fixed, and pre-specified design before data collection in a quantitative study. The relationship between researcher and research participants is a reflexive, collaborative one where the researcher, rather than taking the positivist stance of being objective and value neutral, is an active participant (Miles & Huberman, 1994; Hesse-Biber & Leavy, 2006). However acceptance of qualitative methods has been resisted by some positivists and post positivists who regard it as an assault on the 'truth' of natural science. Qualitative research is viewed at best as a 'soft' science and at worst as a discipline where the findings cannot be verified or tested and therefore read as fiction, not science (Denzin and Lincoln 2005).

Flick (2006) and Hesse-Biber and Leavy (2006) believed that feminist thinking has had a significant influence on the development of qualitative research. Robson (2002) offered some support to this view and acknowledged that the critique provided by feminist researchers on traditional social science research has produced valuable insights thus helping to strengthen the case for qualitative research, but does not believe qualitative methods to be inherently feminist. However Denzin and Lincoln (2005) suggested that several aspects of qualitative research relevant to this study, such as lived experience, dialogue, gender and reflexivity have arisen from the feminist paradigm. The feminist perspective seeks to uncover hidden aspects of an individual's experience with an emphasis on non-exploitative research seeking an empathic understanding between researcher and participant. Feminist research was a response to the male dominance and ignorance of women in the positivist and post positivist traditions which studied women as objects in a value neutral way, ignoring their voices. Feminist epistemology primarily focuses on the position women occupy in a society which is characterised by a patriarchal sex-gender system (Hesse-Biber and Leavy 2006). Whilst it appears that feminist thinking has contributed much to an interpretive perspective it should be noted that qualitative traditions also developed from other sources such as phenomenological philosophy which is rooted in the 18th century.

Within qualitative research there are several different recognised traditions (Creswell, 1998; Robson, 2002; Flick, 2006). These have been variously described as biography, phenomenology, ethnography, grounded theory and case study (Creswell, 1998).

Robson (2002) also acknowledged symbolic interactionism and hermeneutics although he regarded these as less relevant in a real world context. As it is likely that occupational identity is constructed over a lifetime and is unique to the individual (Kielhofner 2002), phenomenology, ethnography, case study and hermeneutics are not appropriate for this study. Grounded theory, symbolic interactionism and biography remained to be considered. The grounded theory method essentially provides a set of flexible guidelines for analysis which allows the researcher to focus their data collection and develop inductive theories through successive levels of data analysis (Charmaz, 2005). It was worthy of serious consideration, but, as it is primarily designed to generate or discover a theory related to a phenomenon rather than explore experience over time, it appeared unsuitable in this case. Denzin (1989) emphasised the complexity of an individual's unique life across time and context therefore an approach which acknowledges these concepts was fitting. The biographical approach retrospectively considers an extended section of life history and is informed, Flick (2006) suggested, by symbolic interactionism rather than the latter existing as a discrete tradition or approach. Therefore, the biographical approach was chosen for the major qualitative aspect of this study in Phase 2. In particular narrative interviews were selected as the method of data collection.

5:4:1 The narrative interview

The narrative interview is used mainly in the context of biographical research and is a recognised method of data collection within the field of social science (Flick, 2006). Narrative interviews differ from other in-depth interviews. They focus on the topic of interest over a lifespan without following the set, semi structured, or relatively unstructured interview format of other in-depth interviews (Hesse-Biber & Leavy, 2006) and as such have also been called life history narratives. The person's life may be approached either chronologically, topically or both, making sense of it in a social context (Frank 1996). Ricoeur (1984-1989), cited in Polkinghorne (1995a) first brought attention to the importance of narrative discourse and described how meaningful stories are created. He outlined the operations of narratives as being goal directed, providing a temporal structure for life events and meaning to ones actions. In essence narratives, he argued, are an essential way of ordering our interpretations of the world (Wilson, 2008). Stories of self are less a conscious construction, but arise more from deeper cognitive processes. These incorporate early childhood and ongoing experiences, emotional responses, thoughts and values, and personality traits and are therefore an expression of identity (Polkinghorne, 1995a; Meador, 1998). This suggests that it is possible to understand a person's occupational history through the use of narrative which frames occupation within an environmental context and imbues

it with meaning, a view strongly endorsed by Clark *et al.*, (1995), Molineux and Rickard (2003) and Wicks and Whiteford (2003). Indeed narratives can reveal layers, not only of meaning but also of intention and emotion (Luborsky and Lysack, 2006).

Life history narrative enquiry would appear to be an ideal mode for the study of occupational identity. Smith *et al.* (2009) asserted personal significance and identity is revealed through telling one's life story. It has the potential to assist in identifying significant life experiences which were the key to identity formation (Wiseman & Whiteford, 2007) and the act of story telling may be seen as a way of managing identity (Molineux & Rickard, 2003). Indeed Randal (2008) goes so far as to assert that 'identity is a life story' (Randal, 2008:170). Barber (2004) also believed, based on the notion of operational intentionality and intentionality of action (Schultz, 1962; cited in Barber 2004), that life history narratives can be used to allow people to make interpretive selection of the past occupations and occupational choices that contribute to current and future occupational identity. This allows individuals to contemplate different future life narratives; an important concept when people in later life may be experiencing or anticipating changes associated with the ageing process. A further property of using stories and narratives, Smith (2006) suggested, is that, during the course of telling the story, the story teller and the listener or researcher may co-create change, which may also be potentially beneficial to participants in this study. It would appear that, although Robson (2002) believed that life history narrative research is of limited value in the real world, it has become a well recognised method of enquiry within the field of occupational science (Molineux & Rickard 2003, Wright-St Claire, 2003, Howie *et al* 2004).

Research studies using a life history or biographical method to study different aspects of occupation have informed the design of this aspect of the study. Amongst these Gattuso (1996) described a study of the life histories of three older women living in Australia engaged in reconstruction of the self as a result of the ageing process and argued that the narratives offer a different view to the dominant negative construction of ageing. However little detail relating to the method was provided which makes it difficult to assess this claim. McKay (2002) conducted interviews with five women who lived with enduring mental health difficulties as part of a larger study. She provided detailed participant and contextual information relating to her method. Each woman was interviewed twice, first an unstructured biographical interview and second a semi structured interview to gain further insight. Constant comparison of the data revealed themes that portrayed their lives; themselves as victims, as personal agents with the need for future goals and hopes to be recognised by health professionals and the long term impact of enduring mental illness on women, their children and families.

Molineux and Rickard (2003) made a scholarly argument for the use of biographical research in the study of occupation and described the development of an interview guide for Molineux's study of the occupational nature of men living with HIV. The characteristics of his method were the spoken word as primary data; chronologically framed interviews with a focus on occupational engagement. The interview recordings were co-constructed and were informed by the multiple traditions and practices of the biographical interviewing method. The interview guide suggested that data was gathered over time and provides a very relevant source of material for an occupationally focussed biographical interview. Wicks (2005) used a life history approach in her study on occupational potential across the life course in six women over the age of 65 in Australia. She found that three or four interviews with each participant for data collection and discussion were generally necessary. Narrative analysis which emphasises the wholeness of the narratives was the preferred method of analysis rather than dissecting each story into elements. The process of data collection and analysis is described in detail and the latter was illustrated with some helpful extracts from the narratives. Whilst this study appears to have provided some rich, in depth insights into how a small number of older women appear to develop occupational potential, the study is perhaps rather a small one upon which to base the requirement that occupational potential be assimilated into the lexicon of occupational science.

Three recent studies of older people used a life history narrative approach to examine particular aspects of occupation or occupational events directly in relation to occupational identity. First, Howie *et al* (2004) offered a logic for understanding how creative leisure occupations maintained across the life cycle contributed to the building of occupational identity in their study of people over the age of 75 who continued to engage in creative occupations. Six people between the ages of 75 and 87 took part in the study. One or two in-depth, semi-structured interviews were undertaken with each participant. In view of the age of the participants the researchers acknowledged their sensitivity to possible fatigue of the interviewees and interviews were time limited according to need. A comprehensive and detailed description of the data analysis process was provided following Polkinghorne's (1995b) form of narrative inquiry which in this study consisted of two steps. The first produced a distilled chronological written story of the participant's engagement in creative occupations from early childhood to the present day derived from the interview data which was returned to the participant for comment and amendment. The second step employed a system of paradigmatic-type narrative analysis to produce categories related to how a sense of self is associated with occupational engagement. All participants were offered the opportunity of a second interview to comment on their occupational life story and

four participants accepted this offer. However little attempt appears to have been made to gain additional insights during the second interview thus limiting the possibility of co-creating possible futures and it is unlikely that the interviews continued to the point where theoretical saturation was achieved. It is quite possible that the age of the participants was influential in this respect (Wilson 2008).

Second, Vrkljan and Miller Polgar (2006) conducted an in-depth study exploring the effect a transition from driving to non-driving had upon occupational identity in an older man and woman. Interviews were semi-structured and two interviews were used, the first to understand the meaning of driving to the participant through various life stages and the second to clarify the biographical information and gain further insights. A constant comparative method of data analysis was used with some detail provided regarding the process. Sufficient participant and contextual detail was given to allow the reader to estimate transferability, however the small number of participants who were related to one another might be a limiting factor. It would again appear from this research that the biographical, or life history narrative method requires at least two interviews with each participant and that great care is needed with the interview guide to ensure that the interview has an occupational focus.

Third, Wiseman and Whiteford (2007) demonstrated the philosophical and methodological value of life history as a tool for understanding occupation, identity and context. This is achieved through a critique of a study conducted by Wiseman who explored the experience of retirement for rural older men. In this study eight interviewees were purposively selected to ensure the greatest possible variation. She investigated the impact that the transition from employment to full or partial retirement had on patterns of occupational engagement and perceptions of identity for these men. The critique explores methodological issues arising from the data analysis which give strength to the use of a life history method to study occupation and identity. They too advocate the use of multiple interviews to allow a relationship of rapport and trust to develop. They argued that participants are more likely to provide fairly factual, time line accounts at the first interview, while a further interview can allow the individual to elaborate and explore issues, sometimes long forgotten, with the researcher. Identity as defined by Erikson (1963) is a process over the lifespan giving meaning and continuity to individual experiences and Wiseman and Whiteford asserted that the life history approach is particularly sensitive to this change over time. This method also clearly illustrates how recent events and actions are shaped by the life already lived. Finally they contended that the relationship between the researcher and the participants can be a valuable asset in elucidating occupational phenomena. Wiseman came from a similar rural background to the participants which

she believed created a degree of acceptance and connection with them though she was aware of the necessity of remaining reflexive, not taking for granted what might be thought to be a shared understanding. The age of the researcher in the current study falls within the age range of her participants which might be expected to provide a similar level of acceptance and connectedness in the relationship, but it is also essential to be aware of the potential imbalance of power between the interviewer and the narrator; a factor not considered by Wiseman and Whiteford. For example, Hesse-Biber and Leavy (2006) contended that the interviewer makes many choices in the editing and interpretation of the narrative which are interlinked with the power to construct and disseminate knowledge

Although occupational identity in later life has been investigated through specific life events, or occupations by previous researchers a broader view of the changes in occupational identity that could take place have not been explored. In view of the in-depth nature of this method it appeared that a small numbers of participants would yield rich data. In these six studies from Gattuso (1996) to Wiseman and Whiteford (2007) very small numbers have been used. The two participants in Vrkljan and Miller Polgar's (2006) study would have hardly been adequate for this study, but the studies by Howie *et al* (2004), Wicks (2005) and Wiseman, cited in Wiseman and Whiteford (2007) suggested that six to eight participants would be sufficient. However such a small number of participants required multiple interviews which is fitting as life history narrative enquiry requires long term contact and collaboration (Frank 1996). A certain degree of flexibility was thought advisable regarding the actual number. While a minimum of two interviews was essential, further interviews were regarded as permissible until it was felt that a full exploration of the changes in occupational identity in later life had been made and theoretical saturation was achieved. The cultural context of the participants was considered for the narrative interview and non English speakers were excluded from the study as it was thought that the use of interpreters would invalidate the narrative processes.

5:4:2 Narrative analysis

Narrative analyses is essentially a way of interpreting stories to understand how people perceive reality and make sense of their everyday worlds (Riessman, 2002; Frost, 2009; Phoenix *et al.*, 2010) through a plot that links past, present and future. The story can exist as written text, or in audio or audio visual form and the model used for analysis is likely to reflect the researchers discipline and perspective. Narrative analysis appears to be used most extensively in the social sciences (Frost 2009). Plot ties

together a person's experiences within the contexts of time and place to facilitate understanding of meaning (McCance, 2001).

Broadly speaking the purpose of narrative analysis is to see how order is imposed on the flow of experience by the interviewee and how they make sense of their life events and actions (Riesman, 2002) and is well suited to the exploration of identity (Frost, 2009). Phoenix *et al.* (2010) argued that structural analysis in ageing research has the potential to reveal not only the overarching storyline, but also the identities, values and moral dilemmas of the storyteller. From this it may be extrapolated that sociocultural influences on the storyteller require inclusion in the analysis as does the social and cultural perspectives influencing the researcher in the interpretation of the data. Even in narrative analysis it is not always possible to completely hear the voice of the storyteller because these representational decisions still enter the research process at numerous points (Riessman, 2002).

As well as analysing the content of the story and the structural devices on which the story is framed, awareness of how the story is told, the performative aspect of analysis, can be equally important as its content (Riessman, 2002; Phoenix *et al.*, 2010). Performative analysis opens up the form of telling where, as well as the linguistic and cultural resources it draws upon, it considers how it persuades the listener of its genuineness. Here the focus is upon why the story has developed in a particular way, how the story teller relates to and interacts with the listener, how she locates herself in relation to others in her story and how those others interrelate. Identity can emerge in the how; both in her stated preferred identity and in others which may be suggested.

There are many different forms of narrative analysis (Frost, 2009; Phoenix *et al.*, 2010). One form of analysis, advocated by Polkinghorne (1995b) for analysing life history narratives follows several stages to ensure quality, is outlined here. First to be considered should be the cultural context in which the life history exists which includes the contextual features that contribute to generating the story. Particular meanings are ascribed to happenings and actions according to the culture in which he or she develops. Thus the actions of the individual can reflect the values, social rules and meaning systems of that culture. Next to consider is the embodied physical and cognitive nature of the main character. Third, important and significant others within the story need to be identified with an explanation of how they have influenced the actions and goals of the story protagonist. This should be followed by a consideration of the choices and actions the main character made in pursuing various goals. It is necessary to take hold of the meanings and understanding in this process; to understand plans, purposes, motivation, and interests. Emotions and possibly inner

struggles are also relevant. Fifth, how past events manifest themselves in the present in such things as habits and ways of thinking should be taken into account as the social events people have lived through are very relevant here, particularly for people in later life. However it needs to be remembered that life histories can also be about the struggle to change and break away from past influences. Once analysis is complete the story should be rewritten to embody the individual in his or her unique situation and which focuses on the context in which it takes place. Finally the researcher needs to provide a story line or plot which organises the disparate elements of data into a coherent explanation of meaning for actions and choices made before writing the story. Polkinghorne's guidelines were thought to be detailed and comprehensive and were used in this study.

5:4:3 Narrative limitations

The process of narrating a past event is almost invariably structured by the present situation and thus is not presented as it was actually experienced at the time (Flick, 2006). Also, she argued, narratives generate an immense amount of material, which can create problems in interpreting them. In addition, Bowling (1997) believed that in depth interviews create greater opportunities for interviewer bias to intervene. However if reflexivity issues are adequately addressed this should not be a problem. Additionally, Phoenix and Sparkes (2009) warned that in narrative analysis insufficient attention is paid to what they term the 'small stories' usually told outside the interview situation which can be revealing in terms of conveying a sense of self and identity.

5:5 Supportive quantitative measure in Phase 2

It was anticipated that the participants in this study would experience no difficulty in the telling of their life story in a narrative interview and talking of their current occupations. However was considered useful to enhance the interview data with an assessment of the actual current occupations participants were engaged in as well as those which were reported during interview. The best way of assessing this was thought to be through time use data.

There are three major methods used to collect time use data; experience sampling, observation and time diaries (McKenna *et al.* 2007). Experience sampling in which participants record what they are doing when alerted at random intervals by a buzzer appeared complex and potentially unsuitable for older people who might experience some sensory impairment. Observation as a method was thought to be impractical and

intrusive for this age group. However, time use diaries have the potential to provide a rich source of information on respondents' behaviour and experience (Corti, 1993). As a research instrument, it can be considered as a form of self-administered survey and so falls within the quantitative frame of reference. The design can vary across the spectrum from completely unstructured to structured responses to specific questions and participants are generally less constrained in their responses than in a questionnaire (Bowling, 1997). It has the advantage of being relatively easy to administer and in some way can take the place of an observational study. An unstructured response can provide rich data but has the potential to be quite onerous for participants whereas a structured diary gives more measurable data.

It is not only the study of what people do, but also the meaning and use of time that are all relevant to the current study (Kielhofner, 2002; Farnworth, 2003). Time use diaries can reveal not just occupations but also patterns of occupation occurring over time (Erlandsson *et al.*, 2004), which can be used as an indicator of quality of life (Harvey, 1993). The diary requires the participant to keep a record or log of the sequence and duration of activities engaged in over a 24 hour period and has the advantage of placing people within their natural temporal context. This can include such information as why an activity is performed and whether it is completed alone or with others (Farnworth, 2003).

Ujimoto (1998), in a review of the literature, examined the contribution of time budget methodology to 'eldercare' research and argued that the questions must be chosen with care. Similarly use of a 24 hour diary with standard one hour time slots limits the richness of the data. He proposed the use of a five minute interval diary with columns to indicate primary and secondary care giving activities and where, with whom/for whom they occurred. He also advocated the use of supplementary qualitative questions related to satisfaction achieved and social relationships. A five minute interval diary was likely to be too onerous for the potential participants in this study, however, the use of qualitative supplementary questions was most apposite in this study. When considering occupational identity potency of meaning was important as people can spend varying amounts of time on activities that are central to their identity (Kielhofner, 2002). A potent activity might appear in a time budget diary for short time duration, and possibly infrequently in a three day period, whilst necessary but unimportant activities could be far more time consuming. Such issues could have a relationship with quality of life: for example completing activities because they are necessary to maintain daily life, or in order to provide structure to the day is likely to be less potent or satisfying than those activities motivated by the desire for enjoyment (Knight *et al.*, 2007).

There is considerable research evidence of time measurement with older people in the form of diaries. For example, three research studies have been conducted in Australia by occupational scientists in recent years concerning the time use of older Australians (Stanley, 1995; Fricke and Unsworth, 2001; McKenna *et al.*, 2007). The method of data collection was different in each study; Stanley (1995) covered a 48 hour period and used 5 minute intervals, Fricke and Unsworth (2001) in contrast covered a 24 hour period using one hour time blocks, while McKenna *et al.* (2007) required her participants to recall their occupations from the previous seven days in half hour intervals. All three studies used the diary in conjunction with other different data collection instruments. This makes it difficult to draw direct comparisons between the three studies, but results indicate that when a diary was used in this way it yielded rich data concerning engagement in occupation, its meaning and potency.

The USA, Australia and Europe all had different forms of time use data collection which were potentially relevant for this study. In the USA the American Time Use Survey (ATUS) data was collected by telephone. The diary aspect of the interview collected a detailed account of the respondents' activities over a 23 hour period. There were no pre-allocated amounts of time for an activity, rather the interviewer asked how long it lasted. For most activities, the interviewer also asked if anyone else was with the person and where the activity took place. Activities in this survey were pre-coded prior to the interview. The major advantage of this method lay in the high level of detail obtained. The Time Use Survey 1997, Australia has created broad categories of activities ranging through no activity, work related activities and voluntary work to personal care activities as well as caring for others. It also included educational, domestic activities, as well as purchasing goods and services, recreation and leisure and social and community interaction (Trewin, 1999). Within each of these categories details were provided of many relevant subsidiary activities. The use of such detailed and comprehensive pre-coded categories in a time use diary can provide helpful data for different groups of people.

The major source of time use data in the UK is the time use survey carried out by the Office of National Statistics (ONS) in 2000-2001. The UK ONS time use survey is closely allied to the Eurostat time use survey which has been designed to harmonise time use survey data across Europe (Short, 2006). Normally a diary is used in conjunction with either a household or an individual questionnaire. This diary has no pre-coded activity categories, but rather allows respondents to define the activities they record in ten minute time intervals over a 24 hour period starting and ending at 4 a.m. However, a detailed list of coded activities is provided in the Eurostat Time Use Survey guidelines for use in data analysis. It is recommended that the diary is kept on

two randomly allocated days, one week day and one day at the weekend. Clear verbal and written instructions for completion should be given to respondents at a face to face interview to ensure reliability (Short, 2006).

It was evident that several forms of diary data collection instruments and methods of data collection are in current use according to the needs of the particular research topic or organisation. In this study it was felt that it would be appropriate to use a diary format which was recognised across all European countries. This allowed direct comparisons to be made between the participants in the current study and the UK and wider European population. It was therefore proposed to use the harmonised Eurostat diary on its own and excluding the questionnaire as much of the information it requests would already have been collected in Phase 1 of this study. The diary was explained and given to participants after the first narrative interview, as recommended in the Eurostat guidelines, and collected prior to the second interview. This allowed the interviewer to elicit degrees of satisfaction, meaning and potency of diary entries during this second interview (Ujimoto, 1998).

5:6 Ensuring quality in qualitative research

5:6:1 Quality in data collection

One of the greatest challenges facing qualitative researchers is establishing quality and trustworthiness in the face of scepticism from the positivist tradition (Robson, 2002; Finlay, 2006). Concepts of reliability, validity and generalizability which ensure quality in the positivist tradition have been rejected by qualitative researchers (Flick, 2006; Finlay, 2006). However Lincoln and Guba (1985) developed a model of trustworthiness for qualitative research which includes the concepts of credibility, transferability, dependability and confirmability for use in qualitative design. These are seen to correspond with the respective terms from conventional positivist enquiry of internal and external validity, reliability and objectivity. More recently Ballinger (2006) has proposed four different considerations to ensure quality and act as a focus for reflection: coherence; evidence of systematic and careful research conduct; convincing and relevant interpretation; and sensitivity to the role played by the researcher. She asserted that the way these are enacted depends upon the methodological realist or relativist position of the research.

The concept of credibility replaces the idea of internal validity and relates to truth value which is subject orientated rather than being defined a priori by the researcher (Lincoln and Guba, 1985). In other words to what degree do the findings make sense.

Credibility strategies include prolonged engagement with participants with opportunities to build rapport, member checking, sampling in a variety of possible situations and settings, reflexivity and triangulation (Lincoln and Guba, 1985; Krefting, 1991). These strategies have been employed in this study in various ways. Prolonged engagement in the narrative interview occurred through the use of two interviews to allow biographical facts to be checked and more sensitive and in depth material to emerge in the second interview. It is acknowledged that these are personal stories and not necessarily historically accurate. However, as Molineux (2003) suggested they represent an attempt to understand the perspective of the interviewee at a particular point in time. Time sampling was employed in that interviews took place in a variety of situations and settings. The role of the researcher was acknowledged and accounted for in the conduct and the documentation of the research, which can reduce the effect of researcher bias. Reflexivity uses the subjectivity of the researcher to positive effect to enable a richer understanding of the data (Finlay 1998).

Transferability replaces the concept of external validity. Transferability assesses the fit between two situations or contexts (Lincoln and Guba 1985). Rather than employing a random or probability sampling technique qualitative researchers aim for a nominated sample which is typical of the membership of the group under study as is the case in this study. Another transferability strategy has been employed through the provision of a detailed description of the setting in which the research took place together with dense background information about informants and context to allow others to assess the transferability of the findings to other settings. However the researcher can suggest how the research may be applied beyond the particular research context. A further transferability strategy proposed by Finlay (2006) has been employed whereby the researcher discusses the analysis of the data to demonstrate the degree to which findings can be integrated or generalised in terms of theory.

Qualitative researchers have substituted the concept of reliability with one of dependability. Here the researcher is encouraged to provide an audit trail of the exact methods of data gathering, analysis and interpretation (Lincoln and Guba 1985). This opens the study to external scrutiny and allows others to follow the decision making trail and replicate the study in a different setting. Confirmability, which replaces the concept of objectivity, also calls upon auditing as a means of ensuring quality. Auditing allows the researcher to demonstrate transparency and self critical reflexive analysis. Records for audit can include raw data, data reduction and analysis, data reconstruction and synthesis into thematic categories, process notes, intentions and dispositions and finally instrument development information (Krefting, 1991).

Triangulation is a further useful tool for confirmability. While the model proposed by Lincoln and Guba (1983) has acted as a guide to ensuring quality, Ballinger's more recent proposal has also informed quality issues in this study. Ballinger (2006) advised that researchers adopting a relativist ontology and epistemology, as in this study, should emphasise researcher reflexivity, consideration of the participatory relationship, interpretations which are supported by verbatim quotes and relevant theory, and reflexive focus on how the researcher might have influenced the research process and outcomes.

Some might see this attempt to provide specific criteria to assess qualitative findings as not fitting for the qualitative tradition (Robson, 2002; Hesse-Biber & Leavy, 2006). It has been argued that there are artistic and ethical dimensions to qualitative research which emphasise the literary and artistic aspects such as vividness, accuracy, richness and elegance rather than methodological rigour (Polkinghorne, 1988; Richardson, 2000; Bochner, 2001; Finlay, 2006). Such aspects can assist the reader to judge the power and trustworthiness of phenomenological research (Polkinghorne 1988). Bochner (2001) argued for the representation of the voices of ill, disabled or other silenced persons such as older people in social and narrative research in order to empower, engage emotionally and provide a moral and ethical centre. Here, detail of the commonplace and acknowledging feelings as well as facts are allowed. Narratives should be complex, providing stories that tell about peoples' believable journeys through the life course. At the same time a sense of the author, and their subjectivity should be evident as 'emotional credibility'. However, Flick (2006) suggested that most qualitative researchers appreciate the need for both artistry and method as has been attempted in this study.

5:6:2 Quality issues in narrative analysis

Lieblich *et al.*, (1998) proposed that rather than the truth value of narrative analysis what is more significant is the process of consensual validation when sharing views, conclusions and making sense with interested and informed others. This, for validity, requires that a trail of evidence is provided which originates in the text. Whereas Riessman (2002) advocates the possible use of criteria derived from art to appraise the blurred genre of narrative; does it move the reader? However this alone is insufficient, something more is required to validate narrative analysis. This she suggested includes *persuasiveness and plausibility* through questioning if the analysis is reasonable and convincing, whether claims are supported by evidence from informants' accounts and alternative interpretations offered. A further quality issue is correspondence where participants should be asked to determine whether the investigator's reconstructions

can be recognised as passable representations of their experiences. In order to create coherence the researcher's initial hypotheses about her beliefs needs to be continuously reviewed and modified during the analysis process. Finally, in order for others to determine trustworthiness of the work it is necessary to describe how the interpretations were made, making visible what was done and specifying how successive transformations were accomplished.

5:7 Reflexivity

The concept of reflexivity in qualitative research acknowledges that the subjectivity of both the researcher and the participant are part of the research process (Flick 2006). Reflexivity require a critical attitude concerning the impact of the researcher on the project design, data collection and analysis and presentation of the findings (Finlay and Gough, 2003). They argued that reflexivity provides a set of practices which enable researchers to reflect on and provide insights into the context, relationships and power dynamics relevant in the research process. Flick (2006) considered the researcher's reflections on their actions in the field, observations about the client and emotions associated with the various aspects of the research process are all for inclusion in the data and forming part of the interpretation. Hesse-Biber and Leavy (2006) suggested that reflexivity in narrative enquiry calls for real listening during in-depth interviews to ensure that the true meaning is understood and they argued that the characteristics of insider/outsider status need to be fully understood in order to decrease the possibility of a power and authority imbalance within the interview.

Reflexivity requires that the researcher should recognise how her or his own social environment and assumptions can influence the research process; also it requires sensitivity to the dynamics of the research relationship which can impact on the creation of knowledge (Hesse-Biber and Leavy, 2006). Wilkinson (1988) has offered an influential feminist perspective of reflexivity which distinguishes between personal, functional and disciplinary forms, although all, she argued, are interconnected. She proposed that personal reflexivity was associated with the researcher's own identity, where the researcher makes known individual motivations, interests, values and attitudes and reflects on how they have impacted on each stage of the research process. Whilst this degree of subjectivity would be labeled as bias in positivist research which would constitute an obstacle to ascertaining objective facts, in qualitative studies the recognition of the personal dimension can be seen as enriching.

Functional reflexivity concerns how the form of the research, the choice of method and the ways in which findings are interpreted, is shaped by personal values, life experience, gender and social role. Here the focus is also on the interactions between researcher and participants and this is associated with status and the distribution of power. She asserted, it is almost impossible to avoid an unequal relationship, even where the voices of participants are encouraged and appreciated. A view with which England (1994) concurred. She argued that the hierarchical nature of the research relationships needs to be acknowledged as reflexivity alone cannot compensate for the power imbalance. Lastly, Wilkinson (1988) introduced the concept of disciplinary reflexivity as a feminist response to the positivist and empiricist ways of knowing in the dominant paradigm of psychology. She suggested several strategies might be used to support this dominance and exclude other ways of knowing, such as through qualitative, feminist research. She argued that those engaged in the latter form of research needed to be reflexively aware of strategies used by the dominant paradigm, for example defining what is legitimate, handling deviance by ignoring or suppressing it, or discriminating against it. Whilst qualitative research has increased its legitimacy over the last twenty five years, Sturdy (2008) argued, twenty years later that personal reflexivity, which involves acknowledging emotions can still be regarded as a challenge to the traditional, political and masculine ways of knowing and may possibly be seen as self indulgent.

Finlay (2002a) demonstrated from her own research experience that assumptions about shared experience might hide differences, but it is possible that the converse is true where beliefs about difference may well conceal shared understanding. Reflexivity necessitates thoughtful and disciplined self reflection through a process of continual evaluation both in the research method and subjective response (Finlay, 1998), which often means that the researcher must often operate on multiple levels (Dowling, 2006). However, Bishop and Shepherd (2011) warned that in spite of reflexive analysis, influential factors beyond consciousness such as past experience, social background and position, personal assumptions, self-narrative and behaviour, could also be influential in narrative research. Therefore, they argued it is not possible to fully capture the researcher's role in data production, which they believed should be acknowledged in the reflexive account.

Finlay (2002a) proposed that reflexivity has the potential to be an effective tool, throughout the research process, from the inception of the research idea to the dissemination of findings. She argued it enables the researcher to scrutinize the impact of his or her own position, perspective and presence. Also examining personal response and interpersonal dynamics allows deep insight and can open up unconscious

motivations, implicit bias and empower others. An additional reflective tool, she argued, is reflexive embodied empathy. This implies more than just an emotional knowing, but rather a felt, embodied, intersubjective experience between the researcher and participant (Finlay, 2005). She suggested that the researcher's task is not only to listen to the participant's story, but also to be aware of the bodily relationship and how it is mutually constituted. She described a state of imaginative transposal, leaving behind one's own context and understanding to imaginatively project oneself in another person's situation in an attempt to see the world through their eyes. She also advocates the use of reflexivity to evaluate the research process, methods and outcomes and the provision of a methodological log for public scrutiny (Finlay, 2002a). However, she acknowledged that there can be no single true reflexive account and considered that it might unwittingly claim more authority and overshadow the participants voices (Finlay, 2002b).

Hesse-Biber (2006) contended that reflexive writing, when writing up research, has been influenced by post modernism and proposed that to write reflectively means having a good sense of positionality in the process. They argued the researcher's power and authority are always present in the research process and this will impact on how the findings are framed. Richardson (1995) commended the narrative form of writing as one which provides opportunities for reasoning and representation. It ensures the voices of the participants are heard and makes their lives comprehensible through cultures, societies and historical epochs. Lieblich (1998) argued that if consensual validation is to occur reflexivity between the researcher and the potential reader must also be considered, as the manner in which material is presented, is determined by the researcher's perceptions of the audience.

5:8 Ethical issues

Ethical principles for research originated in biomedical, generally quantitative research and have been further developed and modified by social scientists since the 1960s to meet the particular concerns and needs of qualitative research (Robson, 2002; Guillemin & Gillam, 2004; Hesse-Biber & Leavy, 2006). They are the guiding moral principles of research and should form the foundation of any research project. Ethical principles should inform, both the selection of the research problem and how the research is conducted (Hesse-Biber & Leavy, 2006). Guillemin and Gillam (2004) identified two forms of ethics, procedural ethics and ethics in practice. Procedural ethics, they classed as those ethical principles which are the concern of the research ethics committee and argued they serve a valuable function of ensuring that the

fundamental guiding principle of research integrity are carefully thought through. These principles include the need for informed consent and a careful consideration of the type of information the potential participant needs in order to make a fully informed decision; the participant's right to withdraw at any time; issues of confidentiality and how it is explained; issues of harm or benefit to the participant arising from the research; the interpretation of the research findings and publication of research data (Robson, 2002; Guillemin & Gillam, 2006; Hesse-Biber Leavy, 2006). Another, sometimes overlooked aspect of research ethics is the need to assess for potential harm to the researcher as well (Robson, 2002; Morse, 2007).

Ethical procedures cannot always cover the situations that can occur in qualitative research and it is important to keep thinking and judging ethical obligations throughout the research process (Rubin & Rubin, 1995). Shaw (2003) called this ethics of skills which emphasises the researcher's ethical skills and moral values which are required to reflexively negotiate ethical dilemmas. Guillemin and Gillam (2004) endorsed this view in describing their concept of ethics in practice. This refers to the ethical issues that arise in the doing of the research, which frequently call for ethical reflexivity, otherwise they argued, ethically important moments may be missed. Hesse-Biber and Leavy (2006) warned of the need for an awareness of the potential emotional impact of the research on both the researcher and the participants and how they can be supported if the need arises. Shaw (2003) asserted that in the naturalistic paradigm the relationship between researcher and participant is one between equal partners with equal voices so that the participant remains in control of the process. One of the ethical issues in this relationship is the degree to which the researcher should push for data (Hesse-Biber and Leavy 2006) as participants may then reveal more than they intend (Shaw, 2003), or withhold material if too much pressure is experienced.

5:9 Summary

The chapter began by exploring epistemological considerations for this study, before discussing the merits of mixed, quantitative and qualitative methods. A mixed method using both quantitative and qualitative methodologies was selected as one approach alone would not have addressed the complexity of occupational identity or the nature of possible changes in later life. However the main theoretical drive for this study was inductive. Reflexivity and ethics in qualitative research were considered and issues pertaining to this study will be addressed in the following method chapter.

A social survey was used to collect data in Phase 1 of the study with a non probability or purposive sample of people over the age of 55. In Phase 2 various methods of qualitative enquiry were debated and the biographical approach using narrative interviews was selected after different studies using this approach were explored. The theoretical underpinning of narrative analysis was then considered. A supportive quantitative method was considered for Phase 2 to discover how participants used their time in the present day. The most suitable instrument was selected, a time use diary. This was modelled on the one used in the UK ONS time use survey. The chapter concluded with a consideration of ways of ensuring quality in qualitative research, both in data collection and analysis and included issues of reflexivity and ethics.

CHAPTER 6

Method

6:1 Introduction

This chapter is in two parts. The first part will concentrate upon Phase 1 of the study, detailing the procedure and presenting findings from this phase. It will conclude with an explanation of how the Phase 1 results informed the selection of the sample for Phase 2 of the study. The second part will provide details of Phase 2. This will include the Phase 2 procedure and the analysis and interpretation of the narratives.

6:2 Phase 1 procedure

In Phase 1 a survey questionnaire was designed to collect demographic, occupational, health and quality of life data. The design of the questionnaire was informed by the Older People as Occupational Beings (OPOB) study at the University of Northampton by Knight *et al.* (2005) and was divided into two parts. Part one focussed on the collection of demographic data and part two on data concerning occupation. The major purpose of the survey questionnaire was to provide comprehensive demographic and occupational data for a large group of older people from which the sample for Phase 2 was recruited.

The first part of the questionnaire aimed to gather relevant demographic data and was based on the demographic section of the Older People as Occupational Beings (OPOB) interview and expanded through exploration of the literature particularly related to family, social contact and social isolation (Bonder 2006, Garcia *et al* 2005, Victor *et al* 2005). Basic demographic data including age, sex, type of housing and location, living arrangements and caring responsibilities were gathered first. Questions on use of transport and whether a car was driven were also included as Liddle and McKenna (2003) suggest this is important to older people. Cann (2006) and Davey (2001) believed information on work, income and levels of educational attainment are useful and relevant for this age group. The employment groupings were derived from the government National Statistics-Socio-Economic (NS-SEC) self-coding groups (ONS, 2001). These groupings were written in lay language and gave useful job examples for

each category which were helpful in identifying the most appropriate employment group. It was thought the request for information on income might be sensitive. Therefore to make it easier, this was grouped into income bands beginning with what was approximately equivalent to the basic state pension of £100 per week rising incrementally by £50 until the sum of £600 was reached with the alternative annual income shown for each.

The second part of the questionnaire related to occupation. Here the occupation categories have been derived from the OPOB study and were broken down into three parts. First to be addressed were those occupations people thought of as work, which might be work around the house and garden, paid employment, caring responsibilities and voluntary work. Second came the occupations engaged in for pleasure and enjoyment, including different forms of social contact, hobbies, sports and active leisure, days out and holidays, cultural activities and passive leisure such as watching television or reading. The last part focussed on all occupations of self care, including routine self care, looking after physical and mental health and spiritual well-being (Knight *et al.* 2005). An attempt was made to include and describe occupations that might be engaged in by a wide range of people. However, no attempt was made to explore motivation as had been done in the OPOB study. Partly this was because it would have made the questionnaire too lengthy and complex, but also because motivation might not be easy for the participants to quantify easily. Rather, it was thought that this subject could be explored more usefully in Phase 2 of the study which would allow for a qualitative in depth exploration.

Care was required in the design of the questionnaire which was intended for self completion by people over the age of 55. As recommended by Robson (2002) short closed questions, requiring a tick box response from a small range of options, were used. An 'Other' option was provided for each question. When forming the questions attention was paid to issues such as avoiding ambiguity and asking negative questions. The questionnaire was introduced on the front page with brief details about the subject and format of the questionnaire and instructions on completion were given. Each of the three sections was introduced with a brief description of content. Simple language was used together with a slightly larger typeface than normal to allow for potential sight problems. Each box was numbered in order to facilitate data analysis. The last page of the questionnaire thanked respondents for completing the questionnaire and gave instructions for return. This page was also used to ascertain willingness to continue to Phase 2, where personal details were requested if an individual was willing to proceed to interview.

An information sheet was provided with each questionnaire which gave details about the researcher, the two phases of the research project and what could be expected of them. Potential participants were assured that their anonymity would be preserved, they had the right to withdraw at any time and the names of the project's supervisory team were given together with contact details for the researcher (Appendix 1: participant information sheet). The questionnaires were piloted through personal contacts with five individuals. A response form requested comments on the suitability of the design and completion time (Appendix 2: Pilot response form). Three out of five were returned, two required no changes; one made useful suggestions for small changes (Appendix 3: final questionnaire).

It was anticipated that a sample size of 100 people over the age of 55 would be appropriate for this study as there was a degree of homogeneity in the proposed population (Robson, 2002). The purposive sample was recruited from three midland counties, Warwickshire, Northamptonshire and Leicestershire. The recruitment area was chosen to be within a range of 30 miles from the researcher's home for the Phase 2 interviews. Groups and organisations of or for older people over 55 were identified via two local government websites. The third county did not have such an easily accessible website and instead some personal contacts were used. Posters were designed for display in clubs and organisations which were not exclusively for people over the age of 55, but following a nil response in a village library this approach was abandoned as not being time effective (Appendix 4: recruitment poster).

Inclusion criteria required participants to be 55 years of age and over, to be living in the community, to consider themselves to generally healthy and to be able to read and speak English. People who were cognitively unable to complete the questionnaire unaided were excluded from the study. Groups were normally approached through a gatekeeper and in some cases the researcher visited and talked to the group. This approach was used in order to recruit a diverse sample in terms of age, location, group or organisation, ethnicity, education, work and income. Over a period of seven months, from May to December 2007, questionnaires were distributed and all had been returned by January 2008. Questionnaires were given to 13 organisations across the three counties, totalling 140 in all. The number given to each organisation varied according to how many the gate keeper felt was appropriate, the largest being 21 and the smallest two. Groups and organisations included leisure groups, day centres, U3A, an older people's forum, ethnic minority groups and a pensioners' pressure group. Two further groups were approached, first by letter and then by a follow up telephone call, but no contact was established. Full details of the organisations approached, their location and response rates may be found in Appendix 5.

Data was collected over a period of eight months. Questionnaires were either returned to the researcher at the University using a stamped addressed envelope or collected personally from the gatekeeper depending upon which was most appropriate. The personal collection from a gate keeper yielded a higher response rate than the postal return. Ninety seven questionnaires were returned, but two were discarded as they were incomplete. As the questionnaires were returned they were numbered. The end page of the questionnaire was checked to see if the participant was willing to be interviewed and, if they were, the page was given the same number, detached and stored separately from the questionnaires in a secure place. This ensured that data could be analysed anonymously but also made it possible that at a later point potential interviewees' data could be identified. A Statistical Package for Social Scientists (SPSS) programme was set up to analyse the data on a computer with codes corresponding to each question response on the questionnaire. A code was also given for a nil response for each question. Each questionnaire was entered into the programme for analysis.

The demographic and occupational findings from Phase one will be presented next with some discussion of the results.

6:3 Findings from Phase 1

The response rate was mixed ranging from one group yielding a 25% return and two 100% return, but generally it was good with an overall response rate of 69.3%.

6:3:1 Demographic findings

6:3:1:1 Demographic details

The age range was wide covering over three and a half decades and the ratio of women to men was high. More than half lived in urban locations rather than rural areas. More women than men lived alone. In those aged 75 and over three out of five women lived alone, which replicates national data for the United Kingdom (UK) (Department of Work and Pensions, 2005; Chin and Spink, 2007). The sample in the study had a slightly higher percentage (n. 16; 16%) of people from black and ethnic minority groups than those found nationally in the UK (15%) in 2001 (Age Concern, 2005). Participants' demographic details can be found in Table 6:3:1:1.

Table 6:3:1:1 Phase 1 participants' demographic details

Participants	Description	Number	Percentage
Age	Range	57-93	
	Median	73.5	
	Mean	70.8	
Gender	Women	73	77
	Men	22	23
Location	Urban	56	59
	Rural	39	41
Living arrangements	Alone	33	35
	Married/partner	56	59
	Child/friend	6	6
Ethnicity	Afro-Caribbean British	2	2
	Asian British	10	11
	White British	78	83
	Other	3	3
	Missing	1	1

6:3:1:2 *Educational qualifications*

The educational qualifications of the participants were very varied and ranged from no qualification to PhD, (Table 6:3:1:2). The question asked, "What educational qualifications do you hold?" and gave a list of the qualifications to select from. As a result many people cited more than one qualification. On reflection it might have provided a clearer picture if the question had asked the respondent to give only the highest qualification. Well over a quarter of the participants held no qualification at all, but this percentage was still lower than that cited nationally (Department of Work and Pensions, 2005). Apprenticeships were the most common qualification for men (n 9, 41%) and GCE/GCSE for women (n 17, 24%) It is interesting that none of the men cited school qualifications which suggests that either they progressed to university or left school at 15, many to take up apprenticeships. Overall women had a wider range of qualifications than did the men.

Table 6:3:1:2 Educational qualifications according to gender

Educational qualification	Male		Female		Total	
	No.	%	No.	%	No.	%
None	4	18	22	31	26	28
GCE / GCSE	0	0	17	24	17	18
A level / baccalaureate	0	0	2	3	2	2
Apprenticeship	9	41	1	1	10	11
Diploma/HND/HNC	1	5	5	7	6	7
Matriculation	3	14	5	7	8	9
PhD/Ed D	0	0	1	1	1	1
BSc/BA	4	18	10	14	14	15
MA/MSc	1	5	7	10	8	9
Other	0	0	1	1	1	1
Missing			2			
Total	22		71		93	

6:3:1:3 *Current and previous employment*

Participants were represented in all employment categories as can be seen in Table 6:3:1:3, however by far the highest percentage were either in clerical and intermediate (n 23, 52%) and modern professional, namely teaching or health professional (n 25,

27%) all of which tend to have a female gender bias. As 75% of the sample were women this is unsurprising. Over a quarter of the sample (n 24, 26%) were working while the majority (n 68, 74%) were not. In this study 12 people (14%) over pensionable age were still engaged in full or part time work, which appears to be slightly higher than is found nationally at 12% (Age UK, 2008).

Table 6:3:1:3 Current or previous employment

Employment groups	Number	Percentage
Modern professional	25	26
Clerical & intermediate	23	24
Senior management or admin	8	8
Technical & crafts	6	6
Semi routine manual & service	14	15
Routine manual & service	7	7
Middle & junior managers	3	3
Traditional professions	5	5
Total	92	97
Missing	3	3
Total	95	100.0

6:3:1:4 *Annual gross joint and single incomes*

The question on income was not answered by 11 (11.6%) of the respondents, all but one of them women as can be seen in Table 6:3:1:4. It is possible that some of women who did not provide an answer were living with a husband and may not have held details of the joint income. Alternatively income can be seen as a sensitive question and participants may have chosen to withhold this information. Data was collected in 2007 to 2008 and up to 50% had annual single or joint incomes below £249 a week only 11 (12%) have incomes between £250 and £399 a week while 30 (33%) have an income above this. However this does not appear to reflect a national pattern, and in general it is possible that the people in this study were slightly better off than is suggested by national statistics for the UK population in 2005-06 (Chin and Spink,

2007), even allowing for inflation. However this pattern is particularly noticeable amongst the single women participants who dominate at either end of the income spectrum and this may be associated with educational attainment. As would be expected, joint incomes were generally higher than single. Overall older participants were more likely to have a lower income than younger ones.

Table 6:3:1:4: Number receiving annual gross joint or single incomes according to sex

Single/joint income			Male		Female		Total	
			No	%	No	%	No	%
Single	Weekly gross income	Under £100	0	0	4	6	4	5
		£100 - £149	2	10	11	17	13	22
		£150 - £199	1	5	9	14	10	12
		£200 - £249	1	5	6	11	7	8
		£250 - £299	1	5	1	2	2	2
		£300 - £349	2	10	0	0	2	2
		£350 - £399	1	5	0	0	1	1
		£400 - £499	0	0	1	2	1	1
		£500 - £599	0	0	2	3	2	2
		Over £600	1	5	1	2	2	2
Total		9		35		44		
Joint	Weekly gross income	Under £100	0	0	0	0	0	0
		£100 - £149	2	10	0	0	2	2
		£150 - £199	0	0	1	2	1	1
		£200 - £249	0	0	6	9	6	7
		£250 - £299	2	10	1	2	3	4
		£300 - £349	0	0	2	3	2	2
		£350 - £399	0	0	1	2	1	1
		£400 - £499	2	10	6	9	8	9
		£500 - £599	2	10	4	6	6	7
		Over £600	4	19.0	7	11	11	13
Total		12		28		40		
Missing		1		10		11		

Older participants were likely to have a lower income than younger participants. Four of the five women aged over 85 had incomes below £13,000 and only one over £31,000. Those in the two age groups below, 76 to 85 and 66 to 75 were each better off than the previous generation, whilst the youngest age group, most of whom were still working had the highest incomes. This is similar to Chin and Spink (2008) who found that younger pensioners tend to have higher incomes than older pensioners because they are likely to receive more occupational pension and earnings income than older pensioners.

6:3:2 Occupational findings

The second section of the questionnaire asked respondents about their everyday activities. Three questions referred first, to those activities which were seen as work (20 optional categories), second those which were done for pleasure, enjoyment and relaxation (28 optional categories) and third activities done to look after the self (27 optional categories). Other options were provided for each section. The occupation categories on the questionnaire were derived from the initial analysis of the 1st round of the OPOB data (Knight *et al.*, 2005; Ball *et al.*, 2007; Knight *et al.*, 2007; Chilvers *et al.*, 2010) therefore the findings from this study are compared with the original OPOB study. Some comparisons are also attempted with national data, but these need to be treated with caution as age bands and categories were not often exactly the same.

6:3:2:1 Work occupations

Occupational roles seen as work have been divided into homemaking, home maintenance, shopping, caring, volunteering and other (Table 6:3:2:1). The most frequently cited were domestic activities as was found in the OPOB study (Knight *et al.*, 2007; Chilvers, Corr and Singlehurst, 2010). The percentage of women engaging in each aspect of this occupational role was considerably higher than the men with shopping showing greatest equality. This suggests that gender stereotypes are still quite prevalent with the age group. The fact that more men than women lived with a partner may also have been influential. A similar pattern was seen in the OPOB study (Ball *et al.*, 2007; Knight *et al.*, 2007).

Table 6:3:2:1 Occupations seen as work

Occupational role	Occupation	Women 71	%	Men 20	%	Total 95	%
Homemaking	Housework	63	88	9	45	72	76
	Cooking	53	74	7	35	60	63
	Laundry	52	72	9	45	61	64
	Ironing	49	68	7	35	56	59
Home maintenance	Gardening	28	39	9	45	37	39
	DIY	16	22	9	45	25	26
	Decorating	14	19	9	45	23	26
Shopping		51	71	13	65	64	67
Caring	Spouse	13	18	4	20	17	18
	Grandchildren	13	18	4	20	16	17
	Parents	10	14	1	5	11	12
	Own children	6	8	1	5	7	7
	Friend/ neighbour	6	8	1	5	7	7
	Pets	7	10	1	5	8	8
	Total no of people engaged in a caring role	30	42	7	35	37	39
Volunteering	Charities	28	39	4	20	32	34
	Religion	9	13	5	25	14	15
	Informal	22	31	7	35	29	31
Other	Finances	34	47	10	50	44	47
	Study	7	10	0	0	7	7
	Paid employment	14	19	5	25	19	20

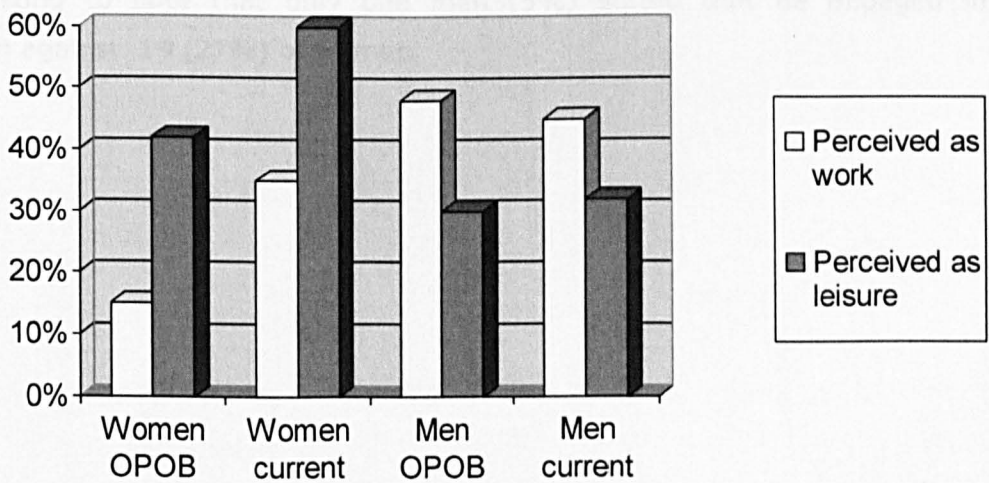
The percentage of people who were volunteers was higher than the OPOB study (n21, 30%) (Knight *et al.*, 2007), although a few respondents engaged in informal volunteering as well as working for a charity or religious group. The actual number of people in the current study engaged in one or more forms of volunteering was 44 (48%), which was similar to the overall figure of people who volunteered found by Soule *et al.* (2005), but the percentage of people engaged in informal volunteering was considerably higher and formal volunteering much lower. This difference may be explained by the nature of the sample in the current study as it is possible that groups or organisations run for or by older people may have a higher number of volunteers than would be found in the general population. However the government report, Opportunity Age (DWP, 2005) reported a similar figure engaged in formal volunteering as in the current study. In terms of overall volunteering the OPOB study found that 33

(30%) participants volunteered in comparison to the current study at 48% (Knight *et al.*, 2007). Women volunteered more frequently than men in both studies, but the difference was less pronounced in the current study.

In the present study, 37 (39%) men and women provided some form of unpaid care for family members, friends, neighbours or pets. In the OPOB study the number of respondents involved in care giving was similar at 37% (Knight *et al.*, 2007). This is in contrast to the national survey conducted in 2001 by Soule *et al.* (2005) who found that only 16% of people over 50 were providing the same form of care. It is possible that care giving was measured differently or the care burden in society has increased over the six year period between the three studies, but this is unlikely to account for the whole difference.

Finally it is worth noting that gardening was the only occupation to be reported by those in the OPOB and the current studies as, either an occupation they regarded as work, or one that gave pleasure and enjoyment as a leisure occupation (Knight, 2005). Interestingly there appears to be a distinct gender difference between those who regard it as work and those who believe it is a pleasure (Figure 1). A higher percentage of women regarded gardening as a leisure occupation than men in both the OPOB and the present studies (Ball *et al.*, 2007).

Figure 6:3:2:1 Differing perceptions of gardening between men and women



6:3:2:2 Leisure occupations

Full details of the leisure occupations may be found in Table 6:3:2:2. First active leisure; here the findings can be grouped into three broad categories, walking, gardening and sport, swimming and dance. In the current study walking was the most

popular physical activity with both 68% of men and women citing walking, which is a little higher than appears to take place nationally (Soule *et al.*, 2005; Chin and Spink, 2007). However both these studies required their respondents to have walked for two miles or over in the four weeks before interview, which may have been more than some of the participants in the current study might have done. Gardening was the next most frequently cited by both men, 32% and women, 60%. The range of sporting activities was broad including sports such as swimming, dancing, bowling, tai chi, sailing and angling.

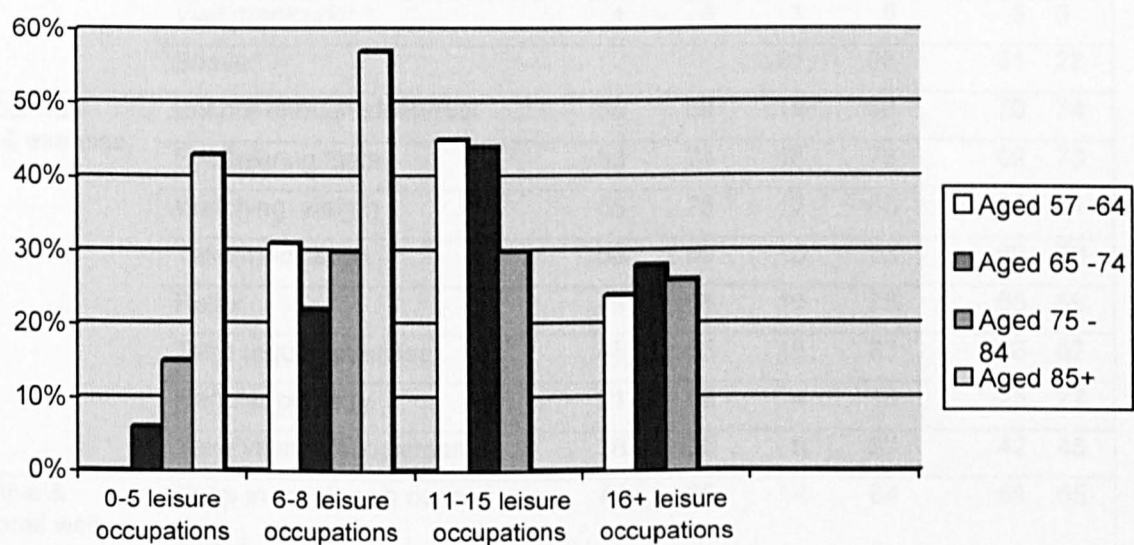
Engagement in passive leisure activities follows a similar pattern to that found by Soule *et al.* (2005). However, in contrast, participants in the current study said they watched TV (84%) or listened to the radio (64%) less than in the general household survey of 2002 (Fox and Rickards, 2004), but read slightly more. In the current study seeing friends was cited more frequently by both men (68%) and women (66%) than seeing family 54% and 48% respectively. This may be because family contacts are more constrained by a distance, or through work. Women were more likely than men to engage in hobbies such as arts and crafts, baking, sewing and knitting and adult education, whereas men cited a range of occupations in the 'others' category such as car rallying, photography and snooker. Slightly more people (21%) engaged in adult learning in the current study than older people in Northamptonshire (Age UK, 2005), or nationally (Chin and Spink, 2007). This may have been influenced by the nature of the sample in the current study where 18% of the respondents came from the U3A, but it is interesting to note that only one man (5%) stated that he engaged in adult education against 19 (27%) of women.

Table 6:3:2:2 Leisure occupations

Form of leisure	Occupation	Women 73	%	Men 22	%	Total 95	%
Active leisure	Walking	50	68	15	68.	65	68.
	Gardening	44	60	7	32	51	54
	Swimming	11	15	3	14	14	15
	Dancing	10	14	3	14	13	14
	Taking part in sport	6	8	3	14	9	9.
	Other					10	10
Passive leisure	Watching television	61	84	19	86	80	84
	Reading	51	70	13	59	64	67
	Listening to the radio	48	66	13	59	61	64
	Listening to music	47	64	12	55	59	62
	Crossword/Sudoku/ Mind games	42	58	10	45	52	55
	Letters/emails/ internet	31	42	8	36	39	41
	Watching sport	10	14	12	55	22	23
Social leisure	<i>Seeing friends</i>	48	66	15	68	63	66
	<i>Seeing family</i>	35	48	12	55	47	49
	Holidays/travel	52	71	19	83	71	74
	Eating out	48	65	14	64	62	65
	Days out	41	56	11	50	52	55
	Visiting houses/ places of interest	41	56	10	45	51	54
	Concerts/ theatre	35	48	4	18	39	41
	With voluntary org	32	44	4	18	36	38
	Hairdresser	31	42	2	9	33	35
	Shopping	22	31	2	9	25	26
	Church/Temple/ Mosque activities	19	26	6	27	25	26
	Visiting the pub	12	16	10	45	23	24
Hobbies & Interests	Cooking/baking	29	40	3	14	33	35
	Knitting	23	32	0	0	23	26
	Adult education	19	26	1	5	21	22
	Art/painting/craft	20	27	2	9	20	21

Engagement in the number of leisure occupations was found to decline with age in the current study (Figure 6:3:2:2), which supports the findings of Soule *et al.* (2005). It is not known the number of leisure occupations that were engaged in pre retirement but it is likely that participants aged between 57 and 74 in the peri and post retirement phase of life had a surge in leisure interests. This was largely maintained well into the 80s but declined sharply after the age of 85 with none engaged in more than 8 leisure occupations.

Figure 6:3:2:2 Engagement in leisure occupations according to age.



6:3:2:3 Self care occupations

Details of the self care occupations participants reported participating in are shown in Table 6:3:2:3. In terms of activities of daily living (ADL) the percentage of people engaging in regular personal hygiene occupations such as having a bath, shower or strip wash, caring for hair, hands and nails, and changing clothes in the current study supports the findings of Soule *et al.* (2005). People generally cited a higher number of self care occupations than they did in either of the other two categories. In self care occupations there were, in most cases, a similar percentage of men and women engaging in each. Some notable exceptions include 3 (14%) men and 37 (51%) women were engaged in learning new things and 6 (27%) men and 29 (40%) women engaged in prayer, while more men n18 (83%) than women n45 (63%) took regular exercise which supports the findings in the OPOB study (Ball *et al.*, 2007).

6:3:3 Summary of Phase 2 procedure and results
Phase 2 used a survey questionnaire to collect demographic and occupational data from a group of 95 living older people living in the United Kingdom. The survey was piloted and refined, was piloted on three retired nurses through groups and

Table 6:3:2:3 Self-care occupations

Occupation		Women 72	%	Men 22	%	Total 94	%
Activities of daily living	Regular bath/shower	65	90	22	100	87	93
	Change/laundry clothes	68	94	16	73	84	89
	Wash own hair	57	79	20	91	77	81
	Care for hands & nails	60	83	15	68	75	80
	Strip wash	18	25	5	23	23	24
	Visit hairdresser	41	57	12	55	53	56
	<i>Use make up regularly*</i>	32	46	1	5	33	35
	<i>Visit manicurist *</i>	4	6	1	5	5	5
	<i>Shave*</i>			21	95	21	22
Physical well-being & exercise	Ensure enough sleep/rest	55	59	15	68	70	74
	Eye/hearing tests	53	74	16	73	69	73
	Watching weight	55	76	12	55	67	71
	Take medication	50	69	16	73	66	70
	Relax	49	68	16	73	65	69
	Take regular exercise	45	63	18	83	63	67
	Regular podiatry	21	29	4	18	25	27
	Take vitamin supplements	36	50	6	27	42	45
Cognitive & emotional well-being	Keep in touch with current affairs	47	65	14	64	61	65
	Pursue a hobby	31	43	12	55	43	46
	Play mind games	24	33	4	18	28	30
	Learn new things	37	51	3	14	40	43
	Socialise with friends & family	57	79	16	73	73	78
Spiritual well - being	Pray	29	40	6	27	35	37
	Attend Church/Temple/Mosque	25	35	5	23	30	32
	Religious study	13	18	4	18	17	18

* The occupations in italics were thought to be gender related which proved to be largely the case although one man indicated participation in using makeup and visiting a manicurist, which was possibly an error.

6:3:3 Summary of Phase 1 procedure and results

Phase 1 used a survey questionnaire to collect demographic and occupational data from a group of 95 living older people living in the community over the age of 55 years. The purposive sample was recruited from three midland counties through groups and

organisations for or of older people found through local government websites or through personal connections. The groups and organisations were selected to represent the diversity of the older population within the three counties and included a pensioners action group, a retirement community, day centres, leisure clubs, an older peoples' forum, and U3A. The overall response rate was 69%. Data was anonymised before being entered into SPSS for analysis.

The participants had a wide age range, the ratio of women to men was high, more lived in urban than rural areas, more were married than lived alone and older people from black and ethnic minority groups were well represented. Educational qualifications varied from no qualification to higher degree. Incomes covered a wide range, and current or previous employment was varied. The occupational findings were presented as occupations seen by the participants as work, as leisure and finally as self care occupations. Within the work occupations key findings demonstrated that gender stereotypes were still prevalent in home based work, the number of those who engaged in voluntary work was similar to national figures, while care giving was a little higher. The pattern of engagement in active and passive leisure activities was generally similar to the national population. Women demonstrated a wider range of leisure occupations with greater engagement than the men, except for the gender typical occupations of watching sport and going to the pub. Self care occupations again were in line with national figures, but also revealed that more women than men engaged in learning new things and in prayer.

6:4 Selection of the Phase 2 sample

A small sample of people who could be studied at depth within their own context was essential for the qualitative aspect of the study that was Phase 2 (Miles and Huberman, 1994). Thus a sample size of six to eight people was identified as appropriate for a study using a life history narrative approach (Howie *et al*, 2004; Vrkljan and Miller Polgar, 2006; Wiseman and Whiteford, 2007). Following Phase 1 data analysis, all those people who had agreed to interview were identified. Over half the sample had consented for interview comprising 41 women and 10 men. They were written to giving more details of what would be involved in the interviews and asked if they wished to continue (Appendix 6 -Interview letter 1). Of these, 28 (38%) women and seven (32%) men responded that were willing to be interviewed. A number of variables were identified to promote diversity within this sample and included age, sex, living arrangements, locations, groups or organisations they were drawn from, ethnicity, education, income, previous employment and paid or voluntary employment. Whilst it

was recognised that it might not be possible to ensure that all variables were represented equally it did provide parameters to guide choice.

It was intended that the sample should attempt to represent the range of differences on the majority of variables, however a significant limitation on sample choice was the small number of men who had agreed to be interviewed. Therefore the following decisions were made. The desired sample size was considered to be eight with five women and three men and an attempt was made to have a wide age range representative of the mean for the sample. A representative balance of those living with a spouse or partner or living alone was sought and only one in a household was to be selected. At least one person from a group or organisation would be selected across the spectrum together with at least one person from an ethnic minority group. The sample needed to also represent the range of income, employment and education from the overall sample and to include at least one person who was engaged in paid or voluntary work. For further details please see Appendix 7. Of the eight who were initially selected for interview, one moved, another went into hospital and a third wrote withdrawing, which meant that one of the selection criteria was not met in that three of the groups/organisations were unrepresented and others duplicated when reserve participants were used (Table 6.4). The small number of men who had agreed to be interviewed, and the lengthy interview period which extended between April 2008 and January 2010, increased the difficulty of selection. The length of time between the completion of the questionnaire and interview also meant that the one man who was working when he completed the questionnaire had retired by the time of the interview so that none of the participants were in full time employment. One of the women was engaged in occasional part time work.

Table 6:4 Groups/organisations of people who agreed to be interviewed

	Organisation	N from Phase 1 sample	Agreed to interview	Potential Phase 2 sample	Recruited sample
1	Ladies Keep Fit group	11	4	1 + 1R*	1 man
2	Age Concern	18	3	1#	
3	Indian Association- Chinese association + Sikh group)	14	2	1#	
4	U3A - 2 different locations	17	6	1 + 1R	1 man, 1 woman
5	Pensioners Action Group	4	3	1 +1R	1 man, 1 woman
6	Retirement Village	12	5	1#	
7	Over 60'S Club	6	1	1	1 woman
8	Senior Peoples' Forums in 2 different locations	5 2	5 2	1 1	1 woman 1 woman
9	Church group	3	2	1R	

* R = Reserve participant.

= Withdrawn participant.

6:5 Phase 2 procedure

6:5:1 Data collection

As Bowling (1997) and Hesse-Biber and Leavy (2006) suggested informed consent was gained in advance and reiterated at the time of the interview with interviewees being given the opportunity to ask questions. In this study participants who were invited to be interviewed had already consented to this in Phase one. Following a yes or no response the selected sample were contacted by letter (Appendix 8: Interview yes letter) outlining the content area of the interview, confidentiality issues and the right to withdraw. Again participants were asked if they wished to continue. Finally at the time of the interview participants were reminded of the content of the letter and asked if they wished to continue. If they did so they were asked to complete a consent form (Appendix 9: Consent form). However the researcher was aware, particularly when researching the lives of older people, that at the time of giving consent the participant might still not really know what they were consenting to and there was potential for painful memories to be aroused. Therefore great care was taken during interviews to ameliorate any such vulnerability, particularly for the two whose spouses had died within the last five years. Once participants had become immersed in the interview process they became relaxed and curious to know more about how their contribution would be used, which was explained to them.

6:5:1:1 Interview Process:

Various theoretical considerations informed the interviewing process. These included views on active and passive interviewing, the 'insider' perspective, the influence of the researchers counselling background and possible constraints experienced by the narrators. There is an assumption prevalent in some areas of qualitative research that the interviewer should be both neutral and unbiased, supportive and not overly invested in the content of the story (Randall *et al.*, 2006). The objective is to gather data and not to develop a personal relationship. However it can be almost impossible not to become to some extent active participants in the interview through a desire to connect with the life world and stories of older interviewees. This may be through gratitude that interviewees are willing to share life stories. Or perhaps even more powerfully, whenever an experience is related that touches the interviewer's own life it may trigger a reconnection with some corner of their inner selves or story, providing a sense of a connected journey (Easterby-Smith, 2008).

In this study the interviewer was in the same age group as the interviewees and therefore might be considered an 'insider', by the interviewees and sharing experience was a common phenomenon. In the same vein, the relationship may develop during

the course of the interview or interviews from one of two strangers to one of some form of friendship and at time emotions can become quite intense (Easterby-Smith, 2008). This insider perspective can be considered an advantage for qualitative researchers (Hesse-Biber and Leavy, 2006). However Darlington and Scott (2002) warn of the danger that erroneous assumptions can be made about shared understandings which might limit the explicit aspect of the narrative and highlights the need for reflexivity (Finlay, 2002).

The interviewer needed to be skilled in active listening (Bowling, 1997), listening with absolute attentiveness to hear the nuance of meaning and emotion and allowing the power of silence (Hesse-Biber and Leavy, 2006). The researcher believed these skills had been acquired through practice as an occupational therapist, in student support and from her work as a bereavement counsellor. Darlington and Scott (2002) suggested that possessing counselling skills can be an advantage, allowing the researcher to form questions that open up areas of reflection and to be self aware in the relationship (Wilson, 2008). However, Randall *et al.* (2006) suggested that caution is needed as those used to adopting a counselling role may have a tendency to steer interviews by summarising and asking questions for clarification, and through the therapist's empathic concern.

Establishing a relationship of trust and creating rapport is important to the interview process (Darlington & Scott, 2002) and Flick (2006) suggested that several constraints arise at the inception of the interview, which can have the effect of allowing the narrator to cover awkward topics that would not normally be mentioned in conversation. Firstly, the constraint of closing gestalt which makes the narrator bring to an end what has been started. Secondly the constraint of condensing partly from limited time, but also to ensure understanding and thirdly the constraint of detailing where background details and relationships necessary to understanding the story are presented. Additionally Riesman (2006) warns that the narrator has had the choice to notice or disregard from the totality of their lived experience, which in turn has been interpreted by the individual through their previous experience, gender and culture. Thus what is obtained in interview is essentially only a partial picture of the whole life. She suggested that telling about the experience as a narrative will be influenced by the nature of the audience and the questions that are asked. In the telling there is an inevitable gap between the experience as it is lived and communicating to someone about it. In this study the researcher was of a similar age to the youngest participants and this facilitated some understanding of many of the experiences recounted. It must also be acknowledged that the same story will change over time and thus the interview

is only a representation of reality at the point of telling and may exclude experiences which undermine the current identity the interviewee wished to portray.

6:5:1:2 *The first interview:*

In this study the topic for research was occupational identity so the interviewer's main focus was on what the interviewee has done during his or her life and rather less on events that had happened, although the later was also considered to be important. The opening preamble roughly followed the format below:

"This interview is for you to tell me about your life and all the things you have done throughout your life. Perhaps a good place to start is with your birth and your early family life".

Following the opening question information was allowed to flow in either direction where the primary focus was on taking cues from the respondents. Hesse-Biber and Leavy (2006) advocated that this form of interviewing requires reflexivity or sensitivity to the dynamics between the researcher and the researched while the researcher must also retain a secondary focus on the research topic. As recommended by Roulston (2010) questions were kept open and short, clarity of meaning and verification of the researchers interpretation on what had been said was often sought as the interview progressed. Responses usually revealed rich and relevant data.

The interview proceeded through the person's life until the present day was reached. This did not usually follow a chronological order as people moved about their lives within the narrative. Therefore the interviewer took the narrative back from time to time for clarification and to fill in missing sections. A series of prompts were used to ensure a continued occupational focus (Appendix 10: narrative interview questions). And thus, as Flick (2006) suggested, this form of interviewing was not entirely open, but is more clearly localised than other methods. The interviews lasted approximately one hour to one hour and twenty minutes, and were terminated by the researcher when she believed the interviewee was tired. However, reflection revealed it was frequently the researcher who was tired and losing the ability to listen, while the interviewee was often still engaged in narrative flow. As Randall *et al.* (2006) suggested each interview moved at a pace and with prompts that seemed appropriate for the participant and in most cases this was sufficient time to gather the required data. On two occasions it was necessary to return a second time to collect all the basic biographical material. On both occasions the participant had been bereaved with the loss of their spouse, two and five years previously and it was clear that it was necessary to spend time talking about this. The interviewer had anticipated that some

participants might have recent losses to deal with and was prepared to use her bereavement counselling skills if it was appropriate. A field journal was kept following each of the first and subsequent interviews of thoughts and observations.

6:5:1:3 Time use diaries

Participants completed two, twenty four hour diary days and returned them to the researcher in a stamped addressed envelop before the second interview (Appendices 11a & 11b: Time use diary). Participants were asked to complete the diary on one typically quiet and home based day and the other on a more active day when they were engaged in some activities outside the home. They were reminded not to feel they should be constantly busy, but try to record what actually happened during the day. The time use diary was introduced and participants were briefed on how to complete it after the end of the recorded first interview. An additional, non recorded visit was made to both of the oldest participants to introduce and brief them on the time use diary as it was felt that fatigue levels prohibited its introduction at the end of the first interview. Field notes were made following these visits and included content of the conversations as well as general observations.

6:5:1:4 The second narrative interview:

This interview focused on the present day occupations; the value and meaning of significant occupations together with an attempt to interpret the possible influence of what they had done in the past on those occupations and their lives today. The second interview was often where, as Hesse-Biber and Leavy (2006) suggested, there was the potential for realisation, awareness and empowerment. The interview began with a review of the first interview transcript for clarification, corrections, amendments and omissions. This was followed by discussion of the time use dairies, ease and accuracy in completion and how representative the two diary days were in terms of their lives today. This in turned flowed into a discussion of current occupations and the values and meanings attached to them and links were made with earlier occupations and influences in their lives (Appendix 9: Narrative interview questions). Some participants were able to explore such issues in some depth and said they had gained a greater insight into how they had become who they were now. Others did not say this explicitly but it was evident in the content of the interview, while two participants appeared to retain a sense of privacy in both interviews and the interviewer believed that only the public self was being revealed. Interview transcripts were given to the participants following each interview. Corrections were sometimes made but no material was withdrawn. However, one participant who wished to pass on her transcripts to her children as a record of her life, revealed in the final meeting material that she wanted

to be known by the researcher, but did not wish to have included in the research. Her wishes were honoured.

6:5:2 Data management

In this study interviews were audio taped, transferred to a private, sole owner computer and transcribed. Field notes were made immediately after the interview on first impressions of what had occurred in the interview. Further impressions were noted during data transcription. The researcher attempted to remain aware of the potential power issues related to gender, race, class and other social issues inherent in transcribing data (Wilkinson, 1988; Hesse-Biber and Leavy, 2006).

6:5:2:1 Data transcription

When transcribing the recorded experience Riessman (2002) suggested that it is important to record in the transcript the form of telling to illuminate inherent meaning in the narrative as she believes there is no single true representation of spoken language. The ability to listen repeatedly to the original sound recording is also recommended at the start of the transcription process. Therefore decisions by the researcher must be made about how much detail is recorded in terms of silences, nonlexicals such as 'um', or discourse markers, such as 'you know'. Whatever decisions are reached they are formed by the researcher's values about what is important and as such must be an interpretive process. Hesse-Biber and Leavy (2006) recommended that data should be transcribed verbatim with notes in each transcription on laughter, pauses, emotions, manner of speaking and some remembered gestures and actions. This procedure was followed in the current study as it was felt that it would add richness to the data and facilitate an interpretive approach to narrative analysis. Not all non verbal gestures were noted as this was not possible on audio tape, but the overall mood and demeanour of interviewee was recorded.

Age appropriate pseudonyms were chosen for each respondent using the same initial as is normal practice in social sciences research (Guenther, 2009). Each person's interviews were numbered and dated. A decision was taken by the researcher to transcribe the data herself as it allowed for immersion in the material from the beginning. Also listening to the voice itself provided greater richness of nuance for interpretation than a third party transcript. This is said by Hesse-Biber and Leavy (2006) to be of particular value in interpreting the voices of those that are not generally heard. This indeed could apply to some in this study; older people who have led simple lives, have had very little power and influence, even in their daily lives, with limited education and income, which characterises the two oldest participants.

Some non recorded visits were made to participants to introduce the time use diaries or to talk about a bereavement. Additional data related to both past and present lives emerged during these visits and notes were made on relevant content immediately following these visits. This data was also transcribed. Place names were kept in the transcripts as locations that have been mentioned frequently assisted in illuminating the participants' life experiences during analysis. However, when writing up participants narratives including verbatim comments, place names were omitted to preserve confidentiality.

The transcripts were given the interviewee's pseudonym, interview number and date. The time of the interview was not noted but interviewees were always given the option to choose the time of the interview and generally this was the afternoon. Verbatim transcripts were returned to the interviewee following the first interview and checked for accuracy in the second interview. When the final transcripts were returned the interviewees were thanked and given a non recorded opportunity for debriefing.

6:6 Narrative analysis of the interviews

6:6:1 Analysing the biographies – vertical analysis

A timeline overview of the decades from 1915 to 1970 was created to provide social and cultural contextual overview of the times through which the participants had lived until the more recent past. Various social and cultural influences were noted during analysis, for example, education, Jamaican immigration, the Sunday school movement and allotment gardening. These were explored briefly to provide a slightly more detailed contextual background to the lives of the participants. These two strategies fulfil stage 1 of Polkinghorne's (1995) analysis.

Creating a chronology from narrative interviews is also recommended by Creswell (1998), Miles and Huberman (1994) and Flick (2006) from which stories and epiphanies will emerge. It also has the advantage of providing a framework of the flow of events that have made up each life. Events long in the past may still have an unrecognised link with more recent or current life events. The interviewer can then prompt the interviewee to make links and expand on relevant sections in subsequent interviews asking the participant to theorise about what has happened in his or her life. In this study such theorising has and will continue to relate to occupational science. A detailed chronology was therefore made for each participant after the first interview. This assisted understanding of the lived experience from a life course perspective and

facilitated an in depth exploration of current occupations in light of this in the second interview. Further details were sometimes added to a chronology if they emerged in the second interview.

As well as creating the chronology, the participants' time use diaries were read and issues for discussion in the second interview were highlighted. What was of particular interest here was that it sometimes revealed occupations not mentioned at all during the first interview but usually it reinforced the validity of the interview data. A further occupational facet of the time use diaries was that it located the participants' occupations within a daily routine. Observations were noted relating to the clients appearance, demeanour, mood and non verbal cues. Of interest also was the environment in which they lived, various photographs and artefacts that were shown. Notes were also made on the form of interactions in the interview, the developing relationship and the interviewer's emotional response to the interview as a whole. This prompted reflection and gave rise to further areas for exploration and fulfilled stage two of Polkinghorne's (1995) analysis.

As Riessman (2002) recommended the audio tapes were listened to again after all the interviews had been transcribed in order to hear once more the voice of the participant. The transcripts were printed out with a wide margins, were read several times and notes were made in the margins. The emergence of themes was framed by the researcher's perspective and interest in occupation and occupational identity. Therefore these emerged as common themes for all participants. Another common theme was relationships as these are an influential aspect of occupational identity and are also considered by Polkinghorne (1995) to influence the goals and actions of the protagonist; stage three of Polkinghorne's analysis. The analysis for each participant was illustrated with narrative quotations from the interview to provide authenticity and verisimilitude (Appendix 12: summary of emerging patterns and themes).

The next stage of vertical analysis was a summary of themes for each participant including reflections and observations of the observer at and after interviews and the contextual social historical events people have lived through together with cultural influences on values, attitudes and actions during their lives; stages one and five of Polkinghorne's analysis. This led to a further emerging theme of how each person made choices about occupation; stage four of Polkinghorne's analysis (Appendix 12). There was a wealth of material for analysis and decisions were taken as to whether material was included or disregarded. At the same time a need was present to stay true to the essence of the interviewee's narrative as had been understood by the

interviewer in an attempt to ameliorated issues of power to construct and interpret knowledge (Wilkinson, 1988; Hesse-Biber and Leavy, 2006).

The content and structure of the biographies were the main focus of the analysis, but some attention was also paid to the performative aspects of each narrative to provide greater meaning to each story. The analysis of content was holistic rather than categorical (Lieblich *et al.*, 1998) with the major overall theme for all eight being occupational identity as it develops and changes over the life course. Other regularly recurring themes related to this were the importance of relationships, occupations, significant influences, meaning and choice on how the life story developed. Contextual influences on the participant's actions and choices were also noted. Both the interview transcripts and the field notes were analysed as the latter revealed useful data concerning identity in the 'small stories' which emerged (Phoenix and Sparkes, 2009). The final stage of Polkinghorne's analysis was to reconstruct the biography with the researcher identifying the factors that have shaped the life and which provides a coherent explanation of meaning for actions and choices. A biography was reconstructed for one of the participants, but it was discovered that this process did not add to the knowledge already generated from the participant's chronology, thematic analysis and summary of themes and it was decided not to proceed further with story reconstruction.

6:6:2 Horizontal analysis

Another form of analysis was required to discover common themes and concepts as illustrated by McCance *et al.* (2001). Relationships between and among categories within individual narratives and across all narratives from the group were identified. This was accomplished inductively allowing themes and concepts to emerge from the eight stories, which Polkinghorne (1995b) described as paradigmatic analysis of the data as an inductive process. This is where the location of common themes across stories determines whether general situations occur. The summary of themes for each biography was the starting place for this process, but it was also found necessary to return at times to the initial thematic analysis or even the original transcript to check for details and ensure accuracy. Luborsky's (1994) terminology related to themes, patterns and areas of concern has been used to provide structure to the horizontal analysis. He defined *themes* as 'the manifest generalised statements by informants about beliefs, attitudes, values or sentiments'. This seeks to understand and reflect the participant's own view. *Patterns* on the other hand describe findings from the researchers own frame of reference, while *topic* or *area of concern* refers to the

summarised content of replies into various topics, for example retirement, loss of a spouse, or community involvement (Luborsky, 1994:195).

Horizontal analysis of the data has revealed all of these (Appendix 12: Narrative analysis tables). First, Table 1. shows the patterns and themes emerging from the initial thematic analysis. Emerging patterns reflecting the researcher's perspective include occupations, occupational identity and making choices developed from the individual summary of themes. These can be found in Table 2. and will be discussed in chapters 9 and 10. Themes emerging from participants, first noted in Table 1. include belonging, the centrality of family, caring, and maintaining independence. These can be found in Table 3 and will inform chapters 8 and 9. Finally topics or areas of concern such as war time experiences, retirement and education can be seen in Table 4 and will be largely reported and discussed in chapters 8, 9 & 10.

6:6:3 *Analysis of the time use diaries*

The diary days used in this study were taken from the harmonised European Time Use Survey and were analysed by assigning one of 30 categories from the British Time Use Survey (Lander *et al.*, 2006) for people 65 years and older to each of the 10 minute time slots. Where it was not possible to assign a category to a specific time slot the 'Other' category was used. The findings from the two diary days were averaged for each participant and this average was entered into an Excel spreadsheet against the findings from the national survey to allow comparison. Both the national average of time spent on an activity by people over the age of 65 and the percentage of people performing the activity were entered for comparison. The percentage of participants performing an activity was noted but not recorded separately in the tables.

6:7 Reflexive processes

6:7:1 *Introduction*

Some of the performative aspects of the participant interviews taken from the field notes, together with reflections during data collection, transcription and analysis, are presented where they provide additional meaning to each narrative (Lieblich *et al.*, 1998). The reflexive processes as suggested by Wilkinson (1988) encompassed personal factors, such as the researcher's own identity as an educator, an occupational scientist, occupational therapist and a bereavement counsellor and their associated values and beliefs. Interconnected with this personal reflexivity were aspects of

functional reflexivity related to the form of the research, the choice of a mixed method with the primary drive being qualitative. The personal life experiences of the researcher, her gender, social roles, current life stage and distribution of power within the research relationship were also considered to be influential. It was acknowledged these factors influenced the relationship between researcher and the participants and the form and depth of emotional response (Lieblich *et al.*, 1998; Easterby-Smith, 2008). Other influential factors influencing the practice of reflexivity were the desirability of remaining neutral and unbiased versus a more subjective involvement in participants lives (Randall *et al.*, 2006); the insider perspective (Hesse-Biber & Leavy, 2006) and finally the co-creation of change (Smith, 2006).

6:7:2 Interviewer, interviewee relationship

Reflecting on the interviewer, interviewee relationship it became clear that it had been possible to establish the necessary trust and rapport suggested by Darlington and Scott (2002) early with most participants. With Sheila, the first interviewee, rapport took longest to establish as expectations on either side were unclear and both participants apprehensive. However a level of trust was built over two interviews that allowed for considerable openness and depth of reflection. It was appreciated that in depth interviewing would be a subjective experience with the interviewer becoming an active participant in the interview process, as is common in qualitative research of this type (Wilson, 2008) and this varied between participants. It was also understood, as Randall (2006) has observed, that stories are co-constructed by the manner in which both parties respond to each other and therefore it must be accepted that a different listener might have revealed different narratives.

Another aspect which needed to be considered was the power imbalance in the relationship (Wilkinson, 1988; England, 1994). The researcher was aware of her potentially dominant position and attempted to ameliorate this through her use of language and manner when arranging the interviews, in explaining and the nature of the research and discussing its implications both at the beginning the first interview and at further points whenever it was requested. During the interviews reflexive embodied empathy was attempted (Finlay, 2005). This involved not only listening to the story, but also being aware of the bodily relationship and how it is mutually constituted. For example, one of the women talked about her grandson and his difficulties far away in New Zealand. She spoke of her great concern about him, a need to be with him, to comfort him, but at the same time she knew that this was not possible. Her body language expressed deep emotion, sitting tightly, leaning slightly forward, hands clasped and her expression anxious and yearning. The researcher was

able to experience the intensity of Alice's emotions. She found herself mirroring her posture and through recalling her own experience of powerlessness in being unable to comfort her own adult children, she was able to empathise with Alice's situation. A further attempt to redress the power balance was to provide all participants with transcripts of their interviews, which they were invited to amend, add or remove material as they wished. Many made small amendments and additions, but no-one asked for content to be removed. However, as England (1994) asserted, it is important to acknowledge that these reflexive strategies cannot completely compensate for the power imbalance.

Occasionally, during interviews some unexpected or intense emotions were experienced by the researcher. These ranged from shock and discomfort when one participant revealed he was a member of the British Nationalist Party, to more empathic responses of sadness when hearing of a bereavement, delight in achievements or pleasure from shared memories. One of the older participants appeared to create an emotional distance within the relationship during the first interview which was experienced as frustrating. Personal reflection made the researcher aware her expectations of what people are willing to reveal was unreasonable with this person and she had created an imbalance of power. The probes she used might have been perceived of as too intrusive, causing the participant to withdraw. Her approach was modified for the second interview which enabled a more equal relationship to develop and much richer data to emerge. During the interview process attachment to the participant can be intense (Easterby-Smith, 2008) which became quickly evident. The interviewer developed a sense of connection with their lives which was reciprocated by the participants, particularly where depth of reflection had occurred. In order to provide safe closure a non recorded interview took place when the final transcript was returned with a card of thanks and a small gift.

A potential barrier for the researcher to establishing a dynamic and fruitful relationship was the participants' manner of expression. Some expressed themselves fluently, while others were far more difficult to understand. One man spoke very quietly, slowly, hesitantly and had a frequent throat clearing mannerism. He also spoke with very little inflexion. These factors combined to make active listening difficult, at times the many extraneous details he provided appeared irrelevant and almost boring to the researcher, however, her difficulties did not appear to restrict him and rich data emerged which confounded the researcher's assumption that it would be of little interest. This led her to speculate whether this man was used to being overlooked in his everyday life. The interviews of another man required close concentration as his speech lacked clarity and he coughed quite frequently although he expressed himself

fluently. One of the women, with very little formal education, spoke very differently. Her rambling form of narrative was rich in detail and was vividly expressed, but for the listener focussed on understanding her life story it appeared disconnected. An unexpected outcome was the participant who, when reading her transcript, perceived her manner of expression as uneducated. This distressed both her and the researcher. Here the researcher had made the wrong assumption that all participants would enjoy having a written verbatim account of their interviews, which was not the case with this woman.

6:7:3 Experience as an educator, occupational scientist and bereavement counsellor

Experience as an occupational therapist, educator and occupational scientist clearly shaped the researcher's choice of research topic, research questions and the choice of method. Previous research experience had been qualitative, but she was also aware of a certain pragmatism in her thinking, which on reflection probably influenced her choice of a mixed method arising from the pragmatic paradigm. As Darlington and Scott (2002) suggested, the researcher's experience as a counsellor may have been an advantage in building a sound and open relationship, through her use of counselling skills in the form of questioning, the use of silence (Hesse-Biber & Leavy, 2006), the observation of body language (Finlay, 2005; Fineman, 2008; Wilson, 2008) which was particularly evident in some of the second and third interviews. However, the researcher was aware that it might be very easy to slip into a counselling role without being fully aware she was doing so and she attempted to remain alert to this possibility. This was most pertinent when a certain degree of troubling connections with earlier life experience occurred with some of the participants and time was given to dealing with the resulting emotion as was necessary. During the course of one second interview it became apparent that one participant was still actively grieving and it was possible to spend some non recorded time on his bereavement issues. Several participants became deeply reflective which brought to light things they had not previously considered and were grateful for the opportunity this had provided in the co-creation of change (Smith, 2006).

6:7:4 Insider perspective

The researcher could be said to have an insider perspective in the interview process as she was of a similar age to the youngest participant. This gave her some comprehension of the contextual influence and events on the lives of the participants,

either from her own perspective or that of her parents. As Randall (2006) suggested this allowed the researcher to relate with the participants as someone who implicitly understood what they were talking about, which is an advantage to qualitative researchers (Hesse-Biber & Leavy, 2006). In addition, several points of personal connection with her own experience occurred for the researcher. It was also apparent over the course of the interviews that the researcher shared a similar value system to many of the participants (Kaufman, 1994), which quite possibly enabled greater empathy in the relationship. However, there was a danger that deep empathy and the insider perspective may mean that both interviewer and interviewee make false assumptions about a shared perspective that in reality does not exist (Finlay, 1998). Thoughtful and disciplined self reflection was attempted throughout the interviews to address this problem. In conclusion, an analysis of the performative aspects of the interviews has provided additional meaning to the interview content which will assist in the horizontal interpretation of the narrative data in the following chapters.

CHAPTER 7

Stories past and present

7:1 Introduction

This chapter will present findings from Phase Two of the study in the form of participant biographies and the participants' current use of time. The first section will give demographic details of the participants' lives in table format before summarising each participant's life narratives in the form of chronologies (Miles & Huberman, 1994; Creswell, 1998; Flick, 2006). Section two will present findings from the participants' current life in the form of the time use data collected on two separate diary days for each participant. It is intended that these findings will elucidate the findings from the horizontal analysis of the narratives presented and discussed in the following chapters.

SECTION ONE

PRESENTING THE PARTICIPANTS

7:2 Demographic table

7:3 Participant Chronologies

Table 7:2 Phase Two Participants

ID	DOB	Partner	Children & grandchildren	Location & time lived there	Group	Ethnicity	Income	Work	Education
Yvette	1944	Married	1 son 1 daughter 4 grandchildren	Town suburb 45 yrs, 36 yrs current house	Older People's Forum - Town	Afro-Caribbean	£26 + Joint	Nurse	Left school at 16 'O' levels SRN nursing diploma
Donald	1940	Partner - previously divorced	2 sons 2 step grandsons	Town suburb 12 years Bungalow	Husband of a member of over 60's keep fit group	White English	£31 + Joint	Building trade culminating as a Construction site manager	Left school at 15 Carpentry apprentice + diploma
Fred	1937	Partner - previously divorced	1 son 1 daughter 5 grandchildren	Small market town 32 years House	Pensioners' action group	White British	£20-26 Single	Mechanical & electrical engineer. Car design and dept of transport.	Left school at 18, 'A' levels. Nat service. Uni 20- 23 M level- Cambridge
Sheila	1938	Alone - divorced	1 son 1 daughter 2 stepdaughter 3 grandchildren	Town suburb 5 years House	U3A	White British	£20-26 Single	Work in IT/ teaching maths & IT/ Oxford exam board/ later managing Erasmus	Left school at 18. 'A' levels. Uni from 18-21 'M' level-Oxford
Alice	1935	Alone - Widow 5 years	1 son 1 daughter 4 grandchildren	Large village 10 years. Bungalow	Older People's Forum - Small town & rural	White British	£13 Single	Laboratory technician Primary school teacher	Left school at 16 'O' levels. T-Dip mature student.
Desmond	1930	Alone - Widower 2 years	No children	Village 27 years Bungalow	U3A	White British	£13-16 Single	Company secretary & pensions. Worked PT at end to care for wife with Alzheimer's disease	Left school at 18 'A' level BA/BSc -London Uni from 18-21
Amy	1924	Alone - widow 13 years	1 son 2 grandsons	Village 60+ yrs, 20 yrs in current bungalow	Village pensioners' club	White British	£8-10 Single	Domestic service FT 'til marriage, then PT cleaning	Left school at 14. No qualifications
Maggie	1917	Alone - widow 30 years	1 son 1 daughter 3 grandchildren	Village 60+ yrs in same house	Lifelong learning seminar for older people Leicester Uni	White British	£8-10 Single	Worked in stocking factory - FT before marriage, PT when children at school.	Left school at 14. No qualifications

Chronology 7:3:1. Maggie - aged 91, Interviewed June 2008 & January 2009

Born in 1917 in Father's public house. Dad army sergeant in war-gassed. Eldest child-1 sister 20 months & 1 sister 9 yrs younger. Dad often ill, M felt she carried Mum's worries. Family poor because of Dads ill health-footballer, went back to Leics to play & out of work ++. M went to live with Aunt M in (009). Taking Learned to knit, sew, crochet.

Life with Aunt M: Mum went back to Leics & Mary stayed with Aunt M in Bedworth (adored her). At first didn't like school, but really enjoyed last 2 yrs at new built school- good at math, bad at spelling. Left at 14, not picked for grammar school. Loved clothes, shopping & cinema with Aunt M. Taught her cooking & preserving. Helped uncle on allotment. Occasionally went home on tram & 2 buses.

Outside work. Lived at home. Dad v strict, M a bit rebellious. Mum timid & M 'mothered' family. Helped Dad in garden, grew fruit & veg. Bought own bike and often cycled to city in summer. Loved going dancing with sister on Sat. nights. Cinema too. Went on holiday to Blackpool (17) with 5 girls from work - dancing

Started work in 1931: Went home to Leics village at 14 & started work in hosiery firm 8-6 as a splicer at 10s a week. Walked home for cooked dinner at 1pm. Did well, piece work at 17s a week then promoted to seamer at 16- continued 'til she married

Met her husband: Knew husband Ted at work. In 1937 (20) met him at dance & started going out at harvest festival time. T came from big family & lived in local village. Married in village church Oct 1938. Bought own newly built house locally. Difficult time at work before marriage-6 week strike, had to give up savings. 3 day honeymoon in Ryll.

Early married life: Carried on working. T goes to war 1940. M stays alone in house. T persuaded her to have baby - daughter born in 1943. Stopped working, knitted & sewed to clothe her. Kept vegetable garden going. T came home & daughter didn't recognise him. Son born 1946.

Children grow up: Both children left school at 16. D trained as secretary and worked at solicitors, then got job on s coast. S did an HND in engineering then trained as teacher-later did OU degree. Both get married and finally leave home. Her Dad dies aged 72. Represents TG in London x 2. Attends church, joins Mother's Union

Family life: 12 yrs off work for family. Managed money carefully. Saved for 1 week family holiday. Family walks. Joined Townswomen's guild (TG). D won scholarship to grammar school & M found part time work. Extra money made big difference. S won scholarship & went to grammar school. Also good swimmer.

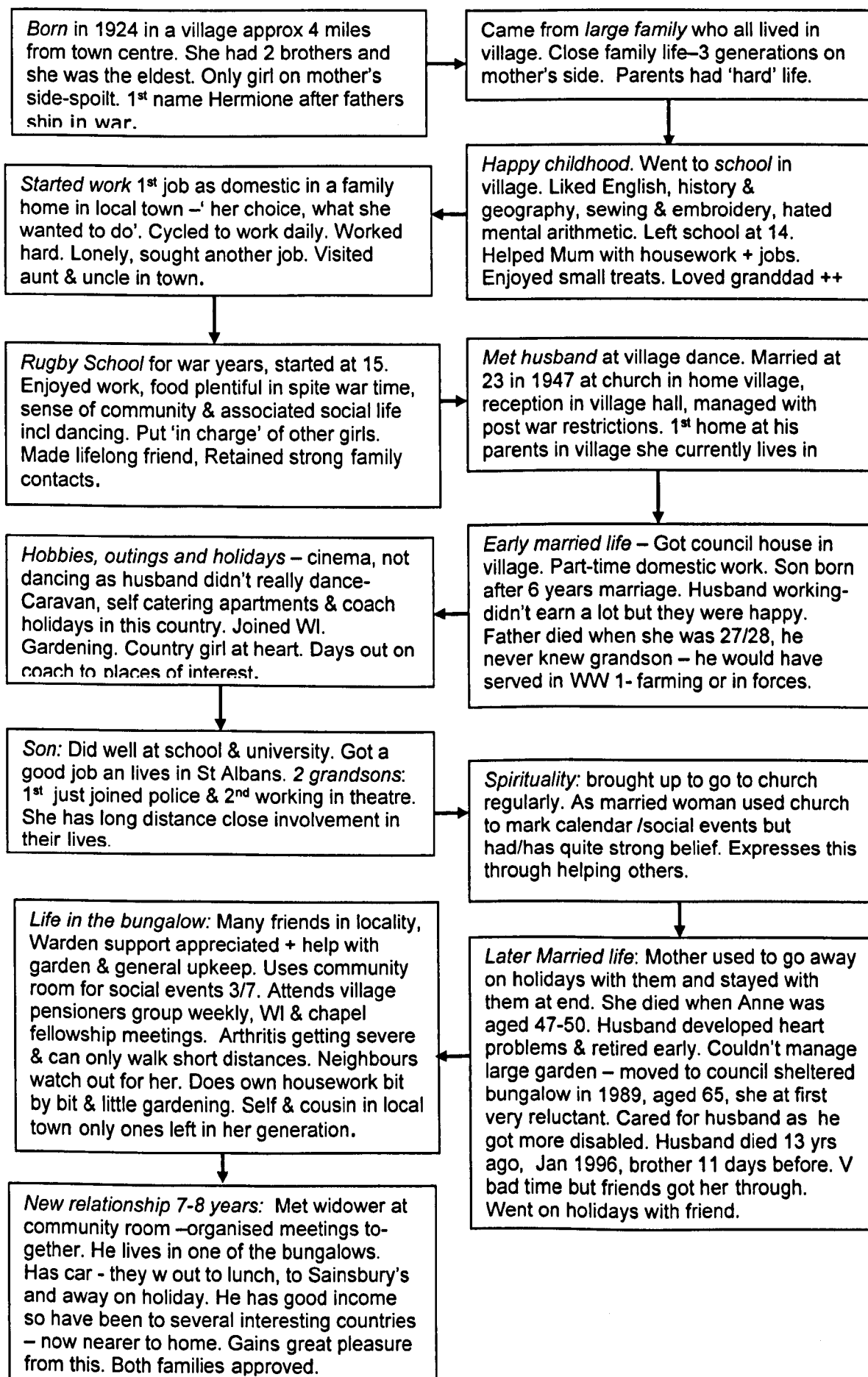
Life with T: Start taking holidays abroad with T, went on train to Austria & the Rhine. Looks after Mum for 5 yrs. Went to adult education classes to learn wine making for T, he encouraged her. Always busy while T used to read. Gardened with T. Saw children & grandchildren (3) Takes up bowling with T. He died on holiday in Wales aged 68.

Learning to live without T: Knew she must get out & see people every day. Continued to make wine. Cooked & bottled for family visits. Joined a gardening club. Continued with flower & veg garden. Garden open to public on village open garden day D's husband dies at 39, she moves back to live near M. Holidays- with sister, then D-often abroad. Loved to travel. Church member. Gets about on local buses. Joined WI

Current life: Still v active, gardens, cooks, bottles, makes jam & wine. Walks & cycles in the village. Gets bus to Leicester & Coventry. Short holidays and days out with D. Attends LLL* seminars at Leics Uni. Sees family. Attends clubs & societies as above. Belongs to Pensioners action group. Plays whist with sister in village.

*LLL = Lifelong Learning

Chronology 7:3:2. Amy-aged 85, interviewed February, March & April 2009



Chronology 7:3:3. Desmond – aged 78, interviewed September & October 2008 and January 2009

Born in 1930, SW London. Sister J 3 yrs older. Father, gassed in WW1, poor health in 1920's. Painter & decorator. Lived in basement of grandfather's house. 1930's hard time for his parents. Dad did fire service in war. Played in street or park. Sunday school. Went local primary school

Evacuated aged 9 with sister in 1939 to small town in home counties, attended local school. Sister went home, he stayed & saw family occasionally. Moved to Kent for secondary school, then W. Country-piano lessons-liked them. Came home end of war- went to local grammar school

Teenage yrs after war: Good academically particularly languages & maths. Unable to cont piano lessons at school-regrets this, but enjoyed music generally. Left at 18. Enjoyed sports, tennis, cricket, football at school. Joined church youth club, played competitive badminton. Very shy, no girl friends. No part time job.

War time yrs: Some experience of the blitz in Surrey, used Anderson shelter in garden or neighbour's Morrison shelter. Also V1 & V2 bombs in Kent. Generally happy at school, quite good academically. Coped by accepting things. Felt he was a bit of a loner. Mother sometimes visited or he returned home, but didn't feel close.

University: Lived at home. Read classics at London Uni- would have preferred Math. Did less well as result, but got degree. Some friendships with mainly older students returning from war. Joined dram soc, but worked behind scenes. No girl friends.

Early working life: Lived at home 'til nearly 30. 1 yr valuations dept @ Somerset Ho. Tried for Inland Revenue-failed exam. Entered commerce -coastal shipping co. Studied 2/3 evenings a week-Chartered Inst. of Secretaries at Poly. Learned to drive, bought car. Played badminton. Moved to bed sit near married sister when parents moved.

Early married life: Married in 64 & moved to Aldershot on GLC scheme. D aged 34 & M 38. M gave up work. As M cared for mother prior to marriage she fell out with her family – M upset. No children. D commuted to London. Qualified as company sec Moved to Calor Gas 1966 as assistant to Co Secretary. M gets part time work. Gave up badminton. Helps M in garden. Continue walking. Bought narrow boat in '73 for hols.

Met future wife: Met wife M through work playing badminton. M worked for same co, lived at home with mother-cared for her. Both belonged to a church, enjoyed catching bus/train out of London and walking in countryside. M like water (sea ranger) Went to cinema, music hall. Spent time at M's house, D studying & M knitting & embroidery. Both played badminton

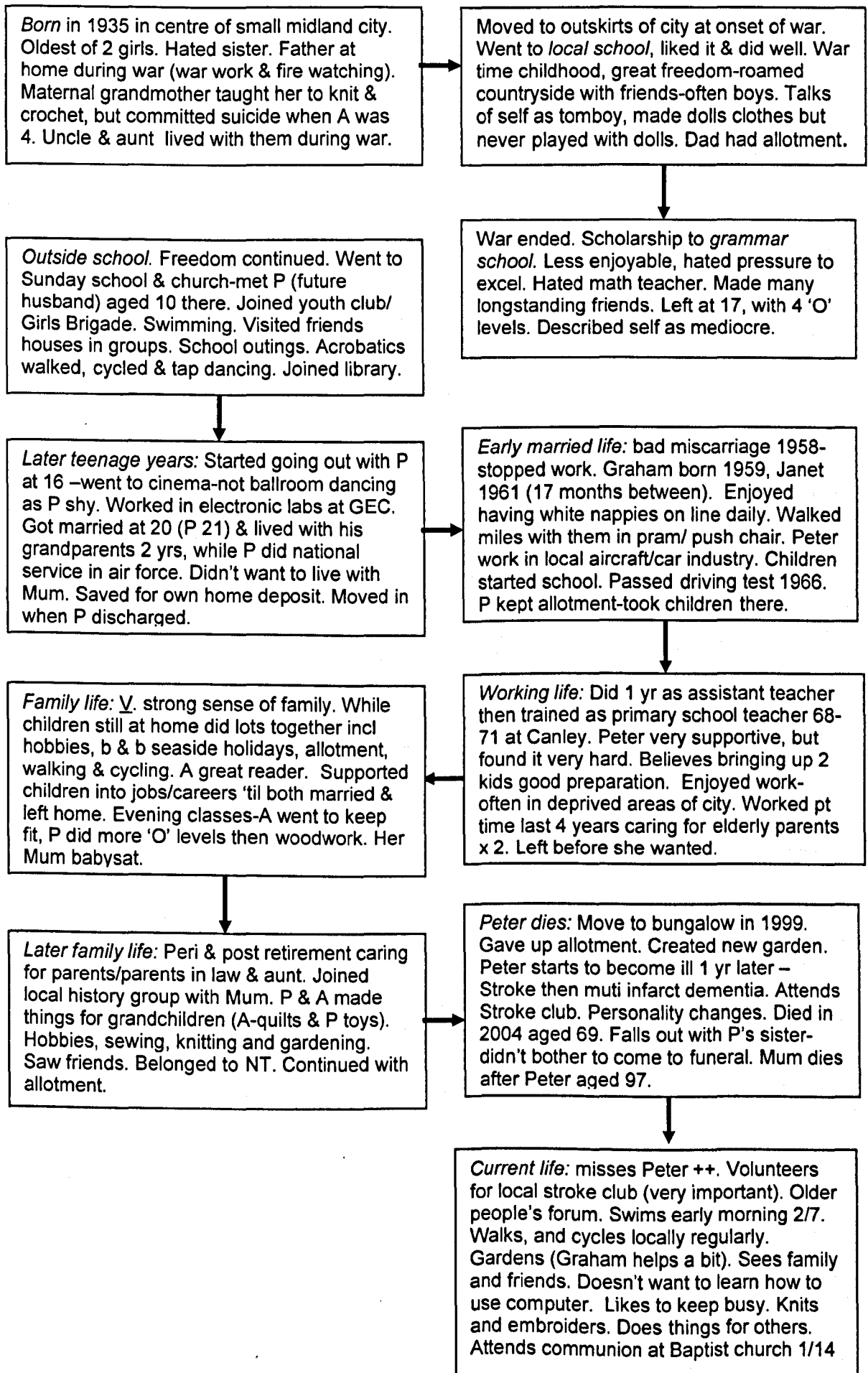
Work & house moves: Calor gas moved to Slough-moved to new house in village nr Henley & moved again to Chilterns & again to nr High Wickham- moves really instigated by M's health or dislike of garden etc. D very work orientated at this time – took on pensions work. Redundant 1983 (Aged 53)

Move to Rugby: 2nd narrow boat built in Napton 80-81. They fitted out interior. Sold 86. Moved to Rugby 83. D worked 3/7 in local firm, mainly pensions. Joined NT, walking, gardening, socially co-dependent. Holidays abroad

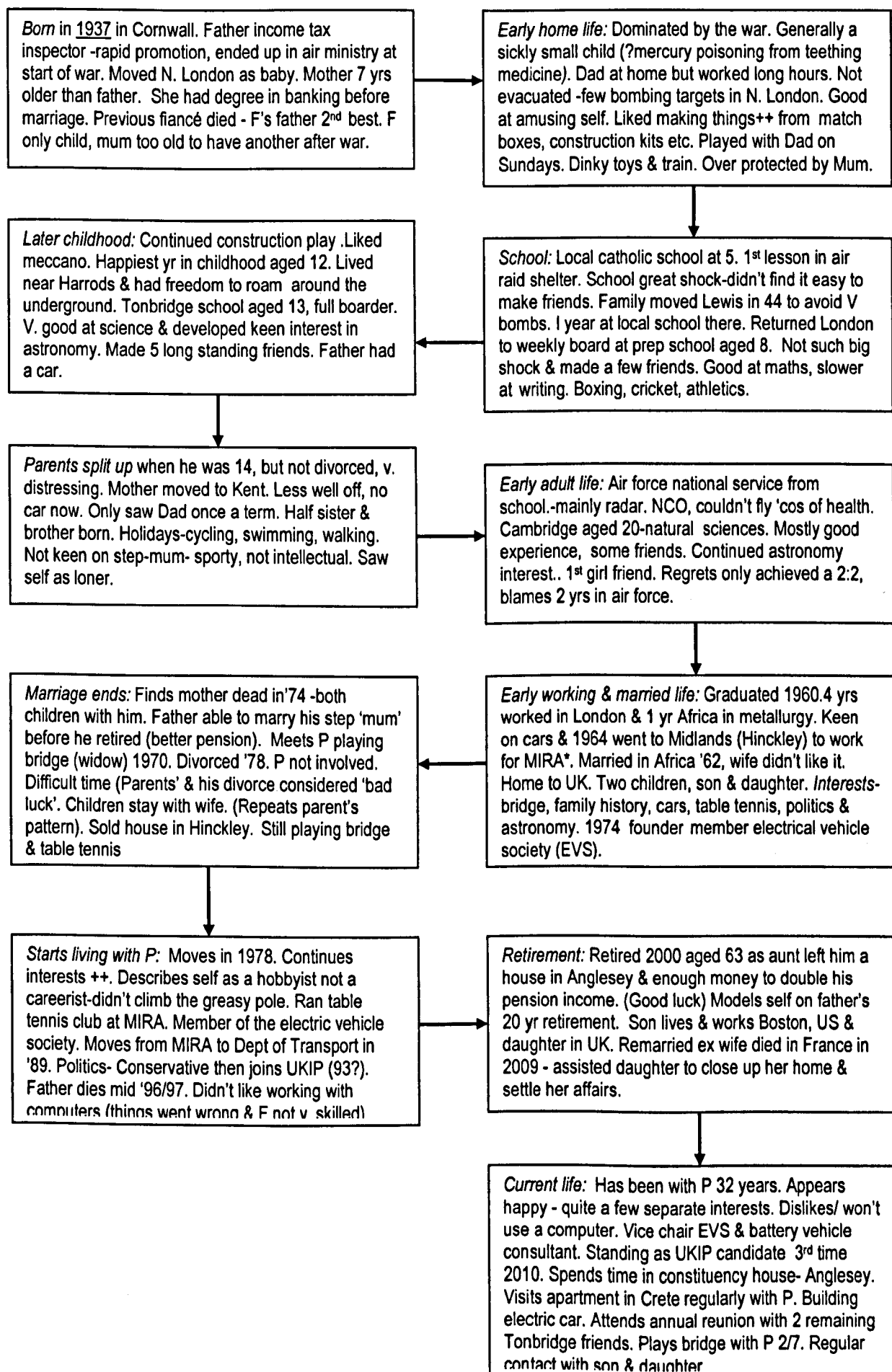
Current life: Misses M ++ Still actively grieving. Continues with carer's group & U3A- canal group + greek & roman history & quizzes. Treasurer for church. Trustee for local Mind & Cross Roads. Has angina. Goes to gym 2/7. Has friends through church & U3A but not out going person.

Later married life: D has heart attack & M becomes forgetful mid 90's. D retires, embarks on complex search for help for M & Alzheimer's diagnosed 1999. Gradually takes over care for M as condition worsens. Cataracts op same yr, detached retina end 2000 & 2004. Used respite services increasingly. M dies Jan 2007. Joins carers grp, U3A & does accounts for local church.

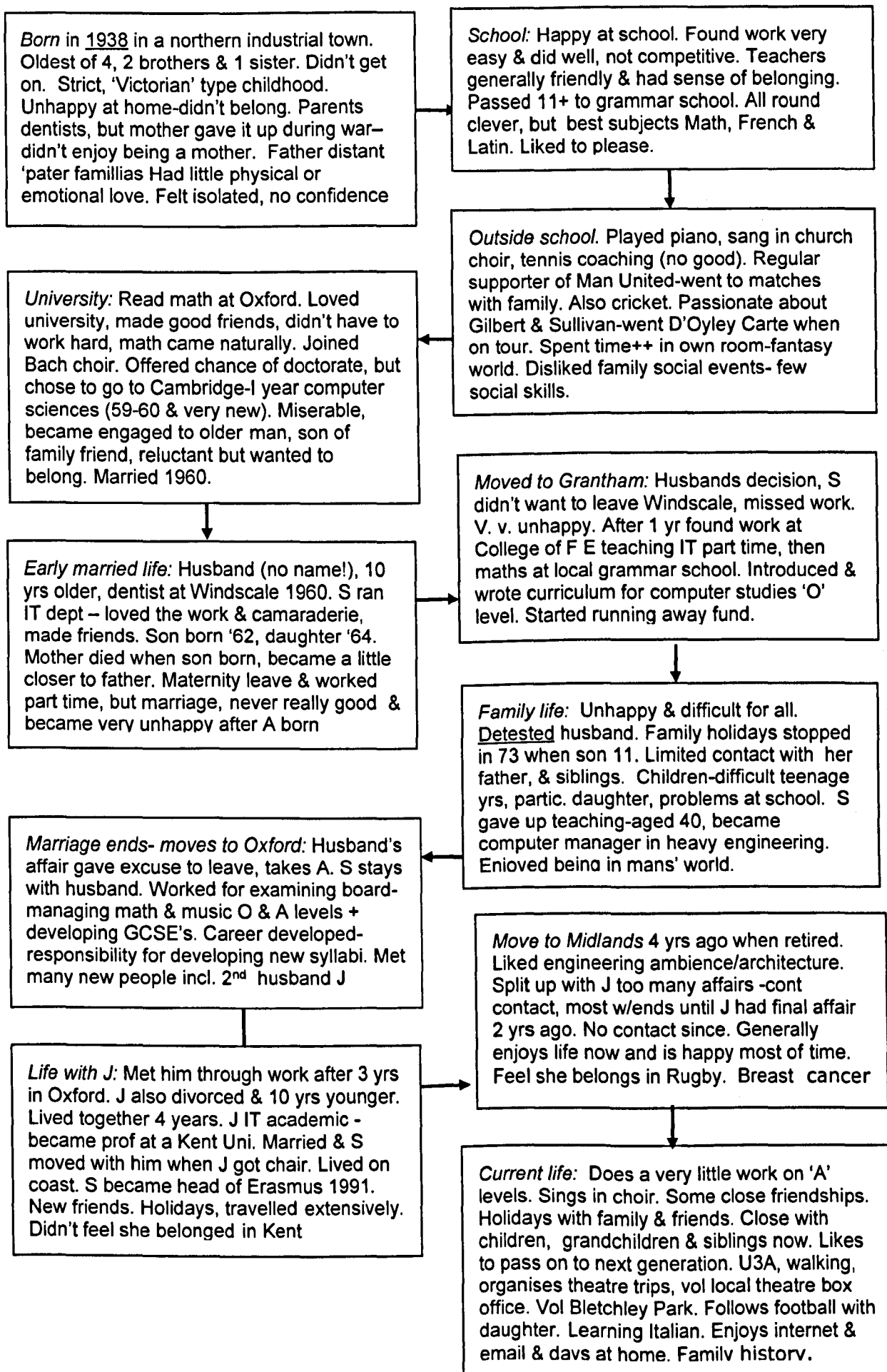
Chronology 7:3:4. Alice – aged 73, interviewed May and July 2009



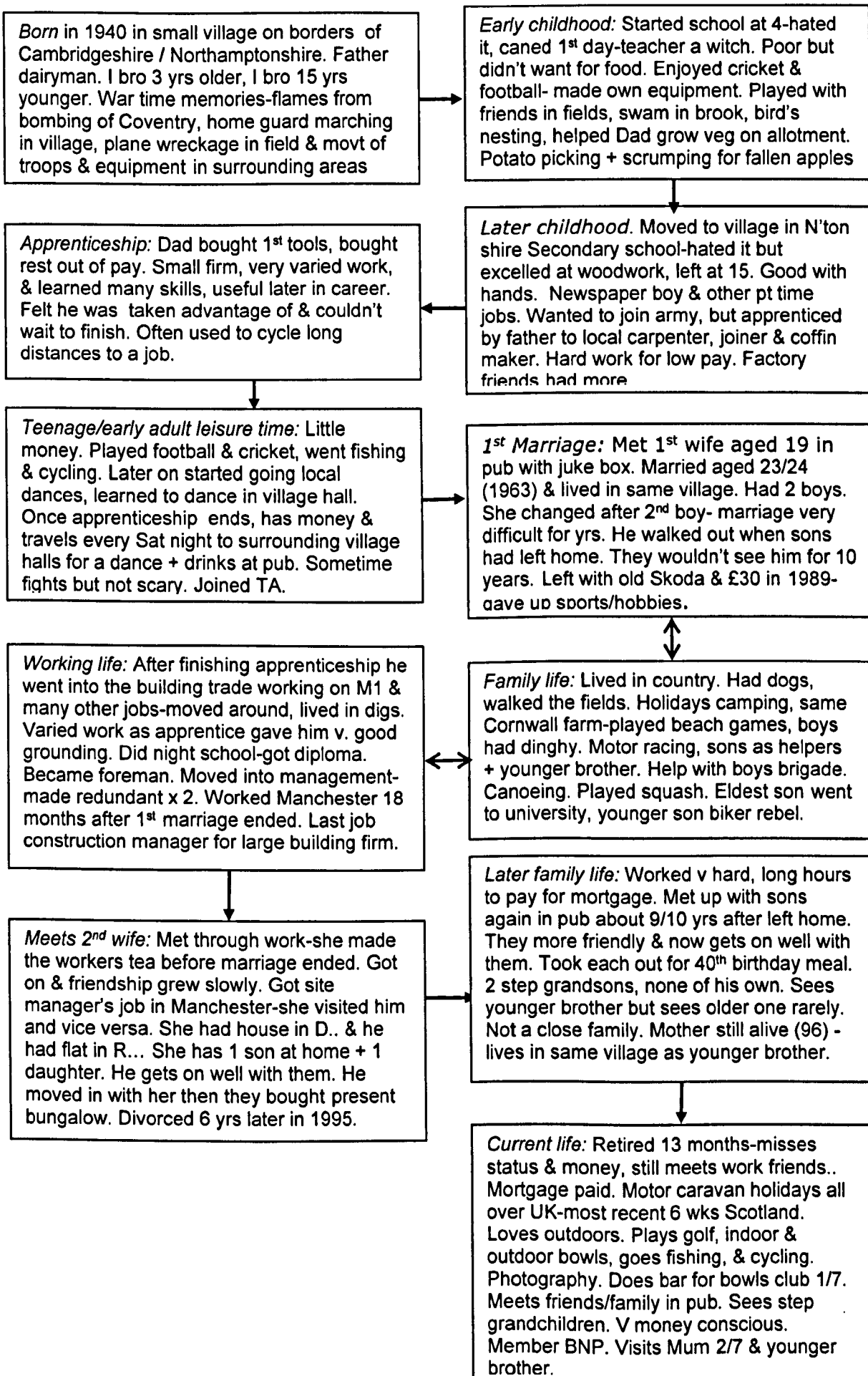
Chronology 7:3:5 Fred-aged 72, interviewed January and February 2010



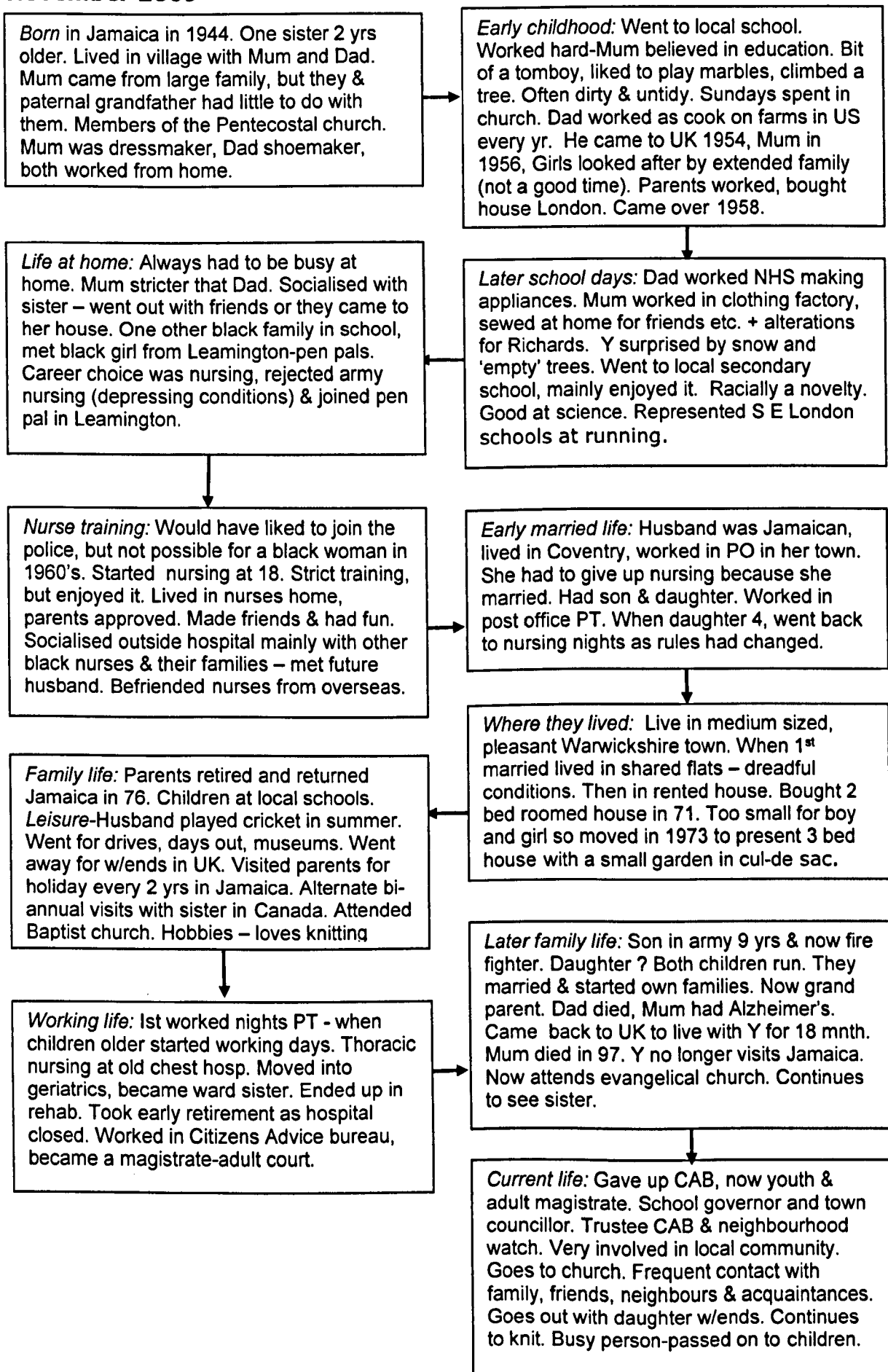
Chronology 7:3:6. Sheila – aged 70, interviewed April & May 2008



Chronology 7:3:7. Donald – aged 68, interviewed July and August, 2009



Chronology 7:3:8. Yvette – aged 65, interviewed September and November 2009



SECTION TWO

TIME USE DIARIES

7:4 Completing the diaries

7:5 Presentation of time use data

7:4 Completing the diaries

Participants were asked to complete two, non consecutive diary days between the first and second narrative interviews. They were advised to choose one of these days to represent a typical busy day and the other to represent a typical quieter day. This was a departure from the guidelines provided by the European Time Use Survey which suggested one day during the week and the other at the weekend (Eurostat, 2001), but, based on the findings of Horgas *et al.* (1998) who found only marginal differences between weekdays and Sundays for the older age group, it was thought that it was unnecessary to place these restrictions. Diaries were completed by the participants on every day of the week except Sunday. Two of the men completed one of their two diary days whilst on holiday, Donald in Scotland and Fred in Crete. All participants considered themselves to be healthy at the time they completed the diaries. However some participants did have various long standing, but controlled conditions such as arthritis (Amy), cardiac disease (Desmond) and asthma (Fred). The findings have been presented with the participants' engagement in a variety of occupations being compared with the British Time Use Survey data collected in 2005. Findings include the occupations where engagement is greater than the national average, less than the national average, where engagement was low and occupations based on social contact.

7:5 Time use findings

Figure 7:5:1. Occupations where time spent was greater than national average

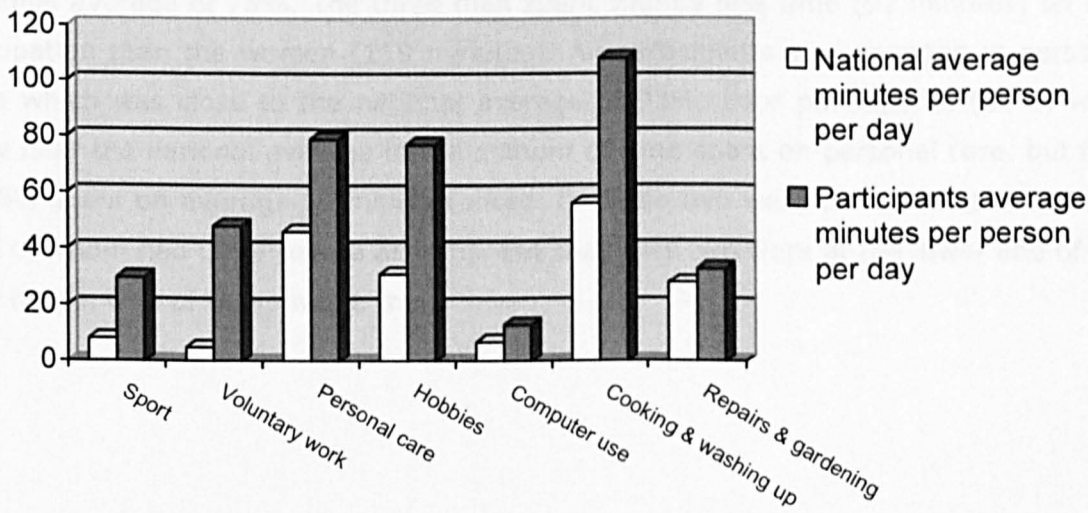
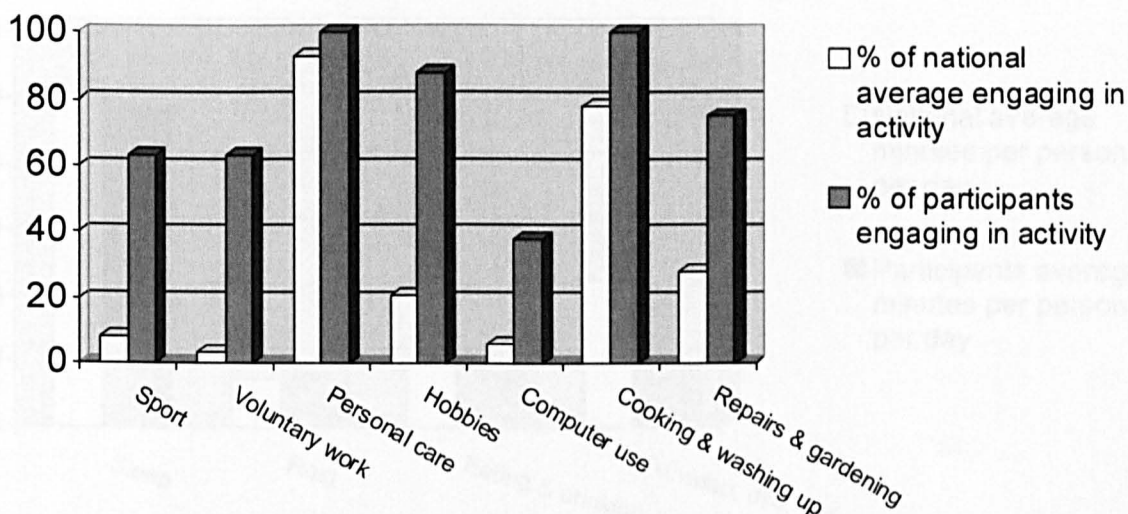


Figure 7:5:2. Percentage of people engaging in these occupation



As can be seen from Figures 7:5:1 and 7:5:2 several occupations were engaged in by more people for greater periods of time than the national average. Of note, the discrepancies are greatest for sport and outdoor activities, voluntary work, hobbies, computer use and repairs and gardening. Only the three youngest participants, Yvette, Donald and Sheila (37%), used a computer, but this was higher than the national average (21%). On average more time was spent using a computer (13 minutes) than was spent nationally (6 minutes). Six participants (75%) engaged in repairs and gardening, however tables 7:1 and 7:2 show that three, Donald, Fred and Amy only engaged for five minutes, while the other three, Alice, Maggie and Sheila spent considerably longer, on average 72 minutes.

All of the participants engaged in cooking and washing up, which was higher than the national average of 78%. The three men spent slightly less time (92 minutes) on this occupation than the women (119 minutes). All participants also engaged in personal care which was close to the national average of 93%. Four participants (50%) were very near the national average in the amount of time spent on personal care, but four (50%) spent on average 59 minutes more. Of these two were the oldest participants, one of whom had quite severe arthritis, but the other two were at the lower end of the age range. One of these was a man.

Figure 7:5:3. Occupations where time spent was less than national average

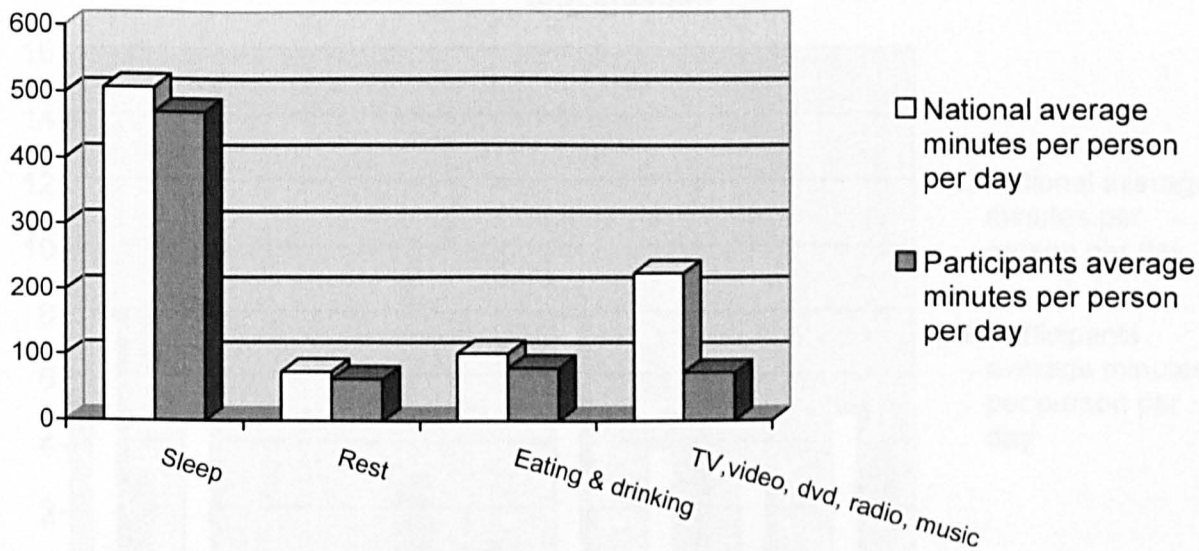
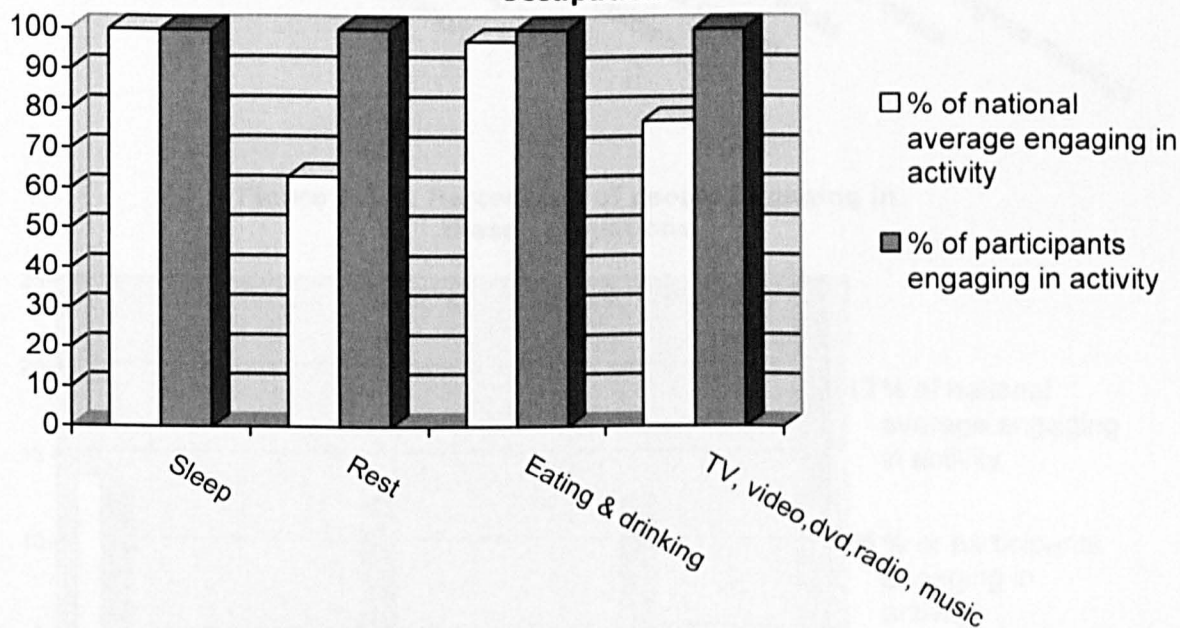


Figure 7:5:4. Percentage of people engaging in these occupation



Figures 7:5:3 and 7:5:4 show the occupations on which participants spent less time than the national average. These were what might be termed either necessary or passive occupations and the only occupation where difference was noticeable was watching television, video or dvd, listening to the radio or to music.

Figures 7:5:5 and 7:5:6 show occupations where engagement was low.

Figure 7:5:5. Occupations with limited or no participant engagement

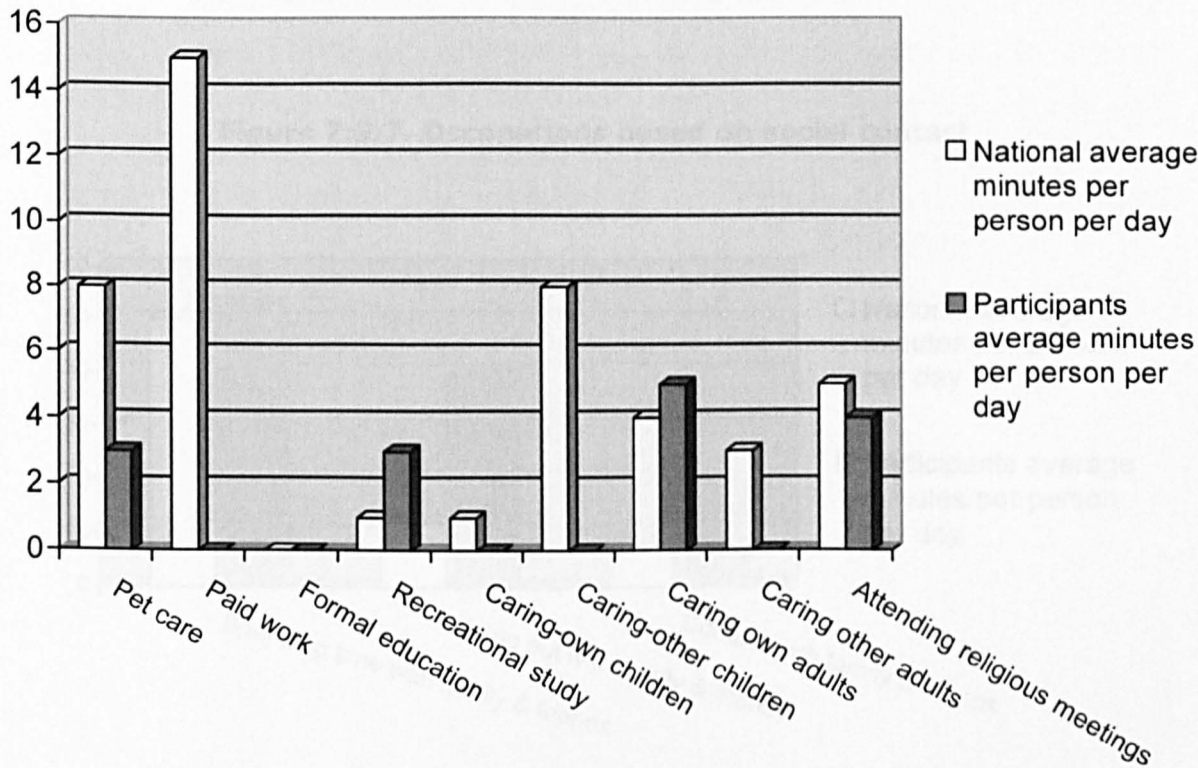
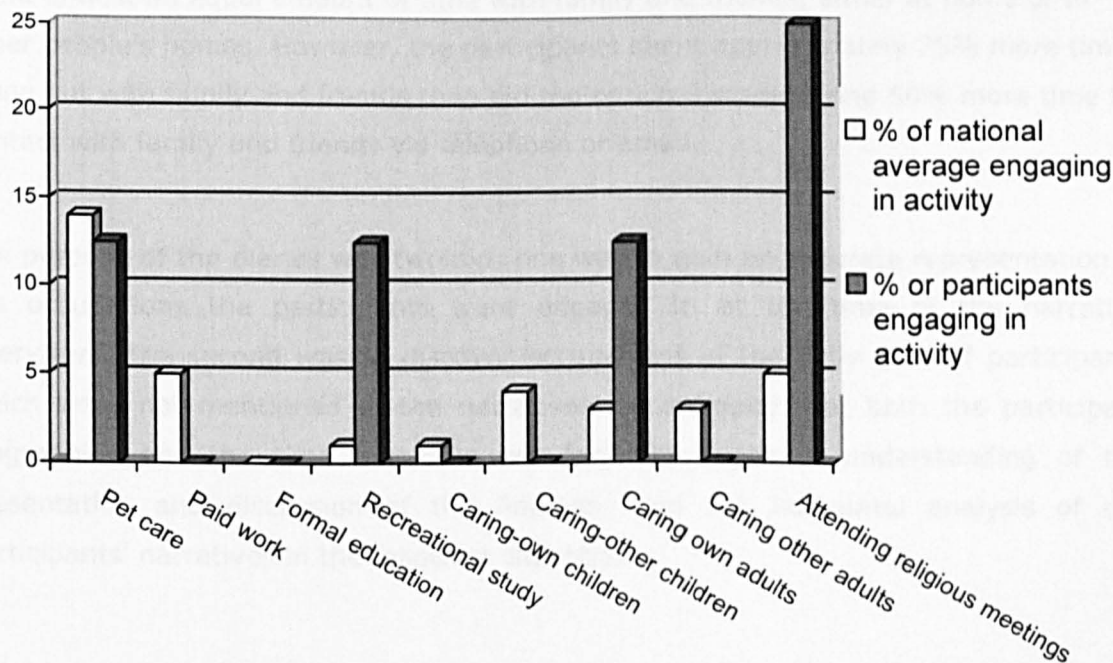


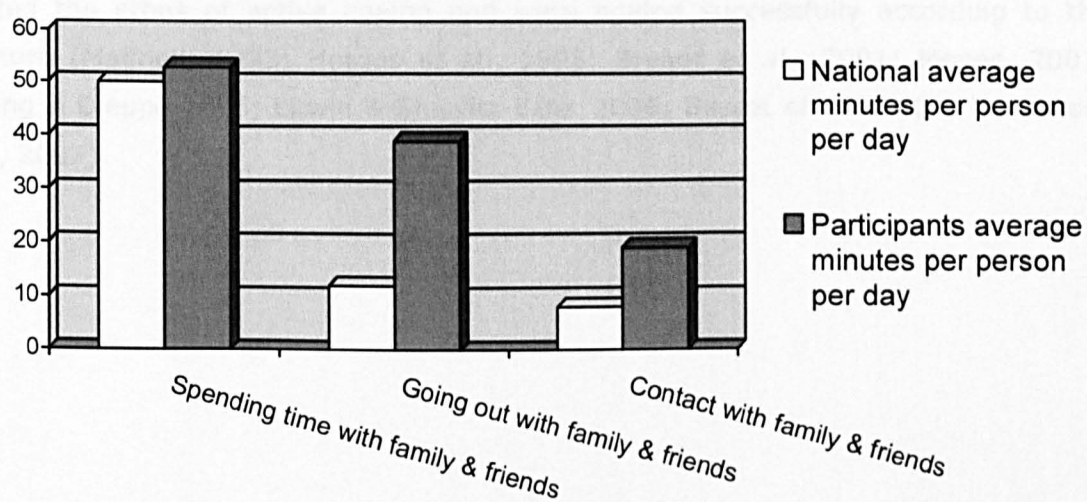
Figure 7:5:6. Percentage of people engaging in these occupations



The greatest discrepancies in low engagement occupations shown in figures 7:5:5 and 7:5:6 were in paid work and caring for children or 'other' adults. While participation was low in the national survey, ranging from one to five percent, none of the

participants engaged in any of these occupations. On the other hand the percentage of participants engaging in recreational study (12.5%) and attending religious meetings (25%) was higher than the national average of 1% and 5% respectively.

Figure 7:5:7. Occupations based on social contact



Finally, figure 7:5:7 shows three occupations based on social contact. Both groups spent almost an equal amount of time with family and friends, either at home or in other people’s homes. However, the participants spent approximately 75% more time going out with family and friends than did the national average and 50% more time in contact with family and friends via telephone or email.

The purpose of the diaries was twofold; one was to gain an accurate representation of the occupations the participants were engaged in at the time of the narrative interviews. The second was to discover occupations in the daily lives of participants which were not mentioned in the narratives. It is hoped that both the participant biographies and the time use data will facilitate depth of understanding of the presentation and discussion of the findings from the horizontal analysis of the participants’ narratives in the following chapters.

7:6 Summary

Section one of this chapter has presented short biographies of all the participants arising from the vertical analysis of the phase two data. The chronologies included

significant life events, contextual influences, relationships and occupations from birth to the present time. These life chronologies underpin the analysis of the narratives in the following chapters. Section two of this chapter has presented data collected from the time use diaries which were completed between the first and second narrative interviews. The data indicates that a greater percentage of the participants engaged in active occupations over longer periods of time than the national average for their age group. Conversely, they engaged for shorter periods of time in necessary or passive occupations. This suggests that on the whole the participants could be said to have adopted the ethos of active ageing and were ageing successfully according to the literature (Mannell, 1993; Horgas *et al.*, 1998; Bryant *et al.*, 2001; Menec, 2003; Bowling & Dieppe 2005; Litwin & Shiovitz-Ezra. 2006; Basset *et al.*, 2007; Reichstadt *et al.*, 2007).

CHAPTER 8

Migrating through time

I have lived long enough to have witnessed great changes in being old as far as women are concerned – smaller ones for men, but for them less was needed.

Diana Athill, 2008:15

8:1 Introduction

Older people are living in a culture that is very different from the one they experienced as children. The cultural context has changed considerably over their lifetimes in terms of material opportunities, liberation of relationships and increasing freedom of choice (Westerhof, 2010). It is therefore relevant to consider the early lives of the participants, the historical and personal events and contextual issues that have constructed their developing identities in order to understand how this might have influenced a sense of self in later life. This chapter will present findings drawn from the participants' narratives and consider how societal structures and events have interacted with the individual participants in shaping their lives and their developing sense of self.

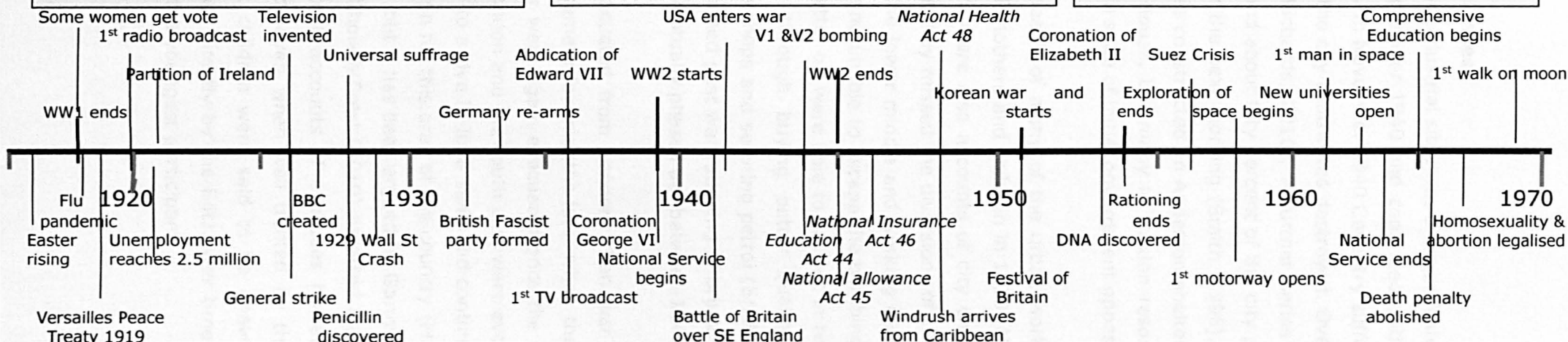
The contextual influences on the developing sense of self will be explored with reference to the social and historical context outlined at the beginning of each of the first three sections on war time influences, childhood opportunities and attainment in later life and family, gender and cultural influences. This is intended to provide a brief outline of the socio-historical events and societal norms which were likely to have had some impact on the lives of the participants. A socio-historical timeline is also provided (Figure 8:1:1) to outline the political, technological and societal events of the decades between 1910 and 1970 as these years were seen to be the most formative in terms of developing identity. Findings will be discussed with reference to social and occupational science theories outlined in previous chapters. The chapter will conclude by presenting the participants' current contributions to society, which will be examined in light of societal and personal influences in early life.

Figure 8:1:1 Timeline 1910 – 1970

1915-1920 WW1 & its aftermath Fight for Irish home rule. Allotments, first provided by the Victorians for the poor to grow their own food following land enclosure earlier in 19th Century, became very important during the war due to acute food shortages. The harsh terms of Treaty of Versailles contributed to unrest in Germany. Britain repays huge war debt to USA & suffers period of severe financial retraction. Looses status as a manufacturing power leading to rising unemployment, mainly in S. Wales & northern Britain. The flu epidemic first affected soldiers on the Western Front & arrived in the UK in May 1918. During the next few months it killed 228,000 in Britain. WI first started for rural housewives in 1915.

1930's The great depression. Unemployment affected 25% of working population by 1933. Benefit cuts, means test, long term unemployment, hunger marches resulted. Britain came off the gold standard, goods made cheaper. For those in work & the more affluent benefits were apparent. 3 million council & private new homes built, better leisure such as dances, cinemas, swimming pools and football became available. Diet & health generally better than previous generations. Family sizes fell leaving more money for luxuries such as vacuum cleaners, washing machines, radios & TV's available for the affluent. Car ownership increased. Holidays with pay & decreased working hrs introduced. Hitler re-arms Germany -appeasement/peace in our time 1938/WW2 begins 1939. Children evacuated from major cities. Phoney war.

1950's Aftermath Women encouraged to leave the workplace & stay at home. Coronation televised and by end of decade 2/3 people had TV. Gradual return of luxury goods to shops - fridges & washing machines. Only 10% of people had a phone. Food shopping done daily from several small specialist shops. Only seasonal food available. Most leisure time spent at home, women knitting & sewing, men gardening. Children played mostly outside & many attended Sunday school. Youth clubs popular with teenagers. Car ownerships doubled during decade. Immigration from the Caribbean & then south Asia continues. Health improved, children inoculated against polio and TB. Low unemployment, rates for older workers higher. Many houses built, by end of '50's 10+ million in new homes.



1920's Acute housing shortage led to large public housing programme. Return of production to private ownership. Large rise in national debt. Increase in unemployment - growth of unions, increasing unrest & general strike and a divided class society with northern Britain worst affected. Public health in these areas poor. Decline in rural population & rural poverty continues as farming depression returns. Increase in middle class aspirations in more affluent south. Authority of C of E begins to decline. Women enjoyed greater freedom. Mass production of cars began with 1,000,000 cars in private ownership by 1930. Decline of the music hall & rise of cinema boosted by introduction of the 'talkies' in 1928. Townswomen's guild formed to promote good citizenship. WI gains popularity.

1940's Conscription introduced for all men between 18 & 41, later 51, unless in reserved occupation & single women between 18 & 30. Rationing starts 1940. Fall of France May 40 & England prepares for invasion-Home Guard formed. Production of more planes/guns/etc. increased. Many women work in industry. Blitz of UK cities in 40 & 41. Children excited by war. Tide begins to turn in favour of Allies in 43, Allied landings 44 lead to victory against Germany & Japan by August 45. Labour government after war created social change despite continuing severe shortages. Introduction of Welfare State. London hosts the Olympic Games 48. Britain has the largest empire in the world. India gains independence 1947. Immigration from the Caribbean begins with the arrival of the Windrush to help rebuild Britain.

1960's A decade of optimism & energy. Supermarkets open, mostly in town centres. Inner city areas cleared for new housing, mostly tower blocks built. Most homes had TV by end of decade. More money available to spend on holidays and people started to go abroad, often on package holidays. Car ownership increased and population more mobile. Increase of leisure facilities by employers & local authorities. Children continue to play largely outside. More leisure opportunities for teenagers-youth club popularity declines. Fast pace of social change for the young as deference to authority eroded. Advances in computer development but not used in homes. Most countries in the Empire independent by 1964. Unemployment low at start of decade but was increasing by end.

8:2 War time experiences

The bombing of cities and industrial sites was a major feature of World War II. The Blitz on London began in September 1940 and continued until the following May. Midland cities were also bombed. In November 1940 Coventry suffered ten hours of unrelenting bombing when much of the city centre was destroyed. Over 550 were killed on the one night (Marwick, 1976; Richards, 2010). A further series of raids took place in April 1941 and August 1942 and about fifty percent of the city population left the city centre each night, but returned the next morning (Smith, 1996). Air raid shelters were much in demand. Some families constructed an Anderson shelter in the garden, others had a Morrison shelter in the house, but many in London resorted to using the Tube on a regular basis as shelter in spite of initial government opposition (Marwick, 1976).

The poverty and poor health of many of the urban working classes became evident during the evacuation of mothers and children in 1939 (Marwick, 1976; Smith, 1996). On the other hand there were also accounts of city children finding rural conditions very primitive and where they missed the diversions of city living (Garmston, 2010). It was generally felt that the lower middle and working classes suffered far more in the war, both in terms of being unable to escape the bombing or supplement their rations (Richards, 2010). The better off were able to eat out in restaurants, make the most of their clothing coupons through buying better quality clothing, and were given preferential treatment in shops and securing petrol (Smith, 1996). Rationing continued well after the war and indeed post war rationing of bread, fats and meat became more severe. Rationing was eventually phased out between 1949 and 1994 (Lane, 1971).

Many children were evacuated from London when war was declared in 1939, but subsequently returned home a few months later when the expected bombing failed to occur. A smaller number were again evacuated once the London blitz began (Marwick 1976). Children from London and the south east were evacuated for a third time when the flying bombs started to arrive in June 1944 and continued until March 1945 causing great fear and devastation for this area of the country (Marwick, 1976). Conditions for evacuees varied greatly, but it has been argued by Garmston (2010) that it was largely a positive experience, although Prest (2010) asserted that a minority were unwelcome and badly treated. Recent accounts of evacuees however, suggest that many felt abandoned and unloved, even when well treated by the host family (Prest, 2010; Garmston, 2010). Most children were said to be unaware of the dangers of war, particularly if not affected directly by the Blitz. War time experiences were influential upon the lives of all but the youngest participant.

8:2:1 Experiences from World War One

The three eldest also experienced the effects of the World War One, two of whom believed it had increased poverty for their families as their fathers' health deteriorated through the effects of being gassed. Maggie said:

"you see my father he couldn't work very much and they were just waiting for me to go and work..." (M2:5)

Her mother found it difficult to cope with a family and sick husband and Maggie as *the eldest...had all Mum's worries* (M1:1). The work opportunities for Desmond's father were also affected by the depression in the 1930s:

He was a painter and decorator and of course during the depression he was out of work for some considerable years. About the time I was born things were pretty tough for them (D1:2).

More positively, Amy was named after her father's ship on which he served in the First World War.

All three experienced the effect of the First World War on their developing identities. Whether from urban or rural backgrounds there was considerable poverty during their childhood years. Yass (1975) has suggested that poverty at this time afforded very little opportunity for choice as external circumstances dictated direction in life. This was evident for the two women, Maggie and Amy. Both were restricted by lack of education, family obligation and expectation to earn money. Additionally, Law *et al.* (1998) argued that the physical environment in which an occupation occurs shapes that occupation. For Maggie, her small industrial community of stocking manufactories offered the only employment available and she was further restricted by gender to one of four jobs. The possession of a bike enabled Amy to move slightly further afield and obtain employment in the nearby town. On the other hand, Desmond managed to escape the effects of early poverty. In spite of the economic problems of the 1930s depression, which according to Morgan (1984) were less severe in the south east, he eventually attended university. His mother may have been influential in this as she appears to have adopted a strong, non traditional matriarchal role in the family to cope with their reduced socioeconomic status in contrast to Maggie's mother who remained in the more traditional subordinate female role, described as the norm for this time by Miller (1991) and Petersen (2000).

8:2:2 Experiences from World War Two

World War Two had a more direct effect on the participants; perhaps most significant were the bombing raids. Three, as children, inhabited urban areas subject to bombing. Alice lived on the outskirts of a small industrial city and she recalls this time.

...we did live under the stairs during the war...my grandma, my Dad's mum and his sister would come out at night to us because they lived...in the centre of..... (A1: 6)

In contrast Sheila, aged three or four when the bombing of her city occurred made no mention of it, while Fred in London had several memories associated with the bombing, for example, on starting school his *"first lesson was in an air raid shelter"* (F1:4).

However the two boys who lived in the country also referred to the Bombing, Donald recalled:

...the bombing of Coventry. I can remember my Dad taking me up to the bedroom window and you could see Coventry burning (Don1:1).

This story may be apocryphal however, as he would have been less than two at the time. Desmond, who lived in Kent, referred to the V1 and V2 rockets towards the end of the war, but with little apparent fear.

when...the ack-ack started up we were hauled out of school, quite happily gazing up to see if they hit this bomber...with the Latin master behind us cuffing our ears to get down in the shelter 50 yards away. And the shrapnel coming down all round (D1:4).

Age also determined their war experiences. The oldest was married with a young child and a husband away fighting while the youngest had no memory of the war. War time memories of the male participants focussed on troop movements, retrieving war trophies and aerial combat. Donald recalls not only the bombing of Coventry, but,

...going across the fields...and finding a tail plane and we dragged it back.

And in preparation for the D day landings

Hearing the wagons at night coming down by the church and through the village to the dock (Don1:1)

Fred also recalls watching the dog fights in the air above London, making model aircraft from kits and having mock airplane fights with his father at weekends.

"We used to... do cut outs, aircraft...put them together....and I said 'lets set fire to them and pretend they're crashing on fire' and died like aircraft really were doing (F1:6)

8:2:3 Women's memories

The women's memories had a different focus. For Alice the majority of her war time memories, in spite of the heavy bombing of her city, focused more on how war affected

her daily life, for example *"going into town to collect the ration book"* (A1:2), or picking rose hips rich in vitamin C:

Rosehips were wanted in the war to make rosehip syrup...we collected 4lbs...it was a heck of a lot of rosehips...that was our war work (A1:3).

A happy memory was her school receiving boxes of sweets from America:

each child had a sweet to begin with...and any left over were reserved for good work (A1:1).

Her father, employed in an essential industry, was at home and they kept rabbits for extra food, and an allotment, *so we always had fresh food* (A1:3). Her mother she recalled *was a very good cook...she conjured things out of thin air*. Her father read the Picture Post and after he had read it *from cover to cover* Alice's job *was to trot down the road to pass it on to the airmen* (A1:4) in the air base at the top of their road.

Amy's war time memories centred on the public school where she worked as a dormitory maid. She recalls this as a happy time, protected from war time privations by the extra rations the school received.

R..... School came under catering and we had jolly good food there...lunch time, we had a staff room, there was a big table and the butler...I can see him now...carving the joint. Nobody else had joints, they all had little bits of meat... so we lived well didn't we? (A1:2).

Maggie, as a young married woman with a daughter, was grateful for the skills she had acquired earlier in life.

I were lucky I could sew. This younger sister, she give me her old dresses for half coupons and I used to unpick them and make clothes...it was the same with the knitting... (M1:9).

She also managed to grow much of their own food during the war whereas this had previously been her husband's role. On the other hand Sheila's only experience of war as a very young child was of a discontented and resentful mother.

My mother was very unhappy, because she had to give up practising dentistry during the war and maternity was not something she was desperately fond of, she just had to do it while my father was away (S1:1).

8:2:4 The effects of social class

Class differences may well have influenced participants' memories. Smith (1996) argued that the middle and upper classes were often protected from the worst effects of bombing and rationing during the war and the narratives supports this view. Maggie and Alice, from working class backgrounds reflected the struggle of daily life at this

time. Whereas Amy lived and worked as a domestic servant in a public school, and, for her, the war was a time of unaccustomed plenty. However all three were aware of the daily struggle of feeding and clothing a family. Growing food, cooking for the family, making clothes and toys for the children and grandchildren has remained important throughout their lives. However Sheila, from a middle class background appeared to be unaffected by wartime difficulties. Fred's middle class father, who worked for the Air Ministry in London during the war, ensured that his family lived in an area not subjected to bombing.

8:2:5 The effects of gender

Gender differences were apparent in the way the participants experienced the war. Richards (2010) asserted that many children were excited by the drama of war, but this study suggests that this was true only for the male participants. It has been argued strongly by feminists such as Gilligan (1982), Miller (1991) and Peterson (2000) that men and women experience and react to the world in different ways and this process begins in early childhood, a view which is supported by this study. In contrast to the men, the women did not focus on excitement and drama but on the way the war had affected daily life. Even Alice, who had lived in the city which suffered some of the worst bombing in the country according to Marwick (1976) and Richards (2010), makes only a passing reference to it. Their memories of daily life strongly evidence the connectedness and focus on relationships that Gilligan (1982) and Miller (1991) argued reflects girl's identity development. Conversely, Desmond was the only man who focused equally on daily life and the drama of war, possibly because being evacuated had a strong affect on his daily life.

8:2:6 The effects of being evacuated

Desmond was the only child to be evacuated during World War Two, from central London to the rural Home Counties at the age of nine, which had a profound effect upon his developing identity. Initially it was not a positive experience as the son of the host family *decided that evacuees were almost slaves if you like* (D1:1) and he appeared to be one of the minority who, Prest (2010) asserted, were not well treated. Desmond moved from this family at the age of 11 to become a boarder with his new school in Kent. He remained an evacuee throughout the war years, returning home at the age of 15. The abrupt separation from his parents and home environment appeared to inhibit Desmond's emotional development.

I suppose one tended to be a bit of a loner in a way 'cos you were on your own away from the family connections, so I suppose one had to grow up a bit more quickly (D1:1).

He had quite a lot of school mates but nothing that really bonded (D1:2) and overall conveyed a rather bleak sense of isolation. Reflecting on the effects of his evacuation experience on his innate qualities, he saw himself now as

Reticent, innate I think in some way...restrains me from being over sociable...I suppose because we were separated in the early years from our family (D3:12) and a bit self reliant (D1:1/2).

Desmond's older sister was evacuated with him but was billeted with a different family which increased his sense of isolation. During this period he was in Erikson's (1963) fourth psychosocial development stage of industry versus inferiority. According to Dunkel and Sefcek (2009) this suggests that if a child is inhibited from discovering his own talents in his own time he is more likely to have low motivation and low self esteem later in life. Both these characteristics were evident in Desmond's narrative. As he grew older he continued to experienced difficulties with close relationships, particularly with girls and "*discretely disappeared somewhere*" (D3:9) whenever meetings with a local girls' school were arranged. At university he appeared to have sought the safety of friendships with older students returning from war service and did not marry until he was 34. When reflecting on his life with his wife, with whom he had a very close relationship, he believed he:

...sort of subdued...adjusted my way of life to her interests...but they were quite happily acceptable to me...I hadn't thought about what could interest me... (D3:11).

From an occupational science perspective Desmond experienced occupational deprivation as described by Wilcock (1998b) and Whiteford (2000) with reduced family interaction, school and play opportunities which had a significant effect on his emotional, social and skills development. The latter also may have been responsible for his rather limited range of interests in later life.

8:3 Childhood opportunities and attainment in later life

8:3:1 Education

By the 1920s free education was available for all children up to the age of 14 years at elementary schools. Approximately one third of places at grammar school were free so it was theoretically possible for some children from working class families to access

academic and professional careers, however there was no regulated system of selection and this could frequently be arbitrary (www.parliament.uk, 2010a; Age UK, 2010). The conditions at many elementary schools were often poor; class size could be over 50 children, although the size of most classes had declined to below this by the end of the 1930s (Yass, 1975). With increasing pressure for places, some new schools were built in the 1920s and 1930s.

The *Education Act of 1944* introduced a tripartite system of schooling with grammar schools, secondary modern and technical schools (www.parliament.uk, 2010b). Entry was at 11 and followed an examination, the 11 plus; school leaving age was raised to 15 (Simonton, 2011) and not long after to 16 (Jones, 2003). The intention was to provide equal opportunity for children from all backgrounds with the brief to consider the whole person including academic ability, spiritual, physical and vocational needs, rather than just conveying academic information. *Grammar schools* took the top 25% and provided a largely academic education for pupils up to the age of 19 and were the recognised route to university. Recent evidence from Scherger and Savage (2010) indicates that until this time many had regarded grammar schools as largely middle class institutions.

Secondary Modern Schools offered a four year course leading to the School Leaving Certificate. The course offered both academic and practical subjects and critics of this system believed that girls lacked equality with boys as the greatest focus for them was on domestic subjects and reinforcing their role as homemakers (Pearce, 1996). By contrast the grammar schools began to widen women's horizons and by 1960 almost a third of undergraduates were women (Holdsworth, 1988; Pearce, 1996). When pupils left school they normally entered the world of work. There were concerns about the general effects of selective education under this system and comprehensive education was widely introduced in the 1960's where children of all abilities were educated in one comprehensive school (www.parliament.uk, 2010b).

There was a limited availability of *university education* in England at the in the first half of the 20th century. The three ancient universities, Oxford, Cambridge and Durham together with six redbrick universities built early in the 19th century remained the only provision until the 1960's when demand rapidly increased as a result of the 1944 education act (McClintock, 2009). In the first half of 20th century universities were largely attended by young adults from public or private schools although a fairly small number of students came from the state aided grammar schools. After the Second World War provision was made by the government for men and women, whose further

education or training had been interrupted by their war service, to attend universities (Mason, 1989).

The two oldest women were educated prior to the 1944 Education Act, attending elementary schools. Maggie did not enjoy school until she was transferred to a newly built urban school at the age of 12 in 1929.

...it were the most modern school in England. It was brilliant and the teachers...it were lovely and...I did enjoy it (M1:1).

She was sad to leave, but in spite of some academic success she did not attain a grammar school place:

Well in our school the headmaster come in and he just stood there and...he said, (pointing with her finger) 'you, you, you,'...there was a girl, oh she was spoiled...I can still hear those words 'Oh Dorothy you may as well go. If I don't send you your father will pay for you'...what a waste! (M1:2).

She sees herself today as someone who has considerable practical skills and defends these against her daughter's academic successes.

Amy attended a rural elementary school where conditions were basic. There were two classrooms with large, inefficient coal fires, separated by "*great big...red, thick heavy curtains*" (A1:13) for the juniors and seniors. Subjects appear to have been fairly restricted. She was taught "*the three R's...religious instruction every morning*" (A1:1) and as she got older sewing and embroidery. No mention was made of possible grammar school selection.

Desmond, the oldest male participant had a rather different experience. He came from an urban lower middle class environment and in spite of being evacuated was selected for grammar school at the age of 11, which he attended as a boarder. In spite of the war his school offered far more academic and sporting opportunities than either Maggie or Amy received. He described himself as:

Reasonably successful.....I became a prefect...won prizes...I enjoyed school... boys only (D1:4).

However he blamed the war for lack of curriculum choice in the 6th form which he believed reduced his achievement at the university he attended just after the war. Overall he conveyed a slight sense of failure that he has not achieved as well in life as expected, possibly a feeling enhanced by the effects of being evacuated.

The two oldest participants experienced the extremes of the educational conditions described by Yass (1997) and Age UK (2010) during the 1920s and 1930's. Holdworth's (1988) research for a documentary television series about the lives of

women in the twentieth century, suggested that girls at this time were likely to be restricted by family attitudes from taking education seriously and were expected to prioritise family needs. The narratives of the oldest two women support this premise. Maggie was required to leave school as soon as possible to support her family and Amy was expected to help her mother with housework as well as attend school, unlike her brothers. On the other hand Desmond was selected for grammar school possibly because, in spite of his parents' financial difficulties, he came from a middle class family and possibly because there were different familial expectations because he was a boy. Goldthorpe and Jackson (2007) suggested that it was not until the mid twentieth century that inter-generational social mobility showed a marked upward trend. These findings support this view as both women were denied the opportunity to stay at school beyond the age of fourteen years. The consequent lack of education limited their social mobility and both remaining working class.

The younger five participants Alice, Fred, Sheila, Donald and Yvette were all of an age to be affected by the 1944 Education Act that provided equal opportunities in terms of access to education for all children regardless of background. Of these, Alice and Sheila went to grammar schools, Donald and Yvette to secondary modern schools and Fred to public school.

Alice was in the first wave of children to attend one of the new grammar schools in 1946. However she was demotivated by the academic pressure,

I came sixth in the class that year (1st year) with 80% and on my school report it was 'A..... can do better'. So I just resigned myself & stopped doing anything (A1:3).

and the additional competition she experienced at grammar school after doing well at primary school.

...it came as a bit of a blow to find you're down with everyone else & perhaps even a bit below (A13:9).

Conversely Sheila, coming from a middle class background went to grammar school three years later and had a very positive experience.

I loved school, that was the place where I was happy, rather than at home where I was not....I was all round clever and there was a feeling of belonging (S1:1)

She was successful in both 'O' and 'A' level examinations and gained a place at Oxford University to read mathematics. Offered a choice of subjects at the age of 14 she demonstrated a desire to take on challenges. She

had to choose between art, music and domestic science... domestic science was not an option...I did a lot of music so I chose...art...because I felt that I would learn...broaden myself... (S2:7).

Avoiding music enabled Sheila to keep science options open which allowed her to study mathematics at 'A' level. She believed if she had followed the music option she *would have been on the side where girls were expected to be...it certainly wouldn't have involved Oxbridge or anything like that. I would have had a completely different sort of life in every possible way... Its just so much more open, so many more opportunities (S2:7).*

Donald and Yvette attended secondary modern schools. Donald grew up in a fairly remote rural area and his opinion of education appears to have been formed on his first day at primary school. He vividly recalls being uncooperative on his first day at school and his teacher, whom he described as a "witch":

dragged me out and she caned me...I wasn't very impressed with school at all. I hated it from that day on.

If he:

could get a day off school that was it! I'd achieved the target (Don1:2).

He then attended a semi rural secondary modern school where he excelled only at sport and carpentry and completely lacked interest in academic learning. He left as soon as he could at the age of 15 and his father apprenticed him to a local firm of carpenters and joiners.

Yvette transferred from a Jamaican school in 1957 to a secondary modern school in London aged 13. In Jamaica she attended a local church school where discipline was strict and was reinforced by her parents who valued education as a way of getting on in life. Because education in Jamaica was based largely on the British education system (Sewell, 1998), she was proud that her new London school assessed her educational level as being on a par with that of Britain, *...they were quite impressed...we came quite high up (Y2:3)* in terms of marks. She did well enough in a sufficient number of academic subjects to enter nursing training and became a state registered nurse. She was motivated in some subjects: *mostly because of the teacher (Y1:5)* and like Donald, she illustrated the importance of the teacher on enjoyment of a subject and subsequent learning.

Finally, Fred was the only child of an upper middle class family where private education would have been viewed as the norm in the 1940's (Smith, 1996). He was taken out of the State system at the age of eight, first attending a preparatory school in 1945 as a

weekly boarder, becoming a full boarder at a public school in 1950. He suffered many childhood illnesses in his early childhood and as a result *hadn't mixed with children very much...I had been rather over protected* (F1:5) and sometimes found school difficult. He did not *find making friends easy* (F1:5) , but going away to school at the age of eight and a half as a weekly boarder

wasn't too bad really...I wouldn't say it was as great a shock as starting school when I was five... (F1:8).

At public school he did well in maths and the sciences gaining a deferred entry place at Cambridge to read natural sciences. He completed his obligatory national service prior to university which he believed had a deleterious effect upon his career.

I do believe, I might have got a better degree if I had gone straight from school to university....a two year break didn't do me a great deal of good (F1:12).

A strong peripheral interest that he developed at school grew out of his association with a young astronomer Patrick Moore who lived near the school, and at one point astronomy was seen as a potential career.

I went round and used his telescope...I did a lot of observing... (F1:14).

The school environment, quality of teaching and societal and family values all appear to have influenced the experience of education for these five participants. Law *et al.* (1998) have argued the importance of these environmental factors on occupation while Ridley (2003) has argued that the genetic intellectual ability of an individual will respond to these environmental cues. Sheila demonstrates these premises well. Her innate intellectual qualities had been shaped and nurtured in the grammar school social environment, but her independence of mind that allowed her to make a choice against advice appears to have developed as a consequence of her feelings of alienation from the family environment which she describes as *not comfortable, no closeness, physical or even emotional* (S1:1). Or, according to social science theory, this appears to have facilitated her sense of agency within societal structures to achieve her desired outcome (Sewell, 1992; Giddens, 2009). However she believed she had broken free from societal constraints by managing to take what she perceived as a masculine career route and much of her positive sense of self stems from this. School was the first environment where she felt a sense of belonging that contributed towards a positive sense of self. Alice on the other hand found the grammar school environment somewhat threatening; the academic environment imbued with middle class values felt quite alien to her and she experienced reduced agency as described by Giddens (2009). From an occupational science perspective it appears that Alice experienced frustration in an academic situation she didn't understand, a sense of powerlessness over her experiences at school and isolation from the mores and values of her life until that

point. All such feelings are thought to be characteristics of occupational alienation described by Wilcock (1998a), which can lead, according to Hagedorn (2001) to occupations becoming meaningless and unfulfilling. This was also reflected in Alice's behaviour as she ceased to make an effort to achieve and left school as soon as she was able.

All the participants except for the oldest two women went on to some kind of further or higher education, although not necessarily on leaving school. Three went on to university in the 1940s and 1950s, two from grammar schools and one from public school. McClintock (2009) has argued that the availability of university education was still very limited pre 1960 and it was largely reserved for those who had attended private or public schools. This was not the case in this study, but possibly this was influenced by a slight bias in the selection process towards those with higher education. Pearce (1996) asserted that people who attended secondary modern schools normally entered the world of work on leaving school, but this was not the case for the two participants who attended secondary modern schools. Neither of them did so; one commenced a nursing diploma and the other an apprenticeship.

8:3:2 Work

Erikson *et al.* (2005) asserted there is a clear and well recognised correlation between educational attainment, social class and gender, and this was evident in the findings of this study. For example, the oldest two women from working class families went into unskilled work that required no formal training. It was apparent that the education Maggie and Amy received was designed to maintain the status quo rather than foster ambition so that both appeared to accept their limited work opportunities. Although for Maggie, both from her words and tone of voice (M1:2), it was possible to discern an element of regret that she was not picked for grammar school and that her parents needed her to work. Both worked part time and took breaks from work after having children. Simonton (2011) argued that men on returning from the Second World War often felt threatened by the independence gained by women in their absence. Maggie's experience of attempting to return to work supports this view.

he wouldn't let me go..., 'they're your children, they're your responsibility', and I had 12 years off (M1:10).

Neither of these women was able to benefit from the 1970 Equal Pay Act. Maggie retired before it could take full effect and Amy's work as a domestic help was unregulated (Hastings, 2009). Two of the other women entered the female dominated professions of nursing and primary school teaching. Nursing, Yam (2004) argued, has

been a female dominated profession since it came into being in the nineteenth century, where women are were seen as being weaker and subordinate to men in the role of doctors and this was still a widely held view in the 1960s. Work done by women prior to the 1970 Equal Pay Act, Hastings (2009) suggested was seen to be deserving of lower pay than men received, which meant that female dominated professions tended to be more poorly paid than those dominated by men. Only Sheila, followed a male career pathway with commensurate earnings and overall work satisfaction.

For Sheila work was a very significant and positive aspect of her sense of self in an affirming environment where she felt she belonged. She followed one of the most successful careers of all eight participants. Following a post graduate diploma in information technology (IT) in the late 1950's she entered the IT industry, working part time after her children were born. Her husband moved his job to a different part of the country which removed her from IT to teaching maths and computer sciences at a grammar school and college of further education, later designing the first 'O' level in computing for the Oxford Exam Board. And then *feeling bored really* with teaching she:

...got a job as a computer manager in heavy engineering which was wonderful. The best fun ever! All these blokes...and I was doing the facilitating job again (S1:6).

Her attitude to working in this male environment is clearly expressed.

Working as a woman in a man's world...was wonderful. There was not resentment. I never felt any inhibitions or any feelings of not being able to progress. I didn't suffer from any of the things women talk about. I wasn't ambitious...I was just having a good time and facilitating, not directly competing with them in their work (S1:6).

Gilligan (1982) has argued that the traditional female role tends to be facilitative and non competitive, which is the role Sheila adopted. Possibly she was successful in the male environment because her role was non-threatening and gender typical.

Later she took up a job offered by the Oxford Examining Board to develop and oversee a wide variety of subjects that she found fulfilling. Following her new husband's move to the south of the country her final position was running an international educational exchange programme. It is interesting that Sheila, who followed a fairly typical female trajectory in terms of part time and full time work and who was dependent largely on where each of her husbands was working, still managed to be so successful. This may be, as Sheila believes, because her educational choices of maths and IT allowed her to enter legitimately the male working environment, but it is likely her innate ability in these subjects was also responsible.

On the other hand neither of the two women in female dominated professions appeared to experience the same commitment and satisfaction in their work as Sheila. While Yvette spoke briefly of her nursing career, describing some of her work as "*interesting*" (Y1:12) she was one of the first to take up the offer of early retirement when her hospital was closing and her work appeared to have formed a relatively minor aspect of her current identity. Alice spoke more fluently in her narrative about her work as a part time primary school teacher which clearly contributed a sense of satisfaction.

I really...like reception children 'cos I think that's the time they are most receptive...they just want to learn... they are fantastic (A13:11).

However, when her school required her to work full time she decided, slightly reluctantly, to leave *but I didn't really want to give up as early as that...* (A11:16) as caring for both her parents and parents-in-law was making too many demands on her time. It would appear that while work was satisfying and important to her, the family aspect of her identity was far stronger than that of work.

Both Fred and Desmond followed careers that required degree level qualifications and were commensurate with middle class values of the time, but neither was particularly ambitious. Fred, working in car design, demonstrated a sense of self where this aspect of his identity lacked significant value.

I never considered myself as a careerist... Everything that I did was a job. A job funded the family, or...latterly my holidays. The hierarchal thing I did not find the least bit motivating (F2:4.)

While Desmond, who eventually became a company secretary and pensions manager, found the cut and thrust of business slightly daunting, possibly because of reduced self confidence as a result of his evacuation experience. For example, as pension's manager, he believed pensions should be: "*for the benefit of the employee*", while the finance department thought the management of pensions should be: "*for the benefit of the company*" (D3:7). This conflict led to his eventual redundancy. Overall his career formed a quite significant aspect of his identity where helping others was more important to him than business profits.

The social class and education of the final male participant was very different to the other two men. Goldthorpe and Jackson (2007) argued that upward social mobility increased markedly in the middle decades of the twentieth century and Donald provides a good example of this. He demonstrated considerable upward mobility, following a career pathway based more on practical skills than academic qualifications. His apprenticeship meant long working hours and poor pay and although he felt he learned many useful skills his attitude to the way he was treated was clear.

I left the day my indentures were due to be signed, I couldn't wait to get away...you were a donkey you know, cheap labour (Don1:10).

He began work on motorway construction and after several years he "*was cajoled into taking a job as a foreman*" (Don1:3). In spite of two periods of redundancy his career progressed well and his final earnings were commensurate with those of the two men who had attended university. He reflected with pride that he:

ended up as a construction manager for one of the biggest construction companies in the land (Don1:3).

Jome *et al.* (2005) investigated different forms of male employment from gender non traditional through gender neutral to gender traditional among 166 full time employed men in New York State. Through a postal survey participants completed scales to measure societal norms regarding what is appropriate behaviour and feelings for men, a scale to measure patterns of male conflicts and a scale to measure homophobia. They found that men employed in more traditional male-dominated settings demonstrated strong masculine attitudes, and had fewer interests than those in less traditional employment settings. The narratives of the men in the current study do not fully support this view. All three worked in traditional male employment roles, however Fred has always had a wide variety of interests, while Desmond did not. Don was employed all his life in probably the most gender traditional work occupation and while he demonstrated strong masculine values, which formed a significant aspect of his identity, he also had quite varied interests.

8:4 Family, gender and cultural issues

The social norms that formed the early lives of the participants have changed dramatically in social and economic terms. For the women participants this was particularly noticeable. In the First World War women had taken on many of the jobs previously filled by men, but post war were expected to return to the home, particularly if married. The Women's Institute, founded in the United Kingdom (UK) in 1915, grew rapidly during 1920's and 30's and did much to encourage this trend by promoting women's skills as homemakers (Pearce, 1996). Women's magazines gave the same messages which were reinforced by government policy designed to ensure that women stayed at home and bred healthy babies; motherhood and employment being seen as incompatible (Simonton, 2011). Any woman who was a nurse or a civil servant automatically lost her job upon marriage. Low pay for women, with average rates being less than half the average man's pay, was a further disincentive to work, and the majority of jobs available for women continued to be in domestic service, clerical work

and the textile industries (Pearce, 1996). However by the end of the 1930's some changes were apparent with a wider range of jobs becoming open to women in commerce, banking, insurance, the civil service and local government, together with the catering and entertainment industries; all alternatives to domestic service (Yass, 1975; Seaman, 1970). Birth control advice for married women became available in 1930s giving them control over the size of their families and divorce laws were more equal. Nevertheless men were still dominant. Women remained responsible for the success of the marriage and continued to be financially dependent (Holdsworth, 1988; Pearce, 1996; Simonton, 2011).

During the Second World War women again became substitutes for men in the workforce; the marriage bar to work was removed and even working mothers were accepted as nurseries were set up in factories to look after their children (Holdsworth, 1988). The work was often boring and poorly paid and women, in some part, continued to be patronised by men as slightly inferior beings better suited to the home, and only tolerated through need in the work domains of men (Holdsworth, 1988). Women also played a much more prominent role in the fighting services than previously, but were limited to non combatant roles where they were expected to carry out clerical, supportive work to free men to fight (Yass, 1975).

Government social legislation in the post war period again encouraged women to return to the home to raise children and the marriage bar to work was reapplied in some occupations, such as nursing. Initially this was intended to free up jobs for the soldiers returning from the war. However employment shortages meant that a number of women continued to work in some industries, often part time. The peak year for marriage was 1947, although few were able to marry in white because of post war austerity (Holdsworth, 1988) and the 1950's saw a pervasive cult of domesticity reinforced by the media where to be a 'good mother' was synonymous with staying at home to look after the children. In spite of this the number of women in employment steadily rose during the 1950's and 1960's and then the 1970 Equal Pay Act and the 1975 Sex Discrimination Act significantly widened women's work opportunities (Hastings, 2009). Divorce, prior to the 1969 Divorce Reform Act, was uncommon (Chan and Halpin, 2005).

8:4:1 Family life

Goldthorpe and Jackson (2007) argued that the effect of social norms on parental behaviour in the first half of the twentieth century meant that most parents were strict with their children and obedience was expected. The effect of early parental

relationships on other relationships over the life course was evident. For some the effects were not wholly benign. Desmond experienced a rather ambivalent relationship with his mother. On the one hand he:

was the blue eyed boy of the family...expected to live up to my mother's expectations...I tended to be rather influenced by her...though having a break...made quite a difference...the continuity had gone (D3:3/4).

On the other hand she was remote:

I found it...difficult to know her properly.... I think she...loved me in a way, but...she didn't express herself at all (D1:11/12).

Sheila's parents adopted a *Victorian, children shall be seen and not heard (S1:1)* approach to parenting *no closeness, physical or...emotional (S1:1)*. She spent much of her time in her bedroom:

avoiding people, I had no social skills or empathy. I got on with my brothers and sister atrociously (S1:2).

As an adult she:

had no confidence of any sort...I find it very hard work being assertive even now, unless of course I've got a role (S1:1).

This has meant that Sheila has struggled to develop satisfying personal relationships during her life,

When I was married and the kids were small.... I built a kind of wall around my emotions, I just didn't allow any (S2:5).

and it was only in middle age that she started to achieve some success in relationships with her siblings, her adult children and her grandchildren. However, she appeared to have felt more comfortable in education *I loved school, it was the place I was happy (S: 1:1)* and work relationships where she has always felt a strong sense of belonging. For her it appeared that belonging reflected an ideal sense of self, the self she aspired to, which eventually allowed her to leave her first very unhappy marriage.

Don, on the other hand, reported *a very happy childhood (Don1:5)*, but was never close to his brothers. His father appears to have been the influential parent, the disciplinarian of the family,

You knew when his hand went to his belt...you were going to get it. You could run away, but you'd get it when you got back (Don1:5).

Donald treated his own two sons in a similar way and his existing relationship with them appeared fairly distant, possibly exacerbated by his divorce from their mother.

The other five participants experienced emotionally close relationships with their family. For example, Amy, growing up in the 1920s and 1930s, felt *very close* to her parents and to the rest of her large extended family,

I loved my Mum and Dad... We had lots of fun and happy times, but we had to behave... (A210/11)

In later life, with only one son and two grandsons, Amy appears to have sought the kind of wide emotional support she had in childhood from her extensive network of friends, which she regarded as *very important to me* (A2:5).

Although Yvette had a *very close family...*, *but my Mum was very strict* (Y1:1), her middle childhood years were disrupted as first her father and then her mother emigrated to the UK. Following the Second World War Britain had experienced labour shortages in areas such as transport and the newly formed National Health Service and immigration to the UK from Jamaica was actively encouraged (Sewell, 1998; Kramer, 2007). Conditions for people living in Jamaica were difficult at this time and migration became a way to seek a better life. By 1958, when Yvette and her sister came to the UK, 125,000 men and women had arrived from the West Indies, often leaving both the older generation and children behind (Blakemore & Boneham, 1994). Once her mother had left, Yvette, aged 11, and her older sister were cared for by her maternal grandmother and various family members. Care appears to have been cursory and to some extent abusive so her father hastened the process of bringing them to the UK.

Even though we lived with my grandmother it was basically the whole family that took care of us...it was hard...Mum used to send a lot of things for us...we never got anything, unless there was something nobody else wanted... ..somebody wrote and told my parents that we weren't being looked after (Y2:2)

This experience appears to have reinforced the importance of their own nuclear family, which Yvette appears to have replicated with her own family.

Alice too recalls a happy childhood which had a significant effect on her adult life.

A loving family really, a very strict Dad and an equally strict Mum in a different way...Mum did a lot for us in a much quieter way...I think it stems from there.....and then I had my own children and grand children, and that family ethos is just embedded in me (A13:1).

Yvette, Amy and Alice all referred to a strict upbringing, but unlike Sheila and Don this did not exclude the love and closeness of family life. It appears that both Yvette and Alice have sought to replicate their early family experience with their own families and for Alice, family appears to have been the dominant aspect of her identity.

I suppose there was a lot of background there to family...and it sticks and it stays. I think if you got that...inside you... (A13:1/2).

In the United States, research has demonstrated that both the socio-economic status of the parents and historical norms regarding child rearing practices influence parenting style and quality (Shaw *et al.* 2004; Mallers *et al.* 2010). Low socioeconomic status was equated with a poorer quality of relationship, but the findings from this study suggest this was not the case. Three participants from low socioeconomic status families had secure and satisfying parental relationships that have provided emotional stability and well-being throughout life. On the other hand, one participant, who was from a family with high socioeconomic status, had a very poor relationship. Through an occupational lens, Law *et al.* (1996) and Rigby and Letts (2003) would argue that both Desmond and Sheila experienced a restricted psychosocial environment as children, which failed to nurture them successfully. They both had feelings of isolation and their subsequent emotional development was inhibited. The research in the United States asserted that there is an association between unsupportive parenting and subsequent health problems, but again findings from this study do not support this finding. What the data does confirm is that parenting styles have changed. Several participants remarked on the strictness of their parents and how within a loving relationship it was deemed a positive attribute.

Gender differences in war time memories, educational and career opportunities have already been discussed. It was also found that women tended to place the needs of their families above their own, unlike the male participants who were more independent and autonomous. For example, in spite of remaining with her first husband until her children were adults, Sheila was still trying to compensate for the "awful childhood" they endured.

Things were really grim at home and I've been trying to make it up to (her daughter) when I discovered what an awful time she was having of it and I've no doubt this will carry on for ever... (S2:10).

Alice only trained as a teacher while her children were young because *it was a necessity, money was...very short* (A13:8) and she learned from a friend that training was being offered to mature students. She was apprehensive but thought *you've got to do something, you can't sit on your haunches much longer* (A13:8). However she later gave up teaching to care for older family members.

Circumstances dictated that I was needed at home as much as anyone...and of course you have to do those sorts of things (A13:15).

Finally the other three women, Amy, Maggie and Yvette all cared for their mothers once they were widowed. In contrast two male participants, Donald and Fred had a more

loosely defined notion of family responsibility where the prime responsibility rested on the woman, whom they supported, while Desmond, who had no children, cared for his wife in her long final illness. These findings are very much in line with feminist theory which suggests that women define themselves in terms of personal relationships and judge their achievements in relation to their ability to care for others (Gilligan, 1982).

8:4:2 Religious practices

All the participants had been brought up in an era when attendance at Church and Sunday school was the norm (Cliff 1986). The Sunday school movement, originally started towards the end of the eighteenth century in response to concerns about the unruly and delinquent behaviour of the children of the poor, was still a strong social movement at the beginning of the twentieth century (Cliff, 1986). As education for the poor gradually improved during the first half of the twentieth century Sunday schools no longer attempted to provide a basic education, but confined themselves to religious and moral instruction. Prizes, books and outings were provided for the children as a reward for attendance. However concerns regarding delinquency of some young people continued during the twentieth century and church run youth clubs began to emerge. A 1950's youth club manual advocated that they should provide opportunity for activity, adventure and religious guidance which would develop the young person as a moral being (Matthews, 1958). Club nights for different age groups often occurred several times a week and the activities offered appeared to have been wide and varied.

Coleman *et al.* (2004) in a British study of 342 people aged 65 and over, found that by the end of the century religious belief had continued for up to 50% of their sample. La Cour *et al.*'s (2006) later study of the 1914 birth cohort group in Glostrup, Demark found that there was also a gender difference, with more women than men continuing to hold religious beliefs. These findings are largely in line with the current study where five participants, four women and one man engaged in religious practices. In the United States, Okun *et al.* (2007) demonstrated that involvement in activities associated with the church was a strong predictor of volunteering, partly because churches often sponsored volunteer organisations, but also through promoting values that fostered concern for others in the community. It is possible the high level of volunteer activity demonstrated by participants in the current study was influenced by altruism fostered through their religious involvement. As well as the church creating a moral climate that can motivate volunteering, Cole and Macdonald (2011) established in their study on the transition to retirement in the United States that becoming engaged in volunteer work of some kind in later life is sometimes regarded as an adaptive response to retirement.

In early life, all the participants had attended Sunday school or church services and some, church youth clubs. More than half of the participants currently had some form of religious involvement, rather more than was found by Coleman *et al.* (2004); most continued to attend church regularly, and also spoke of the continuing moral influence on the way they tried to live their lives today. However, for Yvette, regular church attendance and her spiritual life had been a constant theme throughout her life.

...my church and my spirituality I always believe that...this isn't all there is to life, there's always something better... (Y2:13).

Blakemore and Boneham (1994) asserted that during the early years of immigration from the West Indies, English churches had frequently proved to be both unfriendly and racist, which led to a movement for Caribbean people to build their own Pentecostal churches in order to worship in their own way and which also acted as a framework for social activity. Yvette's narrative reflects this experience; when she and her family first attended church they were told: *we don't want your kind here (Y1:11)*. However it has taken many years of searching to find a church where she felt comfortable.

For Alice the church played a different role in her life. Normally constantly busy she finds attending church allowed her:

my quiet time...my thoughtful time...without being...everything taken away...I can sit there and be me...quietly... (A13:17).

While Amy only attended worship occasionally, she referred to a continuing moral influence of the church on her life.

I always had quite a strong belief...and I always tried to lead a good life, lend a helping hand if I could... (A1:6).

For Desmond, the only man to refer to spiritual matters, involvement with the church appeared to bring companionship, particularly from

my guardian angel...who has been looking after me when M... died and still does actually... (D3:13).

According to Kaufman (1993) and Buchanan (2004) values and beliefs formed early in life endure and inform action in later life. The findings from this study support this assertion. It would appear that church and family had influenced participants' values and beliefs creating a desire to lead a 'good' life, to help others and to contribute to society, and in turn to feel valued by society for what they did.

8:4:4 Cultural influences

In addition to the cultural influences already discussed, two wider cultural influences were evident, one a sense of place and the other ethnicity. A sense of place can have an enduring influence throughout the life course and informs personal identity (Neal

and Walters, 2006; Rowles, 2008). In this study for example, Amy described herself as *always a country girl at heart* (A2:13), while Sheila sought out an industrial urban environment for her retirement home that most closely resembled the northern town where she grew up to gain a *feeling of belonging* (S1:7). Rural cultures of the past appeared to afford more limited work opportunities to participants than urban cultures. Both Amy and Donald grew up in small villages where work opportunities were limited. Amy at the age of 14 cycled four miles for a twelve hour day as a domestic servant. For Donald, the only non-skilled work available would have been the shoe factory, but his father managed to obtain an apprenticeship for him.

However, Neal & Walters (2008) found that rural cultures often provided a strong sense of family and community and there was some indication of this in this study. For example, Amy's large extended family, in frequent contact with each other, engendered a feeling that *we were all close* (A1:12), while the hierarchical village society also influenced how she saw herself.

I used to go to the rectory...they had maids there and a cook...It had a lovely house and grounds and I used to see these maids, now (laughing) white caps and aprons, I fancied that (A2:3).

These experiences appeared to shape her identity as a *very ordinary* person, whose role was to serve others and she remained a domestic servant in one form or another all her life. By contrast Maggie, of a similar generation but growing up in both rural and urban cultures, had a greater sense of possibility. She and her new husband took advantage of the 1930's housing boom (Yass, 1975).

I were determined to have my own home when I got married. We knew they were being built and he said 'what you on about', because they were building a big council estate. I said 'no, we're going to have our own home' (M2:7).

And she continued to demonstrate a confident sense of self allowing her to seize opportunities throughout life.

Ethnicity was another dominant aspect of culture. An early childhood in Jamaica, before emigrating to the UK at 13 and growing up in a black afro Caribbean family, gave Yvette a dual cultural heritage (Moghaddam, 1998). Blakemore and Boneham (1994) claimed that immigrants, at first, were generally welcomed, though often met with reserve and a lack of sociability from the local white population. To cope with social discrimination African-Caribbean migrants began to adapt their own cultural and leisure institutions to life in Britain (Blakemore and Boneham, 1994). As one of the earlier immigrants to arrive in the UK Yvette experienced curiosity at school rather than explicit racism which appears again to support their view.

...it was good then because....we were a novelty....so everybody wanted to be our friends, because people wanted to touch us...and you know...it was OK (Y1:5).

Although Yvette has experienced racism from the church and occasionally from patients at work, she believes her mother's attitude has helped her.

It's not because you're black or white...it's what you make of it (Y2:6)

She socialised to some extent with white children, but she formed close friendships with young black people as an adolescent and when she was training as a nurse, befriending student nurse immigrants from the Caribbean. Today she continues to be part of her local black afro Caribbean community, but also has white friends and neighbours. Sewell (1998) suggested that the ties with home often remained strong and for many the intention was always to return, particularly for first generation migrants. Yvette's parents returned to Jamaica when they retired but she and her husband:

thought about it but with the children and grandchildren...it would be very difficult (Y2:6).

Although her identity is still influenced by her sense of Jamaica as a place with its myriad associations, overall Yvette's experiences in Britain have given her a dual cultural identity which was sufficiently British for her view remaining in the UK with equanimity.

In multicultural Britain today, only two participants made any reference to race, apart from Yvette. Alice reflected on the impact of immigration on her work as a teacher in a city primary school and experienced the difficulties of a rapidly changing school population in the early 1970s, which she appeared to view pragmatically as a challenge to overcome.

...lots of children were coming over from India...it was quite difficult...no educational helps...and classes were large...crammed into small rooms, but we got on...we got down to it (A13:11).

Donald, on the other hand openly described himself as "an out and out racist" (D1:20) and saw himself as white English, rather than British.

I'm English, I was born in England of English parents, I'm English and I shall be until the day I die (Don1:20).

Possibly the rather low significance of racial issues in the participants' narratives was because several had grown up and remained in rural or small town communities which were predominantly white British. However, Knowles (2008) found that discrimination against non white people was often common in rural communities such as the one from which Donald originated. It is also possible a strong masculine culture of the workplace

described by Jome *et al.* (2005) could also be intolerant of difference. Donald, who worked in such a culture, could have had his racist beliefs reinforced at work.

8:5 Contributing to society

All participants were retired and seven engaged in volunteering both formally and informally. The data suggests that reasons for volunteering varied and appeared to stem from influences on their values and beliefs gained early in life. Research in the United States found that altruism and the desire to help others were the most significant motivators for older people engaging in formal volunteering (Cole and Macdonald, 2010; Morrow-Howell, 2010), while research in the UK found that volunteering for older people demonstrated altruism and a strong commitment to society (Knight *et al.*, 2007; Lie *et al.*, 2009). Konrath *et al.* (2012) suggested that these motivators decreased the risk of mortality, while volunteering for self interested reasons did not. The main reasons participants in this study gave for volunteering were a desire to help others and to make a difference which seems to support the view that altruistic reasons for volunteering were most significant and had potential health benefits. Yvette appeared to be motivated in much of her work by a desire to help people, as a magistrate it was

to see how people live and hopefully do some good, even though you might send them to prison (Y2:8).

Desmond continued to attend the carers' group following his wife's death and for him working with carers new to the group was *a joy, passing on information and supporting other people (D3:6)*. While Amy had *always tried to live a good life...lend a helping hand if I could (A1:6)*. And Alice saw her voluntary work as: *a way of making a difference (A12:7)*

Four participants were able to transfer work skills to the voluntary sphere, often experiencing a sense of self efficacy through so doing. For example, Sheila experienced immense satisfaction and efficacy through using her work skills:

It is something I enjoy doing and I'm good at...presenting fairly clearly ...I take a pride in trying to think through the requirements of the audience...I'm learning new things all the time (S2:16).

Desmond used his work skills to audit church accounts and as a trustee for his local branch of Mind. Alice also used skills she had acquired through her education and her work as a teacher in her role at the local branch of the Older People's Forum, where she was able to voice her opinions at partnership meetings with the council.

I think that's coming...going back to my days in college and school... I've got more confidence that way (A13:6).

While Fred's work skills gave him sufficient self confidence and belief in his ability to make a difference at a macro societal level, to stand as a UKIP parliamentary candidate and to be vice chair of the Electric Vehicle Society.

Being influential in their local communities was important to two participants, which had the additional advantage of enabling them to know what was happening. For example, Yvette's work as a town councillor enhanced her local awareness and she attributed this to her mother's influence and her afro Caribbean roots.

My Mum...was a nosey parker. She gets into everything that was going on... (Y1:13).

Finally, three participants appeared to be motivated by a need for companionship, or a need to belong. An enduring theme throughout Sheila's life was her awareness of her need to belong stemming from early childhood experiences. In her current life she found a sense of belonging in her voluntary work.

I started teaching at B..... P..... it's a community and I sort of belong (S1:8).

Two participants were still dealing with the effects of spousal bereavement and volunteering provided a welcome sense of companionship. Alice continued to gain strength and comfort through her work at the Stroke Club her husband had attended, while Desmond did so through his carers' group.

However the form of volunteering was dependent on the level of education attained. Warburton and Stirling (2007) and Morrow-Howell (2010) both found that those with higher levels of income, education and a religious affiliation were most likely to volunteer. The data, in the main, supports this view; five of the six participants who held post school leaving qualifications were engaged in formal volunteering and had medium to high incomes. However, of those five, two had no religious affiliation of any kind. Cole and Macdonald (2011) found that when joining volunteer organisations older people seek to find ways of using their previous work skills in their new roles and the findings suggest that Sheila, Alice, Desmond and Fred went through this process. Yvette, on the other hand made no link between work skills and her voluntary work, which in fact required significant additional training.

The two oldest participants without any form of qualification were quite significantly involved in volunteering in an informal capacity within their local communities, possibly because their sense of self made them feel most comfortable helping others in this way. Volunteering has been found to decrease with age (Parkinson *et al.*, 2010) and Maggie's levels of community contribution had indeed declined but she still delivered

the church magazine to people in her road and generally tried to help her neighbours. Tang *et al.*, (2010) found that volunteers with lower socio-economic status contributed considerable time. Amy supports this view as she was still strongly involved in supporting friends and neighbours and giving her time regularly to running social occasions for the sheltered housing scheme where she lived. However, in other situations her perceived lack of education limited her contribution. As a member of the Women's' Institute she preferred to *go in the kitchen...keep in the background* because people there were *younger people, more educated* (A2:7).

Overall, it is evident from the findings that education and social class have been influential in the form of volunteering that occurs (Morrow-Howell, 2010), although education was more significant than social class. Higher education and work skills appear to create a sense of self which encourages the belief that their contribution would be valued. The fact that the percentage volunteering is higher than found in previous studies, including those of Knight *et al.*, (2007) and Morrow-Howell, (2010), may be because informal volunteering is sometimes not regarded as valid, although it is included in the World Health Organisation's description of contributions to society (WHO, 2001). It would appear that family and church influences created a desire to help others and to contribute to society and in turn to feel valued by society for what they did. This was apparent whether the participants had grown up in urban or rural areas. Finally, it could be conjectured that narrative enquiry allows a great depth of material to emerge on volunteering, for example some of the more informal kinds, such as delivering the Church magazine, or helping out a neighbour, which the participants may not themselves define as volunteering.

8:6 Conclusion

Participants in this study demonstrated a wide variety of contextual influences upon their lives; the main ones have been considered here. Both the effects of WW1 and WW2 were experienced in varying degrees by the majority, with long term evacuation having a profound effect on one participant. The findings support the assertion of Richards (2010) that those from middle class families appeared more protected from the effects of war. In terms of childhood opportunities and attainment in later life differences are apparent. Prior to the 1944 Education Act, there were wide differences in educational opportunity according to class which had a considerable impact on the developing sense of self. After this opportunities were related less to class and more to academic abilities, which improved educational opportunity and increased career choices for the younger five participants. It was found that those with limited education

tended to value practical skills significantly above academic ones. It was also found that future earnings correlated with levels of education for the majority of the participants. Finally those with higher levels of education were more likely to volunteer for formal organisations or charities than those with less education who engaged in informal volunteering.

Gender differences were also apparent in the findings. Women tended to earn less than men and pursued careers in female dominated lines of work. The only woman to be successful in a male dominated profession reported behaving in a gender typical way. Perceptions of war time experience were also gender related with the men focussing on the excitement of war whereas the women concentrated on the effect on daily life, a finding new to this study. Only the women frequently placed family needs above their own, which reflected traditional female identity and women were more involved in spiritual life. Both these findings confirm previous findings, but the latter also illustrates a wide variety of spiritual response within this generation. In terms of cultural influences, rural cultures appear to have afforded more limited career opportunities and a closer sense of community than urban cultures. A negative facet of rural culture was demonstrated where intolerance of difference formed racist beliefs. Finally it is possible that the low incidence of cultural references was influenced by the fact that many came from, or now inhabited areas with little exposure to ethnically diverse populations.

Contrary to previous findings in the United States the findings indicate that a low socioeconomic status was not related to poor parenting. However this study did support findings from studies in the United States and United Kingdom regarding motivation to volunteer. This was influenced by values and beliefs acquired early in life from social context, particularly family and the church. Finally this study has demonstrated that the times the participants have lived through, together with historical events and the places they lived, have interacted with family influences and personal experiences to shape their values and beliefs. These form a central aspect of identity and give meaning to occupation.

CHAPTER 9

Occupational Meaning

9:1 Introduction

There is a need for meaning in individual lives within a temporal world (Frankl, 1992; Atkins, 2005) and the search for meaning continues throughout life (Jackson *et al.*, 1998; Rowles, 2008). Occupational meaning is considered, by occupational therapists, to be fundamental to health (Jackson *et al.*, 1998; Christiansen, 1999; Turner, 2002; Wilcock, 2006). It has been suggested that meaning is derived from the past and is interpreted as a source for being in the present where values constructed in early life act as a source for meaning and identity in later life (Giddens, 2009; Kaufman, 1993). Hammell (2009) argued that the same occupation may have different meanings for those that experience it, because meaning has evolved from their different past experiences. Meaning is socially constructed and is central to self identity (Jenkins, 1996; Giddens, 2009; Reed *et al.*, 2010) and individuals create meaning through interactions within a wide variety of social contexts (Phoenix and Sparkes, 2009). As meaning develops over the life course occupational meaning is likely to be rich and complex as a wealth of personal, social and cultural meanings have evolved by later life (Kaufman, 2000; Hasselkus 2002; Reed *et al.*, 2010) and occupations are more likely to carry multiple meanings.

This chapter will present findings from the narratives and time use diary data. First the meaning of those occupations that participants identified as most important to them currently, their key occupations, will be presented and synthesised with the existing literature. Aspects of continuity, health and successful ageing, and occupational identity in later life will be analysed in relation to the meaning inherent in these key occupations. Finally additional themes of meaning emerging from the data in daily life and routines will be interpreted and discussed.

9:2 Meaning in key occupations

9:2:1 Key occupations

Meaning emerged as one of the major themes from the analysis of the narrative and was manifest in many forms. Meaning often appeared to be rich and complex in nature, particularly in occupations that were important to the participants. Key occupations were those identified as most important to the participants in their current lives (Table 9:2:1). These were: voluntary work (two), singing in a choir, promoting and building electric vehicles, gardening (two), friendships, helping others, U3A special interest groups and sport. Two participants, Sheila and Desmond found it difficult to decide which of two was most important and therefore, both have been included. The average time spent during the two time use diary days on key occupations varied between no time at all and two hours, twenty five minutes, with the majority spending between one and two hours.

Table 9:2:1 – Key occupations

Name	Average time spent on diary days	Current key occupations
Yvette	2 hours 20 minutes	Voluntary work for the community – CAB, magistrate & town councillor.
Donald	1 hour 50 minutes	Sport. <u>Current</u> : bowls, golf & cricket. <u>Past</u> : football & cricket, canoeing, squash, golf, motor racing.
Sheila	30 minutes	Volunteer at war time code breaking centre Singing in a choir
Fred	No time spent	Electric Vehicle Society, promoting & building electric cars
Alice	1 hour 55 minutes	Her garden
Desmond	1 hour 45 minutes	U3A – greek & roman history group, canal group Helping others through carers' group & trustee work.
Amy	2 hours 25 minutes	Friendship occupations
Maggie	1 hour 15 minutes	Her garden

For most participants, interest in these key occupations had ebbed and flowed throughout their lives and at different life stages other occupations would have been seen as the key occupation. The length of time spent on key occupations appeared to be of similar or less significance than the potency of meaning carried by the occupation, and two participants spent little or no time on the occupation during their diary days. For example, Sheila had fairly limited engagement in her key occupation of "two or three days a month" (S2:13) together with some preparation time at home, however meaning was potent and the occupation central to her identity.

9:2:2 Meaningful connection

Meaningful connection in key occupations was experienced in some way by all participants. It was manifested in two distinct forms: first, connection with the past self occurred through memories of performing the same occupation over time, which were often connected to relationships with those who had been involved along the way (Hasselkus, 2002; Hocking, 2002). The second form of connection was of doing things with others as described by Hammell (2009). This was defined by Reed *et al.* (2010) in their qualitative study of the interconnected meanings of occupation as a sense of 'being with' others in the experience of the occupation.

9:2:2:1 Connection with the past self

For some participants, key occupations have existed as a continuous thread throughout life. They often began in mid to late childhood and continued, possibly with short breaks dictated by life events, throughout adult life. Five other key occupations appeared to relate to early life interests, or early life maternal and paternal influences and example, which then remained dormant throughout adult life until opportunities arose in later life to reawaken them.

A connection with the past self was expressed through recalling memories of early interests. For example, Fred's current passion for designing and constructing electric cars originated in childhood.

We used to...do cut outs, aircraft and things... so I sort of got into construction...cut outs were the first thing... (and then) an aunt of mine married a tutor and in the Oxford laboratories they had constructions in the stuff called genero and I could make great things out of that...I didn't have a meccano set until I was about nine, but...(laughing) I've still got it (F1:6/7).

These memories included not only his aunt, but also his mother who:

got me a book with very simple things with match boxes being stuck together. I remember making a tank with...four match boxes, about three or four matches and some...corrugated paper, they represented the tracks... (F1:6)

And his father with whom he had play fights during the war with the model aircraft he had made,

...probably at a weekend. He worked very long hours,...I only used to see him on Sunday really (F1:6).

Gardening was Maggie and Alice's key occupation and both had memories of gardening since childhood. Again their experiences were recalled through connection

with others. They were expected to help in gardens or allotments as children, Maggie because her father suffered poor health,

Well you see Dad couldn't garden...and...at nine I were digging and helping him...even when I got married I...did the garden for him...I did enjoy it, and even when I was at my aunties, my uncle, he'd got two allotments and...you'd come home from school...and you'd go down and help (M1:14).

As an adult she helped her husband in the garden, taking on the traditional role of growing flowers while her husband took care of the vegetable gardening, although during the war she took over his role and again in her early 60s when her husband died.

The neighbours said...'how do you know what to do'? Well if you've gardened since you were nine you know what to do (M2:1).

She also appeared connected to her local community through her garden. Until the previous year she had opened her garden to the public during the village open gardens weekend and was known for her interest in gardening.

there's a gentleman...he's a very keen gardener. I mean these old chaps, they all talk to me you know because I'm interested (M2:3).

Alice recalls a less onerous approach to early gardening. When at the allotments with her father she *probably messed about more than anything (A11:6)*. When she married, she and her husband acquired an allotment and allotment gardening became an important feature of family life.

We both dug it to begin with, with forks and spades...and...if we had lots of stuff to bring back we'd go in the car....we took them (their two children) up there...from when they were babies. They had their own spade and bucket and they made mud pies...they loved it...then as the grandchildren came along we used to grow marrows and J...s name would be scratched on one and A...s name on.... It was a race to see who had the bigger one (A12:3).

They moved to a bungalow when her husband retired, gave up the allotment and created a new garden together. She has continued to feel a strong sense of connection with him in this garden since he died.

I'm sure he's looking down on this garden and saying, 'that's what we were doing together,'... I feel him lots of times...its just something about wandering up and down that garden...we were both really into gardening in every aspect...it was our little territory (A13:20).

On a walk around her garden she also spoke of her helpful son and pointed out various plants and shrubs that had been given to her by different people indicating the many positive emotional connections her garden had brought her over the years.

Hasselkus (2002) contended that many different forms of occupation can be used as a vehicle for connection and the findings from this study confirm this view. Connection with the past self, found in research studies by Hocking *et al.*, (2002), Howie *et al.* (2004) and Reed *et al.* (2010), was strongly evident for five participants, more loosely so for three. A connection with the past self also encapsulated a sense of connection with others who were involved with the occupation over time, as was experienced by Fred, Maggie, Donald and Alice. Connection with the past self appeared to be particularly significant in later life forming an essential aspect of self and key occupations encapsulated the core characteristics of the participants, as Laliberte-Rudman (2002) proposed. Occupational skills, interests and meaning appeared to be formed early in life and for some continued virtually unbroken throughout life, although changing and developing in form over time. For others, occupations that had been established in early life had remained dormant until opportunities presented in later life (Table 9:2:2).

Table 9:2:2 – Continuity of occupation

Name	Latent key occupations resumed in later life	Name	Key occupations continued throughout life
Yvette	Community voluntary work	Amy	Family / friendship occupations
Desmond	- U3A – interest groups - Helping others.	Donald	Sport in various forms
Sheila	Volunteer at war time code breaking centre	Sheila	Singing in a choir
Fred	Promoting & building electric cars	Alice	Her garden
		Maggie	Her garden

The data suggests that a core occupational identity was established in early life relating to skills, values and attitudes, but there was not necessarily a continuity of occupation, which accords with Atchley’s theories on internal and external forms of continuity (Atchley, 1989; Atchley, 1998; Coleman *et al.*, 1999; Sneed and Whitbourne, 2001). This was the case for half the key occupations. For example, Desmond from his early childhood saw himself as someone who was helpful to others. He demonstrated this in his relationships with other evacuees and through activities associated with the church establishing his inner continuity and sense of self. However

this aspect of his occupational self became largely dormant, although in his working life he *preferred the personnel side and pensions rather than the finance side* (D2:2), until his wife was diagnosed with Alzheimer's disease. The caring aspect of his occupational identity resurfaced and during the period he cared for his wife, he attended carers groups, resumed church membership and began to act as a charitable trustee. Retirement appeared to be a key event in enabling the other three participants to resume occupations in accord with their early occupational self, facilitated by skills and a sense of self efficacy acquired throughout their working lives. It has been suggested that individuals actively seek continuity to preserve existing identity (Kaufman, 1994a; Atchley, 1999; Coleman *et al.*, 1999), but possibly, during periods of transition such as retirement continuity of identity is particularly challenged. Therefore, individuals may seek reattachment to long established, but dormant aspects of their identity in an attempt to provide the desired continuity.

9:2:2:2 *Connection with others*

As well as connection with the past self, for some, connecting, or 'being with' others was an important aspect of the key occupation. When asked what was most important to her out of all that she did, Amy responded:

...friends are very important...I don't do anything spectacular, but I do look forward to our coffee mornings in the community room three mornings a week and bingo on a Monday afternoon (A2:6).

and she attended many more occasional events there,

we've had lots of functions...we've organised ourselves...quiz evenings, games evenings like cards and darts...and we have films...fish and chip suppers, sausage and mash suppers...and we always have a Christmas meal (A1:10).

She emphasised that 'being with' her family was rarely possible because they lived at a distance, so in order to be with others she also attended the local over 60s club, the WI and the Methodist Church fellowship meetings, which also afforded a connection with her past self as many of the people she met there she had known for years. For example, she had been a member of the WI *since 1957 unbroken, every year I've joined* (A2:6). Finally a close friendship, developed eight years previously with a widower who lived in the same housing scheme, had provided additional meaning to her through the time she spent with him. *They go out to lunch once a week in the car* (A1:10) and he opened up the world of travel to her going to *places I wouldn't have gone on my own* (A1:9). Sheila also demonstrates this sense of 'being with' in both her key occupations in the form of a sense of belonging.

Donald found meaningful connection through sport, particularly with his wife who accompanied him as a spectator when he plays bowls or cricket.

She comes with me...she likes watching...she's been on the bowling tour this year...we have a good old time...we have a game of cricket on a Friday night...she always comes... (Don2:10).

He also was enthusiastic about the male camaraderie of his golfing weekends.

We've just had a weekend in...S.....played 18 holes of golf on Friday afternoon...walked into Skegness...had a few bebies... Played another 18 holes of golf on Saturday, then went out to a karaoke pub, Saturday night...I stuck it 'til about quarter past one and then I'd had enough... I enjoyed it...we booked for next year (Don2:11).

Conversely, a key occupation normally done with others became meaningless for two participants who had been recently bereaved. For Alice and Desmond, rather than 'being with' others, it emphasised a state of 'being without'. Alice's key occupation of gardening included providing for her family by cooking meals from her garden produce, but since her husband died this had become devoid of meaning.

I cook my own dinner and...I sit there at that table and I think, why isn't somebody here to talk to me? I might as well be eating a piece of cardboard...yet I've put quite an effort into the cooking and I think...you ought to be really enjoying this.....its fine, its keeping me alive, but its not really...doing what it ought to be doing... (A13:21).

While for Desmond a lack of meaning appeared to permeate his whole life. His initial response to a question on the relative importance of various current occupations reflects this.

It's difficult to find a purpose for anything. I think that's what I'm lacking...motivation...my one and only objective was looking after her...8 years, organising everything I & she did. I went to various support groups, did the shopping, the washing and the ironing, all these things...I suppose the same routine still takes place...still things...happen on those particular days (D2:7).

Although he appeared to have sought occupations that created connection with others, at times it still appeared to be an effort to make himself engage,

getting up in the morning unless I know I've got a particular appointment to go to...obviously if you've made an arrangement you can't just back out (D3:3).

Amy, Donald and Sheila all experienced a sense of connection with others while engaging in key occupations, which supports the findings of Leufstadius *et al.* (2008)

in their study of meaningfulness in daily occupations among people with persistent mental illness. Reed *et al.* (2010) defined connection with others as a state of 'being with' in their study of people who had suffered disruption in their lives. Hasselkus (2002) also suggested that occupation may be used as a vehicle to bring about meaningful connection with others. A further factor highlighted in the literature was that the quality of the relationship with others is as important as the occupation, particularly if engagement occurs outside the home environment. For example, Litwin and Shiovitz-Ezra (2006) arguing from a sociological perspective, found the quality of the social relationship was as, or more, important than the occupation itself and Green *et al.* (2005) demonstrated that social activities outside the immediate home environment for those over 80 years of age were particularly valued. In the current study these findings were evidenced by Amy through her engagement in various occupations at her community room and local interest groups in order to provide the friendship connections that were most meaningful to her. The current study suggests that 'being with' appears to be a state, which is experienced in the present and comes, over time, to be assimilated into the construction of the connectedness of the past self. This is in contrast to Hammell (2009) who in her theoretical argument for the re-categorisation of occupation only considered connection with others as it occurs in the present.

The data also revealed a converse state to that of 'being with' not explored by Reed *et al.* (2010); one of absence, of 'being without' which follows loss and bereavement. This was demonstrated powerfully by the two participants who had suffered the most recent spousal bereavements. In order to address this Desmond strove to engage in occupations that involved connection with others through attending various groups, a strategy Van Den Hoonaard (2001) found was often employed by widows, and widowers to deal with feelings of sadness and loneliness. He appeared to be using occupation as affective management of his transition into widowhood, a strategy which Blair (2000) found was effective in managing transition in a much younger student population. For Alice, early identity foreclosure with a personal loss of self, changes to friendships and a growing awareness of society's view of widowhood suggested by Van Den Hoonaard (2000), was evident. However, five years after her husband's death, Alice was still struggling to construct her new identity as the bond with her husband had remained strong. She had made some new friendships and appeared to have adjusted to her social status as a widow, but she was still searching for significant occupational meaning. Overall, it was apparent that bereavement occasioned a form of occupational alienation described by Wilcock (1998b) and Hagedorn (2001), which deprived even key occupations of meaning, and they asserted, could be potentially detrimental to psychological health. This premise is

supported by the findings of Strobe (1998) who established that women in particular suffered increased rates of depression, while men had increased mortality following bereavement. She suggested that the western social context in which they grieve influences their coping styles with women seeking more social support than men.

This appears to support previous findings concerning the association between social relationships and health and well-being which has been demonstrated in the literature (Glass *et al.*, 1999; Atchley, 2001; Garcia *et al.*, 2005; Victor *et al.*, 2005; Fry & Debats, 2006; Litwin & Shiovitz-Ezra, 2006). However, some have considered the importance of social connection in relation to occupation. For example, Rowe and Khan, (1997) in a seminal study of successful ageing identified social and productive activities as being one of three predictors of successful ageing. Fisher and Specht (1999), in their qualitative study of 36 people of 60 and over, about creativity and successful ageing, also found that connection with others arising from creative occupations was its most important quality. Bowling (2005) established an association between quality of life and the amount of social activities in which a person engaged and most recently a European report on ageing reported the link between well-being and health and participating in social activities in various community groups and organisations (European Commission, 2012). However the data from the current study suggests this does not only occur through community groups and organisations, but also in diverse, more informal forms of occupation. Finally the need for meaningful connection in one form or another was apparent for all participants and data from the time use diaries indicates that as a group they were more socially engaged than the national average (see figure 7:5:7). It was the most pervasive form of meaning present in the findings suggesting it was a fundamental source of meaning in later life.

9:2:3 Meaning through work

Following his experiences in Auschwitz, Frankl published *Man's Search for Meaning* in 1946 in which he asserted there were three sources of meaning: Meaning through work, being in love and the ability to choose ones own actions. Meaning through work has been reinterpreted broadly by Rowles (2008) as the sense of worth achieved through engaging in occupation. However it is likely that productive occupation, outlined by Rowe and Khan (1997) as those occupations which create goods or services of economic value to the community in some form or other, could be a more appropriate reinterpretation. The three participants, Sheila, Frank and Yvette who evidenced feelings of recognition and self worth did so as the result of engaging in productive occupations that benefitted the community. All three demonstrated Yalom's

(1982) concepts of dedication to the cause and sense of striving to reach their potential, often not present in other expressions of meaning.

None of the participants expressed these concepts explicitly, but a secure sense of self worth shines out from Yvette's pleasure in her community recognition (Y2:7/8, p12). Fred's membership of the Electric Vehicle Association committee demonstrated his recognised status and influence within the electric vehicle milieu and he had sufficient confidence in his unorthodox design to disseminate his views.

I talked about it in theory in the magazine and demonstrated the arithmetic (F2:8).

For Sheila, her sense of self worth and preferred identity appeared to arise from her working life. Following retirement her voluntary work emerged to replace the sense of self worth gained from work.

It doesn't take a lot of time, but I'm really proud of it, enjoy a lot...I go down there two or three days a month and I teach parties of school kids about the history or...the mathematics...I love it!(S1:8).

Two participants, Maggie and Alice, engaged in productive work in their gardens and meaning for them is perhaps most closely allied to Frankl's view of work. Both grew flowers, fruit and vegetables and found meaning in the act of growing (A12;3, p4) and in using garden produce as food.

Today I've got peas in the fridge that I've grown and blanched and put away...I got red currants, raspberries and gooseberries...cooking baking and bottling, I love it all (M2:3/4).

Possibly the satisfaction they gained from this work was reinforced by their wartime experiences when both, though of quite different ages, became adept at self sufficiency.

Altruism, also associated with productive work, encapsulates two meanings according to Yalom (1982). The meaning of helping or serving others and trying to effect change to leave the world a better place. Both meanings could be found in five of the eight key occupations, the second most frequently cited sense of meaning, together with meaning of place. This supports the findings of Warburton and Pinsker (2006) who suggested generativity made a beneficial contribution to the positive experience of ageing and of Knight *et al.* (2007) who found that altruism was one of the primary meanings underlying productive occupations in later life.

Both Amy and Desmond took pleasure in helping and supporting others. For Yvette both aspects of altruism were expressed in her community work, through helping people and effecting change.

the amount of people that come to you that have had their benefits turned down...when you go through it with them...they get the benefit, and they'll say, 'thanks very much'... (Y2:11).

While for Fred his apparent desire in promoting electric vehicles was to leave the world a better place by reducing the power of the oil companies as "*they could be said to be responsible for thousands of deaths...in Iraq*" (F2:8). For Sheila there appeared to be considerable pleasure in just being able to give,

It's completely voluntary, I could charge for mileage, but I don't...I just give and I'm pleased that I'm able to...it makes me feel good (S2:17).

and passing on her knowledge to others, which reflects Erikson's state of ego integrity in later life (Dunkel & Sefcek, 2009).

9:2:4 Meaning in place

Meaning in place was evident in five participant's narratives when reflecting on key occupations. Both Alice and Maggie wanted to share their gardens, their place, with the interviewer. The walk around the garden, the narratives and the time use diaries were imbued with meaningful connections, routines, the connotations of growing produce and the experience of just being in place in the garden.

Maggie said *my garden fills my life really* (M1:14). Her time use diaries revealed that on an ordinary day in summer she spent 180 minutes in the garden, opening and closing the greenhouse, sweeping the yard, picking and freezing raspberries, doing various small jobs and just sitting and being in the garden. On the second day, which she spent largely away from home, she still completed the morning and evening garden routines. Alice spent approximately two hours on each summertime diary day in the garden, working, picking garden produce and again just sitting. Neither woman spent long blocks of time in the garden, rather being in their gardens punctuated their day as the routines of work and taking care of their place, gathering produce and just "being" occurred.

Maggie expressed her pleasure in taking care of her garden, *...do you know when I swept it, the fresh air, oh it were wonderful* (M2:2) and her delight in gathering her produce.

I'm ever so thrilled when I go and get it. I think, I grewed this. (M2:3).

While for Alice, her garden is a place she created with her husband where she can still feel close to him.

I feel him lots of times...sort of a spirity thing?... Its just got something about wandering up and down that garden, because we were both really into gardening, every aspect of it.... mowing the lawn or picking fruit, everything there...was our little territory...nobody could invade it (A13:20).

Fred's place for one aspect of his key occupation was some distance from where he lived. This place is permeated with positive associations.

...and my good luck...an aunt of mine, married with no children left me her house in Anglesey and quite a bit of money (F1:26).

There, Fred was *beginning to build slowly...in my garage in Anglesey (F2:7)* an electric car. For him, this place appeared to be imbued with a feeling of good fortune, which had allowed him to take early retirement and develop his interest in electric cars, stifled during his working life, even though he had worked in car design. The goal focused, slow creation of the car he had designed and was building himself reflected the temporal nature of this occupation. It also demonstrated a sense of future possibilities identified in the findings of Reed et al. (2010) when he revealed his plans for testing the finished car whilst also being aware of his own age related limitations.

I shan't be demonstrating it on the road. We've got a racing circuit at Anglesey. I shall take it straight there. I shall take it around to one or two exhibitions...within the next year or two, but because of fatigue and tiredness one can't do things as quickly as one would like (F2:8).

Finally, the meaning of being in place was demonstrated on a more macro community level by three of the women, Amy, Yvette and Maggie. All had lived since marriage in the same location and had become embedded in their communities. For example, Yvette recounted with pride her sense of place in the community, which also incorporates the temporal aspect of place.

If I go into L.....about 15 minutes walk, there'll be at least ten people that I say hello to...'cos I knew the children when they were going school with my children and then the parents and...I feel comfortable. And our neighbours are fantastic...so we're quite happy here...even if you're penniless to live among these people...it's worth it (Y2:7/8).

Smaldone et al. (2008) contended that any geographic space can become a place if some form of personal meaning is bestowed upon it, which has a temporal dimension in its construction, and this was evident in the findings from this study. They

suggested that for meaning to be deep and lasting, an enduring relationship with a place is often an essential feature. However neither Alice nor Fred had been associated with their place for more than ten years, which implies that both the potency of the occupation performed within it and its association with the life story may be more influential. This endorses the findings of Heatwole-Shank and Cutchin (2011) who proposed that meaning is more likely to be generated in any location where there is an association between the place and the person's life story. As Rebeiro (2001) suggested meanings associated with place also influenced the meaning of occupations performed within it, which was particularly evident for Alice. A sense of place contributes to identity, develops and intensifies over time (Rowles, 2000; Rowles, 2008) and can express the interdependence between structure and agency (Huot and Laliberte-Rudman, 2010). The three women who had lived in their communities since marriage and were occupationally embedded within them all demonstrated a well developed sense of place and identity.

9:2:5 Creativity and spirituality

Creativity and spirituality were aspects of meaning evident in four key occupations. Both Maggie and Alice experienced a sense of creativity and spirituality in their gardens as has already been suggested. For Maggie gardening enabled "*being in God's air*" (M2:2) and her pleasure in the growing cycle was significant (M2:3, p11) and later, she received great satisfaction from using the produce (M2:3, p10). Alice also gained satisfaction from the growing cycle and spiritually felt closest to her husband in her garden (A13:20, p11). A finding that supports the opinions of Christiansen's (1997) and Peloquin (1997), in their theoretical arguments concerning spirituality and occupation, that gardening, amongst other occupations, such as the expressive arts, can provide spiritual and creative meaning.

However it has been argued that creativity also arises from cognitive processes, for example lateral thinking as a way of facilitating new patterns (de Bono, 1970). A process that does not have to cease in later life, as Engelman (2000) discovered in her study of brainstorming with a group of older women. Fred and Sheila appeared to demonstrate cognitive creativity with Sheila providing a good example in her volunteer work.

I'm doing a day on codes and ciphers with them so I've got to make up all the materials...I'm quite good at presenting...and I take a pride in trying to think through the requirements of the audience... (S2:16).

Whereas singing in a choir for most of her life provided a more aesthetic form of creative meaning, normally associated with the arts and involving the senses.

It's partly the music itself but it's also the co-operative nature... singing in groups and with other voices, that's what I enjoy. I have a kind of kinaesthesia where the voice is concerned...I picture the timbre of voice in terms of colours and materials... (S2:9).

Occupations with creative meaning often involve problem solving and challenge (Creek, 2002; Hasselkus, 2002), and these qualities were evident in the key occupations of both Sheila and Maggie which, they believed, contributed to their life satisfaction in other areas of their lives. This accords with the findings of Fisher and Specht (1999) who contended that creative occupations lead to greater openness to life and a willingness to explore. Also Reynolds (2003) found that positivity in managing adverse or transitional situations all contributed to successful ageing. According to Cohen *et al.* (2006) creativity can promote physical as well as psychosocial health, which was apparent in Sheila's choral singing. It is also possible that Sheila experienced a degree of spiritual meaning, although it was not explicitly expressed. Another characteristic of creative occupations according to Rebeiro and Polgar (1998) and Griffiths (2008) is that they have the ability to produce a state of flow. These authors found this to be particularly beneficial to health (Rebeiro & Polgar, 1998; Griffiths, 2008). This was not expressed explicitly in the data, but it could be argued, was implicit in the way that the participants spoke of their key occupations and it has been suggested that the experience of flow is likely to enhance potency of meaning (Jonsson, 2008). Overall creative occupations were essential to both promoting and preserving a sense of personal and social identity for all participants. This finding is similar to Howie *et al.* (2004) and Reynolds (2009).

9:2:6 Meaning in sport

As Seippel (2006) found, people experience the meaning of sport in different ways. However, in the literature, many of the interrelated meanings inherent in sport and active leisure were largely exclusive to these occupations. Certainly, for Donald, sport appeared to hold a largely different set of meaning from the other key occupations already discussed. He played golf twice a month, indoor or outdoor bowls approximately three times a week and cricket once a week. Studies in the sociology of sport found that sport provides an escape from the realities of everyday life offering embodied experiences of fun, the opportunity for pleasure and enjoyment and an intensity of emotion not normally available in everyday life (Arbena, 2000; Seippel, 2006; Wellard, 2012), and this appears to have been the case for Donald. *It's a bit hair raising...I do it for the thrill of it (Don2:7)*, when speaking of white water canoeing, and of a more recent introductory flying lesson.

It was so exhilarating, almost as good as motor racing..., being in control...fantastic ...but the cost is astronomical... (D2:19).

Donald was no longer able to engage in these challenging sports, but clearly still enjoyed the memory of them.

The literature suggested that meaning in later life is more likely to be associated with negotiating or resisting the negative factors associated with ageing, personal empowerment (Dionigi, 2002; Dionigi, 2006) and mental relaxation (Seippel, 2006). Donald was proud of his trim physique and his ability to keep up with his golfing companions. He appeared to be competitive, but not seriously so,

I'm competitive, but some people when they loose...I just think oh I've lost and well...that's it and I move onto the next one (Don2:10).

This is in line with the view that sport has competitive meaning (Seippel, 2006; Garcia and Mandich 2005), with an underlying assumption that, men are more competitive than women and are able to express their masculinity through sport (Beagan & Saunders, 2005). However, competitive meaning for Donald was also associated with the challenge of improving his skills as Garcia and Mandich (2005) demonstrated. Certainly he revealed a pride in his abilities, which gave him satisfaction and was expressed in posture, facial expression and tone of voice as well as in words.

I was quite...a reasonable bowler. I got in the teams straight away. They were glad that I was able to play (Don2:11).

For Donald sport appeared to have contributed significantly towards his interrelated physical, social and cultural sense of self found by Wellard, (2012). Donald evinced an identity of someone who is strong, fit, assertive and in control. These are qualities that Beagan and Saunders (2006) found to be central to masculine identity. Donald appeared to be using sport to negotiate an acceptable way of ageing, although he expressed some concern for the time when he could no longer play sport.

I don't know what I'd do if I didn't do that, I'd go up the wall...I'd find something else, there's no doubt, you know (Don2:15).

Here he demonstrated a positive sense of future adaptability and he went on to discuss some other less physically demanding occupations. Whilst sport may provide older individuals the opportunity to express youthfulness and negotiate meanings of older age, found by Dionigi (2002) and some ability to resist an ageing identity (Dionigi, 2006), adaptability to cope with declining capacity appears to be essential to long lasting well-being (Atchley, 1998).

9:2:7 Discussion of meaning of key occupations

Various theorists have offered a range of different interpretations of meaning that have all been found relevant to understanding the meanings of key occupations. Different combinations of meaning have been found in each form of occupation, with some more prevalent than others. Sport and active leisure appears to have its own set of meanings which seem distinct from other occupations. Interestingly, there appeared to be considerable similarity of meaning for the two participants who's key occupation was gardening, which also appeared to carry the widest variety of meaning. A further dimension to a sense of meaning experienced in all key occupations was the drive to achieve mastery through building performance skills and competence over time, which supports the theories of Schade and Schultz (1997) and Kielhofner (2008). Maggie, (M2:1, p165) through the extended build up of her gardening skills from the age of nine and Donald (Don2:11, p 176) with his confidence in his sporting skills, both provided good examples of this.

The data suggests that the various forms of positive meaning exhibited have all contributed towards healthy and successful ageing supporting the view of Jackson *et al.* (1998) that experiencing meaning in the context of one's occupations is central to successful ageing. Connection with others, either through the past self or 'being with' others in the present, was the most predominant source of meaning for all participants. Whereas being deprived of meaning through bereavement occasioned a state of 'being without' and appeared to be detrimental to psychological health. It can be extrapolated from this that a similar state of 'being without' might be experienced after any form of significant change such as moving to live near relatives, or into a residential home. Those who were recently bereaved appeared to have used occupation in their search for renewed meaning in life, largely through those occupations which gave connection with others. Those who were bereaved less recently had previously engaged successfully in a similar process. Finally, it was apparent that connection with the past self, including past relationships, was an essential aspect of a continuing sense of self.

The meaning of productivity was evident in seven key occupations in terms of the actual sense of performing useful work, dedication to a cause, a sense of self worth and altruism. It is interesting that this form of meaning has continued to be important for all but one of the participants even though all are past retirement age. This may of course be explained by taking the view that productivity does not only relate to paid employment, and most people in later life engage in occupations with the subjective meaning of work. That productive occupations are beneficial to health has been reported in studies by Rowe and Khan (1997) and Warburton and Pinsker (2006)

while in Yerxa's (1998) opinion, productive occupations are fundamentally more important to health than leisure.

Meaning of place, and creative and spiritual meaning were evident in five and four key occupations respectively. Meaningful places ranged from the intimate to those in the wider community. The potency of the occupation performed within a place and its association with the life story appeared to be as significant to meaning as the length of association with place. Additionally, meanings associated with place can become attached to the occupations performed within them. In relation to creative and spiritual meaning it has been argued that gardening and singing in a choir carried both these forms of meaning whereas meaning associated with cognitive creativity appeared to lack a spiritual dimension. Finally, the subjective meaning of key occupations has been explored in detail, but it is likely that other forms of meaning may be found in the daily lives of the participants.

9:3 Occupational meaning in daily life and routines

In addition to the subjective meaning found in the occupations most important to the participants, meaning could also be found when occupational meaning in daily life and routines was considered. Data from both the narratives and time use diaries were used. According to Clarke (2000), routines locate individuals within a stream of time and are the structure through which occupations are organised in daily and weekly life. The difficulty of sustaining occupational balance in daily routines, found to be important during working life by Christiansen (2006) and Hakansson *et al.* (2006), is no longer pertinent. New routines are required in retirement and establishing new routines may be one of the greatest challenges people face (Jonsson *et al.*, 2000). This might be explained, for some, by difficulty in relinquishing a previous work identity as found by Unruh (2004). This was demonstrated by Donald who was still experiencing difficulty in this respect.

They did offer me a bit of holiday cover, but I turned it down. I think honestly if I went back and got a taste for it I'd be tempted to go back, but I don't want to really... (Don1:12)

Another function of routine is the sense of pleasurable anticipation it may engender, for example Amy articulated the importance of having enjoyable events to shape her weekly and monthly routines.

I look forward to going out with Chad on a Wednesday. We go out for lunch somewhere...and may be to a garden centre or somewhere like

that afterwards,...and I go to these Methodist chapel meetings once a fortnight... it's nice to have something to look forward to... (A2:9).

Three major meaning themes emerged from the data in relation to the participants' engagement in daily life and routines; one, found in key occupations, was meaningful connection in daily and weekly routines. The two other additional forms of meaning were preserving capacity and obligation or fun.

9:3:1 Meaningful connection in daily and weekly routines

Connection with the past self and with others appeared as significant in daily life as it did in key occupations, which again supports the importance of human connection during occupation found by Hasselkus (2002) and Reed *et al.* (2010). For example Desmond's routine still held strong connotation of his previous self when caring for his wife.

I suppose my one and only objective was looking after her...8 years, organising everything I did & she did. I went to various support groups, I did the shopping, the washing and the ironing, all these things...I suppose the same routine still takes place...still things happen on those particular days" (D2:7).

and Alice's routines demonstrated connection with others,

I joined the Older People's Forum; I go to a drop in, where we play scrabble on a Wednesday and I joined this little craft group which I go to Thursday afternoon. I'm also a volunteer at the stroke club...I've met quite a few people from that. I've palled up with a lady round the corner from here and we go out together (A13:6).

while Maggie organised her daily and weekly routines after her husband died to ensure she went out every day to some sort of social gathering in her local community, such as coffee mornings and various clubs. This allowed her to *come home and be content* (Telephone conversation: 18.12.08)

Sheila also believed the structure of her routines ensured she maintained her connection with others.

I do put myself out because...actually putting yourself out for something gives you social contacts (S1:9).

She belonged to several U3A interest groups, however she also appreciated the contrasts in the life that came from her weekly routine.

I go to classes...on family history...and...I go to Italian classes at the Guildhouse. Most of the U3A things are once a fortnight, I go to a music group once a fortnight, other things ...are about once a month, so its not

a gross amount, but I do feel when I look at the calendar and I find a totally blank day...there's a day I can just be me...I can slob and do Sudoku's and watch television (S1:9).

The meaning here suggests that some effort was required in the connected aspect of her routines and a break in routine allowed a more relaxed aspect of her identity to emerge. In other words, Sheila appears to have created a balance in her routine which has met her psychological needs as suggested by Christiansen (2006).

9:3:2 Preserving capacity

According to Kielhofner (2008), age related changes in occupation may be mitigated by remaining physically and cognitively active and some, for example Clark *et al.* (1997), believed doing so is essential for successful ageing. Preserving capacity through physical and cognitive occupations was apparent in the meaning of some occupations for several participants within their daily or weekly routines. For Donald one of the meanings he attached to sport was to negotiate an acceptable way of ageing, but a similar form of this meaning was apparent in some routine occupations of other participants. Four took regular physical exercise; Desmond and Sheila attended a gym twice a week,

I try and do two mornings at the gym, Tuesday and Thursday mornings.

I do about an hour or so... (D2:8).

and additionally the time use diaries revealed that Desmond used an exercise bike; Sheila, Alice and Yvette walked and Maggie and Alice cycled. In her narrative, Alice revealed she also swam once a week having been an enthusiastic swimmer as a child.

I got my passport to leisure and I go usually Tuesday's and Thursdays.

And I've got up to 40 length, which is a kilometre (A13:5).

Another way of preserving capacity was demonstrated by Amy who lived in a sheltered housing community. She appreciated the independence this gave her, which supports the findings of a study by Taylor and Neill (2009) that revealed sheltered housing residents valued the independence and choice it gave them. Individuals living in sheltered housing, Van Bilsen *et al.* (2008) suggested, are also more likely to have a greater sense of autonomy and security than those living independently in the community and have greater social contact. This was evident for Amy and her friends who had a daily routine for ensuring each others safety.

every morning when I get up I'll open my bedroom window...she looks for that widow to be open you see. One morning I overslept and she rang me up. 'Are you all right, your window's not open'?...And then again I've got a blind in the kitchen...and if that blind's not up by...nine

'o' clock there's always someone ring to see I'm all right, which is good isn't it? (A1:11)

Amy organised her life to give precedence to her most meaningful occupation, 'being with' her friends, which supports the findings of Taylor and Neill (2009) where tenants of sheltered housing highly valued social interaction with each other, fostered by activities such as regular lunches, coffee mornings and social events. Amy had so far rejected domestic help with housework because it would impinge on time when she usually connected with her friends in the community room. Instead, with considerable effort, she continued to complete the housework herself.

I get so that I do one job a day...I'll Hoover one day and... dust and polish another...I'll do the kitchen floor...then the bathroom another (A1:12).

Finally, several participants engaged in intellectual occupations, which they believed, preserved cognitive capacity. Part of Desmond's daily routine was completing Sudoku's and crosswords, while Maggie, who played whist regularly, saw it as a way of keeping mentally alert.

I think it keeps my brain active, you know you pitch yourself against some of these old ones who are very, very keen (M2:1).

Sheila believed that many of her routine occupations, such as U3A, adult education classes (S1:9, p20) and voluntary work were opportunities for learning. For example, her voluntary work in the box office provided her with the opportunity to learn a new skill. While a love of learning through the regular lectures, talks and demonstrations at the W I meetings had been instrumental in Amy's continuing attendance and attracted Maggie to join the organisation in her 80s. Both women were also delighted by the new experiences and learning arising from their travel abroad, as the opportunity to do so only occurred in later life.

9:3:3 Obligation or fun

The data suggests that work or productivity occupations often appeared to carry a meaning of obligation, which supports the findings of Ludwig (1997) who found that the meaning and purpose of her elderly, female participants' routines was linked to their ability to meet obligations. Obligatory meaning for participants, described by two as a sense of duty, arose from personal standards and values and from societal expectation. For example, Sheila's personal standards resulted in an obligation to clean the house before people come to stay.

That's something I do as infrequently as possible, I've got a people coming on Friday and I'm going to have to do something about it (S2:3)

While Amy demonstrated personal friendship values:

It's my friend. She's come out of hospital...I go and sit with her for a little while, mostly out of a sense of duty really (A2:8).

Desmond disliked letting people down and sometimes felt societal pressure.

U3A meetings I go to each month, I'm expected to turn up...it's almost a duty in a sense (D3:2).

Ludwig (1998) found that older women sought less obligation and more freedom in later life, which may explain why only four participants appeared to find this form of meaning in their daily routine occupations. In addition, obligations in retirement are largely self imposed according to Jonsson *et al.* (2001), as Amy, Desmond and Sheila demonstrated. In contrast, retirement for Donald meant that he was required to assume what he perceived as an obligatory occupation. In response to societal expectations he started to visit his mother on a regular basis with his wife.

The literature has suggested that sport and active leisure should be encouraged to promote healthy ageing (Glass *et al.*, 1999; Schroll, 2003; Crombie *et al.*, 2004; Berger *et al.*, 2005; Newman *et al.*, 2010) and it is quite likely that it consequently carries a meaning of obligation for some participants in association with preserving capacity. However, various authors, for example Kretchmark (2001) and Riewald (2003), have proposed that in order to ensure continuing participation in sport or active leisure the associated meaning of fun is an essential ingredient. Nevertheless, sport was not the only occupation to carry a meaning of fun in the daily lives of some participants. For them fun was experienced through the memory of connection with others as suggested by Podilchak (1991) and Leufstadius *et al.* (2008) which had connotations of play. The current study supports their findings, for example Donald, who enjoyed sport and physical activity, had fun playing with his children on holiday in the family dinghy,

the fun they had out of it, and I did as well, I mean we could all get in it (Don2:4).

He recounted similar, but less strenuous experiences of fun with his step-grandson in the present time, given additional potency of meaning through recollection of his past experiences with his own sons.

Amy and Alice were the other two participants who referred to having fun in their current routines. Alice experienced this meaning through helping at the Stroke club that her husband had previously attended, *That's where I get a lot of...fun and frivolity (A3:20)*. While Amy found fun in her friendship occupations, for example when playing bingo:

...number three, one little knee, all the fours, droopy drawers...(both laughing), we have a laugh...and we have a lot of fun... (A2:5).

Friendship occupations, which were Amy's core occupation, were clearly fun and formed a key aspect of her identity orientated towards interpersonal harmony and service to others. This supports the findings of McGregor and Little (1998) who found an association between those with communal identities and fun. Fun was also experienced during the recounting of the life story through recollection of fun experienced in the past. Yvette, Fred and Maggie displayed this phenomenon, recollecting events from their earlier life. For them, what appeared to give a lasting meaning of fun and pleasure was acting in opposition to authority, where there existed an obligation to comply. For example, Yvette recalled outwitting authority as a student nurse:

It was fun...(laughing)...you had to be in your room at ten every night and the home sister used to come round and check your rooms ...sometimes we used to put pillows in our beds (both laughing) and ...hide in each others room...in the wardrobes and under the beds... (Y1:8).

In conclusion, meaningful connection was the most powerful form of meaning for participants during their daily and weekly routines, as it had been in their key occupations. This offers strong support to the work of Hasselkus (2002), Hocking *et al.* (2002), Hammell (2009) and Reed *et al.* (2010). However, two additional forms of meaning emerged, preserving capacity and obligation or fun. The meaning of preserving capacity was unsurprising in light of the life stage and societal pressures to remain physically active and engaged in later life. What was less anticipated was the evident meaning of obligation for some, either as a result of societal pressures or personal values. This was sometimes balanced by a sense of fun experienced, either through the recollection of fun in the past, or during current occupations. For two participants there appeared to be a strong association between the meaning which formed a core aspect of identity in their key occupation and the meaning which pervaded daily life. For example, one participant's key occupation of friendship could be associated with the need for fun in her past and current life.

9:4 Conclusion

Meaningful connection was the most dominant form of meaning in both key occupations and daily and weekly routines, either through connection with the past self or 'being with' others in the present. The existence of meaningful connection supports previous literature, and the findings from this study suggest it is, in fact, the predominant meaning in later life. This study also found a further powerful meaning

occasioned by major loss, a severance of connection that created a feeling of 'being without', infusing most occupations. This was experienced at the time of narration by the two participants who had most recently suffered spousal bereavements. They both sought renewed meaning through engaging in occupations giving connection with others. A similar strategy had been adopted by two other participants who had suffered spousal bereavements more than 10 years previously and it is likely they too had experienced a state of 'being without'. In view of the life stage it is likely that "being without" is a meaning actively experienced by the majority of individuals at some point in later life.

Various examples of meaning have been presented in addition to meaningful connection, including meaning of place, work, creativity and spirituality, sport and preserving capacity. However meaning was not mutually exclusive and one occupation could carry a variety of meanings according to each participant's experiences. Using a life history narrative approach to explore meaning in occupation in later life has gone beyond the previous understanding in the literature that occupations carry multiple meanings. This approach has facilitated an appreciation of how meaning is layered, and built upon throughout the lifetime as occupational identity develops and consolidates. Occupational meaning was not just influenced by contextual factors arising from the environment when an occupation is performed, but also by numerous individual meanings arising from past lives. These were related, not only to previous experiences of performing the occupation, but were also influenced by societal factors discussed in the previous chapters, for example, Donald, Maggie and Amy's experience of holiday's and travel had been limited by social class and poverty until well into adult life, intensifying potency and depth of meaning. Previous relationships had also exerted a powerful influence on occupational meaning, particularly those originating in childhood and the findings suggest both societal and relationship factors may have great influence on potency and depth of meaning in occupation.

Other studies of meaning in occupations have not uncovered this whole life aspect of layered meaning encompassing different occupations. For example, the recent phenomenological study by Reed *et al.* (2010) investigated the meaning of recently performed occupations following a disruption and the findings were focussed on the interconnected present and future meaning of occupation, while acknowledging the contribution of contextual differences only in the present. Alternatively just one aspect of current meaning was considered (Heatwole-Shank & Cutchin, 2010) or, meaning was studied in both the past and present, but related to one form of meaning such as meaning of place (Rowles, 2008). Alternatively only one form of occupation (Hocking *et al.*, 2002), or life events such as retirement (Jonsson *et al.*, 2000) were

studied, while in occupational therapy literature the focus has tended towards occupational disruption or disability (Reynolds, 2003; Griffiths *et al.*, 2008).

Finally, the importance of connection to the past self for the participants in this study suggests that occupational meaning and occupational identity are linked throughout life. Findings related to occupational identity will be presented and synthesised with the literature in the following chapter.

CHAPTER 10

Occupational identity over the life course

10:1 Introduction

This first part of this chapter will present findings related to the participants' perceived sense of self in the present, their self schema. It will discuss the influence of self schema on perceived capacity in various occupational skills and values and beliefs acquired through societal influences. These findings are discussed in relation to the theory base of occupational identity includes the concept of the ageless self, and the evidence found for the presence of continuity and coherence in occupational identity. Also addressed is whether there is a possible link between self schema and perceived self efficacy and whether this influenced the participants' occupational choices.

10:2 How people see themselves

Markus and Herzog (1991) argued that people have self schemas, which form the self concept, on aspects of self that are important to them and are aschematic on dimensions that are unimportant. It follows that people hold multiple identities where a range of contexts bring about different selves because self conception, it has been contended by McQuillen *et al.*, (2001, Hogg and Vaughan (2005) and Norrick (2009), is very much context dependent. From an occupational science perspective, Laliberte-Rudman (2002) and Howie *et al.* (2004) have indicated that some occupations encompass the core qualities and characteristics of individuals reflecting the essential person they believe themselves to be and this appears to be evident for the participants in this study. The findings reported in this thesis suggest that there were at least three different aspects to the way the participants perceived themselves; one was related to personal characteristics or qualities, the second was related to perceived skills, ability and capacity in occupations or occupational roles and the third reflected other beliefs about the self.

10:2:1 Personal qualities

Some participants projected a fairly positive view of themselves. Maggie when asked how she would describe herself said:

*I hope I'm easy going...and if I do anybody a good turn I'm really thrilled
...I couldn't be spiteful...yet I don't think I'd let anybody put on me
(M2:8).*

Her earlier adult self was revealed as someone who could never sit idle, *I'd just got to do something* (M2:4), which continued to the present time. Yvette too liked to be busy *this is what we were brought up to...and I don't think I will ever change* (Y2:12). Maggie appeared to be someone who was assertive and as a young person she had *always got this bit of rebellion in me* (M1:3). She was able to stand up to her father, as could Alice who saw herself as *a bit argumentative, particularly where Dad was concerned* (A13:1).

Both Yvette and Alice described their childhood selves as tomboys. Behaviours such as being adventurous, climbing trees, playing with boys, roaming the countryside and getting dirty were involved. Each had a sister, one older, one younger and they contrasted themselves with the behaviour of their sister who in each case was more home based and remained clean and tidy. Yvette recalls:

My sister was the opposite, she was always immaculate, every hair in place. It was so pulled up, nice and clean and tidy and Yvette was always dirty..... (Y1:4)

Maggie, whilst not describing herself as a tomboy saw herself as independent with a sense of adventure, which was demonstrated in her willingness to travel alone, complex journeys by bus, and later cycling on her own, 15 or 20 miles from where she lived. Amy, on the other hand saw herself as adopting a more traditional home based female role early in life:

I think I was quite domesticated when I was a child. I'd always got a dust pan and brush...and a duster and of course Mondays...were washday and when I came home from school at dinner time mum used to tell me to get the duster and do the (A2:3).

She described herself as *'always been a bit shy'* (A2:7) and today when she went out to meetings she was:

*quite happy in the kitchen...wash up, keep in the background...that's me.
Never been one for going up front.*

Of the men, Donald also held a largely positive view of himself as a man with traditional masculine qualities, strong, assertive and fairly dominant for all his adult life, both at work and in his relationships. However, in later life since his second

marriage and his retirement he considered he was '*more laid back, more relaxed*' (Don2:15).

Sheila was the only participant who held two distinct and opposing views of self, one she believed expressed her good qualities, while the other was less acceptable.

Well there were the two me's, there was the me that went out to work and there was the me that was at home. They were just two totally different people (S1:4).

The work me was willing to take chances, seize opportunities and enjoyed a challenge.

I'm quite good at rising to it and I find it helpful occasionally to have some' (S2:4)

Whereas the home me lacked confidence and emotional maturity:

By the time I was grown up I had no confidence of any sort, I find it very, very hard work being assertive even now, unless of course I've got a role (S1:1).

Both Desmond and Fred also appeared to acknowledge what they regarded as less positive personal characteristics. Desmond felt that as a child he was:

More introvert than most other school friends...I was quite happy...in my own space... that probably continued afterwards too (D3:4). And later:
I still have that reticence, innate, I think in some way restrains me from being over sociable (D3:12/13).

While Fred believed he had been a loner and in his work as an engineer had felt: '*more comfortable manipulating things*' (F1:6) rather than being with people. He thought he was probably a poor organiser and could be quite single minded or even obsessive: '*I'm not aware of what other people are doing or thinking*' (F2:6)

10:2:2 Occupational skills based self schema

Three of the participants, one man and two women, expressed confidence in their practical skills. Donald was highly confident in his sporting skills and his workplace practical skills, for example:

I always think practical knowledge is...I can walk into a meeting now ...and I could tell the people who knew what they were talking about and the ones who were bluffing...I suffer fools...not at all, I won't tolerate them (Don1:8).

Both Alice and Maggie were in no doubt of their homemaking and gardening skills, for example, Maggie defended her homemaking skills against her daughter's opinion that she lacked formal education:

and I'd just put the dinner out...and I were really cross...I said "you've got to be educated to do a thing like this" (M2:4).

Amy's homemaking and gardening skills self schemas were now compromised by her reduced physical capacity although previously she saw herself as very skilled in these occupations, whereas Yvette's strongest sense of self appeared to be orientated outside the home in her various volunteer roles in which she regarded herself as effective and respected.

In contrast, the two men who had university education both appeared to carry a self schema of not being 'quite good enough' in their academic and subsequent work skills. They evinced some disappointment in their level of academic achievement at university although both had been successful at school. Of his degree Desmond said:

...it was supposed to be classics but I wasn't...really that good so I ended up doing a general degree (D1:1).

While Fred felt *'I might have done better if I'd gone straight from school'* (F1:17). Both went on to have qualified confidence in their work skills and achievements. Desmond appeared confident in his work skills, but blamed his lack of career progression and stability on his lack of political skills. While Fred blamed his lack of career progression on his lack of management skills.

The combination of being an only child and doing a science subject...its two minuses for getting into management (F1:21).

On the other hand, Sheila's self schema in education and employment was much more confident. She saw herself as being *'all round clever'* (S1:1) at school, including academic work and music, which continued at university and on into the workplace.

I think in a practical way and in an intellectual way I always knew I can do this. It was an assertive, there's nothing to stop me having a go at this (S2:6).

Possibly war time and relational experiences were influential in their different self schema. The war was never mentioned by Sheila and it can be construed that it had little influence on Sheila in terms of education, but relationally she had to endure her mother's reluctant mothering, which appears to have contributed to her two disparate identities. Both Fred and Desmond lived in London as children, Desmond's schooling and parental relationships were disrupted by his evacuation for the duration of the war. Fred's education was disrupted by occasional bombing and later he changed school as a result of the family move out of London. Relationally he regarded himself as being over protected by his mother because he was both 'sickly' and an only child and as a teenager his life was further disrupted by his parents' divorce in 1951, at a time when

divorce was still uncommon and largely undertaken by the more affluent who could afford it (Chan, 2005).

Several also spoke of how effective they felt they were, or had been, in various occupational roles, particularly those involving close relationships. For example Alice and Yvette both saw themselves as being good wives and mothers, whereas Sheila believed she had not succeeded as a wife in spite of *trying very, very hard to be...as good a wife as I could...it got harder and harder (1:4)* and also felt she had failed as a mother.

I think (my children) had an awful childhood really, things were grim at home and I've been trying to make it up ever since (S2:10).

Both Donald and Fred had their relationship with own their children disrupted by divorce. However, while Donald's relationship with his sons remained permanently impaired, Fred currently saw himself as a concerned and supportive father.

10:2:3 Other beliefs about the self

These tended to be related to beliefs about religion, spirituality and ethnicity, which have already been presented in Chapter 8, or about central aspects of the self. All displayed a well developed sense of self, an awareness of who they were and what they had achieved in their lives and there appeared to be an acceptance of the person they had become. Yvette expressed herself as being *'very happy with who I am'* (Y2:14) and felt *'life is worth living'* (Y2:13). Donald was a little more ambivalent; on the one hand he believed he had *'had a very quiet life'* (Don1:15), but on the other hand in another interview he gave his attitude to life as *'live it to the full because you never know how long you're here'* (Don2:18). Maggie believed *'life is what you make it'* (M2:notes) and Amy, who had received relatively few life opportunities, particularly as a child and young woman, was

quite content with simple things...I enjoy my quiet life. I love my bungalow, my little garden and I don't crave for anything else...I've got all I want now (A2:9).

And she believed she was:

Very ordinary I think...very ordinary. Like a bit of fun, feeling my age now but trying to keep young at heart...always see the funny side of everything, when I shouldn't...nothing special, just plain old me (A2:10).

On the other had Fred who had received many opportunities in life believed he had not always achieved his full potential, as did Desmond. However both had attained degree level education and this may also have led to more self questioning behaviour.

For Alice belonging to her family was the most central aspect of self:

That family ethos is just embedded in me...I suppose there was a lot of background there to family...and it sticks and it stays. I think if you got that inside you... (A13:1/2).

And she was very open about who she was:

What you see is what you get...I don't try to hide things because there's no point. I try and be me, that's all (A13:1).

While for Sheila, in later life, her two main, disparate identities had become more united, with the happier and more competent work identity becoming more dominant, although the incompetent and 'horrible' (S2:10) home aspect of self remained. Like Maggie, she appeared to believe life is what you make it:

Luck is...if its there you grab it...it isn't that some people are lucky and some people aren't, its just that some people are better at spotting it's around or have got a more positive attitude (S2:4).

Other central aspects of self for Donald, Yvette and Amy were ethnicity and spirituality discussed in chapter eight. Finally one aspect of self, to which two participants were finding it difficult to adjust, was becoming a widow or widower. The self schema held in the occupational role of spouse had been a predominant one for both of them. Although they were attempting to adopt behaviours and occupations appropriate to their new role, assuming the new self schema appeared to be more elusive.

10:3 Discussion: Occupational Identity and concept of self

10:3:1: Occupational focus of self schema

Various issues for discussion arise from these findings on self schema in relation to occupational identity. There appears to be a very strong occupational focus to many of these self schemas in terms of occupational skills and occupational roles. Also some of the personal qualities and characteristics had an occupational slant where they referred to the need to be busy or always engaged in doing. However, in the main, the findings indicate that the participants' personal qualities appeared to be innate qualities which were generally expressed through occupation and were context dependent. For example, both Yvette and Alice could be said to have an innate need for activity and physical challenge that was expressed through the occupations they engaged in such as climbing trees and scrambling through hedges when roaming the countryside and getting dirty. From an occupational science perspective theorists such as Law *et al.* (1996) and Kielhofner (2008) would contend their social, cultural and physical environments facilitated or afforded these occupations. From the viewpoint of social

psychology Markus and Herzog (1991) would argue that their self schemas were context dependent in that suitable physical environments were available to them, but also by the social mores of the 1940s and 1950s which viewed these occupations as untypical female behaviour, hence the appellation 'tomboy'.

Amy, on the other hand, expressed her innate reticence through occupations which kept her in the background in situations where she felt socially threatened. Contextual influences, such as a limited education and working as a domestic servant possibly served to reinforce her perceived position in a social hierarchy which exacerbated her shyness. When interacting with people she considered her peers she believed she was noticeably more confident, such as in the housing association where she lived. In one occupation, playing bingo, which took place in the community room she feels sufficiently at ease to take on the leading role of calling the numbers. Also with her peers, or with family she often described occupations as *fun*' (A2:5/9/10/14).

10:3:2 *Occupational roles and the ageless self*

Various non occupational scientists such as gerontologists Markus and Herzog (1991), sports scientists Phoenix and Sparkes (2009) and an expert in functional linguistics, Norrick (2009), through their research on ageing and Identity, all referred to multiple identities such as spouse, child, traveller, bridge player, or being fit and healthy, many of which relate to what occupational scientists would term occupational roles. The anthropologist, Kaufman (1993), who proposed her theory of the ageless self, gathered life stories of 60 people over the age of 70 in California who lived in the community. She found that an important source of identity and meaning in later life was the values formed through the societal influences and experiences an individual encountered over a lifetime. These values, which were shared by the whole of her study group, had a strong activity orientation and she argued they have the greatest influence on the formation of identities in later life. The concept of the ageless self has been both influential and appealing in recent years as it portrays the same rather positive image of ageing as do the activity and continuity theories of ageing, but it has also been subject to criticism.

Tornstam (1997) argued that Kaufman's (1994a) theory of the Ageless Self has introduced a separation of the body and the mind in the ageing process. McHugh (2000) asserted that the positive sense of continuity and coherence it offered is tempting to contemporary society, but agreed that the separation of mind and body it proposes conceals the reality of ageing. However the narratives in this study suggest that while the self demonstrates continuity and an unchanging sense of self the

realities of ageing are well integrated within. Fred, for example spent many hours as a child constructing model planes and cars and then worked as a mechanical and electrical engineer in car design. During this time he became enthusiastic about electric cars, but was unable to pursue this interest as, he argued, the power and influence of the oil companies prevented serious, government sponsored research into the concept. At retirement, he was able to combine skills acquired in model making and car design work together with his knowledge of and enthusiasm for electric cars to design and build an electric car. More recently he has become aware of his declining energy and recurring chest problems with the concomitant need to pace himself, both in constructing the car and disseminating his knowledge and expertise. He also conveyed an awareness of the time when he might no longer be able to carry out the occupation in its current form, but his occupational identity of being an enthusiastic proponent of electric cars would remain unchanged. However, whilst an acknowledgement of existing capacities formed participants' current occupational identity, a sense of multiple selves from the past contained within their life stories was also very evident as part of the composite whole occupational identity. Forsyth and Kielhofner (2006) and Kielhofner (2008) make reference to the concept of occupational identity being generated through a history of occupational participation, which is supported by the findings from this study, but this premise lacks an appreciation of the power of the past selves to current occupational identity in later life evidenced in this study.

10:3:3 *Coherence*

Beliefs about the self indicated considerable self knowledge and an inclusive acceptance of the person they had become and generally an overall sense of coherence. Markus and Herzog (1991) argued that according to their findings, in order to achieve coherence, people may restrict their set of life contexts, attribute change to external forces or constantly revise their autobiography. The findings from this study indicate that the later strategy could be the most important in later life. Norrick (2009) found in a large study in Indiana that story telling revealed both past and current selves for older people. Certainly the participants in the current study have had the opportunity to rehearse and revise their life stories many times to integrate past selves, with the different multiple identities of the current self and sometimes giving indication of hoped for future selves. For most of her life Sheila's self concept has lacked coherence as she has held two incompatible identities. Sheila demonstrates very clearly how different contexts bring into play different self schema. Her school environment created self schemas based on occupational competence in school work and music. In her home context her self schemas related to being a silent and obedient child, who avoided being with her family and lacked any form of competence in social and assertion skills.

10:3:4 *Continuity*

It is proposed that enduring self schemas have some similarity with Atchley's (1999) concept of inner continuity, where he argued that continuity and stability emerged over time in internal constructs such as self confidence, emotional resilience, personal goals and beliefs, with health variable having surprisingly little effect on mental constructs. Kaufman (1993) found in her research that continuity was actively sought and was maintained through a symbolic and creative process where meaning was derived from the past and was interpreted for a source for being in the present. Westerhof (2010) found, in his life course narrative interviews in the Netherlands of 24 men and women with a mean age of 70, that his participants were aware of living in a changing world. He identified in the narratives changes of increased material opportunities, more open and egalitarian relationships and more freedom of choice, while the values placed upon them varied with each participant. The narratives of the four oldest participants in this study support this view. Maggie, Amy, Desmond and Alice all acknowledged the often dramatic social and cultural changes that have occurred over their lifetimes, while their core identity appears to have remained unchanged. They used phrases such as '*I've always been*' and '*I'd always got*' and '*I still have that*' and '*I've never been one for*'. However, the youngest four participants in this study with a mean age of 68 rarely referred to societal changes, but still used phrases similar to those of the oldest four participants to indicate core identity.

Previous research on occupational identity has indicated that an essential aspect of some occupations was a consistent core of characteristics or enduring qualities of the person (Laliberte-Rudman, 2002; Howie, 2004; Unruh, 2004) as well as a more impermanent sense of the changing self, influenced on the one hand by the interaction with others and the environment, and on the other hand by changing abilities and capacities of the self (Howie *et al.*, 2004). It has already been discussed in the previous chapter how the participants' key occupations reflected this concept with five participants demonstrating the same key occupation throughout life. These had changed and evolved over the life span, influenced by personal capacity and ability on the one hand and by social structures, events and the social environment on the other. Four participants had developed new occupations in later life which could be traced back to occupations, or events experienced as a child or young adult, but which had remained dormant during working and family life. Retirement or other life event then presented an opportunity to resume an old occupation or branch out on something new. However, close examination revealed that even when a participant takes up a new occupation it can be traced back to self schema held earlier in life. For example, Yvette's work with the Citizen's Advice Bureau can be traced back to her self schema of

being someone who helped others, which she has held since her adolescence through the example of her mother and later through becoming a nurse, while her work as a magistrate reflected her thwarted desire to join the police force when she left school.

10:3:5 Self efficacy

The self schema of the participants represents both the unchanging aspects of self and for some a sense of agency in their ability to effect some change. The widely applied theory of self efficacy proposed by Bandura (Bandura, 1977; Bandura, 1989) was perceived by George (1998), in her research on ageing and identity, to be a key aspect of identity and it was particularly evident in Sheila's narrative. This sense of personal agency, Bandura believed, was a reciprocal causation of action, cognitive, affective and other personal factors, and environmental events interacting together. It acts as a mechanism for initiating and persisting in goal directed behaviour. People with high perceived efficacy were more likely to initiate action, overcome obstacles and achieve the desired goals than those with low self efficacy who were far less likely to initiate action, sustain effort and were easily influenced by failure (Bandura, 1977; Bandura, 1982). Bandura (1982) argued that this constituted a core belief of human agency. Sheila demonstrated two distinct aspects of identity, one at work where self efficacy was high and she had achieved considerable success and her other home based identity where self efficacy was low and characterised by a sense of failure. In her pre and post retirement years she had attempted to effect changes to her relationships with her siblings and her children. Possibly high self efficacy in her work life and relationships was sufficient to encourage her to work on improving these personal relationships. She believed that she was now much more effective, both as a mother and a sibling, than she was when she was younger. However this sense of efficacy in relationships is still confined to roles in which she feels confident, probably ones where she continued to be able to use her work skills, which gives permission for her to behave much more assertively than in most social roles. In occupational science this sense of self efficacy holds similarities with the sense of competence which Kielhofner (2008) included within his definition of occupational identity, whereas earlier Forsyth and Kielhofner (2006) referred to a 'sense of capacity and effectiveness for doing' (Forsyth and Kielhofner, 2006:78).

Other beliefs about the self in this study appeared to reflect attitudes to life. It is suggested that these have shaped the participants engagement in various occupation, for example Maggie and Sheila, displayed the positive attitude of '*life is what you make it*', and both had engaged in a large number and wide variety of occupations, both in the past and currently. This suggests both had high self efficacy in the majority of

these occupations (Bandura, 1989). Alice, in spite of her husband's death, also continued to engage in many occupations. Her core self concept was related to the family ethos embedded within her, which had occasioned her to pursue and prioritise occupations with or for the family throughout her life and she had continued to do so. Alice also appeared to have high self efficacy in the majority of her occupations, but had lost efficacy in some when her husband died, causing significant changes to her occupational identity. Although socially a very competent woman, she lost confidence in her ability to go out socially, to drive beyond her immediate locality or to travel. At the time of the interviews she had an intense desire to be with one of her grandsons who was currently staying in New Zealand and who, she believed, was feeling distressed. Although she had been there twice before with her husband she felt totally unable to travel there on her own.

On the other hand Amy enjoyed a quiet, simple life and engaged in a far smaller range of occupations. It is likely this was influenced by her recent reduced mobility, however possibly an additional factor has been her limited expectations over the years; fashioned by such things as family attitudes and relationships, poverty, gender, education, moral values, class and the culture within which she grew up. The reward from this for Amy, was that her appreciation of her holidays abroad post retirement was heightened. However, Schieman and Campbell (2001) found that self efficacy declines in later life with the intrusion of physical disability and this appeared to be the case for Amy whose occupational range had reduced in recent years.

10:4 Conclusion

This chapter has demonstrated the occupational nature of self schema related to occupational skills and roles held by the participants in this study, which provides strong support for the existence of the concept of occupational identity. In addition, personal qualities or characteristics appeared to be expressed through occupation and were context dependent. The findings upheld the generally held view that occupations frequently embody the core characteristics of a person and demonstrated that even when new apparently unrelated occupations begin in later life, they also embodied self schema held much earlier in life. A sense of multiple selves from the past were evident as part of the composite whole of occupational identity, and this was found to be a more powerful and pervasive aspect of their identity than has been indicated previously. Overall the narratives in this study suggested that while the self demonstrated continuity and an unchanging sense of self, within a changing world, the realities of ageing were, to some extent, also acknowledged within it.

Chapter 11

Discussion

11:1 Introduction

The previous three chapters have discussed findings from this study. The findings and discussion on the influence of the social context in Chapter 8 included the influence of events such as WW1 and WW2 together with the impact of government policy on education and opportunities for the participants. Various societal influences were also explored including early relationships, particularly those with the family, school and church, together with other societal influences such as culture and gender. The effect of these influences on the values and beliefs of participants was evident and these were carried through into later life in the form of religious beliefs, perceived ethnicity and making a contribution to society. Chapter 9 explored the meanings of key and routine occupations held by the participants and a link between occupational meaning and occupational identity was suggested. Meaningful connection was found to be the most significant form of meaning in both key occupations and weekly routines. The loss of meaningful connection following bereavement or other significant loss was identified. Other meanings of place, work or productivity, creativity and spirituality, sport and preserving capacity were also frequently cited by participants and it was evident that occupations had multiple subjective meanings layered and built up over time as occupational identity developed within its own unique social context. It was suggested that societal factors and early relationships may influence both the potency and depth of meaning of an occupation. Chapter 10 presented findings on the participants' sense of self in their current lives through personal qualities, their occupational skills and values and beliefs. It was found that there was a strong occupational focus held within the concept of self which included concepts of occupational roles and the ageless self, coherence, continuity and self efficacy.

This chapter will discuss issues arising from the findings. These will include evidence related to occupational engagement in later life and will discuss whether the findings support some or all of the theories of ageing and the different concepts of successful ageing. It will go on to debate the merits of two major sociological methods of enquiry, social constructionism and structuration theory in relation to the development of the concept of occupational identity. Aspects of choice to be considered will include

occupational meaning, the influence of early life relationships and societal influences. Other issues such as gender, culture and current health and capacity of the participants will be discussed in relation to occupational choices in later life.

11:2 Occupational engagement in later life

The findings from this study lend support to three of the four theories of ageing, the activity theory (Lemon *et al.*, 1972), the continuity theory (Atchley, 1989) and the theory of gerotranscendence (Tornstam, 1989). It provides no support for the disengagement theory of ageing (Cummings & Henry, 1961). The participants in this study have demonstrated a high level of occupational engagement in their current lives, which appears to have developed over time from quite high levels of engagement over a lifetime, providing strong support for activity theory. They have often demonstrated effective adaptation in the face of declining capacities and some have acknowledged the need for future adaptation. This has taken the form of continuing with an occupation, whilst restricting its scope, for example Maggie had decided her garden would no longer be open to the public on her village's open gardens weekend which allowed her to conflate her meaningful past experiences with her current circumstances, something which Kaufman (2000) found was essential for successful adaptation. Alternatively an occupation was changed to one fulfilling the same or similar occupational needs as when Desmond started to use an exercise bike at home every morning to keep physically active as he could no longer walk very far. Both Sheila and Donald demonstrated concern for their ability to continue with key, highly valued occupations. Sheila dreaded not being able to sing any longer, if her cough, the side effect of necessary medication worsened; Donald feared how he would cope if he could no longer actively engage in sport. On reflection, both appeared to believe they would find substitute occupations and demonstrated the strength of inner continuity which forms part of Atchley's continuity theory (Atchley, 1989). It is also likely that because they had a wide range of occupations it was possible to view the possible loss of one with greater equanimity.

Whilst all the participants demonstrated an active occupational engagement in life there was some evidence for the theory of gerotranscendence for a few. This was evident in the way both the gardeners, Maggie and Alice had a sense of just 'being' in their gardens, whilst the oldest two participants, Maggie and Amy appeared to have high levels of life satisfaction. This comes, Tornstam (1997) suggested, as the result of a shift in meta perspective where there is a decreased concern with the material world and relationships and an increased interest in what might be termed spiritual ideas.

Several of the participants, particularly the women, held various forms of spiritual belief; and were probably less materialistic than earlier in life. However, two of the men evidenced a continuing interest in material possessions and none of the participants had less concern with relationships as has been evident in the high importance of meaningful connection with others in key occupations. The participants did not demonstrate any form of disengagement from society through multiple role loss and subsequent decreased interaction with others in the social system.

The participants were not asked if they believed they had aged successfully, but they appear to meet many of the criteria of successful ageing according to the literature. Most were engaged in some form of physical exercise, central to a biomechanical approach to successful ageing proposed by, for example, Glass *et al.* (1999) Crombie *et al.* (2004) and Newman *et al.* (2010). Again, all eight were actively engaged in productive occupation in various forms as advocated by Rowe and Khan (1997) as the third predictor of successful ageing. However, possibly only the youngest two, Yvette and Donald, could be said to meet their first predictor, the absence of disease. It was also evident that the participants met many of the psychosocial and activity criteria of successful ageing. For example, they generally demonstrated effective coping strategies to overcome difficulties experienced in life and to master personal goals, the dynamic of the model of selected optimization with compensation (Baltes & Carstensen, 1996). They also remained strongly involved with family and community advocated by Warburton and Pinsker (2006) and they were occupationally engaged. Godfrey and Denby (2004) regarded active engagement in life as central to successful ageing and the participants, apart from those recently bereaved, appeared to experience the required well-being and satisfaction in life from being actively engaged in occupation.

11:3 Contextual influences on occupational identity

The findings from this study have demonstrated the clear influence of the social context on the development of occupational identity. It can be argued that to isolate the formation of occupational identity from the unique societal structures or social contexts in which it develops limits understanding of the concept, occupational identity. However it is argued that social context alone is insufficient as it ignores personal agency, the ability of the individual to effect change and this aspect also needs to be considered. Two approaches to sociological enquiry were introduced in Chapter 3, social constructionism and structuration theory. Social constructionism has much to offer in terms of understanding how occupational identity is formed within a social context. Burr (1995) proposed that in the construction of identity various threads, such as age,

class, gender, education, ethnicity and so on are entwined to produce the fabric of identity. Each thread is the product of discourses present in the culture, of age, class, gender and so on, which surround events and interactions. Such discourses are closely connected with the way society is organised and tend to preserve the dominant position (Gergen & Gergen, 2003). This frame of reference is useful but some weaknesses exist. Burr (1995) argued that for social constructionists the self is constantly changing in response to contextual situations which contrasts with the more traditional view of personality as stable and unchanging. Any feelings of consistency or continuity over time are attributed to memory. The role of memory is difficult to prove or disprove, but while this study agrees with the notion of multiple and sometime inconsistent identities which come and go over time and context, there was often a very real sense from the participants of continuity of identity exhibited through occupation. Embodied within current occupations was not only a strong sense of the past self, which can be attributed to memory, but also a powerful set of core beliefs about the self. This, it is argued, is more difficult to regard as illusory as Burr (1995) has suggested. Finally social constructionism has found it difficult to accommodate the concept of human agency, the potential for humans to effect change.

A structurationist perspective would suggest that those participants who grew up pre war might have a different concept of their ageing self than those who were born later as cultural and societal attitudes to ageing have changed. For example, life expectancy increased between 1917 when Maggie was born and the birth of the youngest participant in 1944, although this was partly influenced by a dramatic decrease in child mortality (Hicks and Allen, 1999). Expectations of retirement have changed considerably during this time; in the 1940s and 1950s retirement was regarded as a well earned rest, changing to the concept of a reward for service in 1970s and most recently as a time of funded leisure (Cann, 2006; Leeson, 2007). In the 1950s a man aged 65 could expect to live for 11 years and in 2009 this is now 25 years (Balchin, 2009). In addition he asserted people are now generally more mobile, families are more dispersed and social networks widespread. Indeed, families for all participants were widely dispersed, but the social networks for some participants were very localised. This was so for the oldest three participants and for Yvette, the youngest who had afro Caribbean cultural influences. All but the oldest two participants were car drivers and all had been able to take holidays abroad, for many post retirement. This might have been seen as inconceivable by their parents' generation or for the oldest three as unattainable when they themselves were younger.

Both social constructionism and structuration theory are thought to be culturally and socially sensitive and, if used to elucidate the concept of occupational identity, could

answer the charge of Laliberte-Rudman and Dennhardt (2008) and Phelan and Kinsella (2009) that the current conceptualisation is insufficiently sensitive to the non western perspective. Phelan and Kinsella (2009) took the position that as identity is socially produced, further social and cultural theoretical perspectives should be considered. They believed that a more complex process than social approval alone suggested by Howie *et al.* (2004) was instrumental in developing occupational identity and the narratives in this study support this premise having demonstrated the complex and interrelated contextual, relational and occupational issues vital to its development. Phelan and Kinsella (2009) advocated one major school of thought which could explicate the further study of occupational identity, social constructionism. Nevertheless, it should be noted social constructionism was first promoted by Christiansen (1999), who comes both from an occupational and psychological background, and in his original article he suggested that it was not easily possible to separate the person from his or social context.

Laliberte-Rudman and Dennhardt (2008) proposed a cultural framework to consider occupation and occupational identity based on the work of Kluckhohn and Strodtbeck (1961) which usefully illuminates differences in cultural attitudes and beliefs surrounding occupation. One of three value variations relates to what they suggested is the current conceptualisation of occupational identity in the west. This incorporates occupations that express or support a sense of mastery over nature; occupations relating to a desired future; doing: occupations that express and enable accomplishment and achievement and finally with occupations that serve individual goals and reflect autonomy. Whilst several of these attributes are evident in the findings of this study for all participants, some are less so and appear to be gender dependent with some of the women displaying aspects of occupational identity allied with the other two cultural value variations.

On further analysis, the findings of this study indicate that the cultural framework for occupational identity proposed by Laliberte-Rudman and Dennhardt (2008) may present some difficulties. When reflecting on the occupation of gardening, the key occupation of Alice and Maggie, it is possible to see all three value variations from the activity orientation in the ways that they gardened, namely being, being-in-becoming and doing. Certainly they exhibited a sense of just being in their gardens, sitting and experiencing their gardens several times during the day, often with a sense of relatedness to others. There was a sense of becoming in their delight in the growing cycle, a sense of the process as a whole while developing their skills as gardeners and finally a concentration on the doing of gardening where the desire for mastery over nature was particularly apparent with Maggie in the organisation of her fruit and

vegetable garden. In essence it appears, that they were not demonstrating the traditional westernised view of occupational identity proposed by Laliberte-Rudman and Dennhardt. As gardening did not form anything more than a cursory thread in the narratives of the three men it is difficult to know whether or not gender plays a part in these findings, but it is possible that it has some influence.

However, none of these authors appear to have considered a sociological perspective, which, it emerges through this study, could have something to offer the study of occupational identity. Giddens' structuration theory appears to be very sympathetic to the underlying concepts of occupational science in that it employs concepts of activity and societal structures that enable or constrain behaviours or activities which occur within daily routines (Giddens, 1984). It also focuses on the individual's capacity to effect change, admittedly at societal levels, however, it could be argued that smaller actions of individuals over time and place changes very gradually the social structures that shaped them. Giddens' theory also appears more accommodating of the concept of a core occupational identity evident within this study than social construction theory. It is argued that structuration theory also has much to offer in the evaluation of the findings from this study of people in later life where societal structures and cultural influences have changed considerably over time. The current study, through its life history narrative approach has attempted to take a wider theoretical perspective than here to fore. Within occupational therapy, detailed consideration is given to the environments in which occupation is currently occurring, but less attention is paid to the social historical and cultural contexts. Whilst this can often be appropriate to the intervention, such as when using cognitive behavioural techniques, taking such a short term approach in complex situations may be less efficacious in the long term. Analysis of the narratives in this study, in light of social historical and cultural factors together with social interactions which have influenced the participants' identity development has provided a new and very relevant perspective, particularly when considering the lives of older people. It demonstrates convincingly how and why the participants performed occupations in the present with the meaning of occupations frequently being traced back to early life. This suggests that it behoves occupational therapists to be more historically, socially, culturally and even politically aware.

11:4 Gender

Within the literature on occupational identity so far, little attention has been paid to gender. However, gender differences in terms of war time experiences, educational and career opportunities and family roles have been evident in the findings from this study

and were presented in Chapter 8. All were found to contribute to occupational identity and yet this is not currently acknowledged in the theoretical conception of occupational identity, for example by Christiansen (1999), Kielhofner, (2002), Unruh (2004), Howie (2004), Laliberte-Rudman and Dennhardt (2008) and Phelan and Kinsella (2009). Occupational theorists, through assuming a western form of identity, appeared to have adopted what would be considered by social psychologists, sociologists and feminists, for example, McKinlay and McVittie (2008), Giddens (2009), Abrams (2003), to be a generally male orientated view of identity. This implies someone who acts on internal beliefs and feelings, promotes individual goal directed behaviour, is independent, autonomous and separate from others, a person who is free to make choices (Unruh *et al.*, 2002; Laliberte-Rudman, 2002; Unruh, 2004; Forsyth and Kielhofner, 2006; Laliberte-Rudman and Dennhardt, 2008). Feminists have argued convincingly over the years that there are differences in identity between women and men. For example, Chodorow (1978) and Gilligan (1982), writing within a psychoanalytic framework about the differences between women's and men's sense of self, suggested that the predominant western notion of the highly individuated, self-sufficient, separate person described primarily the experience of men. They argued that women's sense of self is that of the 'self-in-relationship' where women's identity is so closely bound up in their relations with others that for them the dividing line between self and other is less clear than it is for men, which is quite evident in this study.

Abrams (2003), in her qualitative study of 27 young, middle and working class women in the United States, has suggested that female identity was shaped by an awareness of male power in the forms of disrespect, and physical and sexual violence. In social contexts where this is prevalent they recognised their place as secondary in the larger gender hierarchy. Whilst the participants narratives in this study in no way suggest that this degree of male power was experienced by the women, it is likely that most, if not all, of them developed a gender identity as secondary to men. In a qualitative study by Peterson (2000) of five Caucasian and five African American women between the ages of 40 and 80, largely from working class backgrounds, differences in identity construction was perceived between the two groups. African American women, she believed, were taught to carve a position for themselves in the sociopolitical context through early experiences in the communities that nurtured them, so learning to define themselves, in what she described as, connected interdependence. This allowed for the development of a clear and stable identity and to a considerable extent Yvette's narrative mirrors this view. Hooks (1991) taking an historical approach to Black feminism also asserted that in the United States black girls have been socialised to speak up and have a voice in the community in order to combat racism. On the one hand, this is not reflected in Yvette's narrative where she was taught by her mother to

ignore racism, to consider such attitudes to be the problem of the other person, or question if her own behaviour was at fault. This attitude may well have been very much of its time during the early period of immigration and a concomitant desire to fit in, but Yvette asserted she has found this attitude useful and has attempted to pass this on to her own children. On the other hand the strong cohesion evident within her family has helped to provide a strong and positive appraisal of their afro Caribbean community in their locality, which Rousseau *et al.* (2009) found helped to protect against racism. She certainly demonstrated a very effective voice within her community through her community work.

However, Peterson (2000) found that the Caucasian women in her study were more likely to have identity changes. Some remained aware of their identity while consciously conforming to roles expected of them and others made an active decision to repress their identity. These findings in Peterson's study resonate to a certain extent with the experiences of the four Caucasian women in this study. The narratives suggest that Amy and Alice, both chose to adopt traditional gender roles which were congruent with their identities, while Maggie struggled against conforming. These differences indicate that there is some element of choice which agrees with the findings of Becker and Wagner (2009) from their European study of gender differences. Sheila appears to have suppressed her identity, reporting a lack of identity until she left her first husband. The women in Peterson's study suffered such things as depression, anger and a sense of loss in their attempt to live the assumed roles assigned to them which gave rise to a growing sense of dissatisfaction. Their attempts to find themselves involved re-ordering their lives, often causing great disruption. Again this reflects Sheila's experiences of saving up enough money and courage to leave her husband to build a new career and relationship in a different place.

Maggie, who struggled with conformity, had coped independently during the war, but on the return of her husband she again adopted a gender dependent self schema, deferring to his opinions and decrees. One that featured in her narrative was not being able to return to work until both her children were at school and then only part time in order to fulfill what he and society perceived in the 1950s to be her role as a mother. Amy too appeared to adopt a traditional, gender dependent self schema all her life. On the other hand, Alice, who was nearly 20 years younger than Maggie, embraced the traditional self schema of wife and mother. She willingly stayed at home to care for her children, took great pleasure in all occupations associated with caring for her family and only returned to work because of family rather than personal need. Women who positively adopt this position were termed by Becker and Wagner (2009) traditional

identifiers. For them being a woman was important, they saw themselves as different from men but of equal status and Alice's narrative suggests this position.

What was not universally evident in this study concerning occupational identity was Kiehofner's (2008) assertion that the transition to retirement was 'the central fixture in the life narrative' (Kiehofner, 2008:138). Only the three male participants made more than a passing reference to it. Of these, one, 18 months post retirement was still in transition, adjusting to his changed status, routines and social contacts referred to by Jonsson *et al.* (1999, 2000a, 2000b, 2001) and Pettican and Prior (2011) in their longitudinal studies on retirement. He was still negotiating resolution of his work losses and it was evident, as Blair (2000) has proposed, he was using occupation in the form of increased involvement in his bowling club and frequent caravan holidays with his wife, to regulate his socioaffective responses to these retirement losses. Another man, nine years post retirement, talked about the occupational opportunities presented by retirement and the third, approximately 12 years post retirement spoke of it in terms of enabling him to care for his wife.

Possibly the societal norms of the participants' era meant that retirement was likely to be a more significant event for men than women for the participants in this study and the centrality of work in a person's occupational identity is likely to be influential in negotiating the transition to retirement. Two of the women in this study were in part time occupations which had only a small impact on their overall occupational identity and they made no mention of the event. Two were in female dominated professions, primary school teaching and nursing and while investment in this aspect of their occupational identity was greater than the previous two, they both made only brief reference to the event, with its impact being focussed on what it enabled them to do next in their lives which they found fulfilling. Even the one woman, whose career had followed what might be described as a traditional successful male trajectory, made only a passing reference to it, even though it had been throughout her working life a significant aspect of her occupational identity. Barnes and Parry (2004), in their in-depth qualitative study of adjusting to retirement, found that women were more comfortable with the process than were the men, and these findings suggest that this may be the case. Overall, the findings from this study indicate that the retirement aspect of occupational identity embodies a western male perspective that does not necessarily accord with the experiences of women of this generation.

Overall the narratives demonstrate that there are distinct gender differences between men and women in this study in relation to occupational identity. The men portrayed a generally typical western form of occupational identity, but the women had identities

which were based upon relationships with others, a sense of connectedness and interdependence. These findings relate of course, to people who were born between the years 1917 and 1944 when traditional role norms were different from those today.

11:5 Choice in later life

Unruh (2002) saw occupational identity as 'a fabric of occupational choices that convey something about who a person is at particular points in his or her life' (Unruh *et al.*, 2002:12). Whilst being an appealing visual concept this implies a certain freedom of choice which may not always be the case. However, the freedom to choose certainly appears desirable. For example, Katz (2000) found in his qualitative study using narratives that a free choice of activity was preferred by his retired participants to a sense of activity being imposed upon them through socially and politically driven expectations, a view endorsed by Cruikshank (2003). However, not all people have the options to make free choices for a wide variety of reasons. In addition to aspects of occupational choice already discussed, further consideration will be given to the topic here.

Laliberte-Rudman (2002) from her study of older people found that occupational choices appeared to be made in ways that allowed the individual to maintain an acceptable and satisfying personal identity and facilitated managing social identity. These adaptive choices are made, according to Atchley's theory of continuity in an attempt to safeguard internal and external sense of continuity of the self (Atchley, 1998, Atchley, 1999). This desired sense of self is likely to be founded in their values and beliefs acquired in early life. Indeed Kauffman (1993) has argued the importance of these values, which act as guidelines for behaviour (Giddens, 2009) and underlie goal choices. Evidence in support of this in the participants' narratives is quite striking in the form of the frequently held value, helping others. All but one participant made this kind of altruistic choice in the form of voluntary work. Influential to these choices were other, perhaps more recently acquired, values such as contributing to society, making a difference and using existing competencies.

It is evident from the participants' narratives that one major influence on occupational choice is gender. It has been argued that women appear to have a more limited sense of choice than men, particularly in non-westernised societies (Moghaddam, 1998; Abrams, 2003; Giddens, 2009; Phelan and Kinsella, 2009). They lack the same degree of autonomy and opportunity as the men which has been strongly evident in the narratives because of restrictive power differentials outlined by Moghaddam (1998) and

Sherwin (1998). Sherwin (1998) proposed that the social world shapes identity and suggested that it is necessary to develop skills in making choices in a context that respects and values those choices. This appears to indicate that for women it is better to accept the status quo and work within societal structures to achieve desired goals. However, while the findings from this study agree with the premise that women in this study did not have the same degree of autonomy and opportunity as the men during childhood or in adult working life, post retirement this may not have been the case. For example, it appears that at this life stage the women had as much, or more, occupational choice than the men. Contributing factors to this phenomenon were that only one of the women in this study had placed significant emphasis on work and all had fairly wide ranges of interests prior to retirement. At retirement they appeared to have more occupations to draw from and they were willing to resume earlier occupations or try new ones. This may explain why Barnes and Parry (2004) established that women found it easier to adjust to retirement than men. In support of this argument, Mannell (1993) has asserted that older people have more freedom of choice than in previous life stages. While this may be true in the immediate post retirement period it is possible that declining capacity together with non facilitative environments may change this.

In western societies remaining independent in later life is generally highly prized because, through doing so, the individual retains autonomy and choice over the routines and occupations of daily life. Certainly Gabriel and Bowling (2004) found that it was seen by older people to enhance quality of life. It is possible that since these occupations have traditionally been the domain of women, they have the potential to exercise greater choice here than the men. Maintaining Independence appeared to be an issue for two of the older participants, who made different choices about how this was done. Amy chose to use a variety of strategies to continue to perform her daily routine occupations without assistance, whereas Desmond was willing to accept some help from others. For Amy, her self concept was of someone who had excellent domestic skills and who had exercised these skills both at work and in the home for most of her life. It appeared important to her sense of self to continue with her daily routine occupations as long as possible. Also the motivation for refusing help with domestic tasks was that it would have interfered with her preferred occupation of socialising with friends at the coffee mornings held in the community room. On the other hand, she had no difficulty with accepting help from others when accessing the wider community, possibly because she had no expertise in driving. The narratives thus suggest that perceived competence and role incumbency in an occupation influences choices that people make when reduced capacity seriously impairs performance. The participants' narratives have suggested that perceived self efficacy has an impact on

choice in later life. In the post retirement period it is possible self efficacy may even become enhanced if new occupations are adopted. The findings of Schieman and Campbell (2001) indicated that self efficacy declines in later life with the intrusion of physical disability and this was evident for the two participants with physical disabilities.

It has been argued by occupational scientists that environments may inhibit or enable the range of occupational choice available to an individual, with environments becoming more restrictive with increasing age (Law *et al.*, 1996; Letts *et al.*, 2003; Kielhofner, 2008). It was evident from the narratives that Amy lived within an enabling environment which had achieved the intended function proposed by Van Bilsen *et al.* (2008), of assisting her in preserving independence. Another aspect of independence for the participants was the ability to access their local community which is seen to be of significant importance within the literature (Marottoli *et al.*, 2000; Liddle and McKenna, 2003; Vrkljan and Miller Polgar, 2006; Whitehead *et al.*, 2006). Most were able to do so independently while two relied on assistance from others. A further aspect of the environment which could influence choice is financial status. The participants had a wide range of income and whilst this might have had some influence on the occupations chosen, for example leisure occupations such as attending the theatre or eating out, so many other influences from earlier in life may have been far more significant, it is impossible to accurately ascertain this. However, six participants in this study engaged in a wide range of occupations, regardless of income. The other two appeared to be limited more by reduced capacity than by income which support the findings of Van Der Meer (2008) in a cross sectional study of leisure activities in the Netherlands.

Finally leisure occupations differed according to the urban or rural nature of the environment, with the number of cultural options being greater in urban areas as Van Meer suggested. However, contrary to the findings of Counihan (2008) the number of occupations for participants in rural areas did not appear to be more restricted than in urban areas, although the nature of the leisure occupations was different. Those living in town suburbs were involved with U3A activities, cultural activities, playing bridge, singing in a choir, adult education and attending the gym. Those in the semi rural areas were more often engaged in social, church or special interest groups, within their communities including the WI and sports clubs. In terms of remaining physically active, those in towns were able to make the choice to use a gym for exercise, whilst those in more rural areas swam, walked or cycled more. Overall, this suggests that while there were limitations to choice in terms of culture, adult education and U3A found by Counihan, for those who lived in semi rural areas, this was compensated for by the

local communities. None of the participants lived in remote rural areas however, and provision might be different in this case.

Rowles (2008) has argued convincingly that a widely recognised notion within occupational science is that meaning in life arises through the course of one's actions and the choices that are made. Occupational deprivation implies the removal of meaningful occupational choice from an individual which is normal to their life stage (Wilcock, 1998b; Whiteford, 2000). For the participants in this study both Yvette and Desmond were deprived of meaningful occupations as children when they were separated from their parents, which had a lasting effect on both of them, more so for Desmond as it continued to influence his present occupational choices. More recently both the recently bereaved participants had been deprived of meaningful occupations rendering choice problematic. However, it was notable that the occupational choices that they did make, even when they lacked substantial meaning, were for those occupations providing connection with others. Occupational choices can also be limited by occupational marginalization as a result of occupational apartheid (Kronenberg and Pollard, 2005) or disability and illness (Charmaz, 2002). Some of the participants appeared to have experienced occupational apartheid earlier in life, for example it can be argued that the pre war social class system created a form of this, particularly for Amy in domestic service (Smith, 1996). Also, as has been demonstrated, gender and poverty served to marginalise some participants occupationally and limited their choices substantially in childhood and adult life. However, leisure opportunities increased greatly during the lives of the participants as a result of changes in technology, transport and social mores, particularly for the working classes (Yass, 1995; Pearce, 1996) and choice in leisure occupations had become more equitable in later life.

11:6 Conclusion

The main issues emerging from the findings have been discussed in this chapter. These have included the nature of occupational engagement in later life and support for some of the main theories of ageing has been evaluated in light of the findings. Contextual influences on the development of occupational identity have been of key importance in this study and the relevance to two social theories to further illuminate the concept of occupational identity have been considered. Issues concerning gender were discussed and evidence demonstrated in this study concerning gender differences in occupational identity was evaluated. Finally the complex issue of some of the, often interrelated,

factors influencing choices made about occupational engagement in later life were explored.

Chapter 12

Conclusion

12:1 Introduction

This concluding chapter will refocus first on the original aims of this study and assess how these have been addressed, and go on to consider how the research questions have been answered. Findings which are unique to this study will be emphasized and their contribution to the body of knowledge will be evaluated. Following this, the limitations of this study will be addressed, particularly those pertaining to method and to personal and functional reflexivity issues. The chapter will conclude with a debate on the implications of the findings from this study for policy, research and for practice.

12:2 Research aims addressed

The aims for this study were to explore occupational engagement over the life course and to understand the development of occupational identity and how this may influence occupational engagement in later life. It further aimed to contribute to the theory base of occupational science. The key questions were firstly, whether changes to occupational identity occur in later life and, if this does take place, what is the nature of the change? A further question was whether occupational identity, which is developed throughout the life course, is influential in the choices that are made regarding occupational engagement later in life? The third question concerned the current western concept of occupational identity and asked whether this is a concept which fits with a UK population of people in later life at the current time?

Occupational engagement over the life course was explored in this study through the life history narrative interviews with the eight participants in the second phase of this study. From these emerged the development of an occupational identity throughout each life and a clear occupational sense of themselves as they were currently. The development of occupational identity was found to be influenced by contextual factors, particularly in childhood, adolescence and early adult life, some of which had the effect of either imposing limitations on the occupations that were engaged in or conversely enabled them. Of particular importance were education, financial circumstances,

gender, family roles and relationships, religion, culture and early work opportunities. The participants demonstrated medium to high levels of engagement in a wide variety of occupations throughout life and continued to do so in later life. They had adapted occupations, or changed them to others which fulfilled the same occupational needs throughout the life course, but had often returned to occupations or occupational interests once they had retired that they had held in early life. Most had also adapted occupations to accommodate declining capacities that came with the ageing process. Two of the three oldest participants had the most restricted capacity but still chose to retain engagement in the occupations that were important to them. Gender was found to be an important factor influencing choice, with the women in this study having a wider range of occupations from which to choose than did the men. Additionally, it was found that the current 'western' concept of occupational identity did not fit the experience of a UK population in later life.

Overall, the narratives in this study suggested that while the self demonstrated continuity and an unchanging self, within a changing world, the realities of ageing were, to some extent, also acknowledged within it. The cultural framework proposed by Laliberte-Rudman and Dennhardt (2008) to assist with a revised conceptualisation of occupational identity has been evaluated. It usefully illuminated differences in cultural attitudes and beliefs surrounding occupation and they suggested a set of three value orientations, one of which they asserted is the current conceptualisation of occupational identity in the west. However, using the key occupation of two female participants, findings from this study demonstrated attributes from all three of the cultural value orientations were evident in the way they performed the occupation of gardening. This implies they were not demonstrating the traditional westernised view of occupational identity proposed by Laliberte-Rudman and Dennhardt (2008). It is of course possible that this may also be influenced by gender as gardening formed no more than a cursory thread in the narratives of the three men, but with this occupation and age group their proposed cultural framework lacked credibility.

Some theoretical concepts from social sciences relating to the duality of social structures and personal agency have been examined. The first was social constructionism, already proposed by Phelan and Kinsella (2009) as a useful theoretical concept to inform the development of occupational identity as it would not confine the theory to a particular cultural perspective. Some aspects of social construction theory appear to create some potential difficulties, for example, the interpretation of personal characteristics, lack of continuity of identity and aspects of agency, but overall it does appear to offer a useful understanding of how identity might be constructed through interactions with society. An argument has been made for the inclusion of a second,

sociological perspective in the theoretical development of occupational therapy. Giddens' (1984) structuration theory was proposed as a useful model to this effect as it lends itself to the study of people over time where considerable change has occurred in societal structures and cultural influence. Analysis of the narratives in this study, in light of social historical and cultural factors together with social interactions which have influenced the participants' identity development, has provided a new and very relevant perspective, particularly when considering the lives of older people. In addition it appears, in essence, to represent human doing within a social context, which should be of interest to occupational scientists. It demonstrates convincingly how and why the participants performed occupations in the present with the meaning of occupations frequently being traced back to early life and it is felt that structuration theory can usefully inform the study of occupational identity in later life.

With regard to the third research question in this study, when exploring occupational identity in the literature it became clear that the current concept of occupational identity may have been incorrectly described as a 'western' concept. Rather, it appears to be a North American one. All but one of the early theorists and researchers came either from the United States of America (USA) or from Canada. The exception was Howie, Coulter and Feldman (2004) who researched from an Australian perspective although they published in the USA. It appears that no research in Europe or the UK has contributed to the formation of the current concept of occupational identity, and yet Europe is generally considered to be part of the western world. Various strategies have been suggested to accommodate non western cultures (Laliberte- Rudman and Dennhardt, 2008; Phelan and Kinsella, 2009), but these may not necessarily address the needs of a European western culture. This study is presenting a European and UK cultural perspective on occupational identity for the first time

Within the literature on occupational identity little attention has been paid to gender. Theorists in this field acknowledged they have adopted a western form of identity, which appears to be modeled on a male orientated view of identity, as an autonomous, independent, goal orientated and separated identity, which is not reflected in the experience of the women participants in this study. Feminist literature has confirmed that women's self concept is different, is built on connectedness and interdependence, and indicated the struggle some women have regarding adopting traditional or nonconformist gender roles over the last few decades. The narratives in this study have uniquely demonstrated that there are distinct gender differences between men and women in relation to occupational identity. These relate of course, to people born in the first half of the twentieth century and subsequent generations will be exposed to different social contexts where there is greater gender equality between men and

women. However, if gender is also biological as well as socially determined as is often recognised (Gergen, 1997; Brannon, 2005; Giddens, 2009) it is likely that some differences will remain and it would be useful to explore occupational identity as it is represented in the life narratives of those now in mid life. Meanwhile it is also important that the theoretical concept of occupational identity should in future include a notion of gender difference within it.

This study has demonstrated a variety of factors which influence occupational choice in later life. A vital factor in occupational choice is the meaning an occupation represents and its strength of potency to the individual, as was demonstrated in the last chapter. The social context has changed dramatically over time which has increased the opportunity for choice in areas of occupation such as leisure. Over time the position of women has changed to a certain extent, although it has been argued that inequalities still exist. In their formative year, opportunities for women were more limited than today and gender roles were more rigidly defined. These factors meant that the women in this study received demonstrably fewer choices than the men during childhood and adult working life. However in retirement, contrary to expectation, it was the women who appeared to have greater choice about their occupations, in part because they had a greater range to choose from and were more willing to resume or embark on new occupations, which may explain why women are thought to find the transition to retirement more comfortable than do men. In support of the literature, values formed in early life were found to influence the ways in which participants chose to contribute to society, but more recently acquired values were also seen to contribute to their choices.

Other factors influencing choice have included, the environment, life events such as bereavement and reduced physical capacity. It was confirmed that some environmental factors were influential on the participants' occupational engagement and identity, particularly the type of housing and its rural or urban location. This study demonstrated that when performance capacity was quite seriously impaired previous competence and perceived role incumbency in an occupation influenced the choices that people made. This study has also contributed to the understanding of the powerful effect spousal bereavement has upon occupational identity, particularly in relation to a loss of meaning across all occupations. A compelling result of the bereavement was the overwhelming sense of 'being without' which coloured all occupational life. It was evident that the need to connect with others was foremost and all participants who had been bereaved had chosen to seek occupational meaning through occupations that enabled 'being with' others.

Finally it was demonstrated that perceived self efficacy had an impact on choice in later life with those who had high self efficacy enjoying greater occupational choice and were more likely to take up new challenges than those with low perceived self efficacy. It is known that a sense of self efficacy often declines as capacity decreases through the ageing process (Schieman and Campbell, 2001), however this study indicates that the changes to occupational identity which occur after spousal bereavement can also have a significant effect on perceived self efficacy. This is important as many people are likely to experience the loss of a partner or spouse in later life. It appears during the long post retirement period many people today can expect opportunities for choice to increase at retirement and this level of choice may continue for some years until choice begins to be reduced by declining capacities. As Diana Athill (2008) said the lives of older people have changed dramatically within their lifetime.

12:3 Limitations of the study

Hesse-Biber and Leavy (2006) and Cameron (2011) have stressed the need for training and knowledge building in mixed method research. The researcher's prior training lay in qualitative methodology and the growth of her philosophical knowledge related to mixed method research deepened over time. It is probable therefore, that it was only at a novice level when planning the methodological design. On reflection, some of the early choices that were made could have been improved, such as the design of the questionnaire and the sampling techniques used in Phase 1. For example, question 21 on education in the questionnaire was ambiguous and a clearer response would have been gained if the respondent had been asked to provide their highest qualification. Also it is possible that the researcher's gender may have created bias in the selection of the range occupations performed for pleasure which may have unwittingly excluded some male orientated occupations.

Data from Phase 1 was used to select the sample for Phase 2 and the lengthy time span this entailed had an impact on the currency of the demographic data, with some of the potential sample either moving, or becoming unwell. The use of a sequential strategy (Creswell, 2009) with data collection in two phases meant that the data collection took a considerable time to complete. The sequential design chosen for this study comprised a secondary quantitative method preceding the primary qualitative method which has resulted in the largely qualitative focus of this study. However, it is possible that more emphasis could have been given to the quantitative findings from Phase 1.

In Phase 1 it proved difficult to recruit men to the study which resulted in a gender bias of three women to one man. An attempt had been made to target potential groups and organisations which were not gender specific, but possibly because the majority of the gatekeepers were women they were more likely to recruit other women. The small number of men recruited impacted on the number of those wishing to be interviewed which meant that the stratification strategy for the selection of the sample for Phase 2 was challenging to implement. When planning sample selection it had been anticipated that ethnic minority groups might not be sufficiently represented and groups representing this part of the population were specifically approached. A similar strategy for ensuring an adequate representation of men could have been adopted through approaching male orientated groups, for example bowls clubs and working men's clubs.

The small size of the potential male sample also meant that only three men were interviewed in a sample of eight which might have limited the male perspective particularly when considering gender differences. Another challenge to sample stratification lay in the currency of the Phase 1 data, which further reduced choice in those willing to be interviewed. This impacted on the range of educational attainment within the sample. A wide range of qualifications were represented but there was a distinct bias towards higher education with three participants holding a degree and three other a diploma. A further factor creating bias was the lengthy time span of data collection for Phase 2. This meant that none of the participants were still working full time although at the time of sample selection at least one of them was. Another factor that is likely to have introduced bias is the participants self selection as it can be conjectured that those who completed the questionnaire and agreed to be interviewed are more likely to have been actively engaged in life than those who did not. It is probable that there are people living in the communities sampled who are far less actively engaged. There was also potential for bias in the time use data from Phase 2 through participants misreporting events or changing behaviour during the completion of the diaries. For this reason they were introduced to the participants face to face and carefully explained, as is recommended to ensure reliability. However, when the diaries were discussed in the second interview some participants acknowledged that completing the diary caused them to think about how they were spending their time and they were tempted to do more than they might have done otherwise.

It is acknowledged that this study has been influenced by researcher bias. Not only the researcher's identity as an occupational scientist, but also as an educator, occupational therapist and bereavement counsellor together with her unique life experience, age and gender have all framed the focus on this study. It has influenced not only the study topic, questions asked and choices made throughout, but it will also have permeated

the researcher's responses during the interviews and interpretation of the findings. It is therefore possible that someone from another discipline would interpret the narratives differently. Also the collection and analysis of the qualitative data was influenced by an insider perspective. While this has some advantages, such as the ability to relate with the participants as someone who implicitly understood what they were talking about, through her comprehension of the contextual influences and events, there was also potential danger. The researcher might have made false assumptions based upon her assumed knowledge or she might have become too deeply embedded in the data and introduce a researcher bias in the interpretation of the data. For example, the researcher owned to sense of positivity concerning occupational engagement in later life which could have been reflected in the data analysis. Reflexive questioning was used in an attempt to guard against this.

Bias is also likely to have been introduced through the power imbalance within the relationship with participants. Reflexive strategies were employed to ameliorate this, such as providing detailed information about the project, the use of verbal and non verbal language to promote equality, control of transcripts and reflexive embodied empathy. In addition, the researcher's age and gender may have promoted greater equality. Overall, her experience as counsellor is likely to have enhanced her ability in the use of these strategies. However, it is recognised that reflexive strategies cannot completely compensate for the power imbalance. Bishop and Shepherd (2011) have warned that in spite of reflexive analysis influential factors beyond consciousness intrude. It is likely that the researcher's past experiences, social background and position, personal assumptions, self narrative and behaviour could, unknowingly, have been influential in this study.

12:4 Implications of this research for policy, research and practice.

There has been an increasing focus on older people and healthy ageing in recent years by policy makers in Europe (Oxley, 2009; Age UK, 2011; Stegeman, 2012; WHO, 2012). There appears to be a lack of cohesion by policy makers between concepts of healthy ageing and well-being in later life. Healthy ageing in Europe equates with being physically active, avoiding substance misuse and eating a healthy and nutritious diet (Oxley, 2009; Age UK, 2011; Stegeman, 2012; WHO, 2012), although there is some acknowledgement of the benefits of volunteering and lifelong learning opportunities. On the other hand good mental health and well-being in later life appears to be strongly associated with engaging in meaningful activities and beneficial social relationships (Age UK, 2006). However, there appears to be little acknowledgement that healthy

physical ageing is rather dependent upon good mental health and well-being. Overall, there appears to be insignificant recognition of the importance of meaningful occupation and connection with others. There is a need to emphasise the importance of meaningful occupation to healthy ageing and the findings from this research could be used to influence policies of, for example, Age UK locally and nationally. Promoting the value of a broad range of occupations that are balanced, and sometimes challenging could be part of the portfolio of their health mentors and trainers. The study also provides evidence for the inclusion of the benefits of healthy engagement in a wide variety of occupations in retirement courses. The benefits of volunteering as an occupation for both the individual and the community could also be considered as part of the course. A further, less formal way of reaching a wider, but targeted population would be to publish the findings in a book for the popular market.

In terms of further research there are several areas for potential investigation. The findings from this study suggested a gender difference in the war time experience of the men and women in this study. The men had focused on the drama and aspects of the war associated with the fighting, while the women were more interested in how war had affected their daily lives. A study to see whether these gender differences extended to larger populations would be useful. This study also indicated a gender difference in occupational identity between men and women whose lives had been shaped by a particular social context in the UK and Jamaica. However it is not known whether this difference in occupational identity relates only to people born before 1945 in the UK, or whether it might be found in later cohorts of older people, or indeed if it exists in cohorts currently in early or middle adult life. As all previous research into occupational identity has taken place in North America or Australia, a UK, or wider European based study is recommended as is the desirability of the collection of longitudinal data. This study also demonstrated the importance of meaning in occupational identity. An in-depth, qualitative study which explored the complex interplay between occupational meaning, sense of self efficacy and the environment, together with how these might impact on occupational choice in later life, is also advocated.

Finally, the findings from this study suggest several implications for practice. In general, it can be argued that at a time when health and social services are under considerable pressure with the concomitant emphasis on reducing the costs it is important to retain sight of the needs of individual service users. This study has demonstrated the importance of the historical as well as the current social context on an individual's occupational identity. This needs to be taken into account by occupational therapists when engaging with their clients. Time pressures may encourage the 'snap shot' view of the client today instead of a more longitudinal view

of a person over a lifetime. Initially this may take longer but could ultimately reduce costs if the therapist is able to understand fully the occupational choices the client makes during rehabilitation. More specifically the findings could add to the understanding of the effects of bereavement on occupational identity and assist in the client's search for meaning through occupation. It was also noticeable that men may be generally more occupationally vulnerable than women to the effects of stressful events in later life as they appeared to have a narrower range of occupations from which to draw.

Increasingly the occupational therapist has a wider remit than in the delivery of health or social care alone. The findings suggest several possibilities for the occupational therapist working in the field of health promotion. The benefits of lifelong learning either through existing organisations such as U3A or through local education or community centres are fully understood. However, there appears to be insufficient lifelong learning provision for older people who are socially disadvantaged or marginalised in the community. Community groups which promote social inclusion to this group through lifelong learning using of a wide range of occupations could have a major health impact. The Claremont Centre in Islington, London provides a good model for this and appears to fulfil many of the UK and EU policy aims for healthy ageing. Occupational therapists have the capacity to set up and be instrumental in running groups of this type. Another potential area within the remit of occupational therapy is pre or post retirement groups, particularly focussed on healthy ageing and which facilitated routes into volunteering for interested participants.

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Appendices

Appendix 1: Participant information sheet



THE UNIVERSITY OF
NORTHAMPTON

School of Health

School of Health

Division of Occupational Therapy

PARTICIPANT INFORMATION SHEET

About the Researcher:

I am a post graduate research student in the Division of Occupational Therapy, School of Health at the University of Northampton. My research concerns the daily lives of healthy people in later life and the things they choose to do.

What the proposed research involves:

The first phase of the research study is to gather background information about a number of individuals over the age of 55 using a three part questionnaire. This should take no more than 20 minutes to complete.

The second phase will involve individual interviews and keeping a diary for 24 hours with a small number of people who complete the questionnaire and who indicate that they are happy to be interviewed. The interviews will normally take place in a local community setting and are likely to take approximately 30-60 minutes. The interviews will be about:

- how you see yourself
- the things that you are doing at present in your daily life
- things you have done throughout your life.
- how these might relate to the choices you make now about what you do in your daily life and
- what you might do in future.

I will record the interview on an audio-cassette recorder. The interview will be typed and returned to you for checking regarding accuracy and any material you would like to add or omit.

After the interview you will be asked to complete a diary about how you spend your time over a 24-hour period.

What will happen to the information I have given:

The information you give to me in phases 1 & 2 of the study will not identify you as an individual in any way. The questionnaires will be

anonymous and for those choosing to be interviewed, details such as your name and address will not be recorded during or after the interview.

The information given will assist me to explore changes in later life concerning the identity people create for themselves through what they do. It is intended that the anonymised findings from this study will be published. The information you give will not contain your name or any other identifying features and will be used only for the purposes outlined above. It will be used solely for the purpose of this research study and will not be given to any other party.

Changing you mind:

Please feel assured that you are able to change you mind at any time about participating in any aspect of the research study and are free to withdraw from the study at any time. If you find any questions during the interview difficult to answer you will be able to move on to another question.

Benefits to You:

There are no direct benefits to you assisting me. However you will be assisting in my research to further understanding of older people and may help to inform health and social care policies and practice.

Who has checked this research?

The Research Ethics Committee of the University of Northampton has approved this study. The research is being supervised by Dr Susan Corr and Dr Merryn Ekberg at the University of Northampton.

Thank you for your interest and support. If you would like to participate in phase 1 of the study please complete the questionnaire and return it to me in the stamped addressed envelope. If you wish to be included in phase 2, the interview, you can indicate this on the questionnaire.

Contacting the Researcher

I hope the above information is helpful to you and gives you a better understanding and insight into the purpose of my research. Please feel free to contact me using the details given below at any time if you have any questions.

Judith Knight Phone: 07966 0815630 Email: judyhk@tiscali.co.uk

The University of Northampton's Combined Insurance Policy provides indemnity for students of the institution carrying out research work (such as questionnaires and interviews) as part of their course.

Appendix 2: Pilot response form

Thank you very much for completing the questionnaire, just a few more questions now about how you found it.

1. How long did it take?

minutes

2. Was it easy to read?

☐ Yes

☐ No

If no, please can you say what was wrong.

3. Did you understand the instructions?

☐ Yes

☐ No

If no, how should they be clarified?.

4. Were they clear and easy to follow?

☐ Yes

☐ No

If no, how should they be changed?

5. Did you understand the questions?

☐ Yes

☐ No

If no, what did you not understand or how should it be changed?

6. Is there anything that you think should be added or omitted?

Appendix 3: Phase 1 questionnaire

Number:

(Please leave blank)

C O N F I D E N T I A L

QUESTIONNAIRE

The purpose of this questionnaire is to find out about the lives of older people, what they do and how they view their health and quality of life.

The questionnaire is in three parts. The first part of the questionnaire is about you and your personal details. The second part asks you about the different activities that you are doing at the moment.

For each question, please choose the answer which applies to you and put a tick in the box next to it ☐. If you are unsure which answer to choose, please tick the one which seems most applicable, or if none apply tick the 'other' box and write your explanation in the space provided.

Some questions ask you to tick all the boxes that apply to you. They also allow you to tick 'other' to add more of your own.

You may feel that some questions don't apply to you, but please try to answer them all so that I can include you in the overall picture.

Take your time completing it. If you get tired why not leave it a few hours and return to it later.

Section 1. Information about you

The first part of the questionnaire is about you and your personal details.

1. Date of birth Day / Month / Year ... / ... / ...	2. Sex Male <input type="checkbox"/> 1 Female <input type="checkbox"/> 2	3. Postcode: 1st section of code only e.g. NN2
4. Type of housing : Bungalow <input type="checkbox"/> 1 Flat/apartment <input type="checkbox"/> 2 Semi-detached house <input type="checkbox"/> 3 Detached house <input type="checkbox"/> 4 Terraced house <input type="checkbox"/> 5 Cottage <input type="checkbox"/> 6 Sheltered bungalow <input type="checkbox"/> 7 Sheltered flat/apartment <input type="checkbox"/> 8 Other (please state) 9 5. Are you an owner or tenant? Owner <input type="checkbox"/> 1 Tenant <input type="checkbox"/> 2 6. How long have you lived at your current address? <input type="text"/> Years		7. Number of bedrooms: One <input type="checkbox"/> 1 Two <input type="checkbox"/> 2 Three <input type="checkbox"/> 3 Four <input type="checkbox"/> 4 Five <input type="checkbox"/> 5 Other <input type="checkbox"/> 6 8. Approximate age of property Less than 10 years <input type="checkbox"/> 1 10 to 19 years <input type="checkbox"/> 2 20 to 29 years <input type="checkbox"/> 3 30 to 39 years <input type="checkbox"/> 4 40 to 49 years <input type="checkbox"/> 5 50 to 59 years <input type="checkbox"/> 6 More than 60 years <input type="checkbox"/> 7

9. Where do you live?			10. Who do you live with?		
City centre	<input type="checkbox"/>	1	Live alone	<input type="checkbox"/>	1
City suburb	<input type="checkbox"/>	2	Husband	<input type="checkbox"/>	2
Large town centre	<input type="checkbox"/>	3	Wife	<input type="checkbox"/>	3
Large town suburb	<input type="checkbox"/>	4	Partner	<input type="checkbox"/>	4
Small town centre	<input type="checkbox"/>	5	Daughter/s	<input type="checkbox"/>	5
Small town suburb	<input type="checkbox"/>	6	Son/s	<input type="checkbox"/>	6
Village	<input type="checkbox"/>	7	Grandchild/ren	<input type="checkbox"/>	7
Small village/hamlet	<input type="checkbox"/>	8	Friend	<input type="checkbox"/>	8
Isolated dwelling	<input type="checkbox"/>	9	Dog/s	<input type="checkbox"/>	9
Other [please state]	<input type="checkbox"/>	10	Cat/s	<input type="checkbox"/>	10
.....			Other [please state]		11
				

11. What is you ethnicity? (optional)

Afro-Caribbean British ☐ 1

Asian British ☐ 2

White British ☐ 3

European (please state country)..... ☐ 4

Other (please state) ☐ 5

12. How much maintenance does your home require?

- | | | |
|----------------------------|---|--------------------------|
| Maintenance free | 1 | <input type="checkbox"/> |
| Low maintenance | 2 | <input type="checkbox"/> |
| Routine maintenance | 3 | <input type="checkbox"/> |
| High maintenance | 4 | <input type="checkbox"/> |
| Other (please state) | 5 | <input type="checkbox"/> |

13. How concerned are you about the current state of repair of your house?

- | | | |
|---------------------------|---|--------------------------|
| Not at all concerned | 1 | <input type="checkbox"/> |
| Minor concerns | 2 | <input type="checkbox"/> |
| Moderate concerns | 3 | <input type="checkbox"/> |
| Major concerns | 4 | <input type="checkbox"/> |
| Other (please state)..... | 5 | <input type="checkbox"/> |

14. How much maintenance does your garden require?

- | | | |
|----------------------------|---|--------------------------|
| Maintenance free | 1 | <input type="checkbox"/> |
| Low maintenance | 2 | <input type="checkbox"/> |
| Routine maintenance | 3 | <input type="checkbox"/> |
| High maintenance | 4 | <input type="checkbox"/> |
| Other (please state) | 5 | <input type="checkbox"/> |

15. How concerned are you about the current upkeep of your garden?

- | | | |
|---------------------------|---|--------------------------|
| Not at all concerned | 1 | <input type="checkbox"/> |
| Minor concerns | 2 | <input type="checkbox"/> |
| Moderate concern | 3 | <input type="checkbox"/> |
| Major concern | 4 | <input type="checkbox"/> |
| Other (please state)..... | 5 | <input type="checkbox"/> |

16. What was or is your main form of employment?

Please tick one box to show which **best** describes the sort of work you do (if you are not working now, please tick a box to show what you did in your last main job).

PLEASE TICK ONE BOX ONLY

Modern professional occupations

☐ 1

Such as: teacher-nurse-physiotherapist-social worker-welfare officer-artist-musician-police officer (sergeant or above) –software designer

Clerical and intermediate occupations

☐ 2

Such as: secretary-personal assistant-clerical worker-office clerk-call Centre agent-nursing auxiliary-nursery nurse

Senior management or administrators

☐ 3

(Usually responsible for planning, organising and co-ordinating work and for finance) *Such as:* finance manager- chief executive

Technical and craft occupations

☐ 4

Such as: motor mechanic-fitter-inspector-plumber-printer-tool maker-electrician-gardener-train driver

Semi-routine manual and service occupations

☐ 5

Such as: postal worker-machine operative-security guard-caretaker-farm worker-catering assistant-receptionist-sales assistant

Routine manual and service occupations

☐ 6

Such as: HGV driver-van driver-cleaner-porter-packer-sewing machinist-messenger-labourer-waiter/waitress-bar staff

Middle or junior managers

☐ 7

Such as: office manager-retail manager-bank manager-restaurant manager-warehouse manager-publican

Traditional professions

☐ 8

Such as: accountant-solicitor-medical practitioner-scientist-civil/mechanical engineer

Never worked in paid employment

☐ 9

17. Do you currently work?

Yes ☐ 1

No ☐ 2

18. If yes, are you working?

Full-time ☐ 1

Part time ☐ 2

If you work part-time how many hours a week do you work?

19. Is this work paid

☐ 1 or voluntary? ☐ 2

20. What is your approximate household weekly income? (Including, pensions, earned income, investments and other)

Under £100 (£5,200 a year) ☐ 1 £300 – 349 (up to £18,148) ☐ 6

£100 – 149 (up to £7,748) ☐ 2 £350 – 399 (up to £20,748) ☐ 7

£150 – 199 (up to £10,348) ☐ 3 £400 – 499 (up to £25,948) ☐ 8

£200 – 249 (up to £12,948) ☐ 4 £500 – 599 (up to £31,148) ☐ 9

£250 – 299 (up to £15,548) ☐ 5 Over £600 (over £31,200) ☐ 10

Is this income single or joint?

Single ☐ 1

Joint ☐ 2

21. What educational qualifications do you hold?

(You may tick more than one)

- | | | | | | |
|-------------------------|--------------------------|---|---------------------|--------------------------|----|
| No qualifications | <input type="checkbox"/> | 1 | Matriculation | <input type="checkbox"/> | 6 |
| GCE 'O' Level / GCSE | <input type="checkbox"/> | 2 | PhD/Ed D/equivalent | <input type="checkbox"/> | 7 |
| 'A' level/Baccalaureate | <input type="checkbox"/> | 3 | BA / BSc/equivalent | <input type="checkbox"/> | 8 |
| Apprenticeship | <input type="checkbox"/> | 4 | MA / MSc/equivalent | <input type="checkbox"/> | 9 |
| Diploma/HND/HNC | <input type="checkbox"/> | 5 | MPhil | <input type="checkbox"/> | 10 |

Other (Please state)..... ☐ 11

22. Do you have any other awards or qualifications? For example related to your employment, voluntary work, hobby or interest.

Yes ☐ 1 No ☐ 2

If yes, please list these below.

.....

.....

.....

.....

23. How do you travel?

- | | | |
|----------------------------|--------------------------|---|
| Mostly by car | <input type="checkbox"/> | 1 |
| Mostly by bicycle | <input type="checkbox"/> | 2 |
| Mostly on public transport | <input type="checkbox"/> | 3 |
| Mostly walking | <input type="checkbox"/> | 4 |
| Other..... | <input type="checkbox"/> | 5 |

24. Do you currently drive a car?

- | | | |
|-----|--------------------------|---|
| Yes | <input type="checkbox"/> | 1 |
| No | <input type="checkbox"/> | 2 |

25. How often do you see members of your family socially? You may tick more than one box to indicate contact with different family members.

- | | | | Comment |
|-----------------|--------------------------|---|---------|
| Daily | <input type="checkbox"/> | 1 | ..... |
| 1-2 days a week | <input type="checkbox"/> | 2 | ..... |
| Fortnightly | <input type="checkbox"/> | 3 | ..... |
| Monthly | <input type="checkbox"/> | 4 | ..... |
| Every 3 months | <input type="checkbox"/> | 5 | ..... |
| Every 6 months | <input type="checkbox"/> | 6 | ..... |
| Once a year | <input type="checkbox"/> | 7 | ..... |
| Other | <input type="checkbox"/> | 8 | ..... |

26. How often do you see friends or neighbours socially? You may tick more than one box to indicate contact with different friends & neighbours.

- | | | | Comment |
|-----------------|--------------------------|---|---------|
| Daily | <input type="checkbox"/> | 1 | ..... |
| 1-2 days a week | <input type="checkbox"/> | 2 | ..... |
| Fortnightly | <input type="checkbox"/> | 3 | ..... |
| Monthly | <input type="checkbox"/> | 4 | ..... |
| Every 3 months | <input type="checkbox"/> | 5 | ..... |
| Every 6 months | <input type="checkbox"/> | 6 | ..... |
| Once a year | <input type="checkbox"/> | 7 | ..... |
| Other | <input type="checkbox"/> | 8 | ..... |

Section 2. Your Everyday Activities

The second part of the questionnaire asks you about the everyday activities that you are doing at the moment. The first question asks about activities you do that you think of as work. The second asks about activities you do for pleasure and the last asks about activities you do to look after yourself. Please tick as many boxes as apply for each question.

1. What activities do you do that you think of as work?		
Housework	<input type="checkbox"/>	1
Shopping	<input type="checkbox"/>	2
Cooking/meal preparation	<input type="checkbox"/>	3
Washing/laundry	<input type="checkbox"/>	4
Ironing	<input type="checkbox"/>	5
Home maintenance/DIY	<input type="checkbox"/>	6
Decorating	<input type="checkbox"/>	7
Gardening	<input type="checkbox"/>	8
Managing personal or household finances	<input type="checkbox"/>	9
Caring for parent/s	<input type="checkbox"/>	10
Caring for spouse/partner	<input type="checkbox"/>	11
Caring for child/ren	<input type="checkbox"/>	12
Caring for grandchildren	<input type="checkbox"/>	13
Caring for friend/neighbour	<input type="checkbox"/>	14
Caring for a pet/s	<input type="checkbox"/>	15
Voluntary work for a charity	<input type="checkbox"/>	16
Voluntary work for Church/Temple/Mosque	<input type="checkbox"/>	17
Informal voluntary work in local community	<input type="checkbox"/>	18
Study	<input type="checkbox"/>	19
Paid employment	<input type="checkbox"/>	20
Other.....	<input type="checkbox"/>	21
Other.....	<input type="checkbox"/>	22

2. What activities do you do for pleasure, enjoyment or relaxation?

Walking	<input type="checkbox"/>	1
Gardening	<input type="checkbox"/>	2
Taking part in sport	<input type="checkbox"/>	3
Watching live sport	<input type="checkbox"/>	4
Swimming	<input type="checkbox"/>	5
Dancing	<input type="checkbox"/>	6
Reading	<input type="checkbox"/>	7
Watching television	<input type="checkbox"/>	8
Listening to the radio	<input type="checkbox"/>	9
Listening to music	<input type="checkbox"/>	10
Crosswords/sudoku/mind games	<input type="checkbox"/>	11
Letters & emails/using the internet	<input type="checkbox"/>	12
Activities with the family	<input type="checkbox"/>	13
Socialising with friends & neighbours	<input type="checkbox"/>	14
Church/Temple/Mosque activities	<input type="checkbox"/>	15
Voluntary work for charities/societies	<input type="checkbox"/>	16
Cooking/baking	<input type="checkbox"/>	17
Art/painting/crafts	<input type="checkbox"/>	18
Knitting	<input type="checkbox"/>	19
Education/attending classes	<input type="checkbox"/>	20
Attending concerts/theatre/shows	<input type="checkbox"/>	21
Visiting houses/places of interest	<input type="checkbox"/>	22
Visiting the pub	<input type="checkbox"/>	23
Eating out in a pub or restaurant	<input type="checkbox"/>	24
Days out	<input type="checkbox"/>	25
Holidays/travel	<input type="checkbox"/>	26
Shopping	<input type="checkbox"/>	27
Visiting hair dresser	<input type="checkbox"/>	28
Other.....	<input type="checkbox"/>	29
Other.....	<input type="checkbox"/>	30
Other.....	<input type="checkbox"/>	31

3. What activities do you do to look after yourself?

Eat a healthy/balanced diet	<input type="checkbox"/>	1
Take regular exercise	<input type="checkbox"/>	2
Ensure enough sleep/rest	<input type="checkbox"/>	3
Take vitamin supplements	<input type="checkbox"/>	4
Take medication as prescribed	<input type="checkbox"/>	5
Have regular health/dental checks	<input type="checkbox"/>	6
Have regular eye/hearing checks	<input type="checkbox"/>	7
Have regular chiropody/podiatry checks	<input type="checkbox"/>	8
Take regular bath/shower	<input type="checkbox"/>	9
Strip wash	<input type="checkbox"/>	10
Shave	<input type="checkbox"/>	11
Wash own hair	<input type="checkbox"/>	12
Visit hairdresser regularly	<input type="checkbox"/>	13
Look after own hands and nails	<input type="checkbox"/>	14
Visit manicurist regularly	<input type="checkbox"/>	15
Use make up regularly	<input type="checkbox"/>	16
Change and launder clothes regularly	<input type="checkbox"/>	17
Watch your weight	<input type="checkbox"/>	18
Play mind games	<input type="checkbox"/>	19
Pursue a hobby	<input type="checkbox"/>	20
Relax	<input type="checkbox"/>	21
Learn new things	<input type="checkbox"/>	22
Keep in touch with current affairs	<input type="checkbox"/>	23
Socialise with friends & family	<input type="checkbox"/>	24
Attend Church/Temple/Mosque	<input type="checkbox"/>	25
Pray	<input type="checkbox"/>	26
Religious study	<input type="checkbox"/>	27
Other.....	<input type="checkbox"/>	28
Other.....	<input type="checkbox"/>	29

Thank you very much for completing this questionnaire.

Please place it in the stamped addressed envelope and post it.

I would like to ask a small number of people who have answered the questionnaire to take part in an interview which will look at the things you have done during your life, what they have meant to you and the choices you are making about the activities you do now. If you are happy to be contacted at a later date about taking part in such an interview, please provide your contact details.

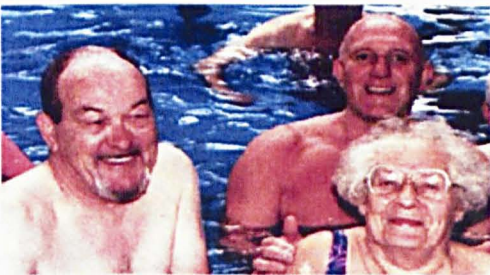
Name: _____

Address: _____

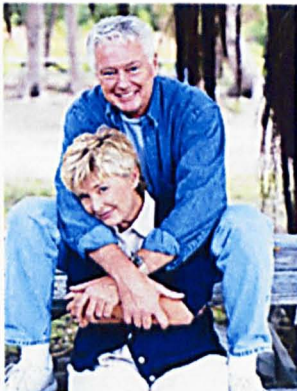
Telephone: _____

Email: _____

Appendix 4: Recruitment poster



Are you over the age
of 55?



Are you willing to
use 15-20 minutes
of your time to fill
in a Questionnaire?

My name is & I am a post graduate research student in the School of Health at the University of Northampton. I am researching the daily lives of healthy people in later life and the things they choose to do.



If you would like to
take part in this study
please can you
complete the
questionnaire which
will be posted
through your
letterbox and return it
in the SAE provided.



Appendix 5: Questionnaires distributed and returned.

Organisation	Date out	Number	Date In	Number
Northamptonshire Ladies Keep Fit	18.05.07	18	10.06.07	11
Age Concern-Warwickshire town	18.05.07	15	22.06.07	13
	21.05.07	5	25.10.07	5
Indian Association-Warwickshire town	05.06.07	6	13.06.07	2
U3A – Warwickshire town	11.06.07	21	25.06.07	17
Leicestershire Pensioners Group	16.06.07	20	19.06.07	5
Sikh elderly day care centre-Warwickshire town	11.10.07	10	1.11.07	8
			8.11.07	1
Warwickshire retirement village	6.11.07	15	22.11.07	12
Chinese Elderly Day Care Centre	6.11.07	4	18.12.07	3
Warwickshire village Over 60'S Club	15.11.07	6	29.11.07	6
Warwickshire Senior Peoples' Forum	17.12.07	10	07.01.08	7 (5)
Leicestershire's Senior People's Forum	12.02.08	2	03.02.08	2
CRUSE	24.01.08	2	18.02.08	2
A Northamptonshire Church	13.12.07	6	21.01.08	3
		140		97
Warwickshire/Leicestershire Muslim Group	04.05.07	No response		
West Indian Association	18.01.08	No response		

Appendix 6: Interview letter 1

Dear.....

In the last few months you completed a questionnaire as part of my research study into the lives of people over the age of 55. When you returned the questionnaire you were kind enough to say that you were also willing to be interviewed.

I plan to carry out the interviews over the coming spring and summer months. The interviews will be quite informal and will normally take place in your home or a familiar local community setting if you prefer. In the interview I would like you to tell me about things you have done in your life so far and what life is like now. I will record the interview on an audio-cassette recorder and it will be typed and returned to you for checking before a second follow up interview.

After the first interview you will be asked to complete a diary about how you spend your time over two 24-hour periods. We will talk about this in your second interview, which will also be typed and returned to you.

I will not be able to interview everyone who has responded as the study only requires a fairly small number of interviews, but it would be really helpful to me at this stage to know how many of you are still happy to be interviewed. I will be able to get back to you by the end of March to let you know whether or not you have been chosen.

Please can you complete the attached form to let me know whether or not you would like to be interviewed and return it to me in the enclosed envelop.

Thank you for your interest in my study so far and I look forward to hearing from you again

With kind regards

Judith Knight

APPENDIX 7 – Selection of participants for phase two of the study.


Table 1: Women who have agreed to an interview

ID	Age	Partner	Location	Group	Ethnicity	Income	Work	Now	Education
87	59	Single	City Centre	Church-Northants	White British	£5 S	Clerical	No	None
71	60	Married	Retirement village	Retirement Village	White British	Not given	Mod professional	No	'O' level
2	61	Partner	Small town suburb	Northants	White British	£31 + J	Clerical	No	None
68	61	Married	Retirement village	Retirement Village	White British	£31 + J	Mod professional	No	BA/BSc
35	63	Married	Village	U3A	White British	£26+ J	Mod professional	Yes	BA/BSc
90	63	Married	Large town suburb	OPF - Warwick	Afro-Caribbean	£26 + J	Mod professional	No	'O' level
32*	63	Partner	Village	U3A	White British	£26+	Trad professional	No	'M' level
88	64	(Alone)	Village	OPF - Leicestershire	White British	£13 S	Mod professional	Yes	BA/BSc
8	65	Married	Small town suburb	Northants	White British	£18 + J	SR man & service	No	None
77	66	Married	Retirement village	Retirement Village	White British	Not given	Snr man & admin	No	'O' level
93	66	Alone	Village	OPF - Warwickshire	White British	£13 S	Clerical	Yes	'O' level
16	68	Married	Large town suburb	Age Concern	White British	£25 + J	Clerical	Yes	'O' level
95	68	Married	Large town suburb	Church, Northants	White British	£13 J	Clerical	No	'O' level
12	69	Alone	Village	Age Concern	White British	£10 S	Mod professional	No	BA/BSc
42	69	Alone	Large town suburb	U3A	White British	£20-26 S	Snr man & admin	No	'M' level
69	70	Alone	Retirement village	Retirement Village	White British	£31 + S	Snr man & admin	No	'A' level
83	70	Alone	Village	Chinese community	Asian British	£13 S	Manual & service	No	None
43	72	Married	Large town suburb	U3A	White British	£31 + J	Clerical	No	BA/BSc
84	72	Alone	Village	OPF - Leicestershire	White British	£13 S	Mod Professional	No	Diploma
22	72	Married	Large town suburb	Age Concern	White British	£5 S	Mod professional	No	Diploma
91	73	Married	Village	OPF - Warwickshire	White British	£20-26 J	Mod professional	No	BA/BSc
92	75	Alone	Small town centre	OPF - Warwickshire	White British	£7+ S	Mod professional	No	BA/BSc
31	78	Alone	Large town suburb	U3A	White British	£8-10 S	Clerical	No	Matric
47	78	Partner	Village	Pensioner's Action Group	White British	£18-21 J	Mod professional	Yes	'M' level
94	80	Married	Village	OPF - Warwickshire	White British	£20-26 J	Mod professional	No	PhD
53	84	Alone	Village	Pensioners' club	White British	£8-10 S	Manual & service	No	None
51	90	Alone	Village	Pensioner's Action Group	White British	£8-10 S	Manual & service	No	None
80	93	Alone	Large town centre	Church-Northants	White British	£5-8	SR man & service	No	None


Table 2: Men who have agreed to an interview

ID	Age	Partner	Location	Group	Ethnicity	Income	Work	Now	Education
86	61	Married	Large town suburb	Cruse	White British	£31+ J	Mod professional	Yes	Apprentice
41	65	Married	Village	U3A	White British	£20-26 J	Mod professional	Yes	BA/BSc
3	66	Partner	Small town suburb	Northants	White British	£31 + J	SR man & service	Yes	Diploma
29	69	Married	Large town suburb	Indian association	Asian British	£5-8 J	Manual & service	No	None
50	70	Alone	Small town suburb	Pensioners' action group	White British	£20-26 S	Trad professional	No	M' level
75	72	Married	Retirement village	Retirement Village	White British	£31 + S	Trad professional	No	BA/BSc
39	77	Alone	Village	U3A	White British	£13-16 S	Trad professional	No	BA/BSc

Key

 First choices: because it provides wide differences on most of the variables:

 Reserves

 Declined when approached for interview

 Replacement participant

32* Late interview agree slip

After four of the participants had been interviewed problems occurred with the selection of the remaining four.

List of interviewees as at 20.04.09

~Woman	70	Alone	U3A	Snr man & admin	White Brit	£20-26,000	Not working	M level
~Woman	91	Alone	Pen group	Manual & service	White Brit	£8-10,000	Not working	None
~Man	78	Alone	U3A	Trad professional	White Brit	£13-16,000	Not working	BSc
~Woman	84	Alone	Village pen group	Manual & service	White Brit	£8-10,000	Not working	None
<Woman	73	Alone	OPF Bulkington	Mod professional	White Brit	£13,000	Not working	Diploma
^Man	68	Married	Desborough ladies	Snr man & service	White Eng	£31,000+	Working	Diploma
*Man (75)	72	Married	Retirement village	Trad professional	White Brit	£31,000+	Not working	BA/BSc
*Woman	64	Married	OPF Warwick	Mod professional	Afro-Carrib	£26,000+	Working	'O' Levels
**Man (50)	70	Alone	HB pen group	Trad professional	White Brit	£20-26,000	Not working	M level
**Woman	73	Married	Age Concern	Mod professional	White Brit	£5,000+	Not working	Diploma

~ Already interviewed

< 1st interview arranged

^ Agreed & informed selected for interview, but away in Scotland 'til ?end of May

* New possible – originally agreed to be interviewed

**2nd new possibles – originally agree to be interviewed

Rationale for changes

The 2nd male participant who was from an ethnic minority has not responded to attempts to contact him by phone x 3 and letter. Visited his house but it looks as though it might be unoccupied so perhaps he has moved. This throws the remainder of the 4 interviews out and I've had to revisit who I'm going to approach. The remaining man is currently away on a long holiday in Scotland but from my contact I've no reason to think he will not be willing to be interviewed when he gets back. I think I need another man in order to keep the 3:5 ratio so I've selected a replacement man from a retirement village (no other man from an ethnic minority). This means that I need to drop the woman living in a retirement village and replace her with one of two women from an ethnic minority. I've chosen a woman aged 64 rather than 71 as I only have one other interviewee in their 60's. She is afro Caribbean and is from the OPF in Leamington. I already have another woman from an OPF but this is from a very different socio demographic area.

If they are unwilling to participate I have identified another man and two other women, one from an ethnic minority and one from age concern, however the two people from Age Concern who have agreed to interview are probably volunteers rather than service users which I'd prefer. After six interviews I found that the man living at the retirement village was in hospital when contacted in November 09, so I approached a man** who was the last participant.

Appendix 8: Interview Yes letter and cancellation slip

25th April 2008

Dear Mr Jones,

Thank you very much for agreeing to be interviewed as part of my research. I thought you would like a little more information about me and what I am hoping to do.

I am a very mature post graduate research student in the Division of Occupational Therapy, School of Health at the University of Northampton. My research concerns the daily lives of healthy people in later life and the things they choose to do. Following your completion of the questionnaire this second phase will involve an informal interview lasting approximately 45-60 minutes. The interview will be about:

The things you have done throughout your life, important influences in your life and what you are doing at present.

I will record the interview on an audio-cassette recorder. The interview will be typed and returned for you to check for accuracy and for you to decide if there is anything you would like to add or take out.

After the interview I will ask you to complete a diary about how you spend your time over a 24-hour period, which I will explain to you more fully at the time. I hope then to be able to return after a week or two for a follow up chat to clarify any queries that each of us may have and talk about some things in a bit more depth.

IMPORTANT INFORMATION:

1. What you say to me will remain confidential between us and when the research is written up you will not be identifiable.
2. You don't have to do this so you are free to change your mind and you can pull out at any time without giving me any reason.

I will telephone you in the next few weeks to make a date for our first interview and I will of course be happy to work round any

holiday or other plans you have. However if you decide for any reason that you do not want to go ahead with the interview I would be very grateful if you could complete the interview cancellation slip enclosed with this letter and send it to me at the address indicated.

I look forward to meeting you,

Kind regards

Judith Knight

Interview cancellation slip

I no longer wish to be interviewed.

Name:

Address:

.....

.....

.....

Please send to:
Judith Knight
Kelmarsh
School of Health
University of Northampton
Park Campus
Boughton Green Road
Northampton, NN1 7A

Or email me at judyhk@tiscali.co.uk to let me know you no longer wish to take part.

Appendix 9: Consent form

Consent Form

For participating in the study of occupational identity changes in later life

[Details of the investigation can be found in the information letter].

Please tick in the boxes

I have read the information letter and understand what is involved.

I understand that the interviews will be audio taped

I understand that the information I disclose will remain confidential and that my data will be destroyed or returned to me after being collated.

I understand that I can withdraw my participation at any time.

I am willing to participate in this investigation.

Signed:

Date:

xxv

Appendix 10: Narrative interview questions

First interview – Life history

Introduction – purpose of interview

Tell me about your family - your parents, brothers and sisters, your place in the family

What was your early family life like?

What about school days?

How did you get on at school?
What did you like to do best/least?
Friendships
(*Successes and failures*)
Holidays / family day's out / outings
Important events
Hobbies outside school
(*Secondary school experiences*)
Part time work and future aspirations

What did you do when you left school?

Work / further study / neither?
Friendships and boyfriends/girlfriends
What things did you like to do then?

Your adult life?

Marriage/partner
Children
Continuing work/career
Family life
Time for your self / hobbies and interests / holidays?
Community involvement

As you grew older? Grandchildren

Ageing parents
Retirement/part time work

What kind of things make up your life now?

Family and friends
Community involvement
Hobbies and interests
Days out / holidays

2nd Interview

- Review experience of first interview
 - Have you read the transcript - any alterations, or clarifications?
 - How was the experience?
- Review experience of completing time use diaries
 - Clarification of diary entries if required.
 - Use diary entries to facilitate discussion on current occupations

Possible additional probes for second interview with first participant

How did you see yourself as a child?

Did this change as you grew older?

Did this (event) change how you saw yourself?

What meaning did (a particular occupation) have for you? Did this continue/change over time

What was most important to you at the time?

What would you say were the biggest influences on your early/later life?

Possible additional probes for second interview (20.01.09)

- What are the most important things that you do now? If you had to pick one?
 - *Tell me about it?*
 - *What is it about..... that is so good/enjoyable/valuable*
 - *What meaning does it have for you? Has this changed over time?*
 - *Has it always been important to you?*
 - *What changes, if any have you made in how you do it?*
- Explore other important occupations in same way.
- How would you describe yourself as a person now?
 - *Do you feel you have changed over the years/ since you were a child?*
- What would you say were the biggest influences on your early/later life?
- How did this event... change the way you saw yourself?
 - *What seemed to be most important to you at the time?*
- What would you say was/is your attitude to life?

SURVEY ON TIME USE

TIME USE DIARY

(For persons 15 years and older)

We all spend our time in different ways. How do you spend your time?

Please fill in this diary for
(Day of the week)

Student number:

Date: |_|_| |_|_| |_|_|_|_|

Diary number:(Please leave blank)

**Please take this diary with you during the day and fill it in now and then, when you have a spare moment,
e.g. on the bus or train, at lunch time or whilst waiting for someone!**

It should be quite easy to fill in the time diary! It will be even easier if you first read these brief instructions and then look at the example of a filled in diary on the next three pages.

What were you doing?

In the "What were you doing?" column we would like you to record your activities for every 10-minute period. The diary starts at 04.00am and cover 24 hours, three hours a page. The example on the following pages will give you an idea of the level of the detail we want. If you did more than one thing at the same time, please write the one you regard as the main activity. Don't record more than one activity on each line. If you did one thing after another within a 10-minute interval, record the activity the took the most time. if you were doing something you feel is too private to record, please write "personal".

Gainful employment. You don't need to record what you are doing during working time. Register what you do during breaks; for example "Lunch break, had lunch", and "Lunch break, went for a walk". Also mention work brought home and done at home.

Studies. Write if you study at home or attend classes/lectures. Record the type of study: adult education, university, U3A, etc.

Travel. Record the mode of transport. Separate the travelling itself from the activity that is the reason for travelling; for example "Walked to the bus stop" - "Went by bus to the shops" "Bought food" - "Caught bus home".

Housework and childcare. Record what you were really doing; for example "Cooked supper". "Made grandchild's tea", "Loaded washing machine", "Cleaned the car", "Cut the grass".

Reading (except studies). Record what you read; for example "Read a newspaper", "Read a novel", "Read non fiction".

Help to other households and other voluntary work. If the main activity was help of some kind - totally or in part - given to some-body outside your own household then report this in your diary. For example, "Helped friends repair their guttering", "Worked at charity shop", "Did neighbour's shopping", "Typed minutes for allotment group".

What else were you doing?

If you were doing more than one thing at the same time, record the second activity in the "What else were you doing" column. Suppose you were taking care of your grandchild (main activity) and watching television at the same time then record "watching television" as secondary activity. You decide which is the main and which is the secondary activity. Please remember to mark the duration of secondary activities, which might differ from the duration of the main activity.

Were you alone or together with somebody you know?

For each 10-minute period, please tick one or more boxes to show if you were alone or together with somebody you know. To be together does not necessarily mean that you actually do things together but rather that somebody else is on hand. You could have put ore than one 'X' on each line, and this number of "x"s may change during an activity that covers more than one 10-minute interval if a person leaves or arrives. You don't have to answer this question for sleeping time.

Checklist

When you have filled in the diary, please answer the questions at the end of the dairy. Finally go through the checklist, which is also at the end of

1. When did you fill in the diary?
- ☐ 1 Now and then during the diary day
☐ 2 At the end of the diary day
☐ 3 The day after the diary day
☐ 4 Later, about__days after the diary day
2. Were you at home or somewhere else at the start of the diary day (04.00am)?
- ☐ 1 At home
☐ 2 Somewhere else
3. Were you at home or somewhere else at the end of the diary day (04.00am)?
- ☐ 1 At home
☐ 2 Somewhere else
4. Did you fell rushed this day?
- ☐ 1 Yes
☐ 2 No
5. Was this an ordinary or unusual day?
- ☐ 1 An ordinary day
☐ 2 An unusual day
- 6a. Are you employed or a student?
- ☐ 1 Yes
☐ 2 No
- 6b. If yes: What kind of day was this day?
- ☐ 1 An ordinary work day
☐ 2 A day of due to weekend/holiday or 3 work schedule
☐ 4 A sick leave day
☐ 5 A vacation day
☐ 6 On leave for other reason
- 7a. Were you on a trip e.g. to another locality (town) during the dairy day? (Disregard regular trips to work or trips lasting less than two hours in total.)
- ☐ No
☐ Yes, on a single day trip within the country
☐ Yes, on a single day trip abroad
☐ Yes, on an overnight trip within the country
☐ Yes, on an overnight trip abroad
- 7b. If Yes, how far from home did you travel
- Miles

CHECKLIST

Please go through the diary one again and check the following

- Please check that you have noted only one main activity at each line and that there are no empty periods.
- Have you marked clearly your working hours of employment if any?
- Have you recorded all travel and modes of transportation?
- Have you marked the duration of parallel activities, if any?
- Please check that there is at least one "x" at each line in the "with who" column, except for time that you spent in bed.

Many thanks for filling in this diary!

Appendix 11b: Sample 24 hour diary page

Time am	What were you doing? <i>Record your main activity for each 10-minute period from 7.00-10.00am</i> Only one main activity on each line! Do not forget travel and mode of transportation Distinguish between travel and the activity that is the reason for travel Distinguish between first and second job if any	What else were you doing <i>Record the most important parallel activity</i>	Were you alone or together with somebody you know? <i>Mark 'yes' by crossing</i>			
			Alone	Children up to 9 living in your household	Other household members	Other persons that you know
07.00-07.10			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07.10-07.20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07.20-07.30			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07.30-07.40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07.40-07.50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07.50-08.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08.00-08.10			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08.10-08.20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08.20-08.30			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08.30-08.40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08.40-08.50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08.50-09.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Appendix 12: Horizontal narrative analysis tables

Narrative Analysis Table 1: Emerging patterns and themes

Sheila	Maggie	Desmond	Amy	Alice	Don	Yvette	Fred
Family relationships incl both husbands & descendents	Significant events & influences –	Significant events & influences	Significant events & influences	Significant influences & events	Significant influences & events	Significant influences & events	Significant influences & events
Emotional life	Relationships – parents/siblings/aunts & uncles	Relationships – parents/siblings	Relationships – parents/siblings/extended family	Relationships – parents/siblings/aunts & uncles	Relationships – Parents/siblings	Relationships: parents/siblings extended family	Relationships: Parents divorce only child
Significant incidents	Relationships with husband & descendents	Exclusive relationship with wife - no children	Relationship with husband, descendents & gentleman friend	Relationships with husband & descendents	Relationships with wives 1 & 2 & descendents	Relationships with husband & descendents	Relationships with wife & current partner & descendents
Relationships at work & friends – work most influential	Relationships at work & friends – friends most influential	Relationships at work/friendships – limited during marriage some friends now	Relationships at work/friendships – friends most influential	Relationships at work/friendships Family were most important now new friends	Relationships at work/friendships Evenly balanced	Relationships at work/friendships Being part of the community most important	Relationships at work/friendships
Belonging Learning & being challenged Taking opportunities	Keeping busy Being outside Learning new things & taking opportunities	Caring for his wife – loss of meaning Doing for others	Friendships Maintaining independence Helping others	Family. Religion/ Spirituality Maintaining memory of husband	Sport / racist beliefs. Values possessions.	Spirituality & religion Serving others- civic duty Response to racism	Politics Promoting electric vehicles Wide ranging interests
Occupations	Occupations	Other occupations	Occupations	Other occupations	Occupations	Occupations	Occupations
Occupational identity	Occupational identity	Occupational identity	Occupational identity	Occupational identity	Occupational identity	Occupational identity	Occupational identity
Health	Health	Health	Health		Health & ethnic identity	Ethnic identity	Health

Narrative Analysis Table 2: Summary of emerging patterns

Patterns	Sheila	Maggie	Desmond	Amy	Alice	Don	Yvette	Fred
Significant social & cultural influences	Urban middle class Alienation from early family Grammar school Subject choice at school University – male orientated work ops ++ Divorce x 2	Rural/suburban working class Early family relationships & bond with aunt. Elementary school–work ops limited Buying own home Managing in war on own Church & SS	Urban/rural middle class Experience as an evacuee Alienation from family Grammar school & university & post grad quals Work ops good Caring for wife Church & SS	Rural working class Strong family sense Elementary school- work ops limited Maid at public school during war-good time Church & SS	Urban working class Strong family sense Effect of war on daily life Grammar school Moderate work ops-gender typical Church & SS	Rural working class Dominant father Excited by war as child Secondary mod school – apprenticeship – good work ops Divorce x 1 White English ethnicity- BNP	Rural Jamaican/ UK urban working class Strong family sense Secondary modern school – moderate work ops Church & SS Dealing with racial prejudice	Urban middle class Effect of war on schooling & play Prep and public school education Parents' divorce University & work ops good. Divorce x 1
Current relationships	Divorcee Son & daughter + grandchildren-making up to them for past mistakes. Siblings Some long standing friends. Regrets over 2 nd marriage	Widow 30 + years Sees one living sister regularly Daughter ++ now retired Son & grand children. Longstanding local friends	Widower – no children. One sister deceased. Minimal contact with nephews & nieces. No surviving longstanding friends. Some local friends	Widow. 1 son & 2 grandsons – regular phone contact + visits less often. New gentleman friend Friends replaced extended family	Widow 1 son & 1 daughter + 4 grandchildren – regular contact Since husbands death more local friends + 2 longstanding friends	Lives with 2 nd wife. 2 sons 1 st marriage-contact infrequent. Mother living, visits regularly. Sees 2 brothers infrequently Good rels-local & work friends	Lives with husband Regular contact with daughter, son & grandchildren Good neigh bours & friends, connects with afro-Caribbean community	Lives with partner. Regular contact with his 2 children & grandchildren + those of partner Work & leisure based friendships
Occupational range	Wide range-home based & external	Wide range-home based & external	Medium range home based & external ↓ due to health	Medium range home based & external ↓ due to health	Wide range-home based & external	Wide range – more external than home based.	Wide range – more external than home based.	Wide range – more external than home based.
Occupational identity	Self image - 2 disparate selves Self efficacy Need to belong Meaning	Self image Self efficacy Meaning in occupation	Self efficacy Life with wife: co-dependency & safety. Self image. Meaning	Self efficacy Meaning Self image	Self efficacy Meaning Self image Family	Self efficacy Adjusting to retirement Meaning Self image	Self efficacy Belonging in community Meaning Spirituality	A man of many parts. Meaning Self efficacy

Pattern	Sheila	Maggie	Desmond	Amy	Alice	Donald	Yvette	Fred
Ageing self	Active ageing-making most of limited time + community eng	Active ageing-good for her age Community eng	Health worries but attempts to keep active Community eng	Health concerns – limits capacity Community eng	Active ageing – walking cycling & swimming + community eng	Active ageing – Bowls, cricket, golf, cycling & outdoor activities	Ethnicity Active ageing – walks/ engaged in community	Active ageing through non phys activity occs
Key occupation	Work Voluntary Work Singing	Gardening Travel/days out Homemaking	Carer's group Voluntary work	Meeting friends	Occupations with or for the family	Sport	Community voluntary work	Electric cars Bridge
Making choices	Obligation Meaning Interest Environment Self efficacy	Obligation Meaning Interest Environment Relationships Self-efficacy Health/capacity	Obligation Meaning Interests Environment Relationships Self efficacy Health/capacity	Obligation Meaning Interest Environment Relationships Self-efficacy Health/capacity	Obligation Meaning Interests Environment Relationships Continuity Self efficacy Health/capacity Managing social identity			

Narrative Analysis Table 3: Themes emerging from participants perspective (Luborsky, 1994)

Participant	Theme
Sheila	Isolated child, lacking self confidence. Belonging. Learning and being challenged. Taking opportunities
Maggie	Keeping busy. Being outside. Learning new things and taking opportunities. Part of her community.
Desmond	Isolated child, lacking self confidence. Loss of meaning following wife's death 2 years ago. Desire to help others through work and voluntary work.
Amy	Friendships. Dealing with reduced capacity-maintaining independence. Helping others
Alice	Centrality of the family. Spirituality. Maintaining memory of her husband following death 5 years ago. Helping the community.
Donald	Sport and being active. Importance of his English identity. Prepared to work hard and take opportunities. Helping others
Yvette	Spirituality & religion. Helping others and serving the community. Positive response in face of racial prejudice. Expecting the best from people.
Fred	Relishing opportunities of retirement

Narrative Analysis Table 4: Areas of concern

Main areas of concern	
Socio-historical influences on developing identity	War time experiences
	Family, gender & cultural influences
	Educational opportunities and later life attainments
	Response to retirement
	Community involvement /contribution
Occupational meaning – key occupations & occ identity	Meaningful connection/with others/ with past self/ being without
	Meaning in place
	Creativity & spirituality
	Meaning through sport
Occupational meaning – daily life & routines & occ identity	Meaningful connection / preserving capacity/obligation or fun
	Continuity and adaptation to declining capacity
Occupational identity	Self schemas – personal qualities / occupation based schemas/ other beliefs about self
Occ identity & concept of self	Occ nature of self schema /ageless self /self efficacy/coherence & continuity

Appendix 13: Time use data tables - Table 7.4:1 – Time Use Diaries A

Main Activity Name	National average minutes	National % reporting activity	YVETTE		DONALD		FRED		SHEILA	
			Minutes	Variation from norm	Minutes	Variation from norm	Minutes	Variation from norm	Minutes	Variation from norm
Sleep	507	100	455	- 52	570	+ 63	375	- 132	495	- 12
Rest	73	63	30	- 43	35	- 38	100	+ 27	70	- 3
Personal care ie wash/dress	46	93	110	+ 64	45	- 1	95	+ 49	50	+ 4
Eating & drinking	102	98	60	- 42	60	- 42	130	+ 28	90	- 12
Cooking, washing up	56	78	145	+ 89	70	+ 14	125	+ 69	60	+ 4
Cleaning, tidying	40	50	65	+ 25			20	- 20	65	+ 25
Washing clothes	11	19	15	+ 4	5	- 6	10	- 1	15	+ 4
Repairs & gardening	28	24			5	- 23	5	- 23	45	+ 17
Pet care	8	14							20	+ 12
Paid work	15	5								
Formal education		1								
Recreational study	1	1					25	+ 24		
Voluntary work	5	3	140	+ 135					105	+ 100
Caring for children	1	1								
Caring for other children	8	4								
Caring for adults in own household	4	3					40	+ 36		
Caring for adults other household	3	3								
Shopping/appointments	40	43	40	0	90	+ 50	75	+ 35	25	- 15
TV & videos/DVDs, radio, music	226	88	15	- 211	85	- 141	20	- 206	75	- 151
Reading	59	52	25	- 34	115	+ 56	80	+ 21	30	- 29
Sport & outdoor activities	8	8	20	+ 12	110	+ 102			35	+ 27
Spending time with family & friends	50	32	115	+ 65			5	- 45	10	- 40
Going out with family & friends	12	9							70	+ 58
Contact with friends/family	8	15	10	+ 2			60	+ 52	10	+ 2
Entertainment and culture	4	3			60	+ 56			70	+ 66
Attending religious & other meetings	5	5								
Hobbies	31	21	50	+ 19	55	+ 24	155	+ 124		
Using a computer	7	6	35	+ 28	10	+ 3			60	+ 53
Others specified/not specified	19	11	30	+ 11	50	+ 31				
Travel	63	71	80	+ 17	75	+ 12	120	+ 57	40	- 23
TOTAL HOURS IN DAY	1440	0	1440	0	1440	0	1440	0	1440	0

Table 7:4:2 – Time Use Diaries B

Main Activity Name	National - average minutes	National -% reporting activity	Alice Average minutes	Alice Variation from norm	Desmond Average minutes	Desmond Variation from norm	Amy Average minutes	Amy Variation from norm	Maggie Average minutes	Maggie Variation from norm
Sleep	507	100	465	- 42	500	- 7	455	- 52	475	- 32
Rest	73	63	15	- 58	30	- 43	65	- 8	155	+ 82
Personal care ie wash/dress	46	93	55	+ 9	60	+ 14	130	+ 84	85	+ 39
Eating & drinking	102	98	60	- 42	125	+ 23	50	- 52	65	- 37
Cooking, washing up	56	78	115	+ 59	80	+ 24	95	+ 39	150	+ 94
Cleaning, tidying	40	50	70	+ 30	10	- 30	50	+ 10	60	+ 20
Washing clothes	11	19	15	+ 4						
Repairs & gardening	28	24	125	+ 97			5	- 23	75	+ 47
Pet care	8	14								
Paid work	15	5								
Formal education		1								
Recreational study	1	1								
Voluntary work	5	3			90	+ 85	30	+ 25	15	+ 10
Caring for children	1	1								
Caring for other children	8	4								
Caring for adults in own household	4	3								
Caring for adults other household	3	3								
Shopping/appointments	40	43	25	- 15	20	- 20			25	- 15
TV & videos/DVDs, radio, music	226	88	35	- 191	55	- 171	215	- 11	80	- 146
Reading	59	52	55	- 4	90	+ 31	45	- 14	20	- 39
Sport & outdoor activities	8	8	30	+ 22	45	+ 37				
Spending time with family & friends	50	32	45	- 5	45	- 5	120	+ 70	20	- 30
Going out with family & friends	12	9	80	+ 68	75	+ 63	90	+ 78		
Contact with friends/family	8	15	50	+ 42			15	+ 7	5	- 3
Entertainment and culture	4	3			45	+ 41				
Attending religious & other meetings	5	5	20	+ 15	15	+ 10				
Hobbies	31	21	85	+ 54	85	+ 54	35	+ 4	150	+ 119
Using a computer	7	6								
Others specified/not specified	19	11	15	- 4	5	- 14				
Travel	63	71	80	+ 17	65	+ 2	40	- 23	60	- 3
TOTAL HOURS IN DAY	1440	0	1440	0	1440	0	1440	0	1440	0