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# Age identity and adjustment patterns in later life : a qualitative study of retired secondary school teachers and manual workers in Hong Kong

Kit Ying, Connie YONG

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**AGE IDENTITY AND ADJUSTMENT PATTERNS IN  
LATER LIFE: A QUALITATIVE STUDY OF RETIRED  
SECONDARY SCHOOL TEACHERS AND MANUAL  
WORKERS IN HONG KONG**

YONG KIT YING CONNIE

MPHIL

LINGNAN UNIVERSITY

2007

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LIFE: A QUALITATIVE STUDY OF RETIRED  
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by

YONG Kit Ying Connie

A thesis

submitted in partial fulfillment

of the requirements for the Degree of

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2007

## **ABSTRACT**

Age Identity and Adjustment Patterns in Later Life:  
A Qualitative Study of Retired Secondary School Teachers  
and Manual Workers in Hong Kong

by

YONG Kit Ying Connie

Master of Philosophy

With escalating heterogeneity of the older population due to extending healthy life expectancy, chronological age is decreasingly likely to be an appropriate discriminator of social groups among the diverse population. It may be more fruitful to understand how older people actually feel and live their lives than merely using chronological age as a categorizing variable. Therefore, the present research investigates individual age identity which may provide a more realistic indicator of ageing in the lifecourse. It may also underpin many behavioural phenomena.

Age identity focuses on how an individual perceives himself or herself in terms of age. Previous studies have shown mixed findings between age identity and a number of variables, such as chronological age, gender, socio-economic status and health status. However, relatively few studies have gone beyond the determinants of age identity to explore the question of how age identity affects the adjustment process in later life. Self-perception is often cited as one of the components of both physical and psychological well-being, so it is also important from this perspective. It seems a “good” adjustment can contribute to a successful later life, and the study of age identity, as a specific dimension of self-perception, its determinants as well as consequences, may be crucial in such adjustment. Thus, age identity and adjustment form a timely research agenda and they grow to be vital topics for policy and service delivery.

To study the relationship between age identity and the adjustment process, in other words, how people feel about themselves and whether they consider themselves to be old, face-to-face in-depth case interviews were conducted with 12 retired secondary school teachers and 10 retired manual workers. Results from this qualitative study show that different people hold different age identity irrespective of chronological age. Retired

secondary school teachers in general reported younger age identity than the retired manual workers, mainly due to their previous job nature, more flexible retirement and greater work continuity after retirement. Three different patterns of adjustment were identified: assimilation, accommodation and mixed. Those with a younger age identity tend to take up assimilation while those with an older age identity were more likely to assume accommodation. It was also found that previous life experience, significant others and individuals' perceptions of age and retirement are important in affecting age identity and adjustment patterns.

In addition to its contribution to gerontology, this study of age identity and adjustment pattern in later life among different occupational groups can help policy-makers' understanding of the needs of older persons. Knowledge of different age identification and adjustment patterns can help guide them on how to assist the diverse and expanding older population in maintaining a meaningful later life. Policy makers can thus give individual care and make personally suited interventions, with reference to one's condition, or at least that of a particular segment of the older population, rather than their chronological age. It is also hoped that the current research will contribute in terms of guiding policy-makers on adjustment strategies design for the expanding older population. It may shed light on preventive measures by encouraging individuals to activate their own resources rather than depending on public social and health policies, many of which focus on needier older persons.

## DECLARATION

I declare that this is an original work based primarily on my own research, and I warrant that all citations of previous research, published or unpublished, have been duly acknowledged.

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(Yong Kit Ying Connie)

12 September 2007

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## **Chapter One: Introduction**

### ***Ageing and Age identity***

Increasing research studies are interested in searching for the meaning of old age since there is a lack of consensus about the definition of being old and signs indicating the beginning of old (Katz, 1996). In the measurement and definition of old age, most of the time it is measured chronologically, i.e. by a person's numbers of year old. One of the rationales for such age structuring is to create comparable social categories for resource distribution and rationing (Harris, 1990; Walker, 2000). For instance, the rationing of health services is achieved on the basis of age in most European societies (Bond & Cabrero, 2007). Therefore, older persons are often portrayed as a burden on society. The institutionalization of ageism in later life, by political, educational, health and welfare structures, constituted "official" knowledge which arguably reinforced the negative stereotypes of older persons and the justification for using age to categorize people. Old age, however, is more likely to be socially constructed rather than chronologically determined (Coupland & Coupland, 1994). Some people may accept physical or mental decline as an inevitable part of the ageing body while others may not accept ill-health in later life as inevitable. The diversity, including physical, psychological and socio-economic conditions, among the older population, has also been acknowledged. There is no clearly identifiable beginning and ending of old age and an universal definition of old age. Age category thus encompasses social meaning which is built upon the surrounding culture and social interactions (Logan, Ward & Spitze, 1992).

Social constructionists have argued that we construct our own version of

reality through daily interaction with one another (Berger & Luckmann, 1967; Burr, 1995). In this sense, age, being one of the ways of categorizing people, does not necessarily refer to real or even meaningful division. One might be expected to wear dull clothing, withdraw from the labour market and feed by social provisions when he or she enters 60s. Age, therefore, can bracket people's behaviours, determines their eligibility to claim benefits and defines social and family status. It may hence convey social meaning to later life that alters individual's age identity and even societal expectations (Kaufman & Elder, 2003). It can also lead to stereotyping.

Traditionally, older persons are often portrayed or stereotyped as ill and/or disabled, dependent, less useful, non-contributing, mentally declining, mentally ill, isolated, poor and depressed (Harris, 1990; Palmore, 1990; Sneed & Whitbourne, 2005). These images of older persons are even overtly revealed. For instance, road signs and publicity in public transport always remind people that they have to take good care of the elderly. Older persons repeatedly being represented in care situations and receiving assistance further reinforce the tenuous position of older persons. Age-relevant social and economic policies also influence older persons' sense of self and how others regard them (Hendricks, 2004). In general, the social meaning attached to old age is relatively negative in many modern societies. By contrast, in traditional societies such as Thailand, India and Nepal, old age and old age related ascribed status often receive higher value. In addition, there is a tendency that later life is viewed in a more positive manner recently (Lupien & Wan, 2004). Concepts such as Productive Ageing, Active Ageing and Successful Ageing offer a more positive view in looking at old age. The images of ageing have

radically changed from those of poor older persons sitting still on park benches or in institutions to those who are told to look youthful, be active travellers, engage in volunteer work and so on. Based on the WHO Active Ageing policy framework, individuals and families are urged to plan and prepare for older age. They have to make personal efforts to adopt positive personal health practices at all stages of life (World Health Organization, 2002). In addition, there is a growing societal emphasis on the “Third age”. The conception of “Third age” means later life is a period for personal growth and fulfilment (Dorfman, 2005). With the increasing amount of time available after retirement, reducing family and financial commitments and growing range of activities to participate, the “third age” is seen as time for engaging in enriching activities and achieving fulfilment (Ballard, Elston & Gabe, 2005; O’Hanlon, 2004). Older persons are asked to be more responsible for their personal health to extend their Third Age Period (Öberg & Tornstam, 2001). Studies also put forward that development continues even one reaches the latter part of life. Older persons become more altruistic, less critical and have increased wisdom as they have satisfied most of their needs in the life (Lin, Hummert & Harwood, 2004; Sheldon, Kasser, 2001). Therefore, the different constructions are probable to bring different reactions among the population.

Age identity refers to the subjective assessment of a person’s age (Kaufman & Elder, 2002). It reflects how individuals perceive themselves in terms of age. Age identity may affect self-concept and self-esteem since identity structures the way people decide they want to behave or how they are treated by the others (Askham, Henshaw & Tarpey, 1997). Self-concept and self-esteem refer to the individual’s perception and description of him or

herself in broad. Self-concept is much of the cognitive dimension of the self while self-esteem is of the evaluative dimension. Such perception is developed in the process of social interaction through constant comparison, assessment and interpretation with significant others and the self (George, Mutran & Pennybacker, 1980). As self-perception has been found to be one of the components in both physical and psychological well-being (Mossey, Jana M., 1995; Hooyman & Kiyak, 2002), the study of age identity, as being an specific dimension of self-perception, and its consequences become a timely research agenda and they grow to be vital topics for policy and guide service providers towards strategies of service delivery.

Previous studies on age identity have tended to focus on how people perceive their own age and the corresponding determinants. The relationship between age identity and variables such as socio-economic status, activity level, health conditions and role transitions are constantly addressed in the field of gerontology (Barrett, 2003; Barrett, 2004; Logan, Ward & Spitze, 1992). Intervening variables such as age, gender and educational level produced research results with mixed findings (Cleaver & Muller, 2002). However, relatively few studies have gone beyond the determinants of age identity to explore the questions about how age identity affects the adjustment process in later life. Although ageing is inevitably associated with declines in functioning and abilities, older persons vary in their resilience and creativity in successfully adapting to challenges (O'Hanlon, 2004) while well-being in later life is largely dependent on how one responds to challenges in later life.

Research results on the relationship between age identity and well-being

showed discrepancies. Some stated that an older age identity may result in worse physical and psychological well-being (Baum & Boxley, 1983; Barrett, 2004; Kaufman & Elder, 2002; Westerhof & Barrett, 2005). The self-perception of old is possibly accompanied with the feelings of loss and stigmatized status in a youth-oriented culture which results in lower well-being (Logan, Ward & Spitze, 1992). On the other hand, some advocated that well-being is likely to be a cause rather than consequence of younger identity. Some others found no association or even an inverse relation (Montepare & Lachman, 1989) between age identity and subjective well-being. The inconsistency probably stems from failure in noticing individuals' reaction towards age identity. Taylor and Ford advocated that later life, as a continuing process, is a constant struggle to maintain cherished lifestyles against any hostile impact of both external events and internal changes. They added that different styles of life would consequently have different kinds of resilience (Thompson, 1993).

As subjective age probably has the potential to offer a multidimensional view of the course of ageing and provide a meaningful explanation for some behavioural phenomena, the current research project seeks to investigate the relationship between age identity and adjustment process in later life of retirees from jobs that have different aspects of work demands.

### ***Purpose of the study and its long-term significance***

The substantial development of research on age identity could be dated back to the 1950s (Barak & Stern, 1986; Uotinen, Suutama & Ruoppila, 2003) since age identity has been found to be correlated with functional health and

self-image (Kaliterna, Larsen & Brkljadic, 2001). However, a huge body of work was based on the cases in Western societies (Uotinen, Suutama & Ruoppila, 2003) where Hong Kong has differing culture, social structure and societal expectations. For instance, Western countries tend to place a high value cultural on youthfulness and have stronger individualistic orientation. On the other hand, Hong Kong is a place where east meets west and the Chinese traditional culture greatly values on the wisdom and experience of the older persons. As a result, this empirical research of age identity in Hong Kong may yield dissimilar results to those in the Western world (Phillips, 2000; Chow, 2000)

The population in Hong Kong is ageing progressively. In 1971, only 4.5% of its population was in the age group 65 and above. This percentage rose sharply to 10.1% in 1996 and then went up to 12.1% in 2005 (Census and Statistics Department, 2006). It is estimated that the senior population will reach 24% of the total population in 2031 (Hong Kong Health Department, 2004). The rapidly expanding older population increases the complexity and heterogeneity among the entire group. As age identity is predominantly subject to individual and historical experiences (Kaufman & Elder, 2002), the assessment of age identity becomes more complicated. Moreover, people are enjoying greater longevity. The expectancy of life at birth (ELB) for males was 79.5 while ELB for females was 85.6 in 2006 (Census and Statistics Department, 2007). The Department of Health (2004) also pointed out that males and female in Hong Kong who survived at age 60 in 2001 can expect to live an average of 21 and 26 more years respectively. As people can live about 20 additional years or more after the age of 60, age at which people, for most

of the time, are regarded as old, all these development have made the distinction between middle and old age becomes more and more ambiguous. This is congruent to the cultural gerontologists' concept of post-modern lifecourse in which the boundaries between life stages are gradually eroding and this consequently affects the ways individuals in understanding their own ageing (Ballard, Elston & Gabe, 2005; Jones, 2006). Thus, people, even with the same chronological age, may report a wide range of age identity.

When people reach a “certain age”, most tend to experience a set of transitions including retirement, grandparenting, change in health condition and bereavement. According to Role theory, people play a variety of social roles throughout the life course and those roles change at different life stages. Older persons will experience both role gain and loss throughout life. It is suggested that adjustment and how people adjust to these role changes is an important determinant of having a successful later life (Hooyman and Kiyak, 2002). Role transitions on the one hand act as signposts that remind individuals that they are moving from one age category to another; they, on the other hand, signify changes in family and social roles. Both transitions and role changes lead people to feel that they are at a certain age because of the things that they are doing, experiencing and thinking about in their daily lives (Logan, Ward & Spitze, 1992).

Role Theory, introduced by Cottrell (1942), has generally been recognized as one of the earliest social theories in gerontology. It provides a theoretical explanation for bridging role and age identity. It proposes that self and social role are in continuous interaction in which social positions drives

our behavioural patterns and lead the self and others to construct expectations about identity and social standing (Peters, 1971). Therefore, changing roles may lead to changes in status and consequently self-perception, perceptions by others and relative social power (Hendricks, 2004). To redefine self-concept and successfully adapt oneself to later life under role changes, old age may require a series of adjustments in individual's routines, relationships and expectations. One of these may be replacing lost roles (such as workers or spouses) by new roles (such as volunteers or part-time workers), as role theory claimed that roles gain through participation in activities (including leisure activities) might help older persons to retain social identity and self-esteem (Hooyman & Kiyak, 2005). This is one of the rationales for the World Health Organization's launch of the concept of Active Ageing in 2002 (World Health Organization, 2002) and countries worldwide repeatedly evocating the importance of participation in later life.

Activity Theory itself, dating from 1969, suggests that life satisfaction decreases when activities decreased. It states that older persons could achieve greater life satisfaction if they keep active through activities in voluntary associations, churches and leisure organizations (Hooyman & Kiyak, 2005). However, activities are usually age-graded which divide people into different chronological groups. Older persons are expected to "act their age" and activities designed for them are categorized in which people may react differently towards their transition. Few studies have explored the kinds of activity which suit the heterogeneous older population best. Moreover, role theory postulates that older persons must deal with role losses in order to maintain their self-worthiness. Activity theory also unrealistically believes that

one must engage in activities at levels similar to those of middle years. Nevertheless, there are increasing numbers of older persons who seek to participate in a diverse range of activities yet some older persons do not like to sustain high levels of activity (Department of Health, 2004; Grant, 2001; Harris, 1990). Some activities, like volunteering, housemaking, grandparenting, do yield substituting roles for older persons. Others, such as gardening, watching television, reading and exercising, may not grant older persons solid roles. However, older persons can still retain their social identity and self-esteem by engage in these activities. Studies add that life satisfaction is dependent on the type of activities in which an older person participates rather than the amount involved (Harris, 1990). Activity theory assumes every activity can provide news roles for older persons to compensate the old ones. In addition, role theory hypothesizes that roles in one's lifetime are organized sequentially and age norms provide capacities and limitations for role adoption (Hooyman & Kiyak, 2005). Conversely, roles appear in a linear direction do not uncommon nowadays that older persons choose to take up their worker roles, although those may be part-time or freelance jobs, again after their retirement. Whilst a useful starting point, Role Theory fails to account for variability in individual preferences and oversimplifies the transitory process in later life. Role Theory, as well as most researches, tend to ignore older persons' perceptions and beliefs about how ageing should be experienced (Grant, 2001). Hence, this empirical study may contribute in revisiting the concept of Role Theory by examining the meaning of retirement and roles to the informants.

Previous gerontological research has often focused on the study of

women mainly because of their greater longevity and often relatively deprived social position. Researchers often tend to see old women as a problem group, hence, old women have tended to receive more research attention than do old men (Arber, Davidson & Ginn, 2003). However, men are not exempted from the influence of ageing, though in a different way from women. Men tend to have strong occupational attachments and fewer non-work routines and networks than women. Therefore, they may find retirement transition more problematic than women which in turn leads to frustration (Barnes & Parry, 2004).

In addition, the determinants of age identity are still inconclusive. Variables most often studied include changes in health, role transitions of retirement and widowhood as well as social structure (Sherman, 1994). Literature on the determinants of age identity shows mixed findings. Some studies have found the loss of critical role as catalyse for increased age identity (Neugarten, 1977), some have suggested the association between good self-reported health and youthful subjective age (Uotinen, Rantanen & Suutama, 2003). The major reason behind may be because people from occupations with differing natures probably have dissimilar ways of life and thus results in differential mind-sets and self-perceptions. Researchers have tended to leave out previous job as an analytical variable and policy makers appear inclined to generalize older persons issues presumably for trouble-free or easier policy making and delivery.

Research seldom takes previous work-life into account in assessing older persons' condition and identity (Berger, 2005; Forum of Labour Market

Ministers, 2002). The lifecourse perspective suggests that earlier life experiences of older persons, as shaped by historical events and cultural heritage, have influenced their values, such as beliefs in family relationships, expectations of kin support and so on (Kinsella, 1995). Life histories provide an in-depth look into how older adults' behaviour and attitudes in later life are shaped by their own personal life experiences (Fisher, 1991). Therefore, each older person has his or her heterogeneous, unique, set of perceptions, generated from personal historical experiences, which influence how to adapt to later life (Hareven, 1995).

Later life has been marked out as one of the most prominent issues by researchers as well as policy makers, and, in most cases, older persons are problematized as a group with particular characteristics including declining body and rising reliance. It is partly because society is aware of the alarmist predictions about the costs of supporting the escalating numbers of dependent older persons, which is the so-called "Moral Panic" used by many politicians, economists and even some academics. Many older persons, conversely, are better off nowadays and enjoy better health than earlier generations. Most older persons in this generation possess better educational background when compared to those in the past. Since the implementation of nine-years' universal and compulsory education in 1978, Hong Kong residents have attained at least junior secondary education. The Hong Kong government has successfully improved the educational level of the entire population. For instance, the overall post-secondary participation rate for the 17 to 20-age cohort has increased to 53% in the 2004 to 2005 school year (Education Commission, 2004). The educational level of the Hong Kong population will

be further enhanced under the education reform which plans to provide post-secondary education opportunities to 60% of senior secondary school leavers by 2011 (Education Commission, 2004). Therefore, it is foreseeable that the future older population will be increasing educated. Many older persons can earn a better living with rising educational level. Although majority of older persons now are still engaged in “elementary” occupations, the proportion is gradually contracting. The proportion of older persons working at the associate professionals rank or above, on the contrary, is expanding and even at a faster pace (Census and Statistics Department, 2002). Together with better retirement protection through the execution of the monetary provident fund scheme as well as the rapid development of the private sector investment, quite a proportion of older persons, especially those in the future, are likely to have a secure and relatively affluent later life.

Moreover, there is apparently in some places a trend toward compression of morbidity, meaning that the majority of the older population is experiencing better health almost until the end of their lives although compression of morbidity is not agreed by everyone (Kalache, Aboderin & Hoskins, 2002; Kinsella & Phillips, 2005; Moody, 1995). Although health status generally deteriorates when a person get older, most of them do not have activities of daily living (ADL) impairment (Census & Statistics Department, 2005). Law and Yip (2003) also suggest that the healthy life expectancy at birth for male is 70.3 and 75.7 for female. Growing number of older persons can thus afford, both physically and financially, taking up their desired leisure pursuits after retirement. Therefore, this research tries to include retirees from both the white and blue-collar groups, with retired secondary school teachers and manual

workers as case studies, to fill the previous research gap. Furthermore, despite the importance of adjustment in later life, relatively little attention has been paid to the adjustment in daily routines, economic condition, psychological state and so on. Studies were likely to focus on participation pattern or look at various aspects of adjustment tactics independently while a more comprehensive view of adjustment patterns was overlooked.

Consequently, the study of age identity and adjustment pattern in later life among different working groups can help policy maker understanding the need of the senior residents. The reasons for studying retired secondary school teachers and manual workers will be discussed in Chapter Four. Highlighting the importance of age identification on adjustment patterns in the study can help guide policy on how to assist the diverse and expanding older population to maintain a meaningful life in their later years. Policy-makers can thus give individual care and make personally suited interventions, with reference to people's condition, or at least that of a particular segment of the older population, rather than solely their chronological age. In addition, the present study also revisits the conception of successful ageing by looking at how older persons can achieve a better quality of life through later life adjustment. Thus, the proposed research has both practical and theoretical significance.

In summary, and stemming from the literature reviewed in subsequent chapters, the major objectives of the present research are:

- 1) To explore the perceptions of age among retired secondary school teachers and manual workers
- 2) To identify patterns of later life adjustment and note if they differ between

the two group

- 3) To examine the effects of age identity, if any, on later life adjustment pattern
- 4) To identify factors affecting age identity and later life adjustment patterns

To achieve the above objectives, the present research tries to answer a number of research questions, using its qualitative approach rather than formal hypotheses. They are, specifically:

- 1) What is the age identity among secondary school teachers and manual workers after retirement? Are there common patterns?
- 2) How do previous life experience, significant others and the meaning of retirement and the term “old” affect retired secondary school teachers’ and manual workers’ perceptions of old age?
- 3) How do retired secondary school teachers and manual workers adjust to their later life in physical and psycho-social aspects?
- 4) How does age identity influence adjustment patterns in later life?

It is hoped that by focusing on the effects, and potential effects, of age identity on adjustment patterns, this study will shed light on preventive measures by encouraging individuals to activate their own resources rather than depending on public social and health policies. It may also contribute in terms of guiding policy-makers on devising adjustment strategies for the expanding older population.

## **Chapter Two: Literature review**

### **Concepts of Ageing and Age identity**

#### **Chronological age**

Researchers and policy makers in most developed countries normally use 65 years as an indicator of old age for making policy proposals including defining the age of retirement and allocating state pension benefits (Bowling, See-Tai, Ebrahim, Gabriel & Solanki, 2005; Department of Health, 2004). Public policy, especially for demographic and cohort studies, most likely enhances the welfare of older persons in most societies but at the same time it has a tendency to reinforce the assumption that ageing is inevitably associated with problems such as economic dependency and functional deterioration (Thompson, 1993, Walker, 2000). The age categorization can be traced back to the Social Security Act of 1935 in the United States and to other retirement schemes in European countries. The arbitrary basis for receiving social security benefits guided the public to have a generalized idea of when a person reaches the status of an older person. For instance, employers may consider 65 as the age of retirement and most gerontological studies also use 65 as the age of the onset of old age (Catterall & Maclaran, 2001, Harris, 1990).

However, using chronological age for categorizing people arguably obscures and even denies the physiological, psychological and social diversity of older persons (Bowling et al 2005; Westerhof & Tulle, 2007). Traditionally, researchers tended to lay considerable emphasis on functional ageing. Early gerontologists also focused on the biological process of becoming old. It was only from the late 1950s that they started to pay more emphasis on the social, economic and psychological aspects of ageing (Harris, 1990; Law, 2001;

Lupien & Wan, 2004). Moreover, many studies of ageing in the 1940s and 1950s emphasized the negativity of the ageing process and were based on samples of ill and institutionalized older persons. Hence, older persons were generally portrayed as frail under such methodological approaches (Harris, 1990). In addition, health reports constantly exhibited figures on reduced physiological adaptability and increased vulnerability to disease with growing age (Lupien & Wan, 2004). Therefore, chronological age becomes a sensitive indicator of health status and in turn grows to be the benchmark of categorizing people.

However, more recent research findings have revealed that there is some flexibility in the ageing process. Although cognitive impairment is strongly related to chronological age, studies demonstrated that such impairment was not unavoidable and many older persons did not develop Alzheimer's disease even reaching their very late old age (Brookmeyer & Kawas, 1998; Grundy, 2002). There is also a trend that the rate of functional ageing is decreasing in which people are enjoying longer life expectancy which is free of severe disability (Dunnell & Dix, 2000; Wanless, 2002). The self-rated health of many older persons also refuted the stereotypes that old age must be associated with frailty and dependency (Census and Statistics Department, 2003). Findings suggested that psychological state, including personality, even improved when one aged due to the aspects of self-development and individual became less worried and felt more comfortable with oneself (Sneed & Whitbourne, 2005; Srivastava, John, Gosling & Potter, 2003). Moreover, external factors such as one's lifestyles, self-efficacy, social network and social involvement were found to be crucial in determining one's health in

later life (Bowling et al, 2005; Department of Health, 2004).

### Types of ageing

Indeed, apart from biological ageing, the conceptions of ageing also commonly include psychological, social ageing and even economic ageing (Phillips, 2000). Psychological ageing refers to the development and changes in cognition, personality and self while social ageing refers to modifications in social lifestyles and attitudes toward changes in social roles (Mathur & Moschis, 2005). As mentioned above, the rate of biological ageing can be highly variable among members in the older population. The process of psychological and social ageing can be even more diversify among older persons as they involve greater degree of the external environment as well as individual experiences and perceptions. The age stratification theory pointed out that members from each stratum behave, think and act in their own way as they differ from each other in terms of lifecourse and experiences (Hooyman & Kiyak, 2002). Not only do individuals in different generations, but even those within the same cohort vary in their socio-economic backgrounds, social participation, social network, values and so on. Hence, ageing is a multi-dimensional and multi-directional process. It is rather a highly individualized experience and individuals are likely to have their own way of ageing. Chronological age is thus not an appropriate and precise discriminator of social groups in a complex society. It is more fruitful to understand how one actually feels and lives his or her life in order to provide explanation for age-related human behaviours than merely using chronological age as a categorizing tool in studies of ageing.

There are different schools of thought or explanation regarding age categorization. Realists see some knowledge and phenomena, including age categorization, as pre-existing and fixed in which they appear to us as “truth” or “common sense” (Jones, 2006). However, social constructionists challenge the traditional view that the so-called “objective knowledge of the world” as given or natural (Gergen, 1985). There is a huge body of work on discursive gerontological studies which demonstrate that the status of older persons in most societies is negotiable and changeable (Coupland & Coupland, 1994; Jones, 2006; Nikander, 2000). Gerontologists are aware that old age is being socially constructed while people create their own social reality within the context of interpersonal interaction. For most of the time, the “reality” of old age is constructed because some powerful parties legitimising and authorizing knowledge formations (Katz, 1996). For instance, ageism, although it may be positive ageism, arguably prevails among social workers, doctors (especially geriatricians), political groups and other professionals working with older persons (Bytheway, 1995; Revenson, 1989). Medical professionals and gerontologists also use statistics, medicine and demography as intellectual tools to disclose the problems of old age (Katz, 1996). Walker (2000) suggested that social and economic policies played a major role in determining the meaning of old age. During the post-war Europe, there was mounting concern on the governments about the socio-economic consequences of population ageing. The main goal of public policy was to provide income security in old age as well as ensure the efficient transition of older workers to retirement. However, these public policies also make people incline to think of the service recipients as poor, deprived and powerless. This is similar to what Foucault and Rose (1990) referred to as governmentality in which old age was

cast as a social problem which required governmental responses. All these powerful social construction agents are prominent in shaping our values and expectations towards different age groups as well as the proper social and family positions of each age category.

### Ageing and the self

Although age is likely to be socially determined, it is not independent to the ageing of the self. In the social constructionist analysis, what we take for granted as criteria for social categories, including the age category, are determined by cultural, historical and other contextual factors (Gergen, 1985). The social roles and situations that one experiences influence the perception of age identity of that individual. Based on symbolic interactionist theory, there is a reciprocal and interdependence relationship between the self and the society whilst we view ourselves by learning from how the others view us (Sherman, 1994; Uotinen, Suutama & Ruoppila, 2003). The theory suggested that the society has a role in shaping the self which then shaping social behaviours. Individuals will evaluate various roles and certain behaviours those they perform in which they can mirror their social selves by reflecting on how they are treated by the others. They can reflect their concept of self, including the aspect of age and that identities are constituted through social interactions and relationships (Gergen, 1985; Gubrium, Holstein & Buckholdt 1994; Lynn, 2003). As Berger and Luckmann (1967) suggested, identity is created by social processes, the age norms and expectations in the society governed sets of age-appropriate behaviours. The social norms and expectations shape one's identity and affect individual's self-view which consequently influence the behavioural pattern.

Identification refers to the condition of being the same with something described or asserted. Age identity, as part of an individual's personal identity, thus implies an age grouping that a person feels affinity. It is a self-oriented perception in regard to age (Peters, 1971; Hendricks, 1995). Although it is a self-perception, age identity, apparently, places limits on a person's behaviour as the society forms cultural expectations about how ageing should be experienced and the age ideology may affect how one constructs his or her age identity. For example, Sherman (1987) and Neugarten (1965) documented the appropriate timing for specific activities and attainments in one's life. Sacks (1972) also suggested that members of a particular category were expected to engage in the corresponding set of activities and they might be bound to other basis such as rights, knowledge, attributes and competencies (Nikander, 2000). Take retirement as an example, although there is no mandatory retirement age in Hong Kong, the eligibility of receiving the old age allowance at 65 acts as a hidden tag for the transition and several occupations including the largest employer, the civil service, have a formal retirement age. Retirement requires individuals to detach from work they have performed for much of their life time. It involves changes in role and also requires adjustment to substantial alterations in time availability, financial status, personal space, health status as well as changes in identity and interpersonal relationships (Barnes & Parry, 2004; LaBauve & Robinson, 1999). On the other hand, age norms and expectations are constantly changing. People today have different perceptions on age-appropriate behaviours from their precedents. The social timetables for specific life events appear to be more flexible and less constraining (Harris, 1990). For instance, it is not uncommon that people staying at work, part-time

or full-time, in a very late life and going to school after retirement.

Most earlier research studies on age identity have been conducted in Western countries and, therefore, relatively little is known about age perception outside the Western world. Cross-cultural studies on age identification suggested that cultural variations had to be noted when studying various aspects of age identity (Barak, Mathur, Lee & Zhang, 2001; Westerhof & Barrett, 2005; Westerhof, Barrett & Steverink, N., 2003). Unlike some traditional societies, many Western countries are arguably characterized by youth-centeredness and individualistic-orientation (Barak, Mathur, Lee & Zhang, 2001; Westerhof & Barrett, 2005). Age identity is affected in the way that people are encouraged to maintain youthful identities to uphold a sense of self-worth towards the decline of autonomy in the ageing process. Individualism emphasizes more on both individual possibilities and responsibilities to realize one's goals and therefore may lead to greater tendency of self-enhancing perceptions and behaviours (Westerhof & Barrett, 2005). Moreover, findings from many Western countries also showed that ageing was largely viewed as a negative experience. Old age, at most times, is a time characterized by a withdrawing role in life, economic insecurity, loneliness, resistance to change, poor physical and mental health (Harris, 1990; Palmore, 1990; Peters, 1971; Sneed & Whitbourne, 2005). Some images of old age may be supported by research evidence in which some older persons may experience several of these conditions, some are stereotypes which contain incorrect assumptions and misconceptions. However, negative ageing stereotypes were found to adversely affect older persons performance on tasks such as memorizing, handwriting and walking (Levy, 2003; Westerhof &

barrett, 2005). They, simultaneously, affect our expectations toward the older person and how older persons themselves behave once they are accepted as fact (McPherson, 1998; Levy, Hausdorff, Hencke & Wei, 2000).

Some older persons, as suggested by Disengagement Theory, may choose to follow societal expectations passively and concentrate on the declining aspects of lives. On the other hand, some may challenge those expectations with their own beliefs and focus on other aspects of their lives (Gulette, 2003). They may identify themselves with a younger group as a strategy towards dealing with negative implications of ageism (Sneed & Whitbourne, 1998; Westerhof & Barrett, 2005). It was found that there was a tendency in which reporting a youthful age identity becomes more common among both younger and older adults in Western countries (Kaufman & Elder, 2002; Logan, Ward & Spitze, 1992; Westerhof & Barrett, 2005). It was also suggested that feeling of distress was likely to be greater among persons who identified themselves as old while happiness was greater among those who identified themselves as young (Logan, Ward & Spitze, 1992). It is mainly because, in line with the proposition by Taylor and Brown (1988), such identification belonged to the domain of positive illusions. Positive illusions include unrealistic positive self-evaluations, exaggerated perceptions of control and unrealistic optimism. Such a “healthy mind” was found to be important in the promotion of well-being (Gana, Alaphilippe & Bailly, 2004; Westerhof & Barrett, 2005). Therefore, people, even at an advanced age, may deny being old, which is mainly due to the denial of stereotypes and prevailing values in the society. Studies have shown that older persons tended to disassociate themselves from the category of old and maintained subjective age identities that were younger

than their actual ages (Jones, 2006; Linn & Hunter, 1979; Peters, 1971; Zebrowitz, 2003). Some of the older persons may have a more complex age identity with alienation between the mind and the body. Featherstone and Hepworth (1989) suggested that some people might claim themselves as remained the same persons but a mask of older persons were being worn on their faces. These people believe they are physically older but still young inside (Ballard, Elston & Gabe, 2005; Jones, 2006; Sherman, 1994). For instance, they can experience the physical signs of ageing, such as greying hair and wrinkled skin, but they tend not to describe themselves as older and consider themselves as young at heart.

### Modernization Theory

Yet, discursive gerontological studies have simultaneously documented that the status of older persons is negotiated within interactions and hence is dynamic and changeable (Jones, 2006). For instance, modernization theory postulated that the social status of older persons decline when a society becomes more modernized. However, it was found that social policies help in maintaining older person's social status in certain countries even in the face of modernization (Law, 2001). Therefore, although modernization theory has provided an explanation why many people hold younger age identity in a youth-oriented society, it probably wrongly assumes that modernization inevitably leads to the decline in social status of older persons in a linear manner (Westerhof, Barrett & Steverink, 2003). In addition, it is evident that the markers and meaning of old age vary across cultures and even among individuals. For instance, Hong Kong people generally saw the onset of old at 60 while the U.S. and Ireland regarded people aged 65 as old (Keith, 1994).

The variations in the timing of transition clearly show that people's perceptions of age identity is not merely based on how the society defines old age but also on what an individual experiences in the lifecourse.

Previous research has shown variation in age identification by the changes of critical roles (Kaufman & Elder, 2003; Logan, Ward & Spitze, 1992). According to role theory, role entry and exit are governed in both occurrence and timing in which the transitions involve creation of new identities. Roles are generally age-graded and different roles and role transitions are associated with different stages in the lifecourse. Some sociologists even considered the lifecourse as being composed of interlocking age-related roles (Mathur & Moschis, 2005). Individuals are gradually socialized into scheduled roles and the changes in role can be expected to bring about shift in age identity. Work and family roles changes, including retirement, grandparenthood and bereavement, take a prominent part in affecting one's age-related self-conceptions. The losing and gaining of roles convey meanings to one's life and hence shape the identity of that individual. The timing of the change in roles, in a similar way, affects how the individual defines himself or herself in terms of age. The acquisition of grandparent role is considered as a benchmark for the beginning of old age. Variables like the number of grandchildren, perceived enjoyment of the grandparenthood and the timing of the grandparent transition were found to be decisive in the formation of various age identities (Kaufman & Elder, 2003).

### One's Role

The work role is a salient or preeminent role for most people as it largely

determines social position in the modern society and it is a role that one performs for much of one's life. The retirement transition is thus probably able to exert a great impact on individual's identity, including age identity. Studies on the association between age identity and retirement exhibited mixed findings. Some found that retirement, as a loss of economic role, signifies the image of old age. Retirees were probable to perceive themselves as older than those who are still working (Achenbaum, 1978; George, Mutran & Pennybacker, 1980; Kaufman & Elder, 2003). It was said that retirement is a factor in influencing age identity since discontinuity may disrupt familiar meaning-making mechanisms and retiree is a socially shared role relevant to older persons (Hendricks, 2004; Mathur & Moschis, 2005). It was also found that early retirement will have greater impact on age identity (Kaufman & Elder, 2003; Sherman, 1994). By contrast, Logan, Ward and Spitze (1992) or Mutran and Reitzes (1981) found no significant effect of retirement on age identity while suggesting that retirement acts indirectly to increase age identity by reducing community involvement. Ward also suggested that social networks can reduce the importance of age to an individual (Kaufman & Elder, 2003). Intuitively, one might expect, directly or indirectly, retirement to be influential on one's age perception since identity is likely to be shaped by one's social experience while role is central in affecting how one ages. Society in general holds ageist attitude towards old workers in which they are considered as rigid, sick as well as cognitively and psychologically impaired. Therefore, people are likely to retire, voluntarily or involuntarily, when they enter their 60s even though people are experiencing progressively longer life.

Later life, nevertheless, may also denote the accumulation of life

experiences and cognitive skills are probable to improve with age since adult brain continues to develop new neurons as long as one keeps cognitively active (Lin, Hummert & Harwood, 2004; Lupien & Wan, 2004). Some studies have concluded that one's quality is just like fine wine which improves with age. The wisdom that grows alongside ageing makes one keep competent even as one enters the final part of life (Lin, Hummert & Harwood, 2004; Sheldon & Kasser, 2001; Sneed & Whitbourne, 2005). However, it is not until recently that the public has become aware of the need to extend the retirement age to a later period or at least for flexibility. Unlike some countries such as Singapore, Hong Kong also lacks a comprehensive system for retaining older workers, especially those are experienced and professional, who are beyond their formal occupational retirement age.

Other work-related factors, apart from the transition to retirement, are found to be correlated with age identity. Existence of work strain may make one to have a feeling of being older than the actual age (Barnes-Farrell & Piotrowski, 1991; Kaliterna, Larsen & Brkljacic, 2002). The report of an older age identity was also found to be related to poorer ability for completing the physical, mental and social demands of work (Iskra-Golec, 2002; Kaliterna, Larsen & Brkljacic, 2002). Job nature appears to be important in influencing age identity as well. It was found that farmers hold an older age identity predominantly because of the physical and mental demand of the farming activity (Kaufman & Elder, 2003).

### Correlates of Age identity

A number of variables are likely to be correlated with age identity. For

instance, numerous research studies have tried to assess the impact of a birthday on one's age identity in which the celebrations may remind older persons of their age (Bytheway, 2005; Sherman, 1994). Some studies have found that having a stronger feeling of old is correlated with increasing chronological age (Barrett, 2003; Kaufman & Elder, 2003). Others suggested that people commonly perceive themselves as younger than their actual age and the gap between chronological and subjective age increases as one grows older (Goldsmith & Heiens, 1992; Kaliterna, Larsen & Brkljacic, 2002; Mathur & Moschis, 2005). In contrast, others indicated that age identity is independent of chronological age and a sizable number of people do not regard themselves as old even reaching a very old age (Bowling et al, 2005; Logan, Ward & Spitze, 1992).

There have also been studies on the relationships between socio-economic status and age identity. It was found that people from lower classes accept the beginning of old age earlier than those in the upper classes. The major reasons were the two groups experience different level of hardships, life events, rates of disability and life expectancies in which members from the lower classes tend to situate at a less favourable position (Henderson, Goldsmith & Flynn, 2001). However, education attainment and financial well-being were insignificant in affecting one's age identity once health status is controlled for (Barrett, 2003; Kaufman & Elder, 2003). It was argued that health status tends to have a stronger association with age identity (Bowling et al 2005; Michalos, Hubley, Zumbo & Hemingway, 2001). The decline in physical health may make people less able to accomplish normal work or even mean the need to seek for assistance with activities of daily living (ADL) and the biological

changes was suggested to be associated with age identity (Mathur & Moschis, 2005). Nevertheless, it is uncertain that how health and age identity correlate to each other. The better physical and mental health may lead one to feel the self as younger. It may also be plausible that people who felt themselves as younger are more likely to take up health-enhancing behaviours and therefore they tend to report having better physical and mental health status (Barrett, 2003; Uotinen, Rantanen & Suutama, 2005).

### Changes in Age identity

Individuals also make comparison between the earlier selves and present selves in the construction of age identity. The comparison usually lies on changes in appearance or changes in health and strength (Sherman, 1994). They will assess their own performance in which identity will be affected when there is a discrepancy between their former and present status. Apart from making references with the self, significant others also appear to be predictive of age identity. Theories of social evaluation and reference groups state that the construction of individual's age identity rests on the process of comparing one's own conditions with peers and more generalized images of people in that individual's stage of life (Sherman, 1994). Social evaluation like comparative age and comparative self-rated health were examined in which those who identify themselves as more favourable than others in the same stage of life report younger age identity (Barrett, 2003; Kaliterna, Larsen & Brkljacic, 2002; Logan, Ward & Glenna, 1992). In addition, it was suggested that age identity will change in response to the death of cohort members and the worsening health condition of a parent (Barrett, 2003; Logan, Ward & Spitze, 1992).

Although in many societies, for many reasons, age is likely to frame one's behaviour and determine one's social standing, older persons tend to go through varying courses of ageing. Havighurst (1949) and Reichard (1959) suggested that variations in self-perception are likely to result in different patterns of adjustment. Having varying age identity is thus possible to predict different patterns of adjustment. Research has shown that many older persons are highly skilled in managing challenges that they face in later life and later life is seen as a time of constant reconstruction (Diehl, Coyle & Labouvie-Vief, 1996; Thompson, 1993). Therefore, how individuals make sense of any events that they experience may shape their way of living. It is congruent to symbolic interactionism's critical concept of mind, self and society interaction. It puts forward that individual, through interaction between one another and society, makes sense of events and phenomena and in turn produces meaningful social action.

Some older persons may deploy their own strategy to maintain a youthful identity (Barrett, 2004). For instance, researchers have noted that some older persons often distance themselves from the experience of old age by focusing their attention on the present and maintaining current positive levels of functioning rather than thinking of their future as problematic or distressing (O'Hanlon, 2004). Some may frame their work transition in terms of moving into retirement and having an opportunity to take on more family responsibilities rather than leaving work (Barnes & Parry, 2004). Others may retain work habits and take up work-like activities at home to maintain strong continuity for comparable self-conceptions after retirement (Thompson, 1993).

Karp (1988) also found that older persons tend to avoid situations that make their age more salient in order to combat age stigma (Russel, Rusticus & Hubley, 2004). The incentives in maintaining a youthful age identity is because, according to the self-enhancement perspective, individuals are motivated to sustain a positive image of themselves. They act in line with their positive self-perception in order to validate and defend such self-perception. On the other hand, Furstenberg (1989) addressed the self-fulfilling nature of beliefs about the self. That means if one is perceived as old or frail, that individual will behave in such manner (Sherman, 1994). In the case of age identity, these older persons are less likely to defend earlier established self-perception. They rather perceive themselves as moving into a degraded age status. For instance, it was found that those who think themselves to be growing old have lower fashion interest and are less keen on entertaining and cultural activities (Mathur & Moschis, 2005). Generally speaking, self-perceptions of older persons are viewed as responses to cultural or social definition of age, changes in social environment and physiological changes with advanced age (Peters, 1971).

### Adjustment

Older persons are often motivated to adjust themselves, although with differentiated patterns, towards any changes and challenges they experience in order to maintain a favourable self-concept. It is because, according to self-discrepancy theory proposed by Higgins (1987), discrepancies between the actual and ideal selves and between the actual and the ought selves will result in depressing emotions such as fear, threat, disappointment and dissatisfaction (Sneed & Whitbourne, 2005). Heckhausen and Schulz's (1995)

life-span theory of control proposes that individuals adjust their goals accordingly in face of loss of control in physical, cognitive and social domains with increasing age. Two forms of control processes, primary and secondary control, have been identified. Primary control refers to behaviours to exert control over the external environment while secondary control refers to adjusting one's internal milieu including cognitive, motivational and emotional states during the self-environment interactions (Sneed & Whitbourne, 2005).

Brandtstadter and colleagues also suggested two measures, assimilation and accommodation, in coping with self-discrepancies with age by cognitive regulation of aspirations which enable a person to positively adjust to the experience of major decline. Assimilative coping refers to strategies which individual seeks to change the environment which is congruent with their own goals or expectations (O'Hanlon, 2004). It involves active and intentional efforts to modify life circumstances in order to minimize the discrepancy between actual and desired states (Riediger, Li & Lindenberger, 2006). The strategy may be taken in forms of counteracting the consequences of unavoidable losses to maintain the favourable aspects of the self, selecting information or creating environments which positively reflect the self and avoiding situations that negatively reflect the self (Sneed & Whitbourne, 2005). Accommodative coping, on the other hand, refers to strategies of readjusting goals and expectations downwards in face of restrictions and limitations within the environment and the self (O'Hanlon, 2004). It denotes unintentional adjustment towards situational constraints (Riediger, Li & Lindenberger, 2006). The strategy may be taken in forms of disengaging from blocked goals

and adjusting self-evaluation standards (Sneed & Whitbourne, 2005) since individuals consider the cause of any declines as associated with ageing rather than environment circumstances. Therefore, those taking accommodative coping method are less likely to adopt preventive and compensative actions towards threats as they have lower perceived control over their lives.

The diverse reactions among older persons towards any age-related challenges and changes are, to a large extent, due to the close relationship between self-concept and social behaviour (Bracken & Howell, 1991; Herzog, Franks, Markus & Holmberg, 1998). An individual tries to maintain a consistency between his or her self-concept and behaviour as individual since he or she, apart from getting opportunities to express himself or herself, witnesses his or her own image in the society consequently (Cross & Markus, 1990). Therefore, one tends to perform in the society according to his or her self-reflection. This self-consistency motive on the one hand leads to self-enhancement behaviour, which means having a more positive image of oneself or the reaction can be described as a kind of identity maintenance behaviour, which means keeping one's original image (Mathur & Moschis, 2005). The self-consistency motive, on the other hand, can result in self-fulfilling behaviour. The internalization of ageist attitudes makes the individual to assume the attributes of older persons defined by the society. It is because once people take up particular role or position, they are likely to take up the corresponding attributes of that role and position as well. Studies indicated that internalization of age stereotypes is likely to shape lower expectations for the future (Ryff, 1991). However, individual may sometimes see themselves as if older person and at other point as if not (Jones, 2006).

Conversely, both the primary-secondary control model and dual-process model of assimilation and accommodation, which have mentioned earlier, put forward the developmental process of primary to secondary control and assimilative coping to accommodative coping on a unidirectional track respectively. They assume that people tend to utilize primary and assimilative coping prior to secondary and accommodative coping in order to maintain a positive sense of self. It is because older persons are likely to have reduced potential and they are less able to achieve desired goals. They, thus, tend to shift their attention away from goals that they can no longer achieve and focus on avoiding losses (Heckhausen, 1997). Therefore, those at their later years tend to somewhat adjust their original goals or expectations downward.

However, the models overlook contingency and fail to take into account situational factors and individual aspects of change such as personal preferences and individual's resources in the implementation of adjustment tactics. They also reflect the prevailing stereotype that older persons are increasing like each other with growing years and they are unable to make any change to the environment. Besides, primary and secondary control as well as accommodation and assimilation may be non-exhaustive. Older persons may take up primary control and accommodation tactics in certain aspects while assume secondary control and assimilation tactics in the others. This can be explained by the model of selective optimisation with compensation developed by Baltes and Baltes (1990) on older person's resilience to age-related tendencies of increased losses and decreased gains. Individuals hold different values for their life domains and hence they tend to have higher

preferences in allocating resources toward tasks of higher immediate value on themselves. For instance, it was suggested that men express greater need for instrumentality and agency while women tend to focus on attachment, intimacy and connectedness (Sneed & Whitbourne, 2005). Therefore, each individual, or at least each gender group, is probable to invest differently in various aspects of life towards numerous physical, psychological and social role changes with advanced years.

The relationship between gender and age identity is also mixed. Some research studies have found that women tend to consider themselves as old rather earlier than many men (Barrett, 2004). Bell (1970) stated that males and females perceive ageing differently and ageing takes different forms for men and women. In general, women possess worse self-rated health, have bigger chance to take care of older parents and are more likely to have an older partner when compared with their male counterparts. All these, according to previous studies, have been found to be significant variables to attaining an older age identity (Barrett, 2004). On the other hand, some found that women perceive themselves as being younger than their male counterparts (Barrett, 2005; Kaufman & Elder, 2003). It was claimed that there is a double standard of ageing in today's culture where the standard of physical attractiveness lies with criteria like youthful, thin and healthy body (Sontag, 1972). Media and advertisement on cosmetic products and surgery in the "beauty industry" constantly demonstrate ideal figure for women and encourage women to aspire to a youthful appearance. The physical signs of advanced age are normally more harshly judged in female than in male. It was believed women are primarily valued for their physical attractiveness and sexuality while men

derive their self-concept from power and position. Therefore women tend to have greater incentives than men to maintain a youthful age identity in order to enhance their self-esteem (Clarke, 2001, Harris, 1990, Logan, Ward & Spitze, 1992).

Role also conveys various and different meaning to male and female. For instance, the work role to many women, especially those in the older generation, tends to be secondary to their carer role while men tend to have a stronger attachment to the labour market. Women and men possess different patterns of lifetime employment, engagement with caring roles in the family as well as friendship and other social networks (Barnes & Parry, 2004), therefore, they are likely to have differing perception towards their own age. It was suggested that women seem to have less attachment to their paid work (Thompson, 1993) and hence work transition is possibly a more salient marker of age status for men while family transition is probably more influential on women's age identity (Barnes & Parry, 2004; Barrett, 2005). Others found insignificant gender differences in age identity (Henderson, Goldsmith & Flynn, 2001; Kaliterna, Larsen & Brkljadic, 2002; Logan, Ward & Spitze, 1992). The reason may lie in gender differences in the interpretation of youthfulness in which males and females have different frames of reference in perceiving their own age (Goldsmith & Heiens, 1992; Henderson, Goldsmith & Flynn, 2001).

Adjustment is crucial in the well-being of later life. Adjustment denotes the ability to adapt to one's environment with changing conditions (Ogunbameru, 2002; Santrock, 2006). One might expect well-being be

negatively affected by loss of roles and functional decline with increasing age. However, studies showed that appropriate negotiation towards the challenges associated with ageing can result in successful ageing (Rowe & Kahn, 1998; Sneed & Whitbourne, 2003). Research has found few age differences in subjective well-being (Mroczek & Kolarz, 1998). By establishing new hobbies and finding new friends, some older persons were found to be able to maintain a meaningful and fulfilling life even in face of later life challenges including retirement, children leaving home and the loss of intimates (Thompson, 1993). Hence, subjective well-being is more probable to associate with adaptive methods to age-related changes than to chronological age.

Clausen (1986) viewed adjustment as necessary because individuals may experience specific events or circumstances over the life course due to developmental and social changes. Ageing is found to be a process of adjusting to age-related changes where successful ageing refers to successful adjustment (Ranzijn & Luszcz 1999). Successful ageing, proposed by Rowe and Kahn (1998) encompasses the avoidance of disease and disability, maintenance of high physical and cognitive functioning as well as sustained engagement in social and productive activities. Neuhaus and Neuhaus (1982) stated that it is dependent on attention to healthy attitudes and activities in later life. A good later life adjustment or adaptation, in the same stance, depends on consciousness about health and fitness as well as having varied social contacts and activities.

Some studies have argued that those maintaining a younger age identity compared with their chronological age and peers are probable to be the best

adjusted and report a better quality of life (Peters, 1971; Staats, Heaphey, Miller, Partlo & Romine, 1993; Westerhof & Barrett, 2005). It was found that satisfaction of daily pursuits is higher even one has an exaggerated youthful identity (Gana, Alaphilippe & Bailly, 2004). Those with a youthful identity are more likely to report the good things about getting older including having greater freedom and more time for enjoyment (Bowling, See-Tai, Ebrahim, Gabriel & Solamki, 2005). One of the reasons may be the denial of ageing helps one to maintain a positive self-image which acts as a self-defensive mechanism against depression (Peters, 1971). Besides, younger identity may contribute to better sense of internal control. The belief about any circumstances are dependent on one's own efforts and ability rather than by chance or fate enhances the satisfaction of that individual (Lupien & Wan, 2004).

On the other hand, some studies have found an inverse relationship between youthful age identity and subjective well-being (Westerhof & Barrett, 2005). Successful ageing, which is based on the concept of adaptation may offer a contrasting meaning to that mentioned above. Successful agers may denote those who can fulfil the expected roles and conform to the needs of the existing society (Andrews, 1999). Cavan and colleagues also defined maladjustment as failure in completely satisfying both individual and social needs (Ogunbameru, 2002). Some studies have emphasized the importance of adapting one's values to meet the challenges of later life. For instance, it was found that moderate self-devaluation by setting low expectations and tolerating negative emotions could contribute to an effective adaptation (Asendorpf & Ostendorf, 1998; Norem, 2001). In addition, a quiet and

non-participating later life may also constitute a good adjustment to old age (Peters, 1971). Knowledge on different age identification and adjustment patterns may offer some noteworthy inputs for a good later life in older persons from different stratum of the society.

In sum, age-relevant social and economic policies might not be sufficient to facilitate older persons to successfully adapt to their retired life in face of increasing variability among the older population. The review of previous studies has identified the close relationship between self perception and people's behaviour in that age identity appears to help older persons dealing with challenges and adversities that can occur in later life. Gerontological research in Western societies has acknowledged numerous variables associated with age identity, including chronological age, health condition, changing roles, work-related factors and socioeconomic status. Based on the literature reviewed, this current study seeks to investigate the effects of age identity on adjustment patterns in a more holistic approach in the context of Hong Kong. Hopefully, the findings may be able to inform future research and provide an initial study within a Chinese urban society.

### **Chapter Three: Analytical framework**

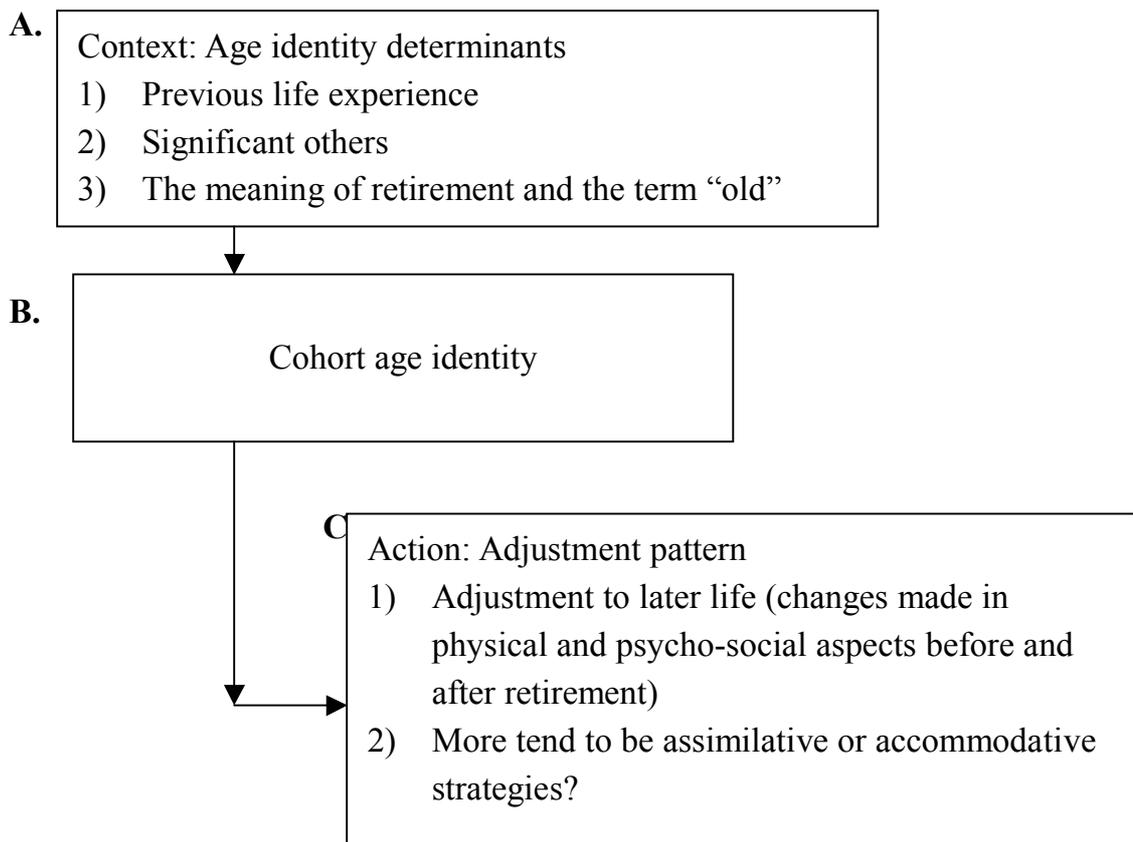
Based on the literature reviewed in Chapter 2, it was suggested that there are different determinants of age identity and how self-perception affects people's behaviour. How different people adjust to their later life has also been reviewed. It shows that different people, even the same cohort members, may have different ways of adjusting to their later life. However, the roles of age identity determinants including previous life experience, significant others and the meanings of retirement and the term "old" among different occupational groups have not been studied comprehensively or they have only been studied separately. Certainly, the dynamics between age identity and adjustment patterns have not been examined in the current literature, especially in the context of Hong Kong or similar Asian cities.

Although Europe remains the world's oldest region at this stage of the 21<sup>st</sup> century, the percentage of the older population is expected to more than double between 2000 and 2030 in Asia, Latin America and the Caribbean (Kinsella & Phillips, 2005). Hong Kong, like most of the Asian cities, is ageing rapidly. Among the older population in Hong Kong, a large proportion survive to advanced ages. The oldest old (people age 80 or older) constituted 3.1% of the total population in 2006 year end. It is the fastest growing segment of the older population in Hong Kong. It comprised 1.8% of the total population in 1996 and sharply rose to 3.1% in 2006 (Census & Statistics Department, 2007).

On the basis of the rapid expansion of the older population in Hong Kong and insufficiency of explanations of the relationships between previous life

experience, significant others, the meaning of retirement and the term “old” and age identity and the relationship between age identity and adjustment patterns, the current research seeks to explore the relationships between the above mentioned 3 variables, namely age identity determinants, age identity and adjustment pattern. The analytical framework is summarized in Figure 1, followed with the discussion of the 3 variables.

**Figure 1 Relationships between age identity determinants (previous life experience, significant others, the meaning of retirement and the term “old”, age identity and adjustment patterns).**



**A. Context**

**1) Previous life experiences**

Individuals’ experiences in earlier life may be significant in shaping latter

self-perceptions, including age-related self-perception. Based on Goffman's (1963) concept of identity, it is the subjective sense of one's own situation, continuity and character that he or she comes to obtain as a result of various social interactions and relationships. Individuals will reflect their concept of self and that these identities are constituted through social experiences (Gergen, 1985; Gubrium, Holstein & Buckholdt 1994; Lynn, 2003). These social experiences may make individuals more aware of their age and hence influence age identity. For instance, the transitions into age-grading roles, such as retirement and grandparenthood, may serve as markers signifying different stages in life. Besides, the experiences in work life, including job content, job nature, retirement benefits and persons with whom to interact, may alter people's meaning-making process and make them revise their age-related self-perception (Kaliterna, Larsen & Brkljacic, 2002; Kaufman & Elder, 2003; Logan, Ward & Spitze, 1992; Sherman, 1994). The variations in lived experiences may lead to differing constructs of events and hence self-perceptions. Therefore, previous life experiences are likely to be of paramount importance in providing better understanding about individual's age identities and corresponding adjustment behaviours. As ageing is an ongoing process which evidently occurs differently in different people, there is no single factor, but combination of life threads that can affect one's perception and behaviour. Therefore, the previous life experiences in the current research mainly centre on the previous work, family and social life, which are the major life events in most people.

## **2) Significant others**

Personal identity and behaviours are shaped through social interactions.

The way of how significant others, including age peers and kin, perceive and treat us is likely to influence our perceptions and social actions. According to the social comparison theory, individuals tend to evaluate their own age by comparison the occurrence and timing of their own major transitions with those of their cohort members (Barrett, 2003). Earlier or later transition in comparison to age peers may lead to varying age identity. In addition, James and Rosenberg (1890, 1979) noted that the experiences of one's close social ties might shape self-perceptions. Karp (1988) suggested that parents, children and grandchildren play a significant role in sending out ageing message. For instance, the ageing of younger generations as well as the worsening health of a spouse and older generations make people to concentrate more on their own ageing process (Barrett, 2004; Sherman, 1994; Umberson, 2003). Therefore, the way in which individuals interact with significant others and the lives of significant others are likely to affect the development of their age identity and adjustment patterns.

### **3) The meaning of retirement and the term “old”**

#### *The meaning of retirement*

Retirement is generally recognized as a period of change which requires subsequent adjustment. Some may see it as a time of crisis due to the loss of status and economic autonomy, change in personal relationships and increase in amount of idle time. Retirement, undoubtedly, has an important role to play in reminding a person the passage of time and the changes in role since it disrupts continuity of long-standing life pattern. However, it can also imply period of greater independence, freedom and enjoyment. Individuals can pursue enjoyable hobbies and some retirees may choose to have a more

flexible involvement in their previous job. Retirement can also facilitate the extension of fulfilling relationships as well as the development of new social contacts from voluntary, leisure and community associations. Degree of involvement after retirement and the content of the involvement are probable to affect one's age-related self-perception. Besides, different forms of retirement, including voluntary and involuntary retirement, may also affect one's sense of self and consequently influence adjustment patterns.

### *The meaning of the term "old"*

In general, the image of older persons in Hong Kong is negative (Chow, 1997; Gibb & Holroyd, 1996). The socio-cultural beliefs and expectations towards older persons in Hong Kong may be one of the factors affecting age identity. Some older persons may choose to identify themselves with a younger identity in order to avoid themselves from falling into the negatively evaluated group. Certain social definitions and expectations may also guide older persons in formulating their self-perceptions and evaluating their positions.

Negative image of older persons may cause the production of a younger age identity as the negative images may induce fear of ageing and older persons may in turn deny being old to maintain a favourable image of themselves (McPherson, 1998). Besides, some of the negative images are myths in which older persons may question or disprove which may also results in a young age identity. On the other hand, negative image of older persons may lead to old age identity at the same time since social opinion poses immense influence on the development of age identity (Gullette, 1997). Some

of the older persons may accept the negative stereotypes and attitudes of older persons as fact by socialization process. Older persons may then internalise the negative views and the social label of old. They may therefore change his or her subjective age identification from young to old, passively follow the description of older persons and focus on their lives that are deteriorating (Cheek & Piercy, 2004; McPherson, 1998).

Furstenberg and Hepworth (1989) suggested that people consider themselves as old if they think that they are demonstrating the characteristics of older persons. However, it is likely that different people have different definition of old. The definition may depend on the various kinds of messages which people get about ageing. Many of these messages are come from cultural attitudes, beliefs and stereotypes expressed by the others. Individual also play a role in observing the condition of oneself and interpreting the cultural definitions of old. The meanings of old in some of the people may rely more on the physiological changes, some socio-psychological changes and others behavioural changes. Different transitions may thus have diverse impacts, some salient and some blurred, on individuals. Therefore, it is likely that different people feel old at different times as they have different criteria of being old. Assigning different criteria of being an old person may also affect individuals' adjustment pattern. It is because individuals may allocate varying resources on aspects those they focus more on in defining one as old.

### **B. Cohort age identity**

Previous studies found that cohort members tended to report different age identity. It is mainly because people have different life experiences, different

people to interact with and receive diverse messages from the society which in turn shaped different age identities among cohort members. Retired secondary school teachers and manual workers come from two contrasting occupation groups. Their socio-economic background and previous job nature are probable to shape distinctive age identity. Younger age identity here means the denial of old and the maintenance of a younger age identity that is younger than one's actual age. Older age identity, on the other hand, refers to conformity to the identity of an older person.

Retired manual workers may be expected to be more likely to have an older age identity as their job primarily requires physical energy, age, therefore, seems more salient to them. Retired secondary school teachers, on the contrary, would under this argument, tend to hold a younger age identity as they are likely to have greater sense of competence after retirement. The close relationship between identity and behaviours has been recognized. Hence, it is likely that different age identity will predict different adjustment patterns.

However, individuals may sometimes see themselves as an older person and at other point as not (Jones, 2006). The "Mask of Ageing" theory proposes that there exists a distance between the external appearance of the face, body as well as functional capacities and the internal or subjective sense of personal identity when the ageing process emerges (Featherstone & Hepworth, 1989). Hence, any physical sign of ageing may not be the ample reason to make one to have an older age identity. Some people may, therefore, have a mixed age identity of feeling physically old but remaining mentally young.

### **C. Adjustment patterns (Assimilation and accommodation)**

The relationship between identity and behaviours has been recognized. Individuals are probable to construct their own way of living depend on how they make sense of events those they come up with in their life. From this perspective, how individuals construct their age identity by making sense of phenomenon in their life is likely to structure the way they decide to behave in adjusting to changes in later life. Together with the desirability of being self-consistent in order to maintain a mind-body integrity, individuals with different age identities may take up the corresponding adjustment patterns. In other words, those who see themselves as young will act in a more or less structured way and the same for those seeing themselves as old. As discussed in the literature review, there are broadly two types of adjustment patterns, assimilation and accommodation, based on the dual-process model of adjustment, different people may take up different patterns due to the fact that they have different sense of self. Those who think themselves as young might be expected to take up assimilative coping method to resist ageing. It might be because the relatively younger age identity offers them a greater sense of control to challenge the inevitability of the deteriorating ageing process. By contrast, those who think themselves as old might be more likely to assume accommodative coping method by accepting the “reality” of ageing. They might have a sense of fatalism about their conditions and accept the taken-for-granted common sense knowledge about human ageing.

The concepts of assimilation and accommodation are drawn from the Dual process model of adjustment developed by Brandtstadter and colleagues (1994). For those who hold a youthful age identity, they tend to have a

self-enhancement motive and try to sustain a positive conception of themselves. They desire to belong to positively valued social groups and therefore they have greater incentive to modify the environment in face of any changes during the ageing process. They are thus more likely to take up an assimilative coping strategy to change the environment which is congruent with their own goals and expectations. For instance, some of them may use age concealment techniques to maintain a youthful appearance. This intervention on their appearance may help them in constructing a valued identity and resisting the categorization as old. Those who think of themselves as old tend to have a self-fulfilling nature of beliefs about themselves. They internalize the social label as old, as part of their consciousness and understanding of the meaning of age. Sherman suggests that if people are perceived as old or frail, they will behave in such manner. Under the “self-fulfilling prophecy” effect, they act according to the societal norms for older persons. It is because they think that their existing state is irreversible and they are unlikely to be able to get better. Therefore, they have lower motivation to resist the challenge of ageing. They rather assume an accommodative coping method by adjusting their original goal and expectation downward.

In Figure 1, which stems from examining the cohort age identity among the respondents, this research then identifies variables contributing to the differences in cohort age identity, including previous life experiences, significant others and the individual’s meaning of retirement and the term “old”. Since very limited literature has documented the mechanisms of how age identity affect people’s life in retirement, the study goes on to examine

how age identity affects adjustment patterns in later life.

## **Chapter Four: The Research Design and Method**

### *4. 1 Research questions*

The present research attempts to answer the following four research questions, as discussed on P. 14 (Chapter 1).

- 1) What is the age identity among secondary school teachers and manual workers after retirement? Are there common patterns?
- 2) How do previous life experience, significant others and the meaning of retirement and the term “old” affect retired secondary school teachers’ and manual workers’ perceptions of old age?
- 3) How do retired secondary school teachers and manual workers adjust to their later life in physical, psychological and socio-economic aspects?
- 4) How does age identity influence adjustment patterns in later life?

### Data sources

In order to answer the research questions, various data were collected, as discussed below. The first question involves the respondents’ perception of their subjective age. The second question entails collecting data on respondents’ personal particulars, including chronological age, job-related characteristics and family structure. It also concerns with respondents’ description of the image of older persons and their personal account of retirement. This question requires collecting data on respondents’ life experiences reviews as well. It mainly focuses on their work, activities and family and social relationships, which they had before retirement. Data about respondents’ present way of life and their perceived societal views towards retirees and older persons are also needed in answering the second question.

The third question requires collecting data about respondents' experience of physical, psychological and socio-economic changes before and after retirement and their corresponding reactions toward the changes. The fourth question requires collecting data on respondents' rationales in undertaking the adjustment pattern.

#### *4.2 In-depth case interviews*

To obtain the data required in answering the research questions and to examine the effect of age identity on adjustment pattern in later life, face-to-face in-depth case interviews of around 1 hour were conducted among sampled respondents. Since each individual is likely to have his or her own way of understanding ageing and how one should age, the recruit of in-depth case interview may help us generating insights regarding respondents' complex perceptions and processes involved in the development of their age identity and later life adjustment. The deployment of a qualitative approach by indepth open-ended interview allows the researcher to gain understanding on how different age identities are formulated and the motivations behind respondents adjustment patterns rather than just patterns which a larger statistical sample would show. The interviews were recorded for further analysis, with the permission by the respondents on the basis of anonymity. To meet the objectives of the present research, the interviews contained four major areas of discussion:

- 1) Respondents' age identity
- 2) The effects of previous life experiences, significant others and meanings of retirement and the term "old" on age identity

- 3) Respondents' adjustment pattern in later life
- 4) The effect of age identity on adjustment pattern in later life

#### *4. 3 Target population and sampling design*

The population of the present research is retired secondary school teachers and manual workers aged 55 or above. They were selected by means of purposive sampling. The purpose of which is to understand their experiences of retirement to later life adjustment. Generally speaking, the retirement age for secondary school teachers from government and aided schools is normally 55 to 60 and many of the manual workers retire at approximately the same age. 22 respondents were drawn in all, with 12 retired teachers and 10 manual workers. All of them must at their early period of retirement, ranged from 1 to 10 years. They were chosen so that any adjustment pattern could be better discussed and assessed as any memory lag problem would be minimized. Focusing on early-retired teachers and manual workers can also help us to identify more clearly some of the major challenges and adjustment methods in face of retirement among both the white and blue collar workers in Hong Kong. Furthermore, giving selection priority to the respondents who are in their early retirement years can take in more people who are likely still to describe themselves as young. The result of the current research can thus shed light on the young old for subsequent improvement and adjustment while they are still young and capable.

The major reason for selecting the two social groups of retirees is there will be a considerable growth in the number of retired teaching professionals and manual workers in the coming years. However, the two groups have

enormously distinctive job nature and socio-economic status. Therefore, the comparison between the two groups is very probably to offer contrasting results. There will be a projected escalating number of retired secondary school teachers in the near future following the education reform launched by the Hong Kong Government. Due to the shrinking fertility rate in Hong Kong, it is anticipated that the number of secondary school students will be reduced by 5% from 2004/05 to 2009/2010 academic years and consequently there will be approximately 840 redundant teachers (HKSAR Government, 2005). In order to alleviate the problem, the Education and Manpower Bureau has allotted HK\$ 520 million in order to subsidize a voluntary early retirement scheme for secondary school teachers in the year 2006 to 2008. Hence, secondary school teachers, especially those in the future, are probable to have a prolonging period of retirement life. Besides, the income for teachers from Government and Aided Schools is scaled from 17 to 33 points for those who were appointed before March 2000. Retired teachers are in a relatively well-off group in which a GM (Graduate Master/Mistress) can receive salary ranging from HK\$ 20,865 to \$43,940 (HKPTU, 2006). The middle class in Hong Kong is expanding in which one third of the population is in this segment. Therefore, it is worth examining how the expanding and relatively well-off older persons adjust to their later life. Drawing samples within group of secondary school teachers can also control the respondents' socio-economic status. They have similar educational level and according to the Education and Manpower Bureau more than 90% of the secondary school teachers are degree holders or above (Education and Manpower Bureau, 2004).

The term manual workers (blue collar workers) refers to those engaged in

jobs that predominantly require physical inputs and activities. Examples of manual worker jobs include construction workers, labourers, cleaners and janitors. Manual work primarily involves physical energy while teaching entails mental power. Manual workers also in this society have far lower social/ socio-economic status than teachers and they are very unlikely to receive any retirement assistance from their job. Moreover, like secondary school teachers, the number of excess low education and low-skill level workers is likely to increase drastically in coming years in Hong Kong. Because of the economic restructuring to a finance and service economy and the migration policy in Hong Kong, there is a problem of manpower mismatch in which unemployment is intense in occupations in the lower segment (Labour Department, 2005). In 2005, the unemployment rate of low-skill level workers was 6% and those from construction and manufacturing sectors comprised more than one-fourth of the total unemployed population (Labour Department, 2005; The Chinese General Chamber of Commerce, 2005). Therefore, there were, and possibly will be even more in the upcoming future, manual workers who retire at a relatively younger age as the occupations in the lower segment fail to accommodate the vast lower educational and lower skill level workers.

The majority of respondents were drawn through networks such as the Hong Kong Professional Teacher's Union (HKPTU), local elderly centres, office of district council and the respondent's personal network. Some of the respondents were reached by a snowball sampling method (referred by other respondents). This has the benefit of allowing better trust to be established between researcher and the researched and thus able to produce relatively

more in-depth results. It does, of course, have some drawbacks in which “like-minded” respondents may be referred. On balance, however, such a method can show some hidden aspects of social experience which are behind a lay person’s view. In order to alleviate the deficiencies of “chain” referral, the snowball sampling method was employed from a multiple source of respondents, rather than just one or two.

#### *4. 4 Measurements*

The present research focuses on three key variables, namely, retirement, age identity and adjustment pattern.

##### *Retirement*

Retirement, according to Richardson (1993), can be indicated by the performance of no gainful employment during a given year, receiving a retirement pension benefit or not being employed year round. In modern society, retirement can be determined by the self as well as controlled by others rather than the one who is retiring. However, flexible forms of retirement are becoming ever more common and it is not rare to see people engage in part-time jobs after their retirement. Flexi-retirement, including voluntary retirement, mandatory retirement, full-retirement and semi-retirement, make it hard to define retirement nowadays. To simplify the picture and to better assess the role of work in secondary school education and manual jobs on retirement adjustment, retirement, this current research, limited itself to those withdrawing from the regular full-time employment as secondary school teachers and manual workers.

### *Age identity*

Previous research studies have adopted different measures of subjective age but have generally accepted definitions of subjective age are: how old the person feels, looks and acts; with which age cohort the person identifies and how they differ from their previous self (Goldsmith & Heiens, 1992; Kaliterna, Larson & Brkljacic, 2002; Kaufman & Elder, 2002). Questions on felt-age can reflect the psychological functioning of the respondents. Questions on appearance-age can reveal the physical functioning and appearance while those of behaviour-age can somewhat tell the normative values in society. Questions on social comparison can reveal with which age category they tend to identify themselves with. Comparison with peers and the self also provide a clearer indicator on a younger or an older age identity. In the present research, age identity will be measured by direct question which asks the respondents whether they think themselves as old, based on the above categories.

Age identity was measured by age categories of young and old for simplicity. However, it is evident that people feel old at different ages; for instance, Neugarten, Moore and Lowe (1965) found the onset of old age at around 65 while Kaufman and Elder (2003) found that people believe old age begins at around 74 years old. It reflects that individuals may have different criteria of being old. Hence, the beginning of old age will be measured by asking respondents follow-up questions on “With what attributes do a person being categorized as old?” after asking the respondent’s perception on their age.

### *Adjustment patterns in later life*

The present research intended to look at adaptation in later life on various dimension including physical state, economic condition, social network, psychological well-being. Respondents were therefore asked to compare physical state, economic condition, social network and psychological well-being of themselves before and after their retirement in order to assess their way of later life adjustment. Two possible distinctive patterns of adjustment noted assimilation and accommodation. Assimilation means modifying the environment which is congruent to goals and expectations while accommodation refers to the process of readjusting goals and expectations. In order to measure assimilation and accommodation, respondents will be asked if they have increase their effort or adapt easily to modifications in their initial plans towards any changes in their physical state, economic condition, social network, psychological well-being in retirement.

To be able to answer the research questions, items in the in-depth case interview contain four major themes:

1. Respondent's age identity and the reasons for the formation of any such age identity
2. The influence of previous life experiences, significant others and the meanings of retirement and the term "old" on respondent's age identity and adjustment pattern
3. Respondent's way of adjusting to their retirement life and the rationale behind for such arrangement
4. The relationship between respondent's age identity and any adjustment pattern

Regarding to the first theme, focus was placed put on how respondents perceive their own age. In order to examine the respondent's age identity and the reasons why they hold their respective age identity, they were first asked to choose the age category, young or old which best describes them and provide corresponding explanation. As different people might have different definition of being old, respondents were then asked to identify the attributes of being old in order to justify their choices further. There were additional questions on their views toward their peer group. For instance, questions like how they thought they appeared to be in the eyes of the others as well as how they compared themselves with those at similar age. It is because individuals develop a sense of self in the process of social interaction and therefore their self perception of age, in the same vein, is dependent on their perception of their significant others.

Regarding the second theme, focus was laid on how some previous life experiences, significant others and the meanings of retirement and the term "old" affected age identity and adjustment pattern in later life. Respondents were asked to review their life before retirement in order to examine the influence of previous life experiences on age identity and adjustment pattern. The range of questions fell within respondents' working experiences, retirement plans, family and social life as well as leisure activity pattern before withdrawing from their jobs. For the impact of significant others, respondents were asked to talk about their family and social network on their daily interactions and relations. To explore the reasons why some of the people might think of themselves as young and others as old, there were questions like "What does the word old mean to you?" and "What does retirement mean

to you?” to explore how the respondents made sense of being old and retirement and in turn generated their respective age identity. Questions like “what do you think about the social beliefs and expectations on people of your age?” were also asked to examine the respondents’ account of certain social beliefs about people at their age. Gender differences were examined along with respondents’ reveals of their lived experiences and how they get along with the others. Respondents were asked to point out the influence of the variables on their respective age identity and adjustment pattern in the end of each set of questions on the variables.

Regarding the third and fourth themes, these centred on the individual respondent’s adjustment to later life and its relationship with age identity. Changes in physical, psychological and socio-economic conditions were taken into account. Because retirement is a lifetime transition, it is probable that it might bring about a number of changes in these aspects such as changes in health status, increases in time available, loses of regular income as well as changes in social and family roles. In order to examine which adjustment tactics the respondents were undertaking, respondents were first asked to spot out any changes in physical, psychological and social conditions and compared themselves with earlier patterns. There were questions such as “How do you take care of your health including physical appearance since you have retired?”, “Are there any new activities that you have become involved in mainly since you retired?” and “How has your social life changed since you have retired?”. Follow-up questions were asked to examine the reasons for the respondents to have such arrangement. They were specifically asked about the role of age in affecting the pattern of adjustment to their retirement life so as to

look at the association between age identity and adjustment pattern. Experiences of how retirees with different age identity adjusted to their later life were shared among the respondents. Respondents were then asked to express their view on the issue in order to have a clearer picture on how respondents' age identity affects their adjustment pattern.

#### *4. 5 Data analysis and data processing*

The data collection instrument is an in-depth interview. It is, by nature, a qualitative interview. Items in the interview, developed by the research from the literature reviewed and were highly related to the objectives of the research, were attached in Appendix I. The conversation with the respondents were transcribed for analysis and all names were anonymized. In order to provide a broader and richer account of the quotes, several transcripts were picked up randomly for peer review.

All in all, this study examines the age identity among retired secondary school teachers and manual workers. The research first investigates the age identity and reasons for the formation of the age identity across various retired secondary school teachers and manual workers. Then it looks into identifying the effects of previous life experiences, significant others and the meanings of retirement and the term "old" on age identity. It follows with respondents' respective adjustment patterns after retirement. It concludes with exploring the rationale for the patterns and examining the relationship between age identity and later life adjustment pattern. Through in-depth interview, different age identity and later life adjustment patterns can be identified. A comparison between retired secondary school teachers and manual workers can also be

shown.

## **Chapter Five: Findings of the research**

This chapter comprises three parts: 1) Age identity, 2) Adjustment patterns 3) the relationship between age identity and adjustment patterns. Before looking into the three parts, this chapter begins with summarizing the profile of the sample.

As noted, the sample of the present study was reached from a diversity of sources. These include: 1) 3 respondents from the Hong Kong Professional Teacher's Union (HKPTU), 2) 1 respondent from elderly centre, 3) 2 respondents via the office of district council, 4) 12 respondents drawn via the respondent's personal network, and 5) 4 respondents referred by some of the respondents. Among the 22 respondents<sup>1</sup>, 12 were retired secondary school teachers and 10 were retired manual workers. The age of the respondents ranged from 55 to 74. 14 of them were men and 8 women. In the analysis, the respondents T 1 to T 12 were retired secondary school teachers while Respondents MW 1 to MW 10 were retired manual workers. All respondents were young old, retired from 1 to 10 years. A majority of the respondents are married. Among those married respondents, the number of children of the respondents ranged from 1 to 5. A summary of the profile of the respondents is provided in Table 5.1. A more detailed profile of each respondent is summarized in Appendix II.

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<sup>1</sup> 33 people were contacted but 11 refused to be interviewed. The major reasons for refusal were: 1) They were not willing to talk about their personal matters to strangers and 2) They refused to have in-depth case face-to-face interviews. Some of them proposed phone interviews but they were not chosen as they only comprised a minority.

Table 5.1 Profile of respondents

		Respondents (n)
Age		
	55-59	11
	60-64	5
	65-69	2
	70-74	4
Gender		
	Male	14
	Female	8
Marital Status		
	Single	2
	Married	18
	Widowed	2
Number of children		
	0-1	7
	2-3	12
	4-5	3
Previous occupation		
	Secondary school teachers	12
	Manual workers	10
Duration of retirement		
	1-5 Years	16
	6-10 years	6

### 5.1 Age identity

The respondents in the present study did hold different age identities, irrespective of chronological age. Some of them identify themselves as older than their actual age, some confirm their identity to that of older persons' and some identify themselves as younger than their actual age.

*“I know that I’m looking differently from the others in terms of age. They look much younger than me...If I was 60 years old, I think the others will misunderstand*

*that I am 66 years old.” (MW<sup>2</sup> 1, 56 years old, male)*

*“Once upon a time when I went to a fast food restaurant, a child almost hit onto me. Her mom then told her not to run or else she would hit on “por por”<sup>3</sup>. I don’t mind people calling me “por por”. I have a head of grey hair now. This is a sign of old age” (T 5, 60 years old, female)*

*“I don’t think of myself as getting old...I still have many things to deal with which require physical energy... If you ask me to take up the work that I used to have before my retirement, I don’t think I can’t accomplish the job. I don’t think myself as old in any aspect so far. I don’t think my fitness is worse than before at this moment.” (T 1, 61 years old, female)*

The major reasons for such divergences were found to include: 1) Previous life experience, 2) Voluntary and involuntary retirement, 3) The meanings of retirement and the term “old”, 4) Status and role in the family and 5) Social distance from younger people.

#### 1) Previous life experience

In the interviews, respondents have talked about their past experiences in their job and health condition before their retirement. The job demand and attitudes toward health may be important in affecting age identity. The feeling of exhaustion from work and physical deterioration usually remind the respondents that they are getting into the latter stage of life.

*“My work is very harsh. This occupation is, in general, really harsh. I have ever worked for one month without any holiday...My appearance may tell you that I am an old man. People always call me “ar bak”<sup>4</sup>... They call me “ar bak” because I am emaciated by my work...I am emaciated. People also said that my work costs me... I would like to continue to work but I really can’t. I am too weak to move the cement if*

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<sup>2</sup> MW represents manual worker, T represents teacher

<sup>3</sup> The way of addressing old women in Hong Kong. (“Granny”)

<sup>4</sup> The way in addressing old men in Hong Kong

*I am asked to do so.” (MW 1, 56 years old, male)*

*“I could do the work which require 2 people to accomplish when I was around 30 years old. I couldn’t do it when I reached round 40 years old. I could only accomplish the job for one person. I could feel the physical energy decreased sharply.” (MW 9, 68 years old, male)*

The teaching profession and manual work have distinctive job demand. Retired teachers and manual workers also have different experiences in physical condition. These life experiences tend to result in different age identity between the two occupational groups.

*Retired teachers and manual workers: Comparisons in age identity*

*Job demands*

In general, retired secondary school teachers hold a younger age identity than retired manual workers. The work of teachers mainly involves “brain power” while that of manual workers involves physical power. The huge physical energy expense in manual work and the ageing bodily fatigues seem to make manual workers aware of the entering of a later phase of life.

*“My previous job required extensive physical energy and long working hours. I often have to forge iron. The task was very harsh. The tools that I used for my job were very heavy and bulky. Sometimes the tools were even broken when I forge the iron. I am getting older right now. I decided to retire because I feel that I can’t work in the manual works anymore. Yes, I am old right now. I certainly can’t handle labour-intensive work anymore.” (MW 4, 74 years old, male)*

*“For construction work, I have to work even it rains hard. Time is also difficult when the sun is too bright. The work is harsh and it makes me old.” (MW 8, 62 years old, male)*

Another reason for manual workers to have an older age identity is they

have a feeling that they are not comparable to those who are younger aged. As manual work requires extensive physical energy, manual workers have a strong feeling of getting old because they feel that they could not compete with the younger workers in terms of physical energy. They believe that they were gradually replaced by those who were younger. Employers' preferences for younger workers further confirm an older age identity among many manual workers.

*"I feel old. I can't compete with the younger people in terms of work. I had to work within very limited time and sometimes I couldn't finish the work tasks on time. I'm weaker than the younger workers." (MW 8, 62 years old, male)*

*"I have ever tried to find another job but I really couldn't find any. I even couldn't find job that was half the salary and fringe benefit of my previous job...I am old although I haven't reached my 60 chronologically. I am very old when I try to seek for a job. Although the government declares that they will fight against ageism, employers always choose to employ younger workers. Especially for the kind of job that I worked in that required much physical energy. We are definitely working slower than young people. Even for jobs which require wisdom rather than physical energy, employer still prefer younger workers as the employers know that whether the workers have the wisdom only after they have employed the workers." (MW 3, 58 years old, male)*

By comparison, although most teachers in the interview complained that the heavy workload and great stress brought about by recent education reforms<sup>5</sup> really cost them their health, they scarcely attributed the physical problems solely to the process of ageing. In the interviews, many of them talk about how the education reform adversely affected all the teachers. Teachers

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<sup>5</sup> The education reform policies in Hong Kong in the early 2000s require existing teachers to attend some modules and sit for exam papers to the corresponding modules. To follow the Education and Manpower Bureau's proposition of "active classroom", the workload of secondary school teachers is greatly increased. For instance, they have to design diversified teaching materials, promote project learning and organize more extra-curricular activities to facilitate all-round development.

tend to see their own physical problems as a collective matter rather than a personal issue.

*“I had to take up many administration works in the school. There were just too many meetings...but most of the administrative works were very minor like recording the time used in the counselling room... Besides, I had to keep on learning new teaching skills and update my I.T. knowledge with teaching... I think this is not my own problem but most teachers also encounter this problem. Other teachers stated that they were terribly stressful because they had to be exam on new stuffs. They had left school for a long time and they couldn't adapt to the exam...So many new things to look after and it was really harsh for me as well as other teachers. Some teachers even had to take in pills for better sleep. All these made them very stressful...” (T 4, 58 years old, female)*

Similar to manual work, teaching does place great job demands on secondary school teachers. However, teachers think that their physical decline, to a great extent, is caused by the heavy mental and preparatory workload in their previous job. Besides, one of the reasons for teachers to retire is to better retain their health.

*“I retired at 55 years old mainly because of health reasons. I do think I still can continue to work at my present age but it will be extremely hard for me to do so... I was hospitalized for a few times between September to December because of some minor sickness. After hospitalization I could feel that I became weaker but I think it was still fine to continue to work. I went back to work but after some considerations and it so happened that I was at my 55, I decided not to work and better retain my health status.” (T 7, 58 years old, male)*

The above example indicates that teachers perceive some of the physical problems are just temporary because they have a strong self-efficacy in retaining their health condition. Since the cause of the physical deterioration is less clear to the retired teachers, they tend to have a younger age identity than manual workers.

### *Physical condition*

Retired teachers and manual workers tend to face different bodily or physical experiences. Both groups assess their current performance or characteristics and those from the past to make sense of their age identity. Retired teachers tend to have a younger age identity than manual workers. It is because manual workers experience more negative physical changes than teachers. These physical changes may act as ageing signs which remind respondents of their age. This is congruent to previous work about the possible role of health status on age identity (Bowling et al 2005; Mathur & Moschis, 2005). The feeling that they become less competent when compared with the previous self and the strong feeling of physical deterioration become the major reasons in contributing to manual workers' older age identity.

*"I have had some physical changes after my retirement. I think this is because of the ageing process so my health deteriorates. I can feel that my health condition is worse than before. The ageing process normally starts at 50. The cognitive power and physical health becomes worse. It is very obvious. The person can feel the changes. Before my retirement, I could walk up the stairs very fast for more than 20 floors. I couldn't do this since I was around 50 years old. Especially in my occupation, it requires large amount of physical energy." (MW 9, 68 years old, male)*

Moreover, the work of manual workers involves more daily occupational hazards. During the interview, many manual workers told me how they were injured during work. A greater sense of vulnerability and a higher rate of disability, which are common signs of old age, make the manual workers easier to feel themselves at an older age.

*"I was injured during work. The injury scarred my arm. I also hurt my spine in my previous job." (MW 4, 74 years old, male)*

*“I hurt my leg 2 years ago when a colleague accidentally knocked down 18 pieces of whiteboards and the whiteboard fell on my leg...My leg hasn't fully recovered yet. This makes me feel as if I am getting old earlier. It is because I have been suffering from pain in my leg when the weather changes and I have to walk with an umbrella. I think it's a kind of arthritis. When the weather is fine I can walk well but I will feel the pain if the weather changes or I take the wrong food. So I feel like I am an old person because arthritis is a common chronic disease among older persons.” (MW 3, 58 years old, male)*

By contrast, some teachers found themselves in better health after retirement. Some stated that they had better throats and voices because they no longer have to keep lecturing loudly for hours every day.

*“I think I have better voice after my retirement. I didn't like using microphone but I had to keep on speaking to the students for a long time. I don't have to do so at present so I feel much better in my throat.” (T 3, 58 years old, male)*

A review of previous findings suggested that more youthful identities tended to be reported by those with better self-rated health and more favourable perceptions of physiological changes (Logan, Ward & Spitze, 1992; Montepare & Lachman, 1989). However, this study, interestingly, find that experience of physical decline does not necessarily lead to an older age identity among sampled teachers. Although the teachers can feel certain physical changes, they tend to attribute the bodily experiences to environment circumstances rather than the ageing consequences.

*“Before retirement, as I had to focus on work, I didn't have time to take care of my health. After my retirement I have more time for body check-ups. I discover that there are more health problems than before...I know I had been suffering from osteoporosis, hypercholesterol and high glucose levels. I didn't have these diseases before my retirement. But I think it is only because I have more frequent body check-ups. I have more time to discover these health problems after my retirement.*

*Once you start on check-ups, you will find more problems.” (T 8, 61 years old, female)*

*“I still join my previous students and colleagues in some outward bound activities. The tasks in the activities are harsh but I am so pleased to see the students’ fulfilment after accomplishing the tasks. Most trainers are quite demanding and sometimes the teachers are being scolded. I may not be able to achieve some of the tasks but I will keep on trying because I think the major reason for my failure is the lack of required skills... I don’t know, I may give up if I failed again for certain times. I will then accept my failure and tell myself that it is fair that everyone must have certain things that cannot actualize in life.” (T 4, 58 years old, female)*

The above examples indicate that teachers tend to have a different interpretation of the experience of physical decline as compared to that of the manual workers. T 8 mentions that she had been suffering from more health problems after retirement just because she had more frequent body check-ups. She thinks that she was aware of her physical changes because she was more conscious about her health condition and therefore more health problems were discovered. She T 4 also believes that her failure in accomplishing certain tasks in some outward-bound activities after retirement was caused by the lack of corresponding skills rather than age-related physical change. Teachers, therefore, tend to report a younger age identity than manual workers since they have a weaker feeling of physical deterioration than manual workers from work. Teachers are also less likely to associate their physical deterioration to the ageing process.

## 2) Voluntary and involuntary retirement

Retirement tends to exert different impacts on age identity. The discontinuity of employment seems more probable to trigger an older age

identity when it is involuntary (i.e. not chosen by the individual). Involuntary retirement may urge people to pay more attention to some changes that make them feel old. Teachers and manual workers tend to go through different forms of retirement and such a divergence may lead to the formation of different age identity.

*Retired teachers and manual worker: Comparison in age identity*

Secondary school teachers tend to have more options in making their retirement decision (i.e. the timing of retirement, while the retirement of manual workers was predominantly involuntary, i.e. forced or forced by employers of circumstances beyond their control.)

*“I think retirement for me is just like a release. I retired mainly because I’ve approached 55 years old. I could choose to retire a few years later but I didn’t. The time was so hard when I was teaching... My life was just occupied by schoolwork...I prefer not to risk my life. I’d better grab the pension and retire.” (T 5, 60 years old, female)*

*“I retired because the company set the retirement age at 55 years of age...The retirement age for women is 55 and that for men is 60. I think it discriminates against women. Why men can retire at 60 but we have to retire at 55? That’s unreasonable. I was resentful at the way I was being treated but I could do nothing else except accept it.” (MW 10, 63 years old, female)*

Manual workers are usually forced to retire because of physical constraints and reduced working opportunities available. Some of the manual workers in the interview state that their skills and abilities in work became obsolete because of the joint impact of mechanization and influx of Mainland labourers. The feeling that their skills and abilities are becoming less required in the market may prompt them to have an older age identity.

*“I have been suffering from quite a number of illnesses and so I quit the job. I can't do it even there is job available...I would like to keep on working.” (MW 1, 56 years old, male)*

*“I think that the age of 60 should be regarded as old. In the past decades, labourers, like myself, could choose their employers and particular work to engage in as well. Since the relocation of factories to the Mainland in the mid 80's, labourers' lives have become difficult. In the first stage of the relocation, job opportunities for local workers were still good because some employers might need us to train the Mainland workers. However, at present, most local workers were replaced by the Mainland workers because the salary of the Mainland workers is almost only half of that of us. Before the relocation, it was easy for local workers to find jobs even they were beyond 60 years old, especially for the semi-skilled workers. Technology is so advanced nowadays that automation replaces the skills and importance of labourers.” (MW 2, 72 years old, male)*

*“I couldn't find any job after my retirement. It is because of my age and no-one can refer me any job. Another reason is because there are many Chinese women coming to Hong Kong. They compete with us for jobs. They can always get their jobs because they accept a lower salary than us. So there aren't many jobs available for us now.” (MW 10, 63 years old, female)*

Retired manual workers also tend to find difficulties in securing suitable reemployment predominantly because of employers' ageist attitudes. Some of them have tried to reach out to other jobs but they found reemployment difficult since employers prefer younger people for new jobs and maybe they lacked the education necessary. Manual workers find reemployment particularly difficult because the employment for older manual workers always incurs more expensive employee' compensation insurance. Therefore, employers usually prefer young manual workers as they are less likely to get hurt.

*“I tried to find another job but I failed. I have reached out many jobs but still*

*couldn't find any. I saw some recruitment advertisement. The employers always said that the posts have been filled up once I went to the interview. I think they were lying. They refused to employ me just because of my age. So I gave up seeking for job because I felt hopeless in finding job.” (MW 10, 63 years old, female)*

*“Even big companies don't employ older employees. Employers will choose to employ younger employees. If there are 2 candidates, one 30 years old and the other 72 years old, employer must choose the 30 year old one. It is because the insurance for older employees is much more expensive. The insurance for labourers who are over 60 is more expensive. The costs are much higher for them to employ older workers. Many companies don't want to bear higher costs.” (MW 2, 72 years old, male)*

Retirement was usually more on a voluntary basis among secondary school teachers. The flexibility of having their retirement from age 55 to 60 offers teachers a greater sense of control. Therefore, retirement tends to impact less on secondary school teachers' age identity. Although retirement is still more or less constrained by their chronological age, many teachers insist that they still have the vitality for their work.

*“Secondary school teachers from government and aided schools can choose to retire on any day after 55 years old... we have a more flexible retirement period from 55 to 60 years old... Actually retiring at 55 years old is just my choice. I retired because I felt that the workload was too heavy. Therefore, I think retirement didn't make me feel old.” (T 10, 56 years old, male)*

*“No one will be suspicious about my ability on work. I don't think I can't accomplish the job if I'm asked to take up the work that I used to have before my retirement.” (T 1, 61 years old, female)*

### 3) The meaning of retirement and the term “old”

#### *i The meaning of retirement*

Many respondents regard retirement as a time of emancipation. They

mention about how they were loaded by their previous work. They consider their early retirement as a honeymoon period because they can free themselves from most pressure generated by their work responsibility and complicated personnel matters as well. They can take their time to pursue their hobbies as they have more flexible schedule after retirement.

*“I have enjoyed the first few years of my retirement life very much. In the past, I had to start working at six. I don’t have to get up early in the morning for work now. I can enjoy a cup of coffee leisurely when I get up.” (MW 9, 68 years old, male)*

*“I lived an ease of life in the first few months of my retirement. There was no work-related pressure any more. I could get away from the conflict between colleagues. Colleagues would always shift their responsibilities to the others. I felt much relaxed right after my retirement.” (MW 3, 58 years old, male)*

*“I have a greater flexibility toward life now. I can engage in any activities while the others are still working.” (T 1, 61 years old, female)*

Some respondents believe that retirement means a complete withdrawal from the previous work. They think that they had spent almost their entire life in work already. Retirement, therefore, should be time for leisure and enjoyment for the remaining years of life.

*“I didn’t take up any job after my retirement. I have struggled for almost my whole life...Only a very small number of people can live over 80 years. As normally one can just live for around 60 years, my life has almost come to an end. I’d like to live the remaining life happily.” (MW 9, 68 years old, male)*

Some respondents think that retirement is just a transition in the lifecourse. They believe that human growth continues throughout the life span. Retirement, for them, is a chance to pursuit activities that were meaningful to life. T 12 even considers retirement as an opportunity for him to explore his

potentiality.

*“Retirement doesn’t mean that everything comes to an end. I try my best to make everyday counts...Some retirees pass away fairly soon after retirement. I think it is because they found nothing to do.” (T 3, 58 years old, male)*

*“I think retirement is a normal process so I maintain a positive mind. I see it as a chance to build up better relationship with the others and explore my available potential.” (T 12, 58 years old, male)*

Retired teachers and manual workers tend to attach different meanings to retirement. Many retired teachers in the interview enjoy the leisure of retirement but they also express wishes for continuous development. On the other hand, retired manual workers tend to regard retirement as a period of comfort and gratification.

#### *Retired teachers and manual workers: Comparison in age identity*

Many teachers in the interview enjoy the freedom from work. However, most expressed the wishes to contribute to the society even after retirement. Retired teachers tend to agree that the human ability continues to growth in years after retirement. For instance, T 1 regards retirement as just a withdrawal from full-time work. She can still contribute to the society because she believes that a person is in continuous growth. She also suggests that certain human qualities improve with age. T 4 also states that work was not the only way in contributing to the society as her husband suggested. Most teachers accept the policy in the education sector that they have to retire on or before 60 years old; however, many suggested that their role in the society is not lost with retirement.

*“Retirement is just a changing way of life. I just find other things that I can do for the society. The education sector confines me to retire at 60 years old but it doesn’t mean that deterioration starts up once I’ve approached my 60<sup>th</sup> birthday. Besides, something like experience will be enriched with growing age. The skill of handling things will also improve.” (T 1, 61 years old, female)*

*“My husband hasn’t retired yet. He believes that he should be contributing to the society for his age. I think I’m contributing to the society too. I just have a different way (helping a slow learner, helping in drama education, volunteering etc) in contributing to the society.” (T 4, 58 years old, female)*

Manual workers tend to consider retirement as a retreat from work. As retirement is more likely to signify old age to them, they tend to have a relatively lower sense of competence about what they can do for the society. Most of them have started working at their very young age. They think that they have enough work already. Therefore, manual workers tend to prefer a peaceful retirement life and are more likely to regard retirement as a time for rest.

*“Even if I can live a long life, I can’t accomplish anything special either. I’m not comparable to the others. I do everything slowly...I can’t say that my life after retirement is very satisfying. (MW 9, 68 years old, male)*

*“I don’t have anything in particular to do except practising Tai Chi after retirement. It is not too bored for me after having taking up Tai Chi. Before my retirement I engaged in heavy manual labor, I would like to focus on my personal matters after my retirement.” (MW 8, 62 years old, male)*

Manual workers tend to express more worries with regard to their retirement. The worries mainly centre on financial aspects. They worry particularly about how to sustain their living with reduced income after their retirement.

*“I felt extremely bored after I have retired. It’s so bored to stay at home. It’s impossible for me to hang out frequently...There is no more salary. Although my children give me money, it is different.” (MW 10, 62 years old, remale)*

*“I don’t what to think too much about my life ahead. It’s useless for me to think about it. I just live the day as it comes. I really worry about my financial condition. I have to spend according to how much I have now.” (MW 2, 72 years old, male)*

Although retirement for retired teachers is generally a positive experience, some of them do have certain worries which mainly focus on the social aspects. They worry about how to occupy their excess idle time in retirement. Several of them also express some worries about financial aspects. However, their worries usually only persisted for a short period of time. Therefore, the retirement transition seems less difficult to retired teachers than manual workers because retired teachers tend to have better human and social resources to alleviate the negative impact of retirement.

*“Before I made my retirement decision, I worried if I would feel too idle after my retirement. I heard that some people felt really bored after retirement.” (T 11, 68 years old, male)*

*“Although I receive my pension after retirement and my husband left me some money, I worried about how I could manage to afford the daily expenses after my retirement. Although joining the activities will not use up much money, I still worried about whether I could afford my living after joining the activities. So I didn’t engage in any activity right after my retirement. Eventually my friends talked to me and gave me some advice on how to manage my pension... I feel more relax about money after talking to my friends.” (T 9, 57 years old, female)*

## *ii The meaning of the term “old”*

There were divergent views amongst respondents about the definitions of being old as well. Some reflected on how the others think of them. They

usually consider they are at the age that the others believe.

*“During this Mid-Autumn Festival, there were volunteers distributing moon cakes to older persons. One of the volunteers said, “ar bak, give you a moon cake.” This makes me rethink whether myself is old. The way that the others treat me makes me think about my age.” (T 3, 58 years old, male)*

Some respondents talked about certain social beliefs towards ageing. They believe those conceptions of ageing are not applicable to them. However, they may still apply certain stereotypes to other older persons. Therefore, social beliefs are probable to affect the respondents’ construction of the meaning of old. The exclusion of the stigmatized old age may act as a way of preserving the respondents’ dignity by opposing certain stereotypes and negative images of later life.

*“I can feel that the vast majority believe that retirees should not be too active. I think there is a large discrepancy between the social image and actual condition of those over 60. Most of them still maintain a very good health condition. I don’t agree with the societal views...I think many people of my age just sit there and do nothing. Some may just go hiking, go to the restaurant every day and they are not willing to take up any responsibility” (T 6, 74 years old, male)*

The physical aspect of ageing was frequently mentioned among the respondents in determining whether a person is categorized as old. Physically slowing down, health deterioration and recognition of one’s mortality are always associated with old age.

*“Many relatives and friends of mine have been suffering from certain illnesses or even passed away... Seeing others’ senility and death make me feel old...One is old when physical and mental health goes worse. He or she will get ill easily.” (T 10, 56 years old, female)*

*“The most important thing for avoiding getting old is to maintain good physical health. Some people, even those at 40 to 50 years old, feel old because they have poor health. If one is ill, he or she will be very stressful. The stress makes their hair turn grey.” (MW 5, 58 years old, male)*

Apart from health, there is an obvious different focus in looking at the meaning of “old” among retired teachers and manual workers.

#### *Retired teachers and manual workers: Comparison in age identity*

Retired manual workers tend to lay emphasis on chronological age and appearance as signals of old age. The major reason is because they find employment difficult with growing chronological age and ageing appearance.

*“I think that the age of 60 should be regarded as old...Since the relocation of factories to the Mainland in the mid-1980’s, labourers’ lives have become difficult...Before the relocation, it was easy for local workers to find jobs even they were beyond 60 years old, especially for the semi-skilled workers. Technology is so advanced nowadays that automation replaces the skills and importance of labourers.” (MW 2, 72 years old, male)*

*“I think I was pretty old when the company first employed me... The company won’t employ people who exceed 45 years old. I was 48 years at that time... I can’t find any job after my retirement is because of my age... I have started to feel old since I retired. Retirement signifies old age. My hair goes grey. Others can see that I’m old even without checking my identity card. They know it by looking at my hair and my appearance.” (MW 10, 63 years old, female)*

*“I even couldn’t find job that was half the salary and fringe benefit of my previous job... I am old although I haven’t reached 60 years old. I am very old when I try to seek for a job.” (MW 3, 58 years old, male)*

By contrast, retired teachers seemed to see chronological age as a less important attribute of being old. Retired teachers in the interview tend to spot

the social aspects of ageing. They mentioned more about the dependent role of ageing and the failure to grow with the pace of the society when talking about how to define one as old.

*“Chronological age is not important. Even a person who is over 40 years old can get the Outstanding Young Persons Award. A 40 year-old person is also a young people. So we shouldn’t stress on chronological age in determining whether one is old.” (T 9, 57 years old, female)*

*“I think one is old, no matter what age is he or she at, if the person is stubborn, unwilling to change, don’t show understanding for the others and being selfish...People are old if they refuse to change. They will always insist that they are correct and don’t accept what the others say.” (T 1, 61 years old, female)*

*“I think one becomes old when he or she is no longer competent of what he or she wants to do... Many people of my age just sit there and do nothing. Some may just go hiking and go to the restaurant every day. They are not willing to take up any responsibility...” (T 6, 74 years old, male)*

Since teachers and manual workers attach different meanings to the term “old”, they are probable to hold different age identity. Retired manual workers tend to feel the onset of old age earlier than retired teachers as they focus on chronological age and physical appearance in defining the term “old”.

#### 4) Status and role in the family

The family status that people occupy may be important for age identity. The examples of T 1, T 5 and MW 3 can illustrate quite well how family status affects age identity. Positioning in a younger family status may result in a relatively younger age identity. The examples of T 1 and T 5 indicate that how age identities were shaped by younger family status and older family status respectively. T 1’s mother is still alive. The family status of daughter

yields her a younger age identity. Although she occupies certain senior status in the family, the eldest sister and mother-in-law, she seldom insists that her sibling and offspring ought to treat her with high respect. The relatively shorter social distance with the younger family members may offset the feeling of old from holding a senior status in the family. T 5, on the other hand, becomes “gu por”<sup>5</sup> because her nephews had an early marriage. She feels old because the “gu por” status acts as a benchmark of the lifecourse, specifically the status of older persons. The word “por”<sup>6</sup> also portends that she is an old woman. MW 3 also feels old because his daughters have started dating. Seeing the ageing of younger family members may speed the pace of feeling old since it signifies the transition in the lifecourse. These life transitions may have great impact on age identity as the social roles that people occupy convey particular important meanings to later life (Kaufman & Elder, 2003; Neugarten, 1977; Sherman, 1994).

*“My mom is still alive. She is the head of the family. She is the older person and so it won’t be my turn to be an older person...I am a Catholics, I think that everyone is equal before the Mother of God. I don’t care about my status in the family. I seldom exercise the rights of the eldest sister. I won’t take the advantage for being the eldest sister...Even with my son and daughter-in-law, I also don’t care much about the family status... My daughter-in-law won’t address me as mother-in-law. Calling me mother-in-law seems too serious.” (T 1, 61 years old, female)*

*“My nephews have married already. I have been living for several decades already. Even though I was 30 or 40 years old, I was still qualified as “ar por”, “gu por” in particular. My nephews married and have children at their very young age.” (T 5, 60 years old, female)*

*“Some of them (daughters) are in love with somebody. This makes me feel old. I*

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<sup>5</sup> The way in addressing the sister of grandfather in Hong Kong. Sometimes it may also symbolize old women.

<sup>6</sup> A way to address old women in Hong Kong

*thought that my dad was old when I fell in love with a girl too.” (MW 3, 58 years old, male)*

Family role may also affect one’s age identity. Those who have greater independence in later life appeared more probable to report a younger age identity. These people usually saw themselves as important caregivers in the family rather than one of the caretakers.

*“I think those who need to be well-taken care of are more likely to feel old... They (son and daughter-in-law) don’t think that we (T 1 and her husband) are old because they don’t think that they have to taking care of us. On the contrary, we always still have to take care of them. I’m busy with taking care of him (grandson). I have to send him back and forth from school. So I don’t have time and chance to feel whether myself is old or not. I may need others taking care of me some days when I can’t walk anymore. But at this stage, I still don’t need others taking care of me.” (T 1, 61 years old, female)*

*“My father is old and his dementia became more serious at the time of my retirement... So I have to spend more time to take care of him, like going to the doctor with him and helping him to get the medicines... Sometimes I will make better food for my family members when I think my maid isn’t do very well... I have to take better care of my health. I won’t make my family members worry about me. (T 8, 61 years old, female)*

#### *Retired teachers and manual workers: Comparison in age identity*

Teachers and manual workers tend to have different degree of dependency after retirement. The greater independency among retired teachers tends to offer them a more youthful age identity as compared to manual workers. Many respondents have mentioned that one of the reasons for their retirement was that they had accomplished their financial obligations in the family. They state that their children had become financially independent and therefore the burden of child rearing is released.

*“I think I had enough work. My children have grown up the financial burden was released.” (MW 9, 68 years old, male)*

*“I have a reduced income after my retirement but I have finished paying off the mortgage for my house and car. My children have also grown up. I don't have to pay for their studies anymore.” (T 12, 58 years old, male)*

However, retired manual workers tend to be more financially dependent than retired teachers. The major source of income after retirement among many manual workers was financial support provided by their children and many of them relied heavily on their children's financial support. Some also relied on the old age allowance (OAA) for their living.

*“My daughters said they would secure my living so I didn't keep on finding job. They have started working. They said that they would take care of me. I definitely couldn't secure my living after my retirement if my daughters refused to take care of me. It would be very stressful.” (MW 3, 58 years old, male)*

*“I don't receive any salary after my retirement. I just use my saving for my daily expenses... All of my children have started working. I expect them to bring money home. They will give some money to my wife after receiving their salary. My wife will then use the money to pay off the household expenses.” (MW 8, 62 years old, male)*

*“I receive the old age allowance every month but I have to spend parsimoniously. The allowance is fine for someone who doesn't suffer from many sicknesses. But sometime it's hard to control.” (MW 2, 72 years old, male)*

As manual workers are likely to retire early because of health problems and reduced job opportunities, some respondents in the interview might expect financial support from their children. This dependent role in the family may adversely affect their self-concept. MW 2 does not receive any financial support from his children. He always feels old and embarrassed since he feels helpless in managing his life situation. MW 1 becomes financially dependent

on his wife. The transition from a breadwinner role to a dependent role challenges his sense of self. The striking change in role is also more likely to symbolize movement from one age category to another, as in the shift from worker to retiree.

*“I want to work but I can't. I have five children but none of them give me money. All of them are working but none of them have ever given me any money since they work...I receive old aged allowance every month. The life would be fine for a healthy old man. However, it is hard to control, being sick is unavoidable... I am old. I am at an embarrassing situation now.” (MW 2, 72 years old, male)*

*“In the past I could have my salary every month. I feel that I am a bit useless now. I can't contribute to the family anymore... My wife works now and she didn't work before my retirement. She hasn't worked since we married.” (MW 1, 56 years old, male)*

Retired teachers, however, tended to have greater financial independence than manual workers. They can keep on receiving their pension<sup>7</sup> under the Old Pension Scheme (OPS) or the New Pension Scheme (NPS) after their retirement. Some teachers even receive an ex-gratia payment for their early retirement<sup>8</sup>. Although their income is largely reduced, many of them believed that they could afford a living which was similar to that they had before retirement. T 7 even states that he was still able to pay for his daughter's study. The extension of the breadwinner role in the family after retirement may extend the ageing boundary and reduce the negative impact of retirement on age identity of an individual.

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<sup>7</sup> Teachers from government and aided school appointed before 1 June 2000 can receive a lump sum plus a monthly pension. The monthly pension is payable until the retired officer passes away.

<sup>8</sup> The Early Retirement Scheme for Aided Secondary School Teachers, implemented in 2006, provides an incentive in the form of ex-gratia payment for some teachers of aided primary schools to retire early so as to ease the problem of surplus teachers. Teachers with more than ten years of services and below the normal retirement age of 60 are eligible for application.

*“Although my income was reduced, it is more than enough... I even spend more on movies and clothes... Retirement is a very positive experience for me... I can afford to learn table tennis because I have ample time and money. I can employ a coach to teach my wife and I.” (T 12, 58 years old, male)*

*“My daughter would like to study again in Australia after 2 years of work. I am going to pay for her study. It is fine because I have reserved some money... Before I made my retirement decision, I had talked to my children. I told them I could afford to pay for their studies even I retired.” (T 7, 58 years old, male)*

The greater financial independence and autonomy among retired teachers may, therefore, give them a more youthful age identity because they tend to have a greater control over their lives after retirement.

#### 5) Difference in social distance from younger people

More interactions with younger people may also lead to a younger age identity because the social distance between generations may be narrowed by increasing mutual communication. It is consistent with previous findings that staying with younger persons would general lead to a more youthful age identity. Teachers and manual workers are likely to have a different intensity of interaction with younger people by the nature of their jobs, school teachers would be used to interact with teenagers. This may be one of the reasons for the difference in age identity among retired teachers and manual workers.

#### *Retired teachers and manual workers: Comparison in age identity*

The reason that retired teachers might have a younger age identity than retired manual workers, in general, is because retired teachers are more likely to keep interactions with younger persons, their previous students in particular. Some retired teachers stated that interactions with previous students always

made them feel younger.

*“The children also make me feel younger, especially those in the lower forms. They are just so cute.” (T 8, 61 years old, female)*

*“Last time I went to Hong Kong Disneyland with some of my previous students. We stayed there for more than 10 hours, from 9 in the morning until 7 in the evening. I enjoy staying with my students very much. This would make me feel much younger.” (T 3, 58 years old, male)*

Retired teachers tend to have a different way to interact with younger people from retired manual workers. Some of the teachers in the interview suggest that it was less tiring and stressful to stay with children than adults. It is because they think that did not have to contemplate on what to say and what to do in front of young people.

*“I feel much easier and more relaxed to stay with young people. Unlike staying with other adults, younger people are straightforward and less tricky. Sometimes staying with adults is kinda tired.” (T 4, 58 years old, female)*

*“I keep on with some flexible teaching in the school after my retirement. I like this kind of teaching very much. I’m really happy to see students in the classroom. There is no personnel matter involved.” (T 7, 58 years old, male)*

Many sampled teachers have engaged in some counselling services for students before their retirement. This is one of the reasons why they have established a closer relationship with younger people and are more familiar with what younger people think about.

*“I had been on the executive of student counselling service for 2 years. The school was a band 5 one and the students there had different academic and emotional problems. The students said that I looked like Lam Chi-Cheung<sup>7</sup>. They*

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<sup>7</sup> A Hong Kong popular singer in the 1980’s.

*called me “Lam”<sup>8</sup> rather than “Chan Sir”. The nickname may tell you that I got along well with my students. They were usually punished by other teachers. Some of them had bad academic results, some of them always not handing in their homework and some smoked. The discipline master referred these students to me and I talked to them. They thought that I could understand what they think about. We had a close relationship and they told me everything about them” (T 12, 58 years old, male)*

Many teachers treat their students as friends. Some teachers even join the leisure activities organized by their students. They hold a positive view on the relationships with their students and express that the relations made them feel they were at a younger age because they considered themselves as a member of youngsters.

*“I stayed very close with my students when I was a secondary school teacher. I seldom scold them. I treat them as friends. They make me feel that I am at a younger age. I always joined their activities when I have time. Some of them become committee members of the Professional Teacher’s Union. We still maintain a very friendly relationship at present. We play together like friends.” (T 6, 74 years old, male)*

Increased or maintained interactions with younger people may make teachers feel much more younger. Some teachers are familiar with the way of life of younger people. T 4 states that interactions with her previous students provide her with information on the current trend. This enhanced her self-image because she thinks that she was more updated than some of her peers.

*“My previous students know a lot of good places for meals and they bring me to different places for meals. The experience is rather interesting. Many of my friends are surprised that I know lots of good places for meals that they don’t know. I think this, in some way, makes me feel myself younger. (T 4, 58 years old, female)*

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<sup>8</sup> Lam Chi-Cheung’s nickname

Nevertheless, many respondent teachers said that they have had fewer chances to develop a close relationship with their students following the education reform. They state that teaching, administration work and further studies occupied most of their time which hindered the establishment of better understanding between teachers and students.

*“In the past, teachers’ major duties were just being in-charge of certain extra-curricular activities, teaching and marking. Since the education reform, there have been much more work to do. There are more meetings between teachers and parents, more markings to do and after-school classes to attend. All these even took up my time in weekends. Since then, I didn’t have much time to talk to my students. Students, no matter good or bad students, are willing to share their thoughts if teachers have time to talk to them. The bonding between teachers and students in the past was closer. Teachers have no time after class at present. They definitely have very limited chance to get to know the students better.” (T 9, 57 years old, female)*

Manual workers tend to feel a greater social distance from younger people. Some of them in the interview noted the existence of social distance from their offspring. For instance, MW 1 is not even certain about which form his son is in. He does not join the gatherings among his children and nephews because he regarded the gatherings as being just for young people. MW 3 also stated that he felt old because he did not understand the meaning of his daughters’ word and expressions. These examples demonstrate that some manual workers can feel the social distance between them and the younger generations.

*“My daughter is sitting for the HKCEE<sup>9</sup> this year. My son is studying at form 4. I’m not sure whether he is in form 4 or not. I don’t know about this thing...sometimes young people do not want to tell you everything... Sometimes they (MW 1’s nephews) will organize some activities like playing badminton and going to barbecue. My children always join their activities. These activities are for young people. I seldom*

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<sup>9</sup> The Hong Kong Certificate of Education Examination, one of the public examinations for senior secondary students in Hong Kong.

*join them.” (MW 1, 56 years old, male)*

*“I think I am old. I can feel a great distance between my daughter and I. I think I can't communicate with them well now. Know very little English but they always mix Cantonese with English in their sentences. Last time my daughter told me that she is going to have a “highlight” in her hair. I don't know what is meant by “highlight” until she had the hair style.” (MW 3, 58 years old, male)*

Increased interactions with younger people thus appear likely to narrow the social distance between generations. Therefore, retired teachers, who more probably will have more interactions with younger people, tend to maintain a younger age identity than retired manual workers.

## **5.2 Adjustment patterns**

From the strategies that the respondents undertake toward the physical, psychological and social changes in later life, three different adjustment patterns were identified. Some respondents take up a more assimilative way of adjustment, some practise a more accommodative way of adjustment and the others mixed assimilation and accommodation in adjusting to changes in later life.

### **1) Assimilative pattern**

Respondents taking up an assimilating way of coping towards changes are more likely to modify the external milieu to maintain a similar life patterns to that of in the past (Heckhausen, 1997; O'Hanlon, 2004). They are eager to maintain the desired aspects of themselves by minimizing and counteracting the consequences of the physical, psychological and social changes in later life. In the physical aspect of adjustment, although respondents experience physical

slowing down or physical deterioration, some of them in the interview are more likely to continue their previous physical activity level. For instance, T 12 mentions that he played tennis more frequently than before even he felt dizzy and short of breath easily now. In the social aspect of adjustment, respondents are more likely to enlarge their social network to compensate the contracting social contact from retirement. For example, T 10 maintains a sizable social network by keeping contact with his previous colleagues. He meets his previous colleagues regularly in order to keep himself physically and psychologically healthy.

*“I can feel some physical changes after my retirement. I react much slower when playing ball games. I also get short of breath easily now. I even felt dizzy once when I was playing tennis. It has never happened in the past... I even play ball games more frequently. I just felt dizzy for once. It might be because I got a little bit sunstroke. The sun was too bright that day. The opponent was a very capable tennis player. I didn't want to lose any point and so I kept running and running.” (T 12, 58 years old, male)*

*“I read from some magazines that lonely people who always stay at home have a high tendency to suffer from Alzheimer disease. Enlarging social network is very important. Others won't ask me to join their activities again if I refuse going for certain times. Therefore, I play ball games with one of my ex-colleagues once a week. I also join my ex-colleagues once they organize some activities. Keeping contact with them help me to maintain a sizable social network. It's good for both my physical and psychological health.” (T 10, 56 years old, male)*

## **2) Accommodative pattern**

Some respondents are more likely to readjust their aspirations and self-evaluative standards. For instance, in the physical aspect of adjustment pattern, some respondents prefer to look older and are more accepting of the signs of ageing. They are unlikely to pay special effort to take care of their

physical appearance. Besides, some respondents mention that they would avoid some of their previous activities as they were afraid of getting hurt.

*“I look old because I have a head of grey hair. My wife asked me to dye my hair. I refused to do so because I think I’m old. It’s not necessary for me to dye my hair.” (MW 8, 62 years old, male)*

*“I felt painful all over my arms after cleaning up the kitchen one day. From then on, I avoid moving bulky items when I’m cleaning the kitchen. I just clean the surface of the refrigerator. There’s a cupboard to hide the sides of the refrigerators from view. There’s no way of getting it out because I afraid of getting hurt again.” (MW 10, 63 years old, female)*

### **3) Mixed pattern**

Some respondents may mix assimilative and accommodative strategies in their later life adjustment. They may practise different strategies at different aspects. Sometimes, they will even practise different strategies on the same aspect. Therefore, they may face a dilemma in adjusting to changes sometimes.

*“In my retired life, I keep learning new things. I have to enrich my knowledge in different aspects. I learn Tai Chi, dancing and calligraphy in the Professional Teacher’s Union. The Professional Teacher’s Union really helps me a lot. I also learn pottery in another organization... Everyone knows that I’m at certain age. I think it’d be better not to make the others think that I’m weird...Individuals should do what suits them and act according to their age. Take “Little Sweetie<sup>10</sup>” as an example, what she does is being laughed by the others.” (T 5, 60 years old, female)*

*“Sometimes there is a dilemma in spending money. On the one hand, I’ll remind myself to spend less as my income reduced after retirement. On the other hand, I’ll tell myself that life is running short, I should enjoy myself, having better food, having better clothes. Therefore, sometimes I’m frugal of my money and sometimes I just spend without any hesitation. It’s a dilemma” (T 3, 58 years old, male)*

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<sup>10</sup> A well-known rich woman in Hong Kong who always dresses like a young lady and braids her hair into two pigtailed.

Retired teachers and manual workers of those in the sample tend to have different ways of adjusting to their later life. Retired teachers tend to take up an assimilative coping strategy while manual workers are more likely to assume accommodative coping strategy towards changes in physical and psycho-social aspect.

*Retired teachers and manual workers: Comparison in adjustment patterns*

*Physical aspect*

Retired teachers in this study were more likely to continue past activities and accept new challenges than manual workers. Sometimes they even adopted more physically challenging activities.

*“I still join my previous students and colleagues in some outward-bound activities... I may not be able to achieve some of the tasks but I will keep on trying...There is a particular step in Tai Chi that I'm not performing very well. I also keep on trying to improve my performance.” (T 4, 58 years old, female)*

*“Recently I went travelling at Huang Shan. I've to walk a lot but I didn't feel tired. Some tourists in the tour are still working but they feel tired easily in the trip.” (T 1, 61 years old, female)*

Although some respondents experienced certain age-related physical changes, they tend to employ a more positive way of thinking towards the changes. They tend to possess greater efficacy in changing the external milieu. For instance, T 8 tells herself that she exercised in the park because she needed more exercise rather than being lonely. She believes that having more exercise and better diet can help her maintain better health.

*“Human beings have the ability to adjust. Don't always think that you can't do it... Sometimes I go to the park after meal for some exercises. I tell myself that I*

*exercise in the park because I need more exercises rather than I'm bored...I consider taking better care of my health as a must. This pushes me to swim for longer time and have better diet." (T 8, 61 years old, female)*

By contrast, some retired manual workers may avoid certain past activities because they have a lower self-efficacy for accomplishing the activities.

*"In the past, I was a relatively active person. I would jump over the fences along the road. I don't know whether I'm still competent in jumping over the fences now but I won't try. I think I'm not the same as young people." (MW 3, 58 years old, male)*

*"Every day is just so slow since I have retired. In the past when I was working, time past much faster... I won't go to work even I was asked to do so now because I afraid to get hurt again." (MW 2, 72 years old, male)*

Some of them were even less likely to try to take compensative actions toward their worsening health because they thought that they are unable to improve their health condition.

*"I feel pain in my knees. It may be caused by my job. I went to the doctor and the doctor said that my bones have started deteriorating. I think most old women have this kind of problem. So I didn't pay special effort to improve the condition." (MW 10, 63 years old, female)*

*"I even couldn't get up from bed one day. My leg just couldn't move. The doctor said that there is spur in my leg. He just gave me some ointment. I haven't put any effort in maintaining my health although there are so many problems with my health. I haven't gone to the doctor for a few months, no matter I 'm sick or not. It's because my health status remains that bad even I went to the doctor." (MW 1, 56 years old, male)*

*Psycho-social aspects*

### **Selective comparison**

Retired teachers and manual workers tend to practise different forms of social comparison. Retired teachers tend to employ a more positive social comparison. They are more likely to think of themselves as better-off than the others, their peers in particular.

*“Some people of my age use a stick when they’re walking. It may also be hard for them get downstairs and may have asthma out break... I read from the newspaper, magazines and television as well as base on my observation in daily life, there are people of my age who have good health condition but I think there are many others who are much worse than me. I think my health condition is fine. It may be because I’m rather conscious about my own health. After that (previous sickness), I almost haven’t visited the doctor since the recovery. I don’t feel that I’m old...Some of them (other members in the Professional Teachers’ Union) are very old so I feel that I am pretty young when staying with them.” (T 7, 58 years old, male)*

*“I think my health condition is fine. Some people of my age are having worse health than me. I retired pretty early. Many people of my age are still working. I think those are still working feel hard. My retirement life is relaxing. There are fewer hassles.” (T 9, 57 years old, female)*

Not only did they compare themselves with their peer members in constructing their age identity, but retired teachers also made reference to what the others say to validate their identity. Some of the retired teachers stated that their peers were surprised when they retired and their friends said they did not appear to be their chronological age. What the messages they received from the others are probable to reaffirm their younger age identity.

*“Some of my friends queried my early retirement. I have to explain to them because they perceived that I am still that active... The janitors were also surprised when I retired. Recently I went to pizza hut for tea and a waiter asked me to comment on the coffee...He said pizza hut would give seniors an extra cup of coffee once they visited. He said I was not senior but I could still have an extra cup because I gave him comments on the coffee.” (T 1, 61 years old, female)*

*“I don't think that I am old. Many people were surprised that I retired so early. They said that it was impossible and thought that I must feel very bored after retirement. I am not bored and am even getting more occupied than before. It is really interesting that many school friends found me once I retired. I meet with this one today and that one tomorrow. I can also try out new things that I had never taken up before. I also have a new appreciation to my family life. I think I made a wise decision at an appropriate time.” (T 4, 58 years old, female)*

Retired manual workers, on the other hand, tended to adopt a more negative social comparison to rationalize their behaviours. They usually compare themselves with younger people and sometimes some better-off peers. They think that it is normal and reasonable for them to experience some age-related changes and consequently their social actions toward the changes.

*“When I became old, the illnesses spark off. Just like an old classic car, every parts of the machine wear out. A child can get up immediately after falling, this is what an older person can't do. Older person can't get up immediately after fall or even can never get up again from then on. They may have bone fracture from the fall.” (MW 9, 68 years old, male)*

*“I have a friend who goes travelling after retirement. It's because he has better financial condition than me so he can afford travelling around.” (MW 2, 72 years old, male)*

Being aware their being in a less prestigious position in terms of a negative social comparison seems threatening to retired manual workers; thus, some of them think that it is more advantageous for them to admit to being old sometimes. For instance, MW 3 thinks that he could get away from some physically demanding tasks if he admitted being old.

*“I think it's foolish for me to deny being old. Others will treat me as a younger person if I deny being old. In reality, I can't compete with young people physically.” (MW 3, 58 years old, male)*

## **Social network**

Although retired teachers tended to agree that retirement leads to decreased contact with their colleagues, some of them took greater initiative to maintain established social network. They spend much of their time meeting friends and relatives. Many of them spent more time caring for friends and relatives, especially those who are ill. Some of them also started to appreciate the time of being alone.

*“I take better care of the people around me since my retirement. I didn’t pay much attention on the others when I was working. My father’s dementia had started becoming more serious at the time of my retirement...I spent more time to taking of him, like going to the doctor with him and helping him to get the medicines. I have never done all these before my retirement. Besides, some of my friends have been suffering from cancer. I meet them more frequently to show my concern to them now.” (T 8, 61 years old, female)*

*“I understand retirement may lead to a reduced social network because some of my previous colleagues are still working. I believe that I’m still at a stage of continuous development. So I learn how to endure staying alone. Sometimes being alone is pretty good. I can undergo personal growth and pursue some of my hobbies.” (T 4, 58 years old, female)*

Retired manual workers were more likely to accept a reduced size of social network with age. Although they still maintained their social network, the social network mainly comprised their close others.

*“One will have fewer and fewer friends when getting old. This is true. There’ll be fewer older persons and so there’ll be fewer friends. You may know it by looking at the older persons who are playing chess over there. Their friends are just those who live next to them.” (MW 1, 56 years old, male)*

*“I seldom find my ex-colleagues. They just kept on their work and I have my own life... Having less frequent contact with friends after retirement is inevitable.”*

(MW 4, 74 years old, male)

### **Diversity of activities**

Retired teachers in the sample tended to expose themselves to a greater diversity of new experiences than did the manual workers. Many of them in the interview claimed that their time was fully occupied. Some mentioned that they were even much busier than the time before their retirement.

*“I’m retired but I am still pretty busy...I’m busy with taking care of him(grandson), sending him back and forth from school. Two to three days a week for Putonghua teaching. I teach students in International school in Chinese and Putonghua. Some others are adults, they work in office...In this year, I worked for a special seminar organized by the Education and Manpower Bureau and the Hospital Authority. The seminar is about students with mental disorders.” (T 1, 61 years old, female)*

*“I’m not bored. I’m even more occupied than before... I can also try out new things that I had never taken up before...For me, I think it’s quite good as I can further develop myself and I can pursue some hobbies...After my retirement I also learn how to be an ordinary housewife... So I learn from some television programme how to make soup. I even bought a new electric boiler for making soup... Besides, I read books in my leisure time. I formed a reading group with a small number of retirees. I also do more exercise including dancing. I will go for the dancing class in the Professional Teacher’s Union after the interview... And also help in drama education of the Hong Kong Drama/Theatre and Education Forum. I helped my husband in conducting some course in Baptist University and Lingnan University... I may also relax myself and just travelling around without doing anything. Everyday is so fulfilled that I don’t feel bored. I had ever volunteered for an environmental protection group... Actually I took a course on archaeology but I didn’t finish it... I think it doesn’t matter and I don’t care about the certificate. I just interested in studying archaeology and I am fulfilled for having ever studied the course...I think retirement is a golden time for me to understand myself better. I can gradually find my interest from experiencing and learning different things...” (T 4, 58 years old, female)*

Retired manual workers by comparison usually felt physically exhausted

with their previous job and preferred a relaxing way of life after retirement. Some of them would like to have a quiet life and focus on their personal matters. Their major leisure activities include gardening, practicing Tai Chi, talking on the phone, visiting and drinking tea with friends and relatives.

*“I’m not interested in anything else. I prefer a quiet life. It required much physical energy and there was so much pressure in working. I just want to do some gardening and rear pets now.” (MW 6, 55 years old, male)*

*“I don’t have anything in particular to do except practising Tai Chi. It is not too bored for me after having taking up Tai Chi. Before my retirement, I engaged in heavy manual labor, I’d like to focus on my personal matters after my retirement.” (MW 8, 62 years old, male)*

*“I meet my ex-colleagues approximately once every 2 months. Most of the time we just go drinking tea and go for chatting.” (MW 10, 63 years old, female)*

### **Pre-retirement Planning**

In general, the respondents had not made any plans ahead of their retirement. Many of them, almost all the teachers, mentioned that they had no time to make any plans. Some of them were frustrated in the early stage of their retirement and found difficulties in adjusting to their early retired life. Some even felt guilty for the lazy lifestyle and did not know how to fill the new spare time.

*“I didn’t plan properly for my retirement and, therefore, I don’t have anything in particular to do at the beginning of my retirement. I just engage in some ordinary housework. I felt pretty bad when I just retired.” (T 9, 57 years old, female)*

*“I didn’t plan for all these activities before my retirement... At the first three months of my retirement I felt rather lost and didn’t know what to do. Sometimes I woke up in the morning because I felt I should get up to school at that moment. I*

*wasn't use to the retirement life in the beginning. Sometimes I also felt guilty for the lazy life." (T 4, 58 years old, female)*

However, some of the retired manual workers in the interview, unexpectedly, said that they had thought about what to do in their retirement life when they were still working.

*"I planned to travel around after my retirement. It's just a brief idea. I planned to go to Beijing and Shanghai with a few of my friends. So I started to prepare for the trip once I retired." (MW 9, 68 years old, male)*

*"There will be changes in social network and the allocation of time after retirement. I think one should get prepared before retirement. One should get psychologically prepared for the changes that come along with retirement. I've expected some changes from my retirement. The changes before and after retirement are thus not obvious to me." (MW 5, 58 years old, male)*

Many of them had been in their jobs for decades and some told me (as the researcher) that they were involved in less work tasks with seniority. Therefore, some of them become less bound with work a few years approaching their retirement and this may be the reason for them to have a rough planning for their retirement.

*"Those who worked for longer years will be responsible to train the younger ones. I have worked for more than 30 years and so I could ask the trainees to work. I won't take up every task. One is really incompetent and incapable if he still has to work very hard even having work for a long period of time. In the few years before my retirement the workload was much lighter. I could enjoy a cup of coffee leisurely in the morning and during tea time." (MW 9, 68 years old, male)*

By contrast, many retired teachers say that they were assigned a range of responsibilities in the school as they have served in the school for longer period of time. In other words, the workload of teachers may become heavier

with seniority. This possibly leaves them little no time for any retirement planning.

*“I taught Mathematics, Physics, Chemistry and English in the past. There are many tasks involved alongside teaching. Younger teachers have to take charge of extra-curricular activities. When teachers get to a higher level after staying in the school for a longer period of time, they have more responsibilities, such as counselling, discipline maintenance and administration work.” (T 7, 58 years old, male)*

### **5.3 The relationship between age identity and adjustment patterns**

From the comparison between retired teachers and manual workers, the general picture emerged that retired teachers tend to hold a younger age identity than manual workers. Retired teachers are also more likely to take up an assimilative coping method while manual workers take up an accommodative coping method.

As teachers tend to have a younger age identity than manual workers in general, they tend to have the desire to confirm their youthful age identity. Thus, they are motivated to seek out identity-confirming behaviour, including continuing past practices and adopting youthful activities. These adjustment behaviours help retired teachers holding on their self-images those developed in earlier life. By upholding the previous established self-images, they also possess greater locus of control. Therefore, they are more likely to take up an assimilative coping method, for instance, adopting health-enhancing behaviours. For instance, T 7 participates in a marathon race, which is a fairly physically challenging activity, after his retirement. He takes his participation in a marathon race as a way to confirm his youthful age identity.

*“I don't think I am old because I really got full recovery after the minor sickness. In the past, I had never participated in a marathon. I'd like to try it out after my retirement. I'm not good at sports but I practiced for it based on a training schedule. At last, I got a pretty good result in the marathon.” (T 7, 58 years old, male)*

By contrast, retired manual workers tended to have an older age identity than retired teachers. They chose to conform to the behaviours of older persons because their relatively older age identity makes them think themselves being too frail to continue some of their past activities. They also felt helpless to change their current condition. Therefore, they seized upon their age as a reason in taking up the accommodative coping method. They think that the ageing process is a normal phenomenon which is irresistible. For instance, MW 10 says that she did not continue to take calcium pills because her doctor told her that her bones had already started to deteriorate. She thought that she was too old to take the pills for the pain in her knees. MW 6 also states that he did not take compensative actions because certain physical deteriorations were normal ageing phenomenon.

*“I took some calcium pills for a short period of time. I didn't continue to take the pills. I think I can't absorb much calcium because I get old. The doctor said my bones have started to deteriorate already. I gave up because I think I can't absorb much calcium from the pills. I'm too old to take the pills. The pills are useless to me even though I keep on taking them.” (MW 10, 63 years old, female)*

*“I have less hair and some of my teeth fell off. I got tired easily now as well. Sometimes, I even feel pain in my knees. I haven't done anything to these changes because I think these are normal ageing phenomenon.” (MW 6, 55 years old, male)*

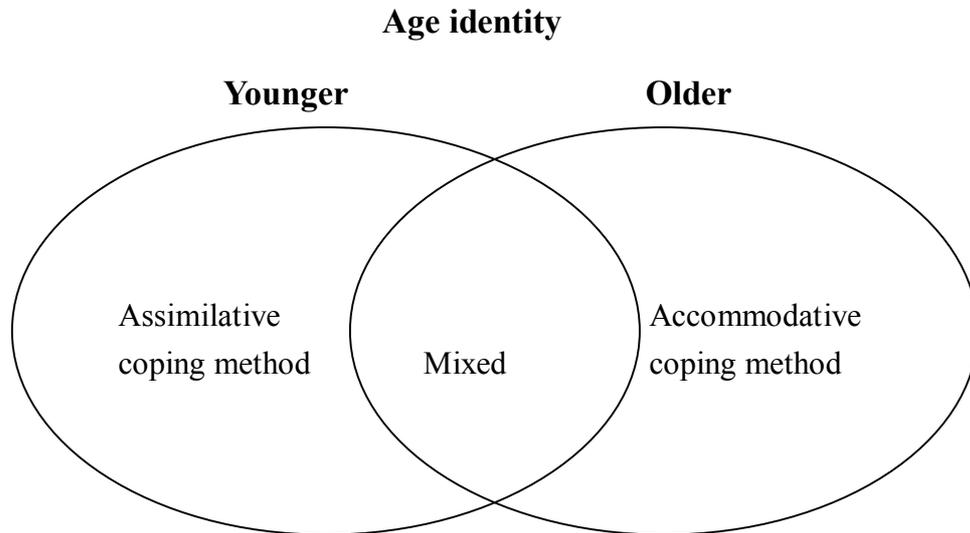
Besides, the major leisure activities in retirement of retired manual workers in the interview are mostly focused on relationship enhancement. These activities include talking on the phone, visiting and drinking tea with friends and relatives.

*“I have nothing to do after my retirement. I just stay at home reading newspaper; playing er-hu and violin...I spend most of my time staying home. I make phone calls to my friends occasionally. Sometimes we can talk on phone for around an hour. We’ll also go for afternoon tea.” (MW 1, 56 years old, male)*

*“After my retirement I had a lot of idle time. I live a monotonous live...I don’t like joining activity. I only go drinking tea with my close friends at most. I just walk around elsewhere near my home. I like playing chess but I don’t want to play with the people there. I don’t like staying with strangers.” (MW 2, 72 years old, male)*

This is consistent with the broad proposition within Disengagement Theory that a reduced size of social networks in old age is the result of a preparation for death by older persons and so there is a gradual and natural withdrawal or disengagement (Hooyman & Kiyak, 2005). Retired manual workers, with an older age identity, were more likely to have a shorter expected years of life than retired teachers. They are thus more likely to withdraw from their original network, concentrate on the interpersonal interactions with their close significant others and are less likely to expose themselves to a new social network.

Diagrammatically, from the qualitative study of retired teachers and manual workers, the relationship between age identity and adjustment patterns can be shown as follows:



### **Importance of continuity**

In the interviews, it was found that those who maintained continuity with past experiences are in general more likely to have a younger age identity. Although most of the respondents' experience changed at times around their retirement, continuity acts as a defensive resource to help them maintain a younger age identity. Based on the concepts of Continuity Theory, individuals will make use of both their existing and past roles in maintaining a stable age identity. It is mainly because such continuity provides individuals with a similar meaning-making mechanism to that of in the past.

As Continuity Theory presumed, enduring thoughts and behaviours are a result of a person's selective investment in time and energy, the continuation

of enduring patterns can thus give individuals a sense of competence to defend the originally-held identity (Atchley, 2003). The consistency over time in the work role provides the respondents with a lower or reduced feeling of “rolelessness” accompanied with retirement and helps the respondents defending a younger age identity. Moreover, a major reason for those who maintain work continuity is to help the others. This occupational self-efficacy and the competence in taking care of the others helps the respondents to maintain a rather stable identity. For instance, T 8 states that she had a strong feeling of being old at the very initial stage of her retirement but the feeling faded away when she went back to school as a part-time tutor.

*“I was a volunteer in my previous school. I taught in some tutorial classes for students having worse result in English and poetry reciting. I go back to school approximately three afternoons a week... I’ve a very strong feeling of getting old when I first went to the park after my retirement. I’ve never had such feeling before. Once I entered the park, I saw everyone there was with grey hair. I was so sad at that moment because I thought that I have to stay with these people for the rest of my life from then on. I haven’t started volunteering in my school at that time. I felt lonely at the moment. I agree that retirement makes my life more relaxing but I found that I love to work. My colleagues are so nice... Time flies when I spend my time with my colleagues. The time is just so enjoyable. I can also get much satisfaction in teaching. I enjoy the interaction with my students in the classroom. I don’t have the feeling of being old now.” (T 8, 61 years old, female)*

This is congruent with what Hewitt (1989, pp.153) argued, “the feeling that one’s experiences of self make temporal sense, that what one is doing, thinking and feeling now is meaningfully related to what has gone before and to what will come later.” Continuity with past pattern probably stabilizes one’s identity. The work continuity allows the respondents to remain in familiar environment and exercise well-practiced skills. This provides them with an

experience of competence and in turn results in a slower rate of change or even no change in age identity.

*“I don’t feel myself as if I am retired, I still work, like during this year, I work for a special seminar organized by the Education and Manpower Bureau and the Hospital Authority...I still don’t think of myself as having nothing else to do. So I don’t think myself as getting old...I still have many things to deal with which require physical energy.” (T 1, 61 years old, female)*

*“This year, I started to work again in my brother-in-law’s construction site. My brother-in-law has a construction site. I think I’m happier now I’m working again...I don’t think I’m old. I still have the vitality and fine physique to work. I still have 2 daughters to bring up... Some of these people just sit at home doing nothing. They think that they are old and become useless. They feel bored.” (MW 5, 58 years old, male)*

Some respondents mentioned that work continuity also helps them in their adjustment. To continue to exercise their own expertise helps them to maintain a sense of competence as they believe that their skills and ability are valuable. They may also have a strong motivation to improve their skills which may be helpful in maintaining a good mental health.

*“I’ve engaged in many volunteer works for older persons when I was teaching. However, I like those for children better as I think my expertise in teaching hasn’t been wasted after my retirement. I think others can also engage in volunteer works towards older persons but not everyone can teach. The volunteer work also allows me to keep having better mental health. I’ve to keep the teaching materials up-to-date. I’ll extract some information from newspaper, books and the Internet to make some new teaching materials. I won’t use my previous teaching materials. This keeps my mind stimulated.” (T 8, 61 years old, female)*

However, retired teachers were more likely to maintain work continuity than retired manual workers. Although most teachers in the interview had work continuity at a reduced level after their retirement, the physical changes

and lower tendency for being reemployed even disrupted the work continuity among most of the retired manual workers. Some of the retired manual workers told me that their work was on a “call-in” basis in which they were called by the employers when there was work available. They also depend on their colleagues who they have long been familiar with and relatives to refer them some scattered jobs. However, it is difficult for them to find new jobs once they have quit their old ones, because their network with their previous employers and colleagues is possibly disrupted by retirement.

*“In the past I didn’t have enough work to do. I worked when jobs were available. When my former employer got a project, he would call me for work. When a project finished, I had to wait for my former employer to call me for another project.” (MW 2, 72 years old, male)*

*“Even though I wanted to work, no one was willing to employ me. They prefer some young and healthy people. I have jobs to work on just because of my buddies. I worked on some scattered jobs. My buddies referred me these scattered jobs...I’m old. No employer is willing to employ me. Even my previous employer didn’t want to employ me. All are just because I got these buddies, buddies that I have long been familiar with.” (MW 2, 72 years old, male)*

*“I think I was pretty old when the company first employed me. One of my friends referred me for the job. No one would employ me if my friends didn’t refer me for the job. The company won’t employ people who exceed 45 years old. I was 48 years at that time.” (MW 10, 63 years old, female)*

Those with very limited work continuity tended to have an older age identity because the role of worker is an important source of social status and self-worth. However, some of the respondents have limited work continuity after retirement but still maintain a younger age identity. It may be because they can maintain an internal continuity in external continuity. External continuity in the study refers to the consistency in social roles and activities

which make up the respondents' lifestyle over time while internal continuity means the maintenance of consistent ideas. These respondents lost their work role but can find other roles to compensate their work role which they believe can contribute to the society at similar extent. They think that they maintain competence in doing what they want to do and they are still contributing to the society in certain ways. Atchley suggested that people still hold expectations, such as the expectation to manage one's own affairs without assistance after retirement. He further understood that retirement is not a "roleless role" because retirees occupy multiple roles. The continuity of social networks of friends and family, in community involvement and leisure pursuits into retirement would typically reduce some of the negative consequences of retirement. T 6, for instance, maintained a youthful age identity because he thought that his role in certain organizations was of similar importance to his previous work role.

*"I don't think I'm old even though I've retired. I engage in many activities after retirement. At present, I am a member in the Hong Kong Christian Council in which not many people are willing to take up the job. The organization aims at helping children in rural areas who face discontinuation of schooling...Our union (the PTU) needs a lot of manpower, including the president, vice-president, other committee members and instructors in the interest classes. I always take up several posts and devote myself as much as I can. I'm responsible for 2 – 3 interest classes, have regular meeting for alternate week and organize an annual dinner every year." (T 6, 74 years old, male)*

## **Chapter Six: Discussion**

### **Summary of findings**

This study has generated insights into the age identities and respective adjustment patterns of retired teachers and manual workers. By means of in-depth case interviews, 12 retired secondary school teachers and 10 retired manual workers were studied. This research contains four research questions (see Chapter 1 p.14). The first question is: What is the age identity among secondary school teachers and manual workers after retirement? Are there common patterns? The second question is: How do previous life experience, significant others and the meaning of retirement and the term “old” affect retired secondary school teachers’ and manual workers’ perceptions of old age? The third question is: How do retired secondary school teachers and manual workers adjust to their later life in physical, psychological and socio-economic aspects? The fourth question is: How does age identity influence adjustment patterns in later life?

The findings of the current research indicate that, in general, different people may be aware of being “old” at different times. One possible interpretation is that the boundary of adult life is becoming more fluid. More and more people are becoming retirees with growing longevity. Retirement, which has previously been conceptualized as a loss of an important role, becomes more widely accepted under the acquisition of new roles and extension of past roles.

The research has also demonstrated considerable variations in age identity among and between retired secondary school teachers and manual workers.

On balance, the variation between the two occupational groups is greater than that among them. Retired secondary school teachers tend to have a younger age identity than retired manual workers. Retired teachers' occupational status granted them a more positive physical experience, a higher degree of flexibility in retirement, narrower social distance with younger people and a less dependent role in the family. Their different previous job demands and adaptation mechanism towards retirement and the different interpretation of the term "old" from retired manual workers prompted them towards a relatively younger age identity.

The two occupational groups also take different actions towards physical, psychological and social changes that they experienced in their later life. Retired teachers tend to take up an assimilative way in adjusting to these changes, in other words, they are more likely to modify the external milieu to sustain their established life patterns and uphold previous goals and expectations. On the other hand, retired manual workers are more likely to take up an assimilative way in adjusting to the physical, psychological and social changes that they experienced in later life. They tend to adjust their expectations downward and conform to the behaviours of older persons when facing the changes. The major reason for the divergence in adjustment patterns is the difference in age identity between people in the two occupational groups. Since retired teachers tend to hold a more youthful age identity, they possess greater self-efficacy to counteract the changes that they come across in later life. By contrast, retired manual workers have a relatively older age identity than retired teachers. They have a lower sense of control over their lives and shorter expected years of life. Therefore, they tend to assume an

accommodative coping method and accept the changes as they are generally viewed as age-related.

Other confounding variables including working position before retirement, marital status and occupational class might also be important to adjustment pattern. As discussed in Chapter 5, some of the manual workers had been promoted to supervisory positions ahead their retirement and were therefore more likely to have time and opportunity to make their retirement plans. These manual workers seem more similar to teachers in terms of adjustment pattern. Retirement planning may act as an additional route to achieve a more assimilative way of coping among the manual workers. Marital status also seems to be important to one's adjustment pattern. Single and widowed respondents were more likely to take up a mixed or accommodative coping method. This might be because they receive less social support for active retirement and attempted fewer new activities through some active retirement groups. For occupational class, retired teachers are more likely to have more diversified sources of information on learning and exposure opportunities. Their social networks are relatively wider which include their previous schoolmates, students and colleagues. Sometimes these acted as retired teachers' valuable sources of information on various new activities and exposure. For example, some respondents mentioned that the illness of their family members made them more conscious about their own health. They also stated the importance of friends in affecting each other's health behaviours.

*"I started to read books concerning health issues. Actually I started buying this kind of books when my father's health got worse years ago. These books are about health care for older persons. But I just started reading them after my sisters were*

*found to have breast cancer recently. I worried this health hazard may also affect me. So I read a series of books on cancers and breast cancer. I discover that I did not take care of my health all along and after my retirement. I have time to take care of my family as well as my own health...I do more exercise and pay more attention to my diet now. I get to learn more about organic food and I think the knowledge on health is new to me... I think people of my age should be more aware the importance of taking care of their own health. But I think most of them did not take up any action as many of them are uncertain what to do so as to achieve a better health. I think there has to be a group of people to influence each other of their living habits in order to attain better health. I have a group of friends who go exercising with me. Sometimes we will share some information about diet. We discuss on which food is good for health in particular season. Many of my friends are retired so we have more time to look into diet. Some of my friends are retired teachers and also retirees from other occupations.” (T 4, 48 years old)*

*“Concerning my social network, I still keep contact with some of my students. We meet regularly. I also approach some of my previous colleagues and schoolmates. I maintain the network with my previous students and colleagues by attending almost all the alumni activities.” (T 6, 74 years old)*

*“Life will be very dull if I don’t have these activities in my retirement life. I learn Tai Chi, dancing and calligraphy in the interest groups organized by the Professional Teacher’s Union. The Professional Teacher’s Union really helps me a lot. I also learn pottery in another organization. I think my social network is a very important source of information. Some of my friends may tell me information about where and how I can access to these interest group classes.” (T 5, 60 years old)*

Some retired manual workers in the interview have also engaged in certain new activities, however, most of them notice about the activities only when they happen to see others taking up the activities.

*“My wife and I met a group of people singing and dancing in the park near our home one day. I didn’t recognize that they are my neighbours until we talked to each others. From then on, we sing and dance with the group once a week.” (MW 1, 56 years old)*

*“I used to walk around in parks in the first few months after my retirement. One day I passed by a housing estate and saw that someone was teaching Tai Chi. I’ve been learning Tai Chi since then.” (MW 8, 62 years old)*

Apart from the differences in intensity of social support, the divergences in post-retirement activities can also be explained by the differences in educational level and form of retirement that retired teachers and manual workers have. Education may provide the teachers with the social skills and self-direction to appreciate the opportunities in retirement for satisfying and meaningful activities. Besides, the retirement of teachers is generally more voluntary or made attractive by the relatively big sum of pension for their early retirement as pull factor. The pension that the teachers received made it less likely for manual workers to have financial constraints to be open to the new opportunities of retirement than manual workers who are always forced into retirement for more negative reasons including poor health and job difficulties.

*“I may have to pay more for some of the activities as I’m below 60 years old. For example, I have to pay higher admission fee for some scenic spots when we go travelling. However, I don’t mind joining the other senior members in the Professional Teachers’ Union.” (T 7, 58 years old)*

*“Although I don’t receive any salary every month anymore, I’m still very generous towards the others, especially to my father. I think it’s very good that I still have the financial capacity to be the host. I’ll buy good quality food, though they are always costly food, because it’s very important for a person to have a healthy and nutritious diet, especially in later life.” (T 8, 61 years old)*

### Conceptual Contributions and Policy Implication

Although the difference in possession of socio-economic resources is an incontestable factor influencing how the two occupational groups adjust to

their later life, this research clearly shows that socio-economic factor is not the sole intervening variable in affecting how people live their lives in the later years.

The close relationship between age identity and adjustment pattern in later life offers valuable insight into how human behaviours are shaped and subsequently how to alter one's behaviours towards well-being. The study shows that older persons may not take up assimilative and accommodation strategies to cope with age-related changes in a unidirectional approach as suggested previously. Individual's perceived resources available, reflected in one's age identity, may play a role in causing the variation. The result may thus help providing explanation on why different people respond differently towards ageing. The richness and diversity of ageing and ageing experiences may supplement existing information about how different older persons can achieve a better way of life. Older persons are faced with numerous physical, psychological and social changes that may challenge their sense of self. However, they may undertake different adjustment strategies that may increase their capacity to live happily. The research clearly showed that how people adjusted to their retirement life largely depended on how they perceived themselves in terms of age. Therefore, policy-makers should take note, if possible, of individual's age identity in assisting the older population to strive for better preparation for and adjustment after retirement.

This research represents a start to researching the role of age identity on later life adjustment in a Chinese society. It is hard to judge whether the possession of a certain age identity or adjustment pattern can contribute to a

more successful later life (i.e. successful or active ageing). Having an older age identity may increase one's self acceptance as they are freed from role responsibilities. The realization of physical ageing may also give people a new appreciation for the interrelationship between the body and the mind. The acknowledgement of being old, especially physical ageing, may help people identifying the challenges and possibilities in the advanced years. However, it may, simultaneously, hinder the pursuit of health-related goals in later life due to the perception about the inability to control one's health and the internalization of negative ageing stereotypes.

Holding a younger age identity may make one more aware and anxious about social evaluation. To define old age as youthful may, suggested by some gerontologists, as a subtle way of ageism. To exclude oneself from the category of "old" reflects that people do not see old age as a future extension of themselves but rather as a detachment from themselves. On the other hand, holding a younger age identity may encourage social involvement, which is defined as important indicator of successful ageing by some Western professionals and researchers. Nevertheless, those with East Asian cultures may have different successful ageing concepts from the West. A research study in Taiwan, for example, shows that older persons have high ratings in physical health and independence and family and social support as well in the successful ageing conception. The concept of engagement with life, including able to learn something new, participate in social groups, is comparatively a less important item for an ideal and successful later life (Hui, 2007). Successful achievement of inter-generational filial piety may also be more important in Chinese societies (Chan & Lim, 2004). Therefore, cultural

differences have to be taken into account in the measurement of successful ageing. Future work can focus more on how age identity and different adjustment patterns correlate with successful ageing among people with East Asian cultures.

Last but not least, the research provides a realistic reflection of the current age identity conditions of the Hong Kong older population in a large modern Chinese society. By examining the age identity among the two occupational groups, it is obvious that the commonly held view of old age becomes inaccurate and no longer corresponds to the real individual experience of getting old. In fact, the vast majority of the culturally-defined older persons are ageing more healthily and socio-economically better-off. The majority of individuals are also able to draw on social support, change their identities, maintain some of their key roles and so on to adjust to their later life. Policy makers and the public should not adopt the stereotypical way in looking at old age. Although older persons may exhibit certain signs of decline, society should also consider the pleasures and achievement of ageing. Many older persons nowadays, especially those who were previously in professional groups, are competent and willing to contribute to the society by exercising their expertise after their retirement.

As discussed previously, it seems that continuity (as emphasized in Continuity Theory), can help one to experience ageing at a relatively gentler gradient. However, many respondents in the survey stated that their job constrained them in developing hobbies and involving themselves in other social activities. Therefore, retirement may exert great impact on the busy

working groups who focused their lifestyle around employment since they might not find continuity in community involvement and leisure pursuits. Many people who are approaching retirement age nowadays also intend to opt for bridging employment rather than withdrawing completely from the workforce. In this regard, work continuity may serve as a platform for helping them to adapt to changes associated with retirement and ageing.

Based on the WHO *Active Ageing policy framework* (2002), the balance between personal responsibility (self-care), age-friendly environments and intergenerational solidarity are to be encouraged. Supportive environments are to be provided to facilitate people's health pursuits; yet, individuals and families should also take the initiative to pursue health practices at all stages in life. Therefore, in the light of the study and the concept of Active Ageing, people should prepare better for their retirement. For instance, they can start developing enjoyable hobbies and undertaking more health-enhancing behaviours in their earlier years, or at least before their retirement. Companies can also assist employees in retirement adjustment by providing more flexible employment. They can offer internal transfer opportunities to posts that have lighter workload in one or two years approaching the employee's retirement. Employees can thus have more time to identify the challenges and opportunities in their retirement life.

Retirees, especially professionals and skilled workers, are valuable resources to society. One of the ways in retaining the expertise and skills of the retirees is to open up reemployment opportunities for retirees. Currently, retired teachers can apply to be supply teachers in government and aided

school through the Education and Manpower Bureau website. It is suggested that such practice can further develop and extend to other professions. Apart from paid employment, matching volunteer works with retiree's occupation can also make the best use of the skills of the retirees. By engaging in relevant practices from those before retirement, retirees may be able to build up a more positive sense of self. The appropriate utilization of the retirees' skill would also add tremendous value to the whole of society.

#### Limitations to the research and Recommendations for further Study

Considering the small size of my sample, this study should be taken only as a preliminary one. The present research identifies three kinds of age identities and three different adjustment patterns among retired secondary school teachers and manual workers. However, it does not tell us which age identity and adjustment pattern would be the most common among retirees in Hong Kong. Nor does it enable us to say definitively why or if one kind of age identity is "better". There is also not sufficient evidence to show gender differences in age identity and adjustment patterns, mainly because of the sample constraint in that most retired manual workers are male. Further studies, by means of larger scale survey design in particular, would enable one to draw more general conclusions. Future work on age identity and retirement patterns among other occupational groups are also suggested to better assess gender differences in age perception and adjustment strategies. Further research efforts focusing on additional job types could also help in identifying more intervening variables affecting age identity and adjustment patterns. However, the results, nevertheless, highlight the importance of examining age identity and the formation of different adjustment patterns in later life.

Research on age identity may offer some valuable data to devise new strategies in order to maintain social involvement and motivation for a better retirement life. Providing a basis for future work, it is suggested that future research could focus on investigating the reasons for bridge employment and how bridge employment relates to adjustment.

## **Appendix I**

### **Interview guide**

1. What would you say about people of your age? How would you describe people in their 60s?
  - Do you feel yourself old? Why?
  - Do you think you look young or old when compared with people of your age? Why?
  - In which aspects would you compare yourself with people of your age?
  - Do you think you are acting your age?
2. What attributes do you think people have about older persons in Hong Kong?
  - What does the word “old” mean to you?
  - What does retirement mean to you?
3. What are the differences, if any, between you and others of your age?
4. How do your physical, psychological and socio-economic conditions change since you have retired? What are those changes?
5. How did you get used to the changes?
  - How do you take care of your health including your appearance since you have retired? Why?
  - How do you utilize your time after you have retired? Why?
  - How does your activity pattern change since you have retired? Why?
  - How does your social life changed since you have retired? Why?
  - How does your consumption pattern and financial management change since you have retired? Why?
6. What would you say about your life before retirement? How would you describe it?
  - Can you tell me something about you job such as job content, working hour and anything your job help with your retirement?
  - What was your experience in getting along with your students?
  - Have you planned for your later life before your retirement?
  - Have you planned for those changes that you have mentioned previously before your retirement?
  - Why, if any, are some of the plans that are not being actualized?
7. What do you think about the social values and expectations on people of your age?
8. How do they influence your perception of age?
9. How would you say about your social and family relations?
10. How do they influence your perception of age and adjustment pattern?

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Appendix II

Respondent	Age	Gender	Marial status	Duration of retirement	no. of children	Age identity	Adjustment pattern	
								* see Ch. 5 pp. 88-99 for explanations
T	1	Female	Married	1 year	1	Younger than actual age	Assimilative pattern	(pp. 91, 93, 96)
	2	Female	Married	10 years	2	Younger than actual age	Assimilative pattern	
	3	Male	Single	26 months	N/A	Confirm identity to that of older persons'	Mixed pattern	(pp. 90)
	4	Female	Married	4 years	0	Younger than actual age	Assimilative pattern	(pp. 91, 94, 95, 96)
	5	Female	Single	5 years	N/A	Confirm identity to that of older persons'	Mixed pattern	(pp. 90, 97)
	6	Male	Married	10 years	3	Younger than actual age	Assimilative pattern	
	7	Male	Married	3 years	2	Younger than actual age	Assimilative pattern	(pp. 93, 99)
	8	Female	Married	18 months	2	Younger than actual age	Assimilative pattern	(pp. 91, 95)
	9	Female	Widowed	2 years	2	Younger than actual age	Mixed pattern	(pp. 93, 97)
	10	Male	Married	1 year	2	Confirm identity to that of older persons'	Assimilative pattern	(pp. 89)
	11	Male	Married	8 years	1	Confirm identity to that of older persons'	Mixed pattern	
	12	Male	Married	3 years	2	Younger than actual age	Assimilative pattern	(pp. 89)
MW	1	Male	Married	1 year	2	Confirm identity to that of older persons'	Accommodative pattern	(pp. 92, 95)
	2	Male	Married	1 year	5	Older than actual age	Accommodative pattern	(pp. 92, 94)
	3	Male	Married	2 years	3	Confirm identity to that of older persons'	Accommodative pattern	(pp. 92, 94)
	4	Male	Widowed	10 years	0	Older than actual age	Accommodative pattern	(pp. 95)
	5	Male	Married	1 year	2	Younger than actual age	Assimilative pattern	(pp. 98)
	6	Male	Married	5 years	0	Confirm identity to that of older persons'	Accommodative pattern	(pp. 97)
	7	Male	Married	4 years	4	Confirm identity to that of older persons'	Mixed pattern	
	8	Male	Married	2 years	3	Confirm identity to that of older persons'	Accommodative pattern	(pp. 90, 97)
	9	Male	Married	8 years	3	Confirm identity to that of older persons'	Mixed pattern	(pp. 94, 98)
	10	Female	Married	8 years	3	Confirm identity to that of older persons'	Accommodative pattern	(pp. 90, 92, 97)