

### Introduction

The transition to retirement marks a monumental occasion in the lives of couples. Past research has focused on easing the stresses associated with this life event. Some suggestions include:

- Making concrete plans about activities that can be done together, and setting aside time to continue in individual pursuits.
- Synchronizing the timing of retirement.
- Communicating concerns and fears to foster greater support

However, few studies to date have focused on identifying and assigning valence to the cause of these stressors and determining the extent to which partner discussion can facilitate a resolution. Thus, three important questions remain:

- 1) What exactly are individuals thinking about as they transition to retirement and to what degree are each of these issues considered?
- 2) Which issues were discussed and resolved by couples during this transition?
- 3) Which of these issues remain problematic despite discussion?

The purpose of this survey was to answer these questions in an effort to inform future workshops offered by the UCB retirement center in order to best cater to the needs of present and future emeriti.

### Methods

149 UCB emeriti (104 males) completed a voluntary survey which combined quantitative and qualitative data. They were asked to rate 36 different issues on a scale from one to five for each of the following questions:

- a) how much they thought about this issue before retirement
- b) how much they discussed this issue with their partner
- c) how much this is still an issue today.

Each of the 36 issues fell into one of eight categories. The complete list of categories can be found in Table 1. The qualitative portion of the survey consisted of three open ended questions regarding the initial transition to retirement, unexpected challenges that were faced, and how retirement is going now.

**Table 1:** Categories of Issues Presented in the Survey.

1) Finding Fulfilling Activities	5) Positive Changes
2) Change in Primary Residence	6) Income and Professional Identity
3) Reallocation of Tasks/Time Management	7) Social Relationships
4) Health Issues	8) Familial Expectations

### Results

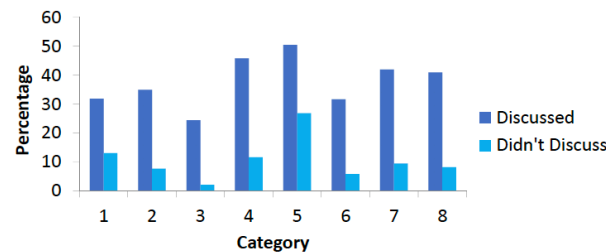
**Table 2:** Ranking of Issue Categories by Thought About Before Retirement.

Issue	Mean
Finding Fulfilling Activities	3.88 (1.86)
Positive Changes	3.48 (1.68)
Income and Professional Identity	3.21 (1.91)
Familial Expectations	2.96 (1.76)
Social Relationships	2.92 (1.79)
Health Issues	2.53 (1.57)
Change in Primary Residence	2.41 (1.87)
Reallocation of Tasks/Time Management	2.08 (1.41)

**Table 3:** Ranking of Issue Categories by Discussed with Partner.

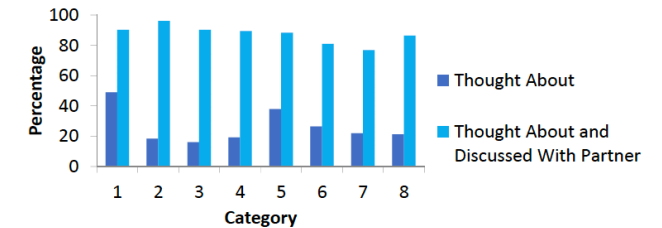
Issue	Mean
Finding Fulfilling Activities	3.78 (1.77)
Positive Changes	3.35 (1.67)
Familial Expectations	2.93 (1.68)
Income and Professional Identity	2.87 (1.76)
Change in Primary Residence	2.59 (1.87)
Social Relationships	2.58 (1.62)
Health Issues	2.51 (1.58)
Reallocation of Tasks/Time Management	2.16 (1.57)

To create Figure 1, “discussed with partner” and “still an issue” were dichotomized. The cut-off point for “yes” was a ranking of three or above. For a category legend, refer to the category numbers in Table 1.



**Figure 1:** Percentage of participants who believe that each category was still an issue as a function of whether or not it was discussed with a partner

To create Figure 2, “thought about before retirement” was dichotomized using the same method Figure 1. For a category legend, refer to the category numbers in Table 1.



**Figure 2:** Percentage of participants who thought about the issue before retirement (dark blue) and the percentage who both thought about it before retirement and discussed it with their partner (light blue)

### Qualitative Trends

The qualitative analyses revealed the following four key themes:

- 1) **Positive changes:** Many reflected on significantly decreased stress levels and having more time for hobbies and individual pursuits.
- 2) **Sustained Academic Life:** Few participants had left academia completely. Many were either lecturing at other universities, or continuing their research pursuits on the side.
- 3) **Challenges for Relationships:** Particularly in relation to compromising on important issues (ex: how much to continue investing) and adjusting to having both partners at home all the time.
- 4) **Loss of Professional Identity:** Multiple retirees reported feeling “thrown out” by their department.

### Discussion and Future Directions

Though it was hypothesized that discussion would lead to a lower percentage of people reporting the category as still an issue, the opposite was found (Fig 1). One plausible explanation is that the category was never an issue, and therefore did not need to be discussed. It was also found that a shockingly low percentage of people are thinking about these issues before retirement (Fig 2). This may be indicative of the fact that the issues considered before retirement are highly individualized, making general trends difficult to highlight. Of the categories, social relationships, health issues, and reallocation of tasks/time management appear to be particularly difficult to discuss with a partner (Table 2, Fig 2).

Overall, more needs to be done to inform retirees of potential issues that they may face and how to deal with them. Furthermore, future research should investigate the trends presented here as a function of time of retirement.

### Contact

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### References

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