

**Experiences of Men in Regional Australia who Retire Early:  
A Life Course Study**

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### **Statement of Originality:**

The thesis contains no material which has been accepted for the award of any other degree or diploma in any university or other tertiary institution and, to the best of my knowledge and belief, contains no material previously published or written by another person, except where due reference has been made in the text. I give consent to the final version of my thesis being made available worldwide when deposited in the University's Digital Repository\*\*, subject to the provisions of the Copyright Act 1968.

Signed \_\_\_\_\_

Date \_\_\_\_\_

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## **Table of Contents**

|                                                               |     |
|---------------------------------------------------------------|-----|
| Abstract                                                      | vii |
| Personal Statement                                            | ix  |
| Chapter 1. Introduction and Research Aims                     | 1   |
| Chapter 2. Literature Review                                  | 6   |
| Chapter 3. Methodology                                        | 35  |
| Chapter 4. Setting the Scene                                  | 53  |
| Chapter 5. Men and Transitions                                | 66  |
| Chapter 6. The Early Retirement Decision                      | 99  |
| Chapter 7. The Lived Experience of Retirement                 | 126 |
| Chapter 8. The Health Experiences of Early Retired Men        | 145 |
| Chapter 9. The Mental Health Experiences of Early Retired Men | 169 |
| Chapter 10. Synthesis                                         | 200 |
| Chapter 11. Conclusion                                        | 232 |
| List of References                                            | 241 |
| Appendices                                                    | 255 |

## List of Tables

|           |                                                                     |     |
|-----------|---------------------------------------------------------------------|-----|
| Table 2.1 | Australian Subjective Wellbeing by Age (2015)                       | 28  |
| Table 2.2 | Reasons Men Leave Work (2013)                                       | 29  |
| Table 4.1 | The Fathers of Men in the Study                                     | 60  |
| Table 4.2 | Comparison between Occupations of Men and their Fathers             | 63  |
| Table 5.1 | Categories of Decision Explanation                                  | 92  |
| Table 5.2 | Participants Use of Decision Explanation Categories                 | 93  |
| Table 5.3 | Number of Instances of Explanation Category Used per Decision Topic | 96  |
| Table 8.1 | Distribution of SF36 Sub-scale Scores                               | 147 |
| Table 8.2 | SF36 Scores and Interview Data by Individual                        | 148 |
| Table 8.3 | The Health of Men and the Health of their Fathers                   | 161 |
| Table 9.1 | Individual Mental Health Histories as Constructed from Interview    | 182 |

## List of Figures

|             |                                                                                       |     |
|-------------|---------------------------------------------------------------------------------------|-----|
| Figure 3.1  | Baseline data collected in the Hunter Community Study                                 | 43  |
| Figure 4.1  | Map of Hunter Region, New South Wales                                                 | 53  |
| Figure 5.1  | Other Focused versus Self-determination Explanations by Individual                    | 94  |
| Figure 5.2  | Adaptive versus Adversarial Explanations by Individual                                | 94  |
| Figure 5.3  | Resource versus Health Explanations by Individual                                     | 95  |
| Figure 9.1  | Kessler K10 Scores by Individual at Enrolment in the HCS and at Follow-up             | 171 |
| Figure 9.2  | CES Depression Scores by Individual at Enrolment in the HCS and at Follow-up          | 173 |
| Figure 9.3. | Variance in CESD and K10 Scores between Initial and Follow-up Testing (by Individual) | 173 |

## **List of Abbreviations**

|       |                                                               |
|-------|---------------------------------------------------------------|
| ABS   | Australian Bureau of Statistics                               |
| AIHW  | Australian Institute of Health and Welfare                    |
| AQoL  | Australian Quality of Life Index                              |
| CES-D | Center for Epidemiologic Studies Depression Scale             |
| DSS   | Duke Social Support Scale                                     |
| HCS   | Hunter Community Study                                        |
| K10   | Kessler 10 Item Psychological Distress Scale                  |
| NSW   | New South Wales                                               |
| SF36  | Medical Outcomes Study (MOS) 36-Item Short Form Health Survey |
| WHO   | World Health Organization                                     |

## **Abstract**

This study into the experiences of early-retired men in the regional Australia uses a qualitative life course approach to better understand the intersections of masculinity, wellbeing and ageing. The study takes place in the context of many deficit-focused notions of older men in popular culture, and some evidence in the research literature for poorer (particularly mental health) outcomes among early-retired men. Four specific research questions were articulated around men's experience of retirement, their pre-retirement experiences, their coping strategies and their sense of wellbeing.

Data for the study were drawn from interviews with, and responses to, questionnaires from 25 men who had previously enrolled in the Hunter Community Study (HCS). The semi-structured interview was formulated around life course interests as antecedents, linked lives, cohort characteristics and the interplay between individual and societal development. In the light of the literature, particular attention was also paid to mental health experiences in the interview. Responses given by the men in the HCS on general health, mental health, psychological distress, social support and work/life history were also available to the study.

Analysis of the data showed that men generally expressed positive sentiments towards their experience of retirement and that retirement was beneficial for their wellbeing. Retirement appears to function as a time in which men find resolution of many pre-retirement issues and experiences. Four qualities were identified from the data that contribute to men's retirement wellbeing. First, financial security was almost unanimously named as a component of retirement wellbeing. Second, alongside finances, the availability of discretionary time allowed men freedom to set their own direction and pace in retirement. The third quality of wellbeing was that they pursued comfort of various kinds, including financial sufficiency, a more relaxed lifestyle and improved close relationships. Pursuit captures the fact that this was a conscious and active direction they chose in retirement. Finally, most men committed themselves to serving others in their retirement through both



formal and informal arrangements. These caring activities included grand-parenting, caring for spouses or ageing parents, volunteering in various community organisations, and neighbourliness of various kinds.

## **Personal Statement – Richard Morrison**

I first approached Julie Byles about the possibility of doing some research in 2006. I had met Julie through activities of the university and the Australian Association of Gerontology. At the time I was project officer for “The Wellbeing of Older Men Project” that was funded by the National Suicide Prevention Strategy and conducted here in the Hunter. The Wellbeing Project ran from late 2002 to 2005 and was a consortium comprised of the University of Newcastle, Hunter-New England Health and Uniting Care (Ageing).

The Wellbeing Project was focused around understanding and intervening in processes that may contribute to the high rate of late life suicide in men. The project was built around social determinants of health perspectives, community development, early intervention and prevention principles and utilised a participatory action research paradigm. The Wellbeing Project was immensely satisfying to me, and a number of the sustainable initiatives developed during those three years still continue today.

One of the great joys of the Wellbeing Project for me was the opportunity to be a part of the conversations of older men. I found many of these conversations (both formal and informal) to be powerful and positive, even life giving (in the context of suicide prevention, I use that expression deliberately). As part of the Project I conducted many focus groups and I use one comment from one of those focus groups illustrates this point for me. One of the men said, ‘Nobody told us retirement was going to be like this!’

In the action research paradigm a comment like that is like a nugget of gold. There are rich hints here pointing to an experience of retirement (at least for this man) that may not have been what he wanted. There is also an element of surprise, that disappointed expectations were not anticipated, and perhaps self-recrimination that the individual should have been better prepared or more aware. All of this is not just held internally but is externalised into the complaint, ‘Nobody told us...’ At that point of externalisation, the social dimensions of older men’s experience become evident. It is possible for the conversation to take up the language of victimisation and build a litany of grievances including, the poor way older people are treated, the expendable workforce, etc.

But in this case, what grew out of the complaint was the seed of an idea that is still bearing fruit in the Hunter today. ‘Why couldn’t people tell intending retirees what retirement is like?’ The Wellbeing Project subsequently assembled a team of retired volunteers who would be willing to talk to intending retirees about the experience of retirement. An interactive workshop program was developed (‘Making Retirement Work’), the volunteers were trained in presenting the workshop, employers were approached for opportunities to enrich the workforce exit experience of their employees, and a volunteer committee continues to oversee the deployment and development of the workshops.

In developing the content of the workshops, I conducted further focus groups with special attention on retirement experiences. Some of these workshops were gender specific (some for men and others for women) and some were mixed groups of men and women together. Flowing out of this material, three main themes were developed for the Making Retirement Work presentations; maintaining health, managing changing relationships and finding meaningful activity.

In large part, my choice of topic for my research is an outflow of my involvement in the Wellbeing Project and the Making Retirement Work presentations in particular.

I am however conscious of a number of other more personal factors which are important in my coming to this research.

My wife and I moved to Newcastle in 1982 (I was newly graduated and newly married) to become the pastor of the Baptist Church in Hamilton. The pastor (and sole employee) of a small congregation has a very diverse range of tasks in their job description. These tasks range from highly formal and socially significant roles of celebrating weddings and funerals, through the various teaching, leadership and management roles involved with a particular congregation, to the more mundane housekeeping/handyman activities involved in maintaining property and programs of the church. The expectation is that the pastor will be able to move from one role to another smoothly, rapidly and often without prior notice or much preparation. The image I use to convey this is that of the General Practitioner who never knows what the next person who walks through the door may bring with them, who has to be broadly competent (without necessarily being an expert in anything) and capable of high volume workloads.

After 20 years pastoring the church in Hamilton I resigned my role as pastor (while still maintaining my membership at that church). Among the many factors that brought me to that decision was the desire to 'play on a wider stage' (than just that small congregation) and a desire to 'play to my strengths'. I identified my strengths as including project work (where there is a high degree of focus and a limited timeframe to deliver clearly defined outcomes), and working with individuals. I built on this latter strength by completed my master's degree in counselling (UNE) and establishing my part-time private practice 'Relational Coaching'.

The challenge to take on a project like a PhD candidature does play to my strengths in project work but it also represents my desire to test myself in something other than a generalist role. It requires of me sustained, focused efforts that are quite unlike either of the roles which were so satisfying to me in the church and in the Wellbeing Project. It poses the question, can I become the expert, can I assemble and order a specialist body of knowledge (not for general and populist consumption, but in a disciplined and rigorous manner)? To put that a different way, it asks the question, 'Can I write?'

Growing up I struggled through school with very poor spelling. In secondary school I self-consciously chose science oriented subjects because I was acutely

aware of the impact my poor spelling and written skills would have on my performance in the humanities where such skills are traditionally privileged. Yet I have strong interests in the humanities, I listen, read and observe well, I am fascinated by human relations and more broadly by connections in general. I love seeing the way things fit, how things came to be so, and other possible ways things could be. To date however, I have not found expression for those things in the discipline of writing. I can teach and present well, I am a competent public speaker and group facilitator, and I can turn a concept into a project plan and implement it – but the challenge for me is whether I can write.

Another dimension to my interest in this research is the fun I find in working with a text. While I was pastor of Hamilton Baptist I introduced an inductive method of bible study which had a significant effect on the congregation. It was essentially a framework for a close reading of the text. My use of it in that context helped generate a sense of excitement and discovery as prescribed ways of viewing a text are re-evaluated from within the space created between the reader and that text. The analysis of interview transcripts in the research context revive and extended those same skills and renewed that joy of discovery and connection.

In a similar way, my therapeutic work with clients in ‘Relational Coaching’ is also a source of great personal satisfaction to me. I count it a very great privilege that people trust me with their lives at times of distress, and that they open their deepest selves to me. That they find my reflective listening, careful questioning and analytical skills helpful and transformative is immensely gratifying, although I know my boundaries around the difference between a therapeutic interview and a research interview.

Another set of personal dimensions around my research is my identity as a man and particularly as a 57 year old man. My experience of life has been profoundly shaped both for better and for worse through my masculinity. I grew up in rural New South Wales in an environment which allowed and encouraged expression of hegemonic masculinity. My last three years of schooling were in Sydney in a boys school which also doubtless played its part in shaping my gender identity.

My experience of church provided diverse gendered experiences both while I was a pastor and prior to that. A church youth group provided a significant counterpoint to my gender segregated school and I saw many models of caring Christian men and fathers in that formative period of my life. As a theological student I wrestled with the debate about gender roles and felt the weight of the sociological and theological forces at work in that context. I continued to feel those forces in various congregational situations throughout my time as pastor of the church. During that time I developed and implemented a structure for congregational governance by which it was possible for women in the church to be involved in leadership. At the same time I also developed a number of initiatives for men in the church that would acknowledge the distinctive issues faced by men.

Being an older man was modelled for me through my childhood in my two grandfathers: On my father’s side I never knew Poppa to work, he had been an

engineer in a sugar mill but retired early because of smoking related ill-health. On my mother's side Granddad had been a watchmaker before being blinded in World War I. He was subsequently rehabilitated, married my grandmother and returned to Australia where they raised four children. In both cases I have warm memories of these men whose (later) lives were marred by significant disability.

Later in my life, my father experienced depression after retirement from his career as a teacher. In a manner typical of him, and perhaps many others of his generation, this information was communicated to me by my mother. A psychodynamic interpretation of my interest in giving voice to the experiences of men in retirement may well see this as fertile explanatory material.

Yet my interest in pursuing this research is not entirely personal. I would like to think that I have the experience and skills necessary to make a new contribution to this field of knowledge. I have seen practical benefits accruing from my earlier work in the Wellbeing Project and in the Making Retirement Work presentations. Gender issues are also a significant focus in my Relational Coaching. I deliberately chose the coaching metaphor to promote and structure my practice for gendered reasons and I have a higher proportion of men as clients than many counselling practices.

I look forward to how this research may bring greater understanding of, and better outcomes for, retired men and the worlds they inhabit.

**Richard Morrison**

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