Narratives and Experience in an Occupational Transition: A Longitudinal Study of the Retirement Process

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This article presents the results from a longitudinal study of retirement. Data were collected through interviews with 12 Swedish participants over a 7-year period, beginning when they were still working and continuing through their early years of retirement. The findings show that the participants' narrative anticipations of retirement interacted with the events of ongoing life. Sometimes these events influenced the outcomes of the retirement process unpredictably. Consequently, retirement was often full of surprises and temporary periods of turbulence. Although some participants managed a transition into a satisfying pattern of retirement, others found it an ongoing process of frustration and dissatisfaction. Evidence from this longitudinal study indicates that a special type of occupation—engaging occupation with six constituents—was an important determinant of retirement satisfaction. This key finding is discussed with regard to its implications for theory development as well as its practical implications related to the importance of differentiating occupations and attending to the interaction between internal motivation and external expectations in the occupational pattern.


This article presents findings from a longitudinal investigation of retirement that examined how an occupational transition unfolds over time (Jonsson, Borell, & Sadlo, 2000; Jonsson, Josephsson, & Kielhofner, 2000; Jonsson, Kielhofner, & Borell, 1997). Retirement is one of the prominent life transitions affecting a person's occupational pattern (Jonsson et al., 1997; Kendall, 1996; Rudman, Cook, & Polatajko, 1997). Although retirement is a unique life event, examining it can potentially reveal more universal features of occupational transitions throughout life.

Although the psychological and cultural aspects of retirement have received substantial attention in the literature, the occupational aspects of retirement have rarely been highlighted (Jonsson, 1993; Jonsson & Andersson, 1999; Kendall, 1996; Rudman et al., 1997). Furthermore, few studies have investigated retirement longitudinally (Long, 1987; Luborsky, 1985; Richardson & Kilty, 1991; Savishinsky, 1995; Tikkanen & Kuusinen, 1992). Except for those that are part of our longitudinal project, no longitudinal studies of retirement have been published in the occupational therapy literature.

It has been argued that people understand their everyday occupations through narratives (Kielhofner, Borell, Burke, Helfrich, & Nygård, 1995; Mattingly, 1998).
Narrative understanding of life events involves configuring selected elements from the past and present with future expected elements into meaningful structures or plots (Bruner, 1986; Polkinghorne, 1988; Ricoeur, 1984). These plots offer interpretations of life; they also guide perceptions and choices.

Narrative theory is a useful theoretical structure for understanding occupational life, especially those processes related to motivation and meaning. A growing number of studies have explored how occupation and narrative are linked (Clark, 1993; Helfrich, Kielhofner, & Mattingly, 1994; Mallinson, Kielhofner, & Mattingly, 1996) and how therapy interfaces with narrative (Barrett, Beer, & Kielhofner, 1999; Helfrich & Kielhofner, 1994; Kielhofner & Barrett, 1998; Mattingly 1998; Polkinghorne, 1996). However, none has studied how narratives unfold over a significant period of time and how they interact with ongoing life.

In this study, we followed a group of Swedish participants for 7 years from when they were working through their retirement until they were established as retirees. In the first report of this study (Jonsson et al., 1997), we described how 32 workers 63 to 64 years of age narrated their anticipated retirement. This investigation revealed two distinctive elements of the narrative. First, one's narrative is a kind of “state-of-the-art” proclamation about one's occupational life. Because work was the occupation about to change, the participants’ narratives were anchored in different meanings that work and working life had for them. For participants whose narratives emphasized the positive experiences of work, such as social contact or effectively using their skills and knowledge, they struggled with the problem of how to maintain such experiences during retirement. Some planned to expand involvement in things they already did, whereas others planned to take up new occupations in retirement. Other participants dreaded the impending losses of valued aspects of work and had no real plans for retirement. Some expected a release from negative experiences at work, such as a rigid schedule or boring tasks. Others saw the end of work as providing time for more valued occupations, such as spending time with grandchildren. Visions of future life always hinged on how work cessation would affect future experience. In the end, anticipation of retirement hung in the balance between what positive values of work would be lost and what negative values of work would be shed.

The second important element of the participants’ narratives was that each revealed an anticipated direction in which life would proceed. With current working life as the point of departure, all the participants’ narratives considered the basic direction (better or worse) of their future as retirees. Although most allowed for both positive and negative outcomes of retiring, they nonetheless emplotted their narratives within a general characterization of the direction of their future lives as retirees. We found three basic directions in the narratives, a finding that is consistent with the concept of narrative slopes outlined by Gergen and Gergen (1983, 1988). Progressive slopes showed a looking forward to retirement because life was going to get better. A stable slope showed an expectation that life would be about as good or as bad as before. A regressive slope showed an anticipation of life as getting worse and one centered around losses that could not be replaced in retired life.

In the second phase of the study (Jonsson et al., 2000), 29 of the same participants were interviewed again at 65 to 66 years of age when most of them had retired. In this study, the participants were still adjusting to their newly retired lives. We compared their current retirement narratives with those told in the first study. Interestingly, the lives of about one third of the participants went in different directions than they had anticipated. One important reason for these unexpected directions was unanticipated experiences, as some occupations took on a different meaning when they became part of a new life pattern. Some narratives were reshaped by personal action and external events. The conclusion we made was that although narratives predispose persons toward certain actions, they also interweave with and incorporate changed directions as a result of ongoing life events and experiences.

The third phase of the study is presented here. Participants were interviewed at 70 to 71 years of age, when all were retired. The majority have been retired for about half a decade. The aim of this study was to explore and understand retirement as an occupational transition over time, beginning during the working years and extending into life as an established retiree.

Method
Participants

Twelve participants were chosen for this phase of the study from the initial 32 who were randomly chosen from all persons in a socioeconomically diverse region of Stockholm, Sweden. Twelve were selected to allow for more in-depth data collection and analysis and to represent a variety of demographic characteristics, pathways to full-time retirement, and directions in earlier retirement narratives. Table 1 presents basic descriptions of the participants with regard to gender, marital status, type of work, and status as a worker or retiree.

Data Collection

The data for this analysis included the first two sets of interviews conducted with these participants during the previous two phases of the study (i.e., at 63–64 and 65–66 years of age) and a third interview conducted at the current phase at 70 to 71 years of age. Thus, 36 interviews conducted over a 7-year period, taped and transcribed verbatim, were used. Each interview lasted between 50 min and
Most had settled into the experience of retirement. Notably, these retirees sustained, revised, realized, or avoided their anticipated narratives over time through the events, behaviors, and experiences of unfolding retirement, all of which interacted with each participant’s volitional narrative. Simply put, life inserted itself into the participants’ narratives and, to the extent that these folks were trying to pursue a given life story, they inserted their narratives into their lives.

The relationship between one’s life story and life’s reality is a complex one. We have identified three themes that illustrate some important aspects of this complex relationship: (a) transition as interaction between the narrative and the living world, (b) surprising experiences, and (c) engaging occupation as an important feature in narrative configuration.

Transition as Interaction Between the Narrative and the Living World

In earlier analyses from this longitudinal study, we argued that prospective narratives represented the participants’ “volitional readiness” to interact in particular ways with ongoing life events and circumstances (Jonsson et al. 1997; Jonsson et al., 2000). That is, prospective narratives motivated occupation and influenced the participants’ actions; a participant was acting to realize or, in some cases, avoid a particular plot. However, this plot was enacted within an unstable landscape of life events that could change rapidly and radically as each participant interacted with the environment.

For example, Ove anticipated retirement as leading to a worse life. He arranged an unusual agreement between his employer and union that allowed him to continue to work for 2 years beyond ordinary retirement age. Thus, he intervened to change the plot of his narrative, changing his regressive narrative anticipating retirement to a stable narrative by avoiding retirement.

Sometimes change was initiated outside the participant’s control, and the participant more or less took advantage of its occurrence. For example, Brit was looking forward to retirement as a release from her basically negative

| Table 1 |
|---|---|---|---|---|
| Participant Demographics |
| Gender | Marital Status | Type of Work | Status as Worker or Retiree |
| Male | M | Management | At 63–64 | At 65–66 | At 70–71 |
| Male | UM | Blue-collar | Consults 50% | Consults 20% | Retired but |
| Female | UM | Lower white-collar | Works 100% | Works 20% | Retired but |
| Male | M | White-collar | Works 100% | Works 50% | Full-time retired |
| Female | M | Management | Works 100% | Works 50% | Full-time retired |
| Male | UM | Blue-collar | Works 50% | Works 50% | Full-time retired |
| Male | M | Blue-collar | Works 100% | Works 100% | Full-time retired |
| Female | M | Lower white-collar | Works 100% | Works 100% | Full-time retired |
| Male | M | Blue-collar | Works 80% | Works 80% | Full-time retired |
| Female | UM | Lower white-collar | Works 100% | Works 50% | Full-time retired |
| Female | UM | White-collar | Works 80% | Works 50% | Full-time retired |

Note. M = married (all participants living with a partner were married); UM = living as single.

120 min and was situated at the participant’s chosen locale (usually in the home). All interviews were semistructured (Kvale, 1996), with open-ended questions aiming to capture the participants’ own stories. The first interview asked participants to anticipate how life would be as a retiree. The second focused on how retirement actually turned out. The third asked participants to tell about their present situation and to review the whole process, looking back to the time when they were still working. All three interviews were constructed to encourage narrative responses (Reissman, 1993). In the second and third interviews, individualized questions, tailored to the participants’ earlier narratives, were used.

Data Analysis

We used a combination of narrative analyses (Gergen & Gergen, 1983, 1988; Reissman, 1993) and the logic of comparative qualitative analysis as outlined by Bogdan and Bilken (1992) to analyze the data. In the narrative analysis, we looked for a narrative discourse with an overall directionality that contained one or several plots. The comparative analysis contrasted the similarities and differences in narratives both within each participant over time and between participants. We did the analysis in three steps. In Step 1, we examined the three narratives of each participant in terms of their directions over time. We looked at what type of relationship the prospective narrative had to the subsequent two narratives, and we looked for similarities and differences in the narratives each participant told, first as new retiree and later as a more established retiree. In Step 2, we compared individual participants, looking for similarities and differences in their narratives as analyzed in Step 1. In Step 3, we identified a series of thematic categories that shed light on how the participants’ narratives unfolded over time and what factors accounted for differences among them. To maintain trustworthiness, the analysis was peer reviewed by senior researchers familiar with qualitative analysis.

Results

At the time of the third interview, all participants had been retired for some time and viewed themselves as retirees. Most had settled into the experience of retirement. Notably, these retirees sustained, revised, realized, or avoided their anticipated narratives over time through the events, behaviors, and experiences of unfolding retirement, all of which interacted with each participant's volitional narrative. Simply put, life inserted itself into the participants' narratives and, to the extent that these folks were trying to pursue a given life story, they inserted their narratives into their lives.

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work experience. Some time before her retirement, she was offered new and challenging tasks that proved to be a minor, but positive part of her work. Britt accepted these new tasks as something with which she would end her working life at age 65. Because of the positive experiences of challenging work tasks combined with a need for her services she continued to work about half time until she was 70, something that in her prospective narrative she could not imagine wanting to do. Her former plot had enough plasticity to permit narrative change when her experiences changed.

An interesting interaction exists between the plot and content of the narratives these two participants told over time. Ove had anticipated retirement with a regressive narrative. At his second interview, his life narrative had changed to be organized around a new plot because he had managed to avoid the negative event he expected. In her first interview, Britt had told an initial progressive narrative about getting away from her negative job in retirement. In both her second and her third interviews, she still told a progressive narrative, but the content—continuing to work—was not what she had expected.

Both of these examples can be seen as transitions involving interaction between the anticipated narrative and the events of the real world in which the latter significantly changed the former. In other narratives, interaction also took place, but the narrative unfolded largely as participants had expected. In some cases, the participants worked to make real life unfold in particular ways. Some participants with progressive narratives acted to increase engagement in a valued nonwork occupation. Others acquiesced to unfolding life events, even when they were anticipated in a regressive narrative. In all cases, the narrative and unfolding life events were inseparably linked.

Surprising Experiences
Most participants found the transition to retirement more complex and unpredictable than they had imagined in their prospective narratives. Erik said, “I have learned that it’s not that easy to become a retiree.” Participants frequently referred to “surprises” that they encountered as they embarked on retirement, that is, an experience that clashed with a certain part of their narrative plot. To be able to incorporate this experience, the narrator must change some part of the plot. Consequently, narratives must have plasticity to maintain their coherence. Surprising experiences were found in four areas related to occupation: (a) internal motivation–external demands, (b) rhythm, (c) meaning, and (d) social relationships.

The relationship between internal motivation and external demands. Many participants anticipated retirement positively because they looked forward to the absence of external demands from work. They expected that the lack of such demands would give them more control over their own time. They also anticipated that a lack of demands would make life less stressful and, thereby, preferable. “I guess retirement is the only time that you really own yourself,” is one example of a statement expressing this expectation.

Nonetheless, for several participants, the lack of external demands for performance turned out to be not so positive. Rather, they found it difficult to create satisfying life routines. Per said that in 25 years of working, he knew what ruled him and what he ruled in his working life, something he was pleased with. In his second narrative, after about 1 year of retirement, he said, “It has been more complicated to create new work routines, or I’ll rather call it life routines, than I thought.” At the time he made this statement, Per was trying to build up a consulting business and experienced difficulties because everything had to come from his own initiative. In the third interview, Per’s narrative was organized once again around being needed, but now it was in taking care of elderly relatives and helping children. Although quite different in focus compared with working, he had returned to a narrative plot in which he was ruled to a certain extent by external demands and expectations. He expressed satisfaction with this situation.

Surprisingly, the absence of external demands among these participants felt like a void in their lives. Before retirement, Erik said, “I have learned that it’s not that easy to become a retiree.” Participants frequently referred to “surprises” that they encountered as they embarked on retirement, that is, an experience that clashed with a certain part of their narrative plot. To be able to incorporate this experience, the narrator must change some part of the plot. Consequently, narratives must have plasticity to maintain their coherence. Surprising experiences were found in four areas related to occupation: (a) internal motivation–external demands, (b) rhythm, (c) meaning, and (d) social relationships.

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lived out. During the adaptation process, most participants incorporated a new rhythm into their narratives. Reflecting back, some expressed surprise that they ever had time to work. Others, however, said that they had lost a preferable rhythm in life and that the pace in retirement was too slow. This experience was surprising because they had anticipated retirement with a narrative that was organized around the advantages of freedom.

**Occupational meaning.** Participants described how the meaning of occupations that they had always performed surprisingly changed in retirement. Changes in occupational meaning mostly occurred because some of the meaning related to the total narrative, which changed when work disappeared. “It is not the same any longer” was one participant’s comment while discussing long-term occupations that he experienced differently. For example, Erik told about going to his summer cottage. Before retirement, going there allowed him to escape the demands of the workweek and to rest and relax; it was a well-earned retreat before the next period of work. But once he no longer worked, going to the cottage did not feel the same. The joy of relaxing and well-earned rest was, to his surprise, no longer present. It no longer had a relationship to another part of his life.

What this theme points out is that the meaning of occupations derives not only from the occupation itself, but from its relation to the whole plot of one’s narrative. When the plot changes, emplotting one’s experiences in the same way as before is no longer possible. The participants experienced this plot change as a period when they felt uncomfortable with their difficulty to make sense of their experiences. In time, however, the plasticity of the narrative offered new possibilities of ways to incorporate the new experiences and achieve narrative coherence.

**Social relationships.** In the area of social life, an absence of experiences influenced the retirement narrative. After retiring, some participants came to realize that their relationships with coworkers were of a specific type that could not be re-created in relationships with friends and neighbors. For example, Anna explained that her contacts with others as a retiree consisted mainly of taking walks and eating dinner with friends, often one at a time. However, social contacts at work had involved working together in groups to solve difficult problems or chatting together during coffee breaks in which there was group camaraderie. Gun also expressed that she missed the aspect of working together in a group. For these two participants, the problem was not that they lacked social involvement, but that the nature of social contact had partly changed, leaving one type of social experience out of their narratives. The participants had not been aware of this special nature of their working relationships during the time they had been employed. Most expected that they would replace contact with others at work with new interactions with their friends and acquaintances. Therefore, it came to most as a kind of “revelation” that their previous relationships at work had been quite special and could not be readily replaced.

To summarize, the theme of surprising experiences illustrates how prospective narratives often encounter a more complex reality than expected in the actual life transition. Surprising experiences can be described as those experiences, or absence of experiences, that collide with the anticipated personal narrative and subsequently change part of the narrative plot.

**Engaging Occupation as an Important Feature in Narrative Configuration**

The theme of engaging occupations emerged from analysis of the interviews in which the participants expressed continuing turbulence or lack of coherence in their narratives. These narratives lacked occupations that engaged the participants. Here we refer to engagement as something that goes beyond ordinary daily experience. Engaging occupations are those that evoked a depth of passion or feeling that made them stand out in the narratives. Engaging occupations were sometimes connected to participants’ former work, such as consulting part-time in the field where one once worked full time. An engaging occupation could also be a long-term leisure interest that had always been meaningful or exciting for the participant, such as hiking in the mountains. Sometimes, engaging occupations were things done with family, such as taking regular care of grandchildren or older relatives.

The presence or absence of engaging occupations appeared to be the main determinant of whether participants were able to achieve positive life experiences as retirees. Those who had difficulty adjusting to retirement had narratives in common that lacked truly engaging occupation.

Engaging occupations are done with great commitment, enthusiasm, perseverance, and passion. Participants talked about them in an emotional way, and discussion of these engaging occupations dominated their narratives. Engaging occupations were a special type of occupation that stood out from the other things a participant did. From the participants’ stories, we found six constituents common to engaging occupations.

**Infused with positive meaning.** An engaging occupation is experienced as highly meaningful and important in several respects. For example, some participants described engaging occupations as especially enjoyable, interesting, and challenging. Åke had a full-time pension and now worked on a variety of minor repair jobs. He called such work his hobby and said, “I think it’s fun, and you meet people and come to talk with them.” Others stressed how the engaging occupation provided valued social contacts. Per took care of elderly relatives and highly valued that occupation. Britt helped her daughter with her business for...
the same reasons. Lisa engaged in volunteer work for elderly persons, also finding the work highly meaningful. Engaging occupations sometimes reaffirmed a person’s worth or identity. In referring to her consulting and why she found it engaging, Britt remarked, “One is quite happy when one is needed.” Anna lacked such an occupation in her life and gave one of the most telling descriptions of the meaning of an engaging occupation. She indicated that what she really wanted and did not have was “something to take a real bite on.”

In summary, an engaging occupation was infused with positive meaning connected to interest (pleasure, challenge, enjoyment), personal causation (challenge, indication of one’s competence), and value (something worth doing, important, contribution to family or society). The engaging occupation resonated with all aspects of volition (Kielhofner et al., 1995).

**Intensity.** Engaging occupations involved intense participation. Intensity is a function of two variables: length of involvement and regularity of involvement. Engaging occupations were typically those that the participant did with some sort of regularity over the week; they were not sporadic. Moreover, engaging occupations were also long term in nature, meaning that there was often a long history of involvement that the participant expected to continue regularly.

A coherent set of activities. An engaging occupation consists of a set of activities that cohere or constitute an interrelated whole. The occupation might have been begun as a single activity, but over time, it became more intense and involved interrelated activities and projects. For example, Sören belonged to a club for hiking in the mountains. However, his involvement went well beyond hiking. He attended regular boarding meetings and was assigned responsibility for the club office. He also went out for longer walks in the mountains and took a lot of slide photos. In the wintertime, Sören was invited to lecture in club contacts, the occupation is the focus of the social activity, whereas in other kinds of social contacts, the occupation fades into the background.

**Analogues to work.** Engaging occupations could very well be paid work, as in the case of Åke who continued to work for payment. But even without payment, engaging occupation may take on many of the features of work in the participant’s experience, and the participant may continue to think and talk about it as work. Although the engaging occupation is ordinarily no longer done as a means of earning a living, it is done with the same kind of seriousness and commitment formerly given to work. Kurt, who was formerly a manager, indicated that when his wife (who is still employed) asks him what he has done for the day, he replies, “I have been at my work. I have been on the golf course. We pros, we are stuck there on the golf course, you know.” When participants talked about their engaging occupations and tried to explain how complex they were and how they involved several different activities and required ongoing commitment, they often resorted to the analogy or metaphor of work to explain their involvement. Such comments as, “one could say that I work at my leisure time,” and “it’s like a sort of work,” illustrate this analogy.

**Summary.** The six constituents of engaging occupations were highlighted in the narratives. They were central to how the participants’ narratives were emplotted. Participants consistently returned to these features when describing their preferred occupations. These constituents served as criteria by which the relative positive or negative direction life had gone in retirement could be evaluated.

**Discussion**

In this longitudinal study, we investigated how prospective narratives interacted with unfolding life events. In occupational therapy, one of the most important sources of infor-

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sion is prospective narratives from clients who are facing big transitions or changes of their daily life (Barrett et al., 1999; Helfrich & Kielhofner, 1994; Kielhofner & Barrett, 1998; Mattingly, 1998). The findings in this study indicate that a person’s prospective narrative has limitations in predicting the process as well as the actual outcome of an upcoming transition. Rather, the prospective narrative represents a working version that is in an ongoing dialogue with life as it is lived.

Our findings also highlight an important feature in narrative theory, namely the presence of openness and tension in narrative employment (Bruner, 1986; Ricoeur, 1984). Narrative has theoretically been described as a discourse providing a readiness for action in an unpredictable life (Bruner, 1986; Ricoeur, 1984). The findings of this study empirically support this concept.

Our findings may also be useful to expand existing theoretical constructs. The role of surprise as a feature requiring narrative adaptation is one such possible expansion. Surprise not only was unforeseen, but also engendered a new understanding of elements of the participants’ life stories that they did not previously see. Like the fish unaware of the water in which it is swimming, features of an occupational pattern may be unseen by the person and turn up as surprises in the transition.

The transparent quality of narrative points to limitations about predicting the future and might present an important feature in planning and conducting occupational therapy. First, successful occupational therapy has to respond to the interaction of the prospective story with the living world, and just as the client’s prospective narrative might be remade in that process, so must the therapy. Successful therapeutic plans require plasticity, as Mattingly (1998) and Mattingly and Fleming (1994) argued after following therapists in clinical work: “The highly improvisational character of much clinical work, situations where the therapist suddenly ‘sees’ a possible story, often presented through the unexpected actions of the patient, and opportunistically builds on this. Competent therapy requires revision of initial plots” (p. 158). Altogether, our findings as well as Mattingly’s challenge the traditional process models of treatment in which planning is considered to precede treatment.

**The Importance of Engaging Occupations in the Occupational Pattern**

Our identification of engaging occupations and their characteristics suggests an expanded view of how occupation traditionally is understood. The occupational therapy literature has stressed meaning as important (Crabtree, 1998; Hannam, 1997; Kielhofner, 1997; Johnson, 1996). But the literature has been vague on what makes an occupation meaningful. The concept of engaging occupations with its six constituents, based on the empirical data of the present study, provides one way of further exploring what is meant by meaningful occupation.

Christiansen and colleagues have proposed the concept of personal projects as a useful concept for capturing the individual dimensions of occupation (Christiansen, Backman, & Nguyen, 1999; Christiansen, Little, & Backman, 1998). The five factors mentioned in personal projects—meaning, structure, community, efficacy, and stress—have some clear connections to engaging occupation. It seems that the concept of personal projects, however, is a broad one that covers several kinds of projects, for example, psychological as well as occupational. Alternatively, Rudman et al. (1997) identified five contributions of occupation of which three can be seen as parallel to concepts in engaging occupations: well-being, social connection, and organizer of time.

Another related concept developed in leisure studies is named “serious leisure,” as distinguished from casual and relaxing leisure (Stebbins, 1997). The concept focuses on the social identity that develops with this type of leisure. The concept of engaging occupations in retirement might not fulfill all the criteria of serious leisure; furthermore, engaging occupation focuses on the occupational aspect of engagement rather than the psychological aspect. Another concept that partly connects to commitment is that of flow (Csikszentmihalyi, 1975). Flow is experienced in challenging activities that can be matched by individual skills; flow fulfills one important aspect of quality of life (Csikszentmihalyi, 1998). Flow experiences can be seen as an important part of an engaging occupation. However, because the concept of engaging occupations goes beyond personal pleasure, it covers aspects of occupational performance beyond those covered by the concept of flow.

The concept of engaging occupations could be central in analyzing a person’s occupational pattern and in guiding clients who are facing occupational transitions. Traditionally, occupational therapy has focused on occupations that provide basic living skills, often called activities of daily living (ADL). Although this focus is important, it is not enough for life satisfaction. An occupational perspective on life satisfaction suggests the importance of considering engaging occupations that provide meaning, challenge, regularity, and social interaction. Such a concept also transcends the division between work and leisure that has been questioned in the literature (Primeau, 1996a, 1996b). Instead of an objective outsider’s view, the concept of engaging occupation stresses the individual experience of a certain occupation regardless of whether it is performed in the area of work, leisure, or ADL.

**The Importance of Interaction Between Internal Motivation and External Demands**

Our findings regarding the importance of balance between internal motivation and external demands in the occupa-
national pattern are also noteworthy. The paradox that the anticipated freedom to do whatever they wanted ended up feeling like a burden “draining energy” arose from some of the participants’ narratives. In the second phase of this study where the participants were 65 to 66 years of age (Jonsson et al., 2000), this paradox was conceptualized as going from one type of imbalance in occupational life (too many external demands) to another type of imbalance (demand is only up to oneself). Engaging occupations seem to create a continuing interaction between internal motivation for occupation and external expectations for occupational performance. Without this interaction, participants found that it was difficult to keep up their motivation. Meaning and motivation in occupation has often been described as coming from within the person (Crabtree, 1998; Johnson, 1996). From our findings, we believe that it is important to stress the encounter and the interdependent relationship between internal and external factors.

Limitations and Directions for Future Research

Because heterogeneity in experiences is one important characterization of the retirement process, confirmed both in this study and in theoretical discussions in social gerontology (Calasanti, 1996; Light, Grigsby, & Bligh, 1996), a limitation of this study is the number of participants and the way they were chosen. To have the possibility to study the transition from worker to retiree, we initially chose participants at 63 years of age who were working half time or more. According to Swedish statistics at that time (Statistics Sweden, 1993), this criterion leaves out about half of the population (i.e., men and women who already were retired at age 63). It is likely that this already-retired group differs from the participants in this study (i.e., the participants could be assumed to have better health and more positive attitudes toward work). This situation does not raise questions about the study conclusions. Rather, it opens up the possibility that other patterns also could be found in studies of life transitions, such as retirement.

We found a strong commonality between the experience of retirement satisfaction and involvement in engaging occupations. Some participants, however, experienced a good life without being involved in very engaging occupations. They were living what they themselves called a calm life as retirees. Future research can further analyze multiple perspectives in understanding retirement satisfaction.

The narrative approach in this study meant that the interview questions were open-ended to give maximal space for the participants to tell their stories. Of course, the possibility that the participants wanted to show a positive public picture to an unknown researcher must be considered. In the initial part of this study, this concern was most certainly relevant. During the progressive series of interviews with each participant, a confidence has developed that made this aspect fade into the background. Further, the longitudinal character of the study enabled the researcher to make comparisons between the interviews and individually tailor questions for the second and third interviews to clarify areas of uncertainty. Over time, the interviews combined with the analysis also meant that a growing interest and individual understanding could develop.

The longitudinal design of this study made it possible to examine retirement as a process and to discuss the different narratives in connection to each other. Our aim is to continue to follow the participants as they age and to collect further occupational narratives into the aging process.

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