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The Social Statuses in Later Life: A Study of the Effect of Retirement in Germany today.

by

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Abstract

The thesis presents analysis on four types of social statuses (as defined by Linton and Merton), namely volunteer, carer for an adult, child carer, and friend, in the second half of life in Germany based on the German Ageing Survey. In reference to the cultural sociological theories of Gerhard Schulze, the impact of retirement as life event on older adults' lifestyle and likelihood of adopting these statuses is critically discussed. The use of the category of 'old adult' is put into question.

It is found that between 1996 and 2008 the share of volunteers and of people spending time on leisure activities in company has increased in all age groups in the German population aged 50 and over. Carers, on the other hand, showed stable numbers with decreasing time investment, and the share of people looking after children was on the decline. All social statuses were represented in different numbers in Eastern and Western Germany, with Eastern Germany showing less engagement especially in volunteering and social leisure activities. Possible reasons for this are discussed.

The volunteer and friend statuses were selected as dependent variables for regression models of the influence of retirement. The models based on cross-sectional as well as the models based on panel data showed that there was at best a marginal influence of retirement on a person's likelihood of volunteering or spending leisure time with friends and relatives.

With Gerhard Schulze's theory of the 'event society', it is argued that the reason for the increase of volunteers and of people more actively cultivating their friend status amongst older Germans is that they no longer significantly differ in their value orientations and lifestyles from younger adults and that therefore the persistent founding of research and social policy on age categories is no longer a valid approach.

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0. Introduction

0.1 Overview of this study

This study examines the changing status of people in later life. Numerous, mostly qualitative, studies have discussed the destandardisation of the life course and the ever-increasing healthy lifespan (discussed in more detail in the following two chapters). In this doctoral thesis, some aspects of the social change these developments bring about are measured with the help of quantitative data. These are operationalised as five different social statuses: participant in the employment market, volunteer, child carer, friend, and carer for an adult. With their help, the changing engagement of people in 'old age' in their social environment is explored. In doing so, this study challenges the existing idea of a distinct group of 'old' people, which is why they are here usually referred to as people in later life or older adults.

Since the critical reception of Cumming & Henry's 'Disengagement Theory' (1961) social theory of ageing has moved far away from the idea of the older adult actively retreating from society. Still, academia, nursing and health practitioners, and social policy makers for a long time took a view of older adults as distinct category of people in our society; a view that despite actions against ageism has still not disappeared, partly due to discussions about population ageing and a fear of the costs associated with it. An 'us & them' mentality has been described by many critical observers (Iversen et al. 2009).

In light of this manner of thinking, this study examines the social statuses of German adults aged of 40 to 85 to compare their engagement in the named social statuses. Following the idea that 'old age' is undergoing change, that older adults are becoming more active (which led to a distinction of a group of older adults often termed the 'young old'), the development over time is analysed. The results of these analyses will suggest that older adults' lifestyles do not differ from that of middle-aged adults.

Additionally, as central demarcation line of the transition from mid-life to later life, the effect of retirement will be examined. This dissertation will show that retirement in fact has very little impact on an adult's other social statuses in society. Additionally, due to the special German context, attention will be paid to differences in the engagement in these social statuses between Eastern and Western Germany.

The analysis is based on quantitative data from all four interview waves of the German Ageing Survey (GEAS) that were conducted between 1996 and 2011. This allowed to both

look at changes in the target population over time as well as at the effect that retirement has as a life course transition.

Gerontology is occasionally criticised for being ‘data rich and theory poor’.¹ This study combines its empirical findings with a theory of social change developed by the German sociologist Gerhard Schulze in 1992. With it, it will be argued that ‘old age’ is no longer a useful concept when trying to make sense of the heterogeneous social realities of people in the later years of their lives. Instead, through changes in the value-orientation of the German society at large, retirement has lost its significance in the life course.

In the remaining parts of this introduction, a brief overview of the various concepts around old age will be presented, and the demographical changes giving this life stage importance but also diversifying it will be discussed. At the end, the research questions and aims will be formulated and elaborated upon.

The next four chapters lay out the existing research, the context of the German case study and the methodological and theoretical considerations.

Chapter I provides a theory and literature overview. It will offer a more detailed retelling of social theory of ageing in so far as it is relevant to this study and explain why out of the various concepts used in the field social roles were seen as the most suitable for this research project. A few pages are subsequently devoted to summing up key works on social roles and developing the exact terminology used throughout this study, which is based on the work of Linton and Merton – a clear distinction between social statuses and social roles is made in this study, with statuses being an obtained position and roles being the various sets of behavioural expectations attached to this position. In the last part of this chapter, Schulze’s theory will be introduced.

A data chapter contrasts the various data sources that were researched before deciding to work with the German Ageing Survey. An overview of the various topical areas covered by the GEAS will be outlined and non-response and attrition issues will be addressed.

The subsequent chapter provides information on the specific German context and how this fits into a wider European perspective, and in the chapter on methodology all practical issues surrounding the handling of the empirical data will be covered.

¹ This phrase was first coined by Bengtson, e.g. in Bengtson et al. 1996, and since repeated numerous times, e.g. by Lowenstein et al. 2011.

Chapters V to VIII present the findings of this study.

The first three of them discuss how common the four social statuses are in Eastern and Western Germany, draw a picture of their development from 1996 to 2008 (following the cross-sectional waves of the GEAS) and explore which socio-economic characteristics are associated with them.

To that end, chapter V looks at the social status set as a whole, to see which subgroups of the target population are more likely to hold several of the statuses and which are inactive, as well as to answer the question whether having a wider set of social statuses has become more common.

In chapter VI it will be shown that the caregiver statuses did not contribute to the overall increase of the average number of social statuses in the German population aged 40 and over. Instead, the numbers of people providing care to adults are stable, albeit with lower average time investment, and child carer numbers have decreased. Possible reasons for this development are explored. An analysis of who the carers are also highlights Eastern and Western lifestyle differences (and the reduction of these differences over time) and the gender imbalance in late life.

While carer activities may not match the new, experience-focussed lifestyle Schulze writes about, volunteering and spending time on activities with friends and family do. These pastimes are captured in the statuses of volunteer and 'friend' and are discussed in chapter VII. Their significant rise is apparent in both parts of the country, although overall, in 2008 Eastern Germany still lagged behind Western Germany in its share of people with these statuses. Linear regression and binary logistic models aiming to explain the differences between the levels of volunteering and spending time on activities with friends and family suggest that variations in socio-demographic characteristics alone are insufficient explanatory factors.

This finding is in line with Schulze's theory about a value change in German society. According to him, this value-change from security-focused values to an experience-centred lifestyle is cohort-based. This claim leads to a discussion of period and cohort effects in this study.

Schulze also claimed in his book from 1992 that despite the cohort-based value change he found in his empirical studies, he could also detect a point in the life course when in light of their remaining lifespan becoming shorter, Germans started to reflect on their lifestyles and made adjustments. This observation mirrors the idea of there being something

qualitatively different about later life; that midlife and old age are distinct phases. This concept is put into question in this thesis.

Chapter VIII therefore examines the potential influence of retirement as a typical demarcation line for the transition from midlife to later life. In role terminology, retirement is the loss of the status gained through active involvement on the employment market. Whether it indeed has any influence on other social statuses will be examined from various angles: are there differences between economically active and retired people? Do the reasons for retiring help predict whether a person is likely to volunteer or frequently pursue activities with friends and families? Did it have an effect if someone found their retirement transition difficult? It is concluded that while retirement provides more time to invest into social statuses, it does not affect people's likelihood of obtaining any of these statuses.

While Schulze's work is utilised throughout the findings chapters, the conclusion will combine all the findings and put them into the interpretational frame provided by his theory. It will discuss which points the study was not able to cover and suggest further avenues for research.

0.2 'Old Age'? – A critical introduction.

*All the world's a stage,
And all the men and women merely players:
They have their exits and their entrances;
And one man in his time plays many parts,
His acts being seven ages. At first the infant,
Mewling and puking in the nurse's arms.
And then the whining school-boy, with his satchel
And shining morning face, creeping like snail
Unwillingly to school. And then the lover,
Sighing like furnace, with a woeful ballad
Made to his mistress' eyebrow. Then a soldier,
Full of strange oaths and bearded like the pard,
Jealous in honour, sudden and quick in quarrel,
Seeking the bubble reputation
Even in the cannon's mouth. And then the justice,
In fair round belly with good capon lined,
With eyes severe and beard of formal cut,
Full of wise saws and modern instances;
And so he plays his part. The sixth age shifts
Into the lean and slipper'd pantaloon,
With spectacles on nose and pouch on side,
His youthful hose, well saved, a world too wide
For his shrunk shank; and his big manly voice,
Turning again toward childish treble, pipes
And whistles in his sound. Last scene of all,
That ends this strange eventful history,
Is second childishness and mere oblivion,
Sans teeth, sans eyes, sans taste, sans everything.*

-William Shakespeare (1623), *As you like it*

Old age, as Shakespeare's retelling of the many stages of human life above bears witness, is not a new concept. The varying phases of life have occupied philosophers, poets, and visual artists for millennia: you can find their contemplation in Cicero's 'On old age' (1923), in Hans Baldung Grien's portrayal of 'The seven ages of woman' from 1544, or in Giorgione's painting commonly referred to as 'The three ages of man'.

Even though the changing nature of the human body has continually been part of the social imagery, this did not mean that old age was always regarded in the same light. In Rome, the Senate's name was gleaned from the Latin word 'senectus' for high age, and consequently the most senior members had the right of the first speech. Looking at the Early Modern times, Münch, quotes a German pastor, who reported in 1813:

„So lange Eltern in der Wirthschaft mit Hand anlegen, und sich bald hie und bald da brauchen lassen, da sind sie noch ziemlich gelitten; schwinden aber ihre Geistes- und Körperkräfte bei ihnen so dahin, daß sie keine Arbeit mehr verrichten können, sondern vielmehr Pflege und Wartung von ihren Kindern bedürfen: da setzt es saure Gesichter; da betrachtet und behandelt man sie als unnütze und lästige Brotfresser und Faulenzer, und verbittert ihnen durch unverdiente Vorwürfe beinahe jeden Bissen, den sie genießen“.

„As long as the parents still participate in the daily duties and make themselves useful, they are quite welcome; yet if their mental and physical prowess dwindles so that they cannot do any work but require care and maintenance of their children, then faces fall, then they are regarded and treated as useless and troublesome bread eaters and slackers and their every bite is spiced with unjustified reproaches’.

(quoted after Münch 1998: 407, own translation)

Münch even claims that in the society of that time, in the ‘familia’, there was no room for sentimentalities; instead, it was held together through economic necessity (indeed, the term ‘familia’ describes the community of the members of a household, no matter whether they are related by blood or joined the household to work). What seems undisputable is that the degree of human kindness and solidarity (such as towards the frail) depends on the amount of affluence, as Dominika Tölle (1996) remarked in her treatment of the same epoch, and whether care is perceived as a financial burden.

That observation may well be made today. Social policy, academic and media perception of ‘the old’ is very much dependent on the kind of old age they discuss. Are we talking about the active, ‘young’ old? About the ‘successfully ageing’? Or are we talking about the frail old that are ‘threatening’ to heavily draw upon our health and care systems? The latter can easily be identified in Shakespeare’s play: the shrunk, slippered person slowly losing their mind and their senses. Yet what about the spry retiree? Amongst the puking infant, the whining schoolboy, the youthful lover, the soldier, or the knowledgeable justice, he or she is not to be found.

This might be explained by the change in the position of old age in the life course. In the middle ages and early modern times, old age was not at all an expectable stage of life. This may in part explain that while there are numerous rites of passage in early life (baptism, bar mizwa and bat mizwa, school leaving ceremonies, weddings etc.), there are none established for old age. Only with the health transitions in the 19th and 20th century were morbidity and mortality further and further delayed in the life course (Riley 2001). According to Peter Laslett (1996), old age became an anticipatable life stage only in the

middle of the 20th century. Only then, a significant part of the population reached old age and those aged 70 and older became a relevant part of the population (in Laslett's calculation, the share of the population aged 70 and over needed to be at least half of that of people aged 25 and under). Laslett, alongside Bernice Neugarten (1974), is thus often named the inventor of the 'Third Age'.

With this perspective of *population ageing*, 'old age' became an abstract, a statistical likelihood.

To give room to the observed differences in old age and the diverging pictures painted of it – early old age, the entry into retirement, often being associated with much spare time, with childcare, travelling etc., whereas later old age is often discussed in light of physical and mental fragility, depression and loneliness – some social theorists have introduced a Fourth Age. Laslett himself describes the Fourth Age in reference to Shakespeare's already mentioned play as 'a condition of half-life, "sans teeth, sans eyes, sans taste, sans everything"' (1996: 20). Baltes and Smith (2003) offer a population-based definition of 'the transition between the Third and the Fourth Age [...] as being the chronological age at which 50 per cent of the birth cohort are no longer alive' in an attempt to increase 'the likelihood that people beyond that cut-off age are indeed subject to aging processes' (p. 125).

This already highlights the conflict between the need to deal with large numbers of ageing people and their very individual experience of ageing. Several different approaches to dealing with this issue have been proposed. Gilleard and Higgs propose to look at third age and fourth age not as successive stages in the life course but as different paradigms. In their conceptualisation, 'third age' describes 'a generationally defined "cultural field" which emphasises the values of choice, autonomy, self-expression and pleasure' (Gilleard and Higgs 2013: 368), whereas the fourth age is, in contrast, not an actual experience of old age but the fear of what it could be and how it is often discussed in the public discourse. It is the manifestation of all the culturally transmitted, negative images of old age as a phase in which the individual is frail, unable to participate socially and robbed of their agency by their dwindling mental and physical prowess (Gilleard and Higgs 2010, 2013).

In Critical Gerontology, on the other hand, the whole life course perspective with a fixed idea of life stages has been put into question. Authors like Baars (2012) and Grenier emphasise 'the constructed nature of the lifecourse' (Grenier 2012: 19). By demarcating old age clearly with social policy concepts such as retirement age, individual life transitions

were subsumed into norms and expectations. These authors call for an acknowledgement of the differences by applying qualitative approaches to the individual experiences of ageing.

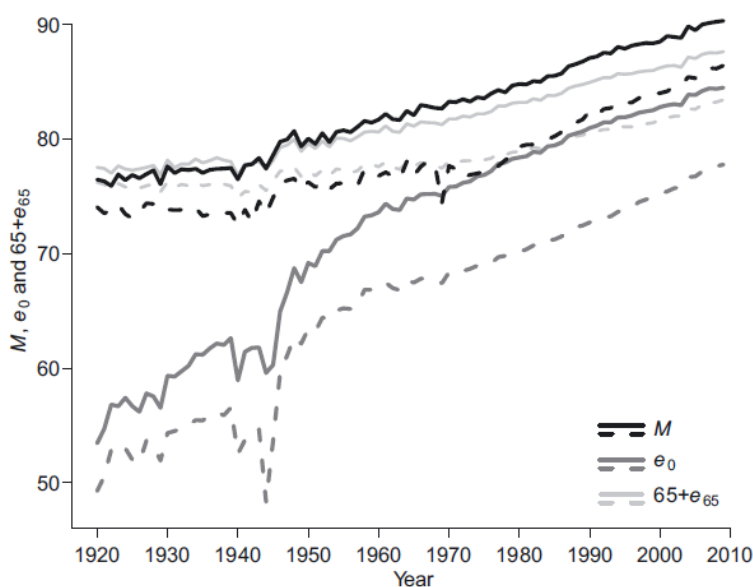
However, the reduction of the complexity of the social and physical reality of the life course is an essential requirement when trying to make sense of it and answer research questions connected to it. While research on the many individual experiences of adult life and the ageing process are valuable to explore the different perspectives that need to be taken into consideration, for many practical applications the ability to make summary statements is essential. For ageing research a key question is: ageing is a continuous process – is there anything significantly different about old age that would justify distinguishing it as a separate life stage from earlier adulthood? Ageing processes can roughly be divided into two broad areas: (1) physical and mental health and wellbeing and (2) the socio-economic aspects of ageing. These will be explored in the following two sections to elaborate on this question.

0.3 Changes of health in later life

The rising number of people reaching 'old age' is an outcome of improving population health. It is often discussed as a financial hazard to health care systems, because it is assumed that rising numbers of older adults mean rising numbers of frail people with a need for nursing and medical care. A range of measures is utilised to statistically capture changes in the life course. Besides the absolute number of people aged over a more or less arbitrarily defined age line in a given population or their relative share of it, researchers have also looked at the rise of the maximum lifespan, meaning they aim to identify the oldest people within populations (e.g. Wilmoth et al. 2000). Most, however, focus on a measure of central tendency, with the mean age at death – commonly referred to as life expectancy (LE) – being the most often utilised measure. It is sometimes calculated as life expectancy at birth, sometimes (to exclude mortality factors for certain age groups, such as infant mortality) at later ages. According to calculations by Imhof (1988), for example, a baby born in the region of Schwalm in Northern Hesse, Germany, between the years of 1600 and 1649 had a life expectancy of just under 25 years. A person, however, who had already reached an age of 80 years could, on average, hope for further five years of life. Due to the health transitions that lowered the rates of premature, non-age related deaths, life expectancy is the measure with the steepest incline. Yet some studies also focus on the median age of death and even the modal age of (adult) death (Horiuchi et al 2013, Clay

2014, Missov et al 2015). As Figure 1 illustrates for France, the adult modal age of death shows a slower development over time than life expectancy. It is not sensitive to early life mortality but focuses on the peak of deaths in later life. It thus captures the slow lengthening of later life: according to Clay (2014), the adult modal age of death in England and Wales was 71 years for men and 77 years for women in 1841; by 2010, it had risen to 85 and 89 years respectively, suggesting a lengthening of later life by at least a dozen years.

Figure 1: The adult modal age at death (M), life expectancy at birth (e0) and total life expectancy at age 65 (65 + e65) for civilian females (solid line) and males (dashed line) in France, 1920–2009

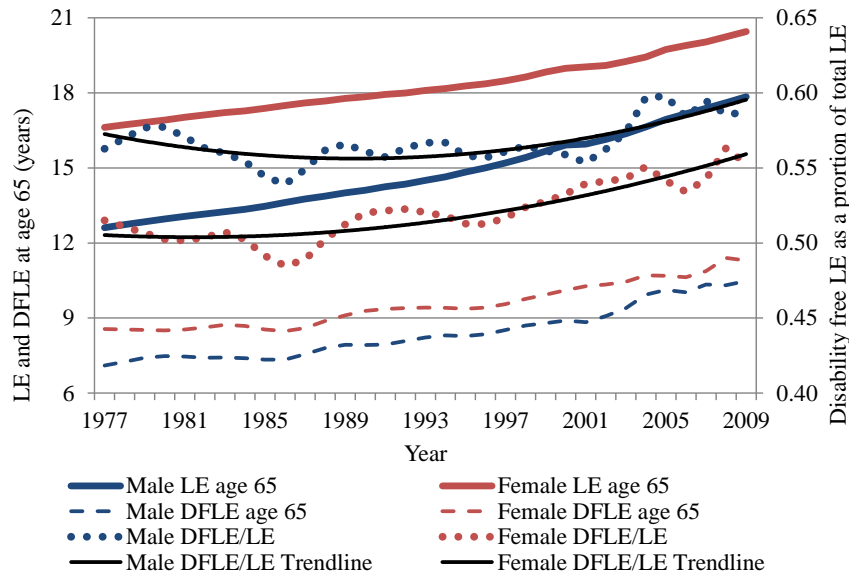


Source: Horiuchi et al. 2013, p. 49.

However, the length of life is just one aspect. Contrary to much popular thinking, longer life expectancy does not necessarily imply more years in bad health (Lutz and Scherbov 2005). Recent studies suggest that physical limitations and disabilities are also being postponed, especially among the population up to age 85, despite an increase in chronic diseases and conditions (Crimmins 2004; Perenboom et al. 2004; Parker and Thorslund 2007; Schoeni et al. 2008; Christensen et al. 2009). This may sound contradictory, yet is at least partly explained by the spread of earlier diagnosis and improved treatment (Parker and Thorslund 2007). Data for the UK suggests that while life expectancy at age 65 has been increasing almost monotonously over the last four decades, this was not accompanied by similar increases in disability free life expectancy (DFLE) until the late 1980s. At this point, disability free life expectancy started a slow process of increasing its share of the overall life

expectancy at age 65 from ca. 42% for men and 46% for women in 1990 to ca. 47% for men and 49% for women in 2009 (Figure 1).

Figure 2: Life expectancy (LE) at age 65, Disability Free Life Expectancy (DFLE) at age 65 and DFLE as a proportion of LE at age 65. Great Britain. 1977-2009 (3-year moving averages plotted on central year.).



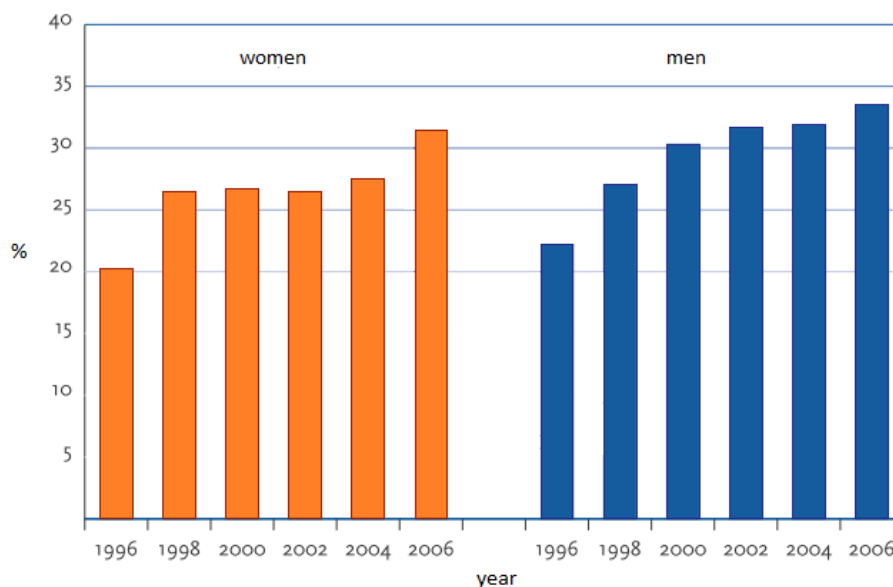
Source: Graph produced by Jeroen Spijker (unpublished). Calculations based on figures published in Bebbington (1988) and Office for National Statistics (2004; 2012).

In Germany, data from the ‘Gesundheitsberichterstattung des Bundes’ (Federal Health Reports) carried out by the Robert Koch Institut, The German Centre of Gerontology, and the Federal Office for Statistics, likewise shows a clear improvement of the health of older adults (Kroll et al. 2008).

Figure 3 shows the rise of the share of people in good and very good health within the population of 60-69 year-old Germans, based on data from the socio-economic panel: it rose by 11% over the course of eleven years².

² It has to be noted that the authors remark upon the exclusion of people in institutional care in relevant surveys, so that the data may present a positively skewed picture of German health. However, if we consider nursing homes for old adults in need of care as main source for potential bias, they point out, only 2.7% of 75-59 year-old Germans live in such an institution, with care rates increasing in higher ages. This suggests that the data provides reliable findings for people under age 80.

Figure 3: Share of people with good or very good health, ages 60-69 in Germany. Data source: Socio-economic panel 1996-2006



Source: Adapted from Kroll and Ziese 2009: 109.

For the years 1984/1986 to 1998, the Life Expectancy Survey (LES) of the German federal institute for population studies provides figures of healthy life expectancy for Western Germany based on a sample of people between the ages of 45 to 69 years (Kroll and Ziese 2008 citing Gärtner and Scholz 2005). They show that within this span of 12-14 years, the share of disability free life expectancy of the overall life expectancy has risen for both sexes and all included age groups, albeit to varying degrees.

These results show that worries about the ageing population as burden for the future society are exaggerated. More important for the here addressed question, they show that it is impossible to define a consistent age border between mid-life and later life when seeking to define old age based on a person's statistically-likely health status. Some demographers have thus suggested to not use years since birth but years to death (for example 15 years), the remaining life expectancy, as more useful measure (e.g. Sanderson and Scherbov 2010). Yet with a shrinking share of disability in the average life course, this likewise is a flawed approach.

Thus, from a health perspective, old age as a fixed life stage seems to be a research tool lacking the sharp edge that would make it useful. Does it have this edge when dissecting social roles in mid- and later life?

0.4 Old age as an indicator of changing social statuses

There are many different definitions of stages of life based on various characteristics. The UK Census recently introduced a measure called 'adult life stage' which 'classifies people in households by age, the presence of dependent children in the household, age of the youngest dependent child, and the number of people in the household. The exact categorisation used depends on the person's age.' (Office for National Statistics 2015) This seems a very fluid operationalisation with many inherent but not clearly spelled out judgements about what constitutes the difference between adult life stages. A simpler and more often applied demarcation of the transition into a new phase of adult life is retirement.

Having once been introduced as a very basic measure of poverty prevention for people too frail to feed and clothe themselves without family support, retirement has in the course of economic prosperity grown into a bastion of freedom from everyday toil. It is commonly viewed as the well-deserved repayment for one's labour by society with a set phase in life when gainful occupation is no longer required because the next generation provides. As shown with the discussion of growing healthy life expectancy, retirement entry no longer is bound to physical or mental frailty. However, it is still regarded as a transition into a new phase of life in a society in which work-life is a central characteristic determining a person's identity (see, e.g., Barnes and Parry 2004).

Yet retirement is not only a point of transition because of the loss of the occupational status and the prestige and connections this position entailed. Along with it comes an assumed gain of time and financial freedom, as well as a loss of the daily rhythm and sense in life. According to Ekerdt's (1986) theory of the busy ethic as well as continuity theory (discussed in more detail in the following chapter), people will seek to remain active participants in society to validate themselves as useful members of their local communities and continue their behavioural patterns. Therefore, retirement should bring about a boost in the number of people occupying alternative social statuses, such as that of volunteer, child carer, or carer for an adult. Some researchers also expect a rise of the number of people working in retirement with the first wave of baby boomers reaching that age (e.g. Griffin and Hesketh 2008). Continuity theory, on the other hand, can be utilised to theorise that people will be more likely to maintain the social statuses that they have attained throughout their lives because they have learned to value these, rather than build up new ones.

This discussion of social statuses in later life rarely makes use of theoretical sociological concepts of change in the social structure and the value foundations of society. Already in 1992, Gerhard Schulze claimed in his book 'The experience-driven society' (Die Erlebnisgesellschaft) that there was a huge shift observable in how Germans built their social networks from an intergenerational focus to an intra-generational focus. For older adults, this means a shift from family-oriented lifestyles, from a focus on their children and grandchildren that are these days less likely to live close by, to an emphasis on spending time with friends, taking care of their partners when such need arises, and being more engaged in their communities. Above this, it points to a value shift, a more hedonistic lifestyle focussing on personal wellbeing and interests.

This value shift is mentioned frequently when the attention turns to people aged 50+ as potential consumers. Cirkel et al. stated in a study on the economic potential arising from the growing number of senior citizens commissioned by the Saxon state ministry for social affairs (2006) that there was a clear trend of the third-agers to view their stage of life as a time of activity and savouring experiences. They also observed a growing wish for social interaction, communication, sociability and community as a central theme in this age group. The authors referred to findings from the Society for Consumer Research (Gesellschaft für Konsumforschung, GfK) that showed that a continually rising number of people in this age group agreed to the statement that they preferred leading a 'fine life' to saving money (a previously predominant attitude).

Based on a study from 2009, the Federal Ministry for women, senior citizens, family and youth distinguishes five consumer groups amongst the Germans aged 50 and over. The 'price-aware home-oriented' (preisbewusste Häusliche) still made up 43% of the sample (n>9,000), whereas the 'comfort-oriented individualists' made up the on average youngest and smallest group (6%).

Gilleard and Higgs (Gilleard 1996, Higgs et al. 2009) are two of only very few authors who approach social gerontology from a cultural viewpoint and introduce consumerism as a relevant topic in international academic publications. They agree that personal identity is nowadays determined as much by a person's consumer choices as by their contribution to the production process. Furthermore, they likewise describe this shift in what determines identity as a gradual one through the cohorts, with later cohorts having been more influenced by consumer culture than earlier cohorts. In this context, the baby boomers are often named as a generation that revolutionises later life (e.g. Culp 2009, Pearce 2008). The

'revolution' lies in the loss of significance of retirement. Productivity is – if we follow the ideas of many postmodernists (discussed in more detail in chapter 1.2) – no longer the main source of identity. The family-based life course has long been diversified, and lifestyle choices have a much more pronounced impact on personal identity without experiencing a drastic change in retirement. Thus, the transition into retirement occurs these days on average with a greater amount of continuity.

Following this line of argumentation and returning to the initial question whether there is anything significantly different about old age that would justify distinguishing it as a separate life stage from earlier adulthood, the here proposed answer to this would be no: the classical definition of old age no longer renders much use in a cultural sphere in which consumerism and a rising healthy life expectancy largely equalise the lifestyles of middle-aged and older adults in the diversification of lifestyles that consumer culture has brought.

This reasoning stands in contrast to the school of thinking surrounding the concept of 'productive ageing', which at first glance appears closely linked to this study. One branch of this research focusses on connections between age and productivity in light of an 'ageing' society (e.g. Garibaldi, Martins and van Ours 2010, Nyce and Schieber 2005); another looks at what McMunn et al. (2009) call 'socially-productive activities', which often encompass care and volunteering. However, while the studies working with this concept look at the same activities as this study, they do so with the aim to either show that old people also contribute in some way (e.g. Davis et al. 2012) or they aim to explore benefits gained from such activities (e.g. McMunn et al. 2009) or to establish how we as society need to support them, thus again emphasising the frailty characteristic of old age (e.g. Warburton 2008, 2011).

One aspect that has to be considered, however, when challenging the distinct status of old age is that even if there is no qualitative difference between middle-aged and older adults, they are subject to different circumstances and life-course events. Does retirement itself, due to the significance culturally ascribed to it and due to the time it frees up, have an influence on people's lifestyle choices?

0.5 Research aims

Above, it has been discussed how old age grew from a marginal and uncertain phase of life to a well-established, anticipated period of leisure after the end of the work life. It is true that the period of retirement has become more and more dominant in the life course.

According to Johnson (1994), the share of men in the work force of all men over 65 in England and Wales sank from 75 per cent in 1881 to less than ten per cent one century later. At the same time, retirement itself has grown longer and longer. In the UK, the life expectancy of those people who have reached age 65 (LE65) was 10.4 additional years for women and 9.5 for men in 1891; it had climbed to 17.9 and 14.8 years respectively in 1991 (Laslett 1996, 108). According to the Office for National Statistics (2011), these figures increased further to 20.6 for women and 18.0 years for men in the 2008-2010 period. In Germany, LE65 in 1891/1900 was 10.2 years for men and 10.6 years for women (DESTATIS 2012). In 2009/11, it had risen to 17.5 (men) and 20.7 years (women; DESTATIS 2015).

In recent years, more numerous in the new millennium, studies on the social activities of older adults have been conducted (for a more detailed discussion of these see the following chapter). How do they arrange their retirement? Do they find it easy to adapt to a life without work, and to adapt to the changes in their social network and their social recognition connected with it? Are they active in their local communities, e.g. through volunteering? Or do they have care obligations – for children or adults? How do the old people themselves think about old age, and how does this affect their own later life?

What this provides us with is a mosaic of snapshots of subgroups of the population of older adults in various countries that will be discussed below in the Theory and Literature Overview chapter. Yet few studies have systematically explored changes in the lifestyle and social networks of older adults with the help of large scale quantitative data over time. This is partly due to many repeated surveys of people in later life having been started a comparatively short time ago – the Survey of Health, Ageing, and Retirement (SHARE) was launched in 2004, the Scottish Longitudinal Study on Ageing has only recently received funding to name only two – and partly because many ageing studies focus on physical and mental ageing and less on the social aspects.

The German Ageing Survey, however, established in 1996, offers at this point three distinct waves of cross-sectional data over a span of twelve years representative of the whole German population aged forty and over, as well as four waves of panel data over a period of fifteen years. The first makes a comparison possible between older adults in 1996, 2002, and 2008. The second provides an opportunity to study life-course influences on a person's social position in later life.

With this data, the following three hypotheses are explored in this dissertation:

1. Older adults in Germany today on average obtain more social positions for which they fulfil the associated social roles after retirement.
2. Social statuses associated with an experience-driven lifestyle are more popular in the German society than social statuses connected to other values.
3. Retirement has no significant impact on which and how many social statuses a person occupies.
4. Retirement does have an impact on the time invested into the friendship status.

These hypotheses were formed based on the following reasoning:

1. *Older adults in Germany today on average obtain more social positions for which they fulfil the associated social roles after retirement, and they spend on average more time on these than previous cohorts.*

Many authors, starting with Durkheim and his 'Suicide' (1952), have shown with the help of empirical data that social cohesion and an active social network are an important positive influence on people's wellbeing (e.g. Poortinga 2006, Litwin and Shiovitz-Ezra 2006), or conversely that loneliness has a negative influence on health and quality of life (e.g. Perlman 2004). This implies social groups with ritualised interactions that bind the individual to the interests of the group, not merely casual interactions.

Commonly discussed ritualised groups are the workplace with its relatively constant set of colleagues that share daily work routines and breaks, the family, religion (Durkheim 1952), and sometimes also the social class (e.g. Luhmann 1998). However, as shown above with data from the UK, only a small percentage of adults over 65 still participate in the labour market. As will be introduced in more detail later, this study is, however, based on German data: according to the German 2011 census data, 9.1% of the Germans 65 and older were unretired (1.9% of these were unemployed). While the majority of the over 16.5 million Germans in that age group were living with a partner, over 825,000 were unmarried and without a partner, and nearly five million (29.67%) had outlived their partner (470 did not specify their marital status).

A relatively short remaining lifespan leaves little time to reorient and seek a new social position in one's environment. However, with on average eighteen to twenty years more to live at age 65 (and one to two years more in retirement, since in 2012 the average age of

people starting to receive state pension was 64, with hardly any differences for men and women but about a year difference between Eastern [63.2] and Western [64.1] Germany; Deutsche Rentenversicherung 2013), it is very likely that many people will seek new forms of social engagement, be it through taking up new responsibilities or through increased social leisure activities. The aim of this study is therefore to see if this is true and to what extent. It will also explore which social statuses especially gain in significance and which do not gain or even lose importance in the overall population.

The results of the analyses based on hypothesis 1 are presented in chapter V.

2. *Social statuses associated with an experience-driven lifestyle are more popular in the German society than social statuses connected to other values.*

Counting the number of social statuses held by a person only holds a limited amount of information. Schulze's theory of value-change would suggest that people will lean towards specific types of statuses. Not statuses of social security and support like the two carer statuses but instead statuses that enhance the person's chances for new, enriching experiences and enable it to widen its social network, with each new encounter again carrying the potential of more thrill.

Chapters VI and VII will show that the data from the German Ageing Survey supports this theory.

3. *Retirement has no significant impact on which social statuses a person occupies.*

This hypothesis is derived from the previous discussion of the changing significance of old age in the life course. In the previous subchapter, it was concluded that old age cannot be viewed as a clearly distinct stage of life. Subsequently, the question was raised whether retirement itself, due to the significance culturally ascribed to it and due to the time it frees up, has an influence on people's lifestyle choices, which include their engagement in specific social statuses. Partly based on other studies' outcomes, such as Hyde et al. (2004) or Moen and Fields (2002), and partly founded on continuity theory's ideas that people seek stability in their lives and thus would not seek change in other areas of their lives when they already experienced a big change in their economic activity status, it is hypothesised that this is not the case.

To explore the question in greater detail, two sub-hypotheses were formed:

- a) *Retirees are as likely to take up volunteering as people who have not yet retired, controlling for everything else.*

This is based on a cross-sectional perspective and compares retirees with people who have not yet retired from the set of interviews sample. It is focussed on the volunteer and friendship statuses here, because it is assumed that childcare and adult care are much more dependent on the needs of the social environment, leaving less room for 'lifestyle choices'.

- b) *Retirement as a life course transition has no effect on a person's likeliness to volunteer.*

While hypothesis a) takes the cross-sectional perspective, this one is concerned with intra-cohort development. It does not check for differences between those cohorts who work and those who are already retired but it can model whether retirement has affected people who have first been interviewed before their retirement and have been re-interviewed after having made the retirement experience.

4. *Retirement does have an impact on the time invested into the friendship status.*

- a) *Retirees are more likely to score higher on the scale of social leisure activities than people who have not yet retired, controlling for everything else.*

- b) *Retirement as a life course transition affects the amount of time a person spends on cultivating their friendship status.*

The fourth hypothesis has again been split up into two separate items. These follow the same logic as sub-hypotheses a) and b) of hypothesis three: the first adopts a cross-sectional, inter-cohort perspective; the second takes an intra-cohort perspective.

Overall, these hypotheses say that while it is not expected to find an effect of retirement on whether someone engages in a social status at all, it is expected that retirees on average invest more time into their friend status than working people. This hypothesis cannot be tested for volunteers due to data restrictions (see Methods chapter).

The hypotheses on the effect of retirement are tested in chapter VIII.

I. Theory and literature overview

I.1 Activity and social roles in social ageing research

In the following subchapters, there will first be a discussion of the theoretical frame of this study. The concepts of activity, social participation, and social capital are considered in an aim to identify which concept is the best tool to analyse how later life and retirement influences people's social lives and if there are cohort differences. Eventually, the social role concept is introduced and it is elaborated why this is regarded as the most suitable. Subsequently, an overview of the present state of research is presented. Many different factors have been explored in recent research to see what influences social behaviour in later life, and these will be discussed in detail: personality and learned behaviour over the life course, socio-economic characteristics, and the social and physical environment.

I.1.1 Later life and activity research

Social ageing research has been closely linked to the question of activity from the start: already in the 1940s, when research in this field was first established, it was a central point of discussion. While conventional views and even contemporary academic contributions (e.g. Cumming and Henry 1961) saw old age as a phase of passivity and reclusiveness, Robert J. Havighurst, Professor of Education and Executive Secretary to the Committee on Child Development at the University of Chicago since 1940, regarded them in a different light. '[E]xcept for the inevitable changes in biology and health,' he wrote, 'older people are the same as middle-aged people, with essentially the same psychological and social needs' (1968: 161). When addressing the decreasing interaction with their environment, Havighurst sees the causes in a withdrawal of society, more precisely in a 'shrinkage' of the social world due to natural causes, and he thus proposed that an older person's well-being very much depended on their ability to find new social roles. This was the cornerstone to ideas of 'successful ageing' that have been pursued in social gerontology ever since.

Havighurst is remarkable, because he did not see old age in isolation; rather, he researched it as one of six developmental stages of human life. Under his leadership, the Committee on Child Development thus became the Committee on Human Development, he co-founded the Gerontological Society, and the University of Chicago was at the heart of social ageing research for decades.

The term 'activity', however, has never been clearly defined in gerontology and has thus found diverse application: to describe physical activity ranging from sports to being able to still go outside alone at all, to describe the diversity of hobbies, to measure mental agility, or to look at the involvement in the local community, to just name some examples. These studies are often concerned with measuring the association of their defined type of activity with the 'quality of life' (Silverstein and Parker 2002; Lee et al. 2008) or well-being (Litwin and Shiovitz-Ezra 2006; Baker et al. 2005; Adams, Leibbrandt and Moon 2010).

Alternatively to the term activity, *social participation* has been utilised. This narrows the area of activities down to an involvement with people, but nevertheless often remained an underdeveloped concept. Bukov, Mass, and Lampert (2002), after remarking that some research had suffered from insufficient consideration of the different forms that social participation can take, defined it as 'socially oriented sharing of individual resources' (p. 510). They suggested a hierarchical order of the types of social participation, with community based participation at the base with the shared resource of time (e.g. sharing hobbies, travelling with others), productive social participation in the middle, with shared time and abilities (e.g. volunteering, caregiving), and political participation at the top, which uses most resources (beyond time and skills also social knowledge/skills) and is therefore least common. Alternatively, Broese van Groenou and Deeg (2010) use a distinction between formal social participation, by which they mean 'activities in which a person is of service to groups or individuals in the community through their involvement in political and voluntary organisations' (p. 448), and informal social participation (personal involvement in the community, in which the individual is more concerned with his or her own development and wellbeing). In contrast to Bukov and colleagues, they are therefore more interested in the motivation behind the activity than the resources invested.

Yet the term 'social participation' and its conceptualisation also offers points for critique. While Bukov, Maas, and Lampert's work with the Berlin Ageing Study is very interesting and follows in many ways the same motivation as the here presented research does, their hierarchy of social participation suggests that some forms of participation are 'worth' more than others. Because political participation requires more resources and potentially means carrying more societal responsibility, it stands at the top of the imaginary pyramid. The authors may not have intended this, but this order seems to be fed by the need to defend old age and retirees by saying that yes, they do still contribute usefully to society. This is justifiable from a macro-sociological perspective, if such a defensive stance is

deemed useful, but gains different significance on the individual level: not every person has the same opportunities. Beyond the commonly examined factors, such as health, that can impair a person's ability to participate, other factors like level of education or the existence of participation opportunities within the mobility radius of the individual matter. Of course these can be controlled for in a statistical model, but this is rarely done (such predictors were not used in Bukov et al.'s models) and does not negate the normativity of the hierarchical order.

Broese van Groenou and Deeg's definitional distinction of formal and informal, on the other hand, implies that social participation either primarily serves the individual or primarily serves the community.

The term 'social participation' itself suggests that the default position is not to participate, because social participation requires active engagement (or investment of resources). Thought to the extreme end, a social participation concept as widely defined as Bukov et al.'s seems to suggest that the default position is to be completely reclusive, and that it needs to be explained why that is not true for everyone. This sets us back to the assumptions about the lack of social function of later life previously questioned.

Furthermore, the concept of social participation remains somewhat diffuse: while the above discussed definitions aim to categorise different forms of social participation, these are still rather rough and the connection between them remains unclear: social participation – especially when translated into the German term 'soziale Teilhabe' can be regarded both as a result of society reaching out to the individual as the individual reaching out to the society, but it is often understood in only one of the two dimensions. Participation is a very abstract term that does not necessitate personal interaction and reveals nothing about the framework in which it takes place.

Social capital is a much discussed and highly utilised tool in social science research. At the same time, it is not a singular, clearly defined concept (Gray 2008).

The term 'social capital', which some authors trace back to the 18th century (see Bartkus and Davis 2010) gained much of its popularity after Pierre Bourdieu's book 'La distinction. Critique sociale du jugement' was published in 1979. In it, he forms a theoretical model based on a case study of France of how members of different social classes distinguish themselves from one another. Here social capital is only one of several means, besides cultural, economic, and symbolic capital, 'the aggregate of the actual or potential resources

which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition' (Bourdieu 1983: 249). Each of the forms of capital are linked insofar as having access to one will facilitate accessing others.

The large number of research publications in numerous disciplines in the last twenty years using the term 'social capital' draw, however, mostly not on Bourdieu's concept thereof but instead develop a range of conceptualisations closer related to Coleman's idea of social capital. In his article 'Social Capital in the Creation of Human Capital', he regards social capital as a bridge between two opposing concepts of the actor: on the one hand homo sociologicus, the actor who is guided by social norms, rules and obligations, and on the other hand homo oeconomicus, the independent actor who is primarily led by his own self-interest and has a long tradition in economics, leading far back to Adam Smith and others.

'If we begin with a theory of rational action, in which each actor has control over certain resources and interests in certain resources and events, then social capital constitutes a particular kind of resource available to an actor.

Social capital is defined by its function. [...]

Unlike other forms of capital, social capital inheres in the structure of relations between actors and among actors. It is not lodged either in the actors themselves or in physical implements of production.' (Coleman 1988: 98; emphases not by Coleman)

This emphasis on functionality is apparent in the majority of publications: titled 'Social Capital and X', they discuss the positive effect of social capital (with varying definitions and operationalisations of it) on e.g. health (Caperchione et al. 2008), likelihood of finding employment (Mouw 2003), risk of hunger (Cook et al. 2004) and so forth. In some studies, social capital is a possession of an individual, in others it is a common good, for example of a neighbourhood or an organisation. Some authors, such as Fine (2002 and 2010) or Arrow (1999) have made some fundamental points of criticism concerning the conceptualisation and practical operationalisation of social capital. Yet on which level it is situated or what is criticised concerning the practical use of this concept is not relevant for this study, for the view of social capital as it is adopted by the majority of researchers, stands in opposition to this study's basic idea of motivation for human action.

The rational actor on whom social capital theories are based aligns his actions so they suit his specific goal. Yet there is more to social interaction than just the potential usefulness of the network it helps to build. Does a person only volunteer because it may

provide them with the number of someone they can call when in turn they need help? Is there not an ingrained or even innate need in the human being to have a place in a social group? Are the positive effects on wellbeing that are reported about social capital not partly explained by the satisfaction that a person gains from being around other people; from being awarded attention; from sharing experiences with others; from being granted a smile?

True, many social capital operationalisations do, often influenced by Putnam's *Bowling Alone* (1995), include a measurement of trust (Knack and Keefer 1997, Glaeser 2000), with the intention to indicate how likely people think it is that when they do someone a favour, that favour will be repaid.

For Putnam,

“social capital” [is] a term that social scientists use as shorthand for social networks and the norms of reciprocity and trust to which those networks give rise. No democracy, and indeed no society, can be healthy without at least a modicum of this resource.’ (Sander and Putnam 2010: 9)

As such, social capital can be a good measure for the economic utility of social interaction and social cohesion, and a range of authors have followed Putnam's example of examining formal group membership in the light of its societal use. Even psychological measurements and effects of life course events could be (and have been) operationalised to explore the sources of social capital and differences in social capital in this light (see e.g. in Mascherini, Vidoni, and Manca 2010).

And yet it remains that social capital is the resource used to achieve something. In this study, however, the aim is not to examine how well connected older adults are and how this affects their wellbeing or their physical or mental function. Instead, volunteering, leisure time spent with friends and family, caregiving, and childcare are viewed as purpose in and of themselves, as a part of the adult lifestyle.

The concept of social role treats all areas of social interaction as equal while allowing for a detailed differentiation of the demands and the rewards of a role, as well as of possible role conflicts. It was therefore selected as the theoretical framework for this research and will be explored in the following subchapter.

I.1.2 Social roles and social statuses

The role concept in sociology

The idea of roles was present in Sociology already a century ago, when the discipline itself still took its early steps. At first, it was manifest in works of micro-sociological perspective or social psychology: in works concerned with direct interaction of individuals. As will be shown, the underlying aim of all theorists engaging the role vocabulary, however, lay in identifying patterns of human behaviour that formed social structure.

In Germany, Georg Simmel was one of the first to utilise the role vocabulary. He opposed the idea of social processes resembling that of biological processes; of society being just another kind of complex organism that followed similar rules as did biological organisms, a view that was dominant at the time. Likewise, he refused to look to historical events as singular, inexplicable phenomena that could only in hindsight be understood and interpreted in their significance, as many of his contemporaries in Germany did at the time (Coser 1977). Instead he analysed group behaviour, seeking the common elements in what otherwise appeared very distinct social phenomena: he looked at the form of social interaction, rather than its content.

However, Georg Simmel's work is characterised by a sharp eye for observation of greater patterns, rather than small detail, and he is often criticised for his lack of a fixed vocabulary and his 'impressionism' (Nedelmann 2003), his descriptive, essayistic, rather than systematic approach. Thus his actual use of the term 'role' does not occur as the introduction of a scientific terminology but as random utilisation of a commonly used phrase when he writes of the 'specific role of the stranger' and illustrates this with the social position of the Jew in European society (Simmel 1908: 510). Yet his work already holds a lot of the elements that will reappear later on in 20th century Sociology and many of the key ideas of social role: that individual and society as well as individuals within one group interact, and that individuals do not exist as set elements but rather are defined through their interactions. He thus states that one should not speak of society but of socialisation/socialisation to emphasise this dynamic (Simmel 1917: 14). While he does not use the term 'role' in its later meaning, he described a range of social types, such as 'the stranger', 'the poor', 'the mediator', who become what they are 'through [their] relations with others who assign [them] a particular position and expect [them] to behave in specific ways' (Coser 1977: 182).

This formulation reminds very much of George Herbert Mead's work, who indeed, through his review of Simmel's 'Philosophie des Geldes' in the Journal of Political Economy (1900-01), is proven to have been familiar with his work, even though Georg Simmel was – reportedly due to his Jewish heritage – never to gain the career that the praise for his work by many contemporaries should have brought him in Germany.

George Herbert Mead's (1934) approach to social interaction, while also theoretical rather than empirical, showed the love for detail that Simmel lacked: his lectures on human interaction went beyond a rough description of some typical social situations and into the fine mechanics of social behaviour, exploring what went on inside the mind of a person when their behaviour was directed towards another individual. Building upon behaviourism and especially Wilhelm Wundt's work (Farr 2001), Mead did not follow Simmel's lead of regarding human society distinct from biology; instead, he understands social interaction as a process that is rooted in the biological: an interaction process of biological systems that can move beyond the biological through the development of self-consciousness and purposive behaviour.

Mead's central contribution to the idea of role is, perhaps, how he connected it to the 'self', the personal identity. In his interpretation, the mind and the self are not preceding social interaction; they are formed by it. By experiencing a long row of interactions with others throughout their lives, humans learn what behaviour is expected of them in a given situation, thus growing aware of their self in a given social interaction and being able to choose from a variety of behavioural options. These situations, however, will differ and so will the expectations towards the individuals in these situations.

This is where the concept of social roles (or 'rôles', as Mead called them) comes – quite literally – into play: in each different situation, when interacting with a different set of individuals and/or to a different purpose, the human takes on a different role according to what is required (expected) of them. The older adult will behave differently in the morning when helping their demented spouse with their personal hygiene (role: carer) than they do when they are visiting their general practitioner for a routine check-up (role: patient) or when they are interacting with their grown up children (role: parent).

In each of these situations, they will directly interact with one or several people that are called 'significant other' (a term not introduced by Mead but by Harry Stack Sullivan

[see e.g. Feinman 1992, Roeckelein 2006]) and will function as direct 'mirrors' (thinking of Cooley's [1902] looking glass self) of their behaviour, since these significant others will immediately react to it. They will, however, implicitly also refer to the 'generalised other', expectations that they have learned are held by most towards their behaviour: social norms and rules.

This is the frame in which the individual is situated within an interaction. Yet Mead did not claim that we were pure constructs of the common structure of social interaction as has been claimed by some critics of social role theory. He distinguished the 'I' (the personal self) and the 'me' (the limelight self, the social self, that 'arises through the taking of the attitudes of others' [Mead 1934: 174]) specifically to emphasise that human individuals are not purely governed by the social forces around them but that their behaviour varies beyond what can be explained by outside influences.

While Mead is commonly regarded as a micro-sociologist, interested in direct interaction, he did consider the wider societal implications of his theory, and here the difference between I and me is central. The individual attitude of the 'I' towards its situation allows the human to override the learned behaviour of the me and to adapt, thus potentially evoking a change in society. He went beyond that to formulate a wider theory of society which, however, cannot compete with more refined theories of social structure and its functions.

An author writing about social roles at about the same time as Mead was the anthropologist Ralph Linton. His work was concerned with the connection of social role and social status. Linton (1936) attested the term status a double significance: on the one hand, 'status' describes the position in any given social interaction that defines the individual's rights and duties in it – the position of teacher, employee, husband, grandparent etc. On the other hand, 'the status of any individual means the sum total of all the statuses which he occupies' and 'represents his position with relation to the total society' (Linton 1936: 113). Linton's differentiation between status and role differs from Mead's in so far as Mead does not split the social position with its rights and duties from the behaviour that it evokes – this behaviour, however, is what Linton calls role or the performance of a role (quite in the sense of Mead's playing of a role). While this differentiation is not commonly used anymore today, making it is useful especially regarding the again double significance of role as acting according to the status in a given situation and role as a description of the general contribution to society as a whole and what the individual can expect of it. This enables a

closer look at the two levels on which this research project is relevant: the data was gathered on the individual level, and so the results of the analysis will provide information on the share of people taking up specific roles as well as on why they do so based on their particular characteristics. However, the wider aim of the project is to look at the societal position of older adults (their summary status as a group) and their societal contribution (their summary role). Furthermore, the differences in the summary social role and social status of individuals are of interest, as well as how these can be explained.

Indeed, Linton applied his theory to characteristics like sex, age, family relationship, and established social group (class). These are in his definition 'ascribed' statuses, statuses that are given to the individual by society without their own contribution. '[...] the statuses whose occupation will be determined by age can be forecast and trained for with accuracy,' he wrote. 'In all societies the actual ascription of statuses to the individual is controlled by a series of these reference points which together serve to delimit the field of his future participation in the life of the group' (ibid: 116). This is certainly true, yet the question is, are the traditionally ascribed statuses of older adults still suitable for today's life realities? Are they changing? If so, who or what changes them, and who may still refer to the old statuses?

The second form of status attainment is that of achieving a status through personal skills, such as a talent. A need for abstraction of social roles to be able to systematise these for a large number of cases to be analysed with quantitative methodology in this project does not allow for such a differentiation in the data as such. However, there are certainly types of social roles addressed in our analysis that are likely to require some prior knowledge or skills while others are mostly steered by necessity.

Talcott Parsons (e.g. 1966) has contributed much to the popularity of the role concept, introducing it, amongst other works, into medical sociology with his work on the sick role. However, Parsons' role concept is part of his larger body of work of systems theory that does not seem very suitable for the here presented study.

An adaptation of role theory that is regarded as much more suitable theoretical framework, combining the micro-sociological and the macro-sociological perspective and including social roles, is that of Robert K. Merton (1964). Merton brings Mead's work together with Durkheim's functionalist thinking and emphasis on methodologically accurate empirical research. The functionalist perspective is latent in the whole debate on

population ageing: on the one hand, there is the concern about a large group of people who need to be taken care of while not fulfilling a social function of their own. This is at least an outdated idea, if it ever held any merit, yet it is still often underlying the discussion. On the other hand, in order to meet the perceived need for care and financial support in later life, society has to reorganise itself so that there are social institutions fulfilling these functions.

Merton distinguishes two types of functions. On the one hand, there are indeed the function of a given behaviour, social role or social institution: these are called 'manifest'. On the other hand, any act within the social sphere can have wider effects that were not directly intended by the actor: these are called 'latent'. This will be returned to later.

To the concept of social roles, Merton adds complexity that is also to be found in his conception of social functions: he does not believe in the perfect order of all elements of the social world, and therefore he does allow for the possibility that not all social functions are beneficial ('positive' 1949: 32) for everyone, just as not all social roles must be compatible. Items of culture or social structure may well only be residues that have lost their social function, he argues against Malinowski's conviction that indeed 'every custom [...] fulfils some vital function]' (Merton 1949: 33).

When opposing the idea of the indispensability of any part of culture, Merton also opens up the path to societal development completely: of course customs, institutions, beliefs and the like can change their social functions or their social functions can be taken up by other parts of the social order, just as new social practices can be developed that will fulfil a newly required social function. For example, as in many other cultures, the days before Lent were celebrated in different ways throughout Germany. People would dress up, specific food would be made, colourful processions and mocking speeches were prepared. These customs are still celebrated in many regions, but they have long lost their Christian frame of reference and thus their original function.

Merton only belatedly, in the revised edition, added his ideas about social roles to his main publication on 'Social Theories and Social Structure' (1964). His starting point is Linton's concept, yet where Linton postulated that each social status was connected to one social role, Merton points out that there are actually several social roles (behavioural expectations) associated with each status. The behaviour of a teacher, for example, is going to vary when he talks to pupils, parents, other teachers, or the director of the school. The social status will remain the same, yet the roles will vary between figure of authority,

service personnel, colleague, and subordinate. To emphasise the temporality of social statuses, Merton introduces the term 'status-sequence' (such as, e.g. from student to trainee teacher to teacher) and states that such sequences also exist for status-sets.

Do social statuses or social status sets lead to other social statuses or status sets? More precisely, does being in a socially engaged status make it more likely to also acquire other socially engaged statuses? If so, how do past social statuses influence the present status-set of older adults?

In her paper on social perspectives on life transitions, George (1993) wrote that while it was well suited to illuminate the topic, role theory was underdeveloped when it came to role transitions – role exits (status exits) and role entries (status entries). Due to role theory being already on the decline when she made this statement, no attempts to rectify this have been made since. When looking at the literature on role transitions and life transitions, papers on transitions into adulthood are more numerous than papers on transitions from mid- to later life, as is also apparent when Silver (1996) connects role transitions with transition rites – whose absence in the transition to later life has already been remarked upon in the introduction.

Concerning the critical appraisal of role theory

While being taken for granted in the 1960s and 1970s, role theory today is only very occasionally employed by researchers. This paradox suggests that the reasons for role theory's falling 'out of fashion' are somewhat diffuse, rather than grounded in substantial, unchallengeable points of criticism. When digging into the literature to explore the truth behind this hypothesis, two waves of criticism come to light: one already under way at the height of role analysis, with contributions from, e.g., Habermas (1963), Dewey (1969), and Coulson (1972; see Gerhardt 1980), and the other in the early 1980s, originating in feminist literature (see Jackson 1998).

Many of the points held against role theory originate in Parson's rather rigid concept of social structure and social roles. So Komarovskiy (1973) identified three recurring criticisms of social structural role analysis:

1. A neglect of individuality. Actors are perceived as interchangeable shells for socially prescribed behaviour without any free will.
2. An overemphasis on role conformity and social stability that cannot explain deviance or social change.

3. The 'fallacy of normative determinism' (p. 651): do social norms and expectations dictate behaviour, or are social norms not negotiated daily through 'constant interaction involving the interplay of interests, changing conditions, power, dominance, force, fraud, ignorance, and knowledge' (Blake and Davis 1964, cited after Komarovsky 1973: 651)?

Jackson (1998) locates the 'most penetrating analysis of the deficiencies of role theory' (51) in the work of Robert W. Connell, who published an essay on 'The concept of role and what to do with it' in his 1983 essay collection. In his slightly polemic attempt to 'laugh [role theory] out of court' (Connell 1983: 189), he demonstrates a broad knowledge of select texts on role theory and role analyses that focus on the idea of acting out roles as if in a theatre play and emphasises the rigidity of the social structure that ensues, more or less restating Komarovsky's points of criticism (which he was aware of) without acknowledging the counterarguments she made and entirely omitting any mention of Merton's contributions to the field. His re-telling of social role theory is drawing a picture of a very conservative social theory, and he almost seems to insinuate that it forces its normative values of 'normal' and 'deviant' onto society.

Largely following him, Jackson (1998) summarised further arguments against role theory that she found most pertinent. In her view, role theory oversimplified, using conservative ideal types, such as 'the mother', without taking into consideration the real-typical different circumstances of the mother role, such as being single mother or being a lesbian mother. She also finds it necessary to point out that socialisation cannot account for all social behaviour but that momentary strains may force the individual to negotiate away from their learned patterns of action and to once more emphasise that role theory lacked a concept of individual agency as a way to actively deviate from or aim to change social norms and values.

Overall, feminist arguments against role theory, as represented here by Connell and Jackson, appear to confuse role theory with the social reality it describes, perhaps because some of its authors represent the very conservative milieu. That Connell in the 1980s thought it necessary to point out that Linton's 1930s ideas about the necessity of social class differences were faulty, speaks volumes.

Turning once more to Merton makes it easy to disperse the above mentioned points of critique, as Komarovsky already did in 1973.

In answer to both the claim of a lack of individuality, as well as an overreliance on stereotyped role ideas, Merton (e.g. 1957) states clearly that it is the individual, and not the role expectations, that decides how to negotiate, how to act and feel in any given situation. The previously discussed concepts of role conflict and role strain make it plain that roles are no more than internalised and externally communicated behavioural expectations that cannot always be met – either because other role expectations stand in conflict with or also because the individual is personally incapable of meeting them (take, for example, the student that has a ‘blackout’ in an oral examination due to being too nervous).

Merton furthermore clearly factored in the changeability of status-sets and role-sets when he wrote about sequences and considered possible problems that individuals may face when changing into different statuses. When asking if social norms and expectations dictate behaviour, or social norms are not negotiated daily through ‘constant interaction involving the interplay of interests, changing conditions, power, dominance, force, fraud, ignorance, and knowledge’ (Blake and Davis 1964, cited after Komarovskiy 1973: 651), one might select a middle path and propose that both is the case: there are established norms and values that inform daily interaction, yet through outside stimulation, such as changing economic or political circumstances, it is possible that the individual actor finds themselves forced to deviate from the established behavioural practices. If this occurs often enough, it can alter the perception of what is normal or worth to strive for.

In recapitulation, social roles and social statuses are well established concepts in Sociology, with many of the classical authors having contributed to them. There was some debate around their ability to explain social change, much of which targeted Talcott Parsons’ work on these concepts. However, these points of criticism could not convince. While social roles are no longer as central a concept in sociology as they once were, it is still more frequently found in the literature on volunteering, childcare and adult care. Linton and Merton’s work to refine these concepts with a detailed distinction between social roles, social statuses, and social status sets provides a good set of analytical tools for this study.

Multiple social statuses

It is widely accepted that individuals are likely to possess multiple social statuses, and for each of these social statuses a whole set of social roles, and that these can contradict

each other. Merton went to some lengths to explore the mechanism that help alleviate these conflicts within a role set or a status set, yet other authors of his time and later continued discussing these and research them empirically.

'Role conflicts' (by which is usually meant what in Linton and Merton's terminology would be called status conflicts), which lead to 'role strain', have already been addressed by Goode in 1960 (crediting Merton, amongst others, for helpful comments), who described the latter in fact as 'felt difficulty in fulfilling role obligation' (p. 483) with the function of holding the larger social structure in place. This suggests that, while conflicts between roles or social statuses, both time-related and behaviour-related, can lead to a sub-optimal role enactment viewed from each single role relationship, on the societal level, they are beneficial, because they force the individual to adjust their behaviour to do justice to all societally important positions that they have and keep up social structure.

On the other hand, the idea emerged that multiple social statuses do not always have to be only time and energy consuming but may enhance a person's ability to fulfil the role expectations connected to social statuses ('role enhancement'; see e.g. Marks 1977). Sieber (1974) suggests four rewards of 'role accumulation': '(1) role privileges, (2) overall status security, (3) resources for status enhancement and role performance (acquired, e.g. through a wider social network), and (4) enrichment of the personality and ego gratification' (p. 569).

In this context, these deliberations lead to the empirical question in how far one status, such as caregiver, is beneficial or a hindrance to achieving another status, e.g. as volunteer, and fulfilling the role expectations associated with it. This will partly depend on the importance of that status within the person's status set: the occasional household helper may have more time and energy than the person who looks after their demented mother nearly around the clock, partly on the nature of the role expectations, and partly on the individual's perception of the demands and rewards of their status.

Caregiving in particular is often associated with role strain (Rozario, Morrow-Howell and Hinterlong 2004). Scharlach (1994) examined how people in a U.S. sample who were both employed and caregivers perceived this dual 'role' and found both traces of role strain, in the form of less time and energy than before for any of their roles, as well as of role enhancement in the form of 'a sense of fulfilment from handling the demands of each role, the ability to utilize the opportunities afforded by each role on behalf of the other role, and enhanced interpersonal relationships with co-workers as well as with the care

recipient' (p. 382). Dautzenberg et al. (2000) also examined the relationship between caregiving and employment and found that when elderly parents required help, the caregiver role tended to be given to the daughter or daughter-in-law living closest to them with the least competing demands, yet that there was little evidence suggesting that once this decision had been made, differences in the work life of these women had any influence on their execution of the care responsibility – or that the care responsibility affected their work performance. Rozario, Morrow-Howell and Hinterlong (2004) compared the well-being of caregivers who also had other 'productive' roles, such as volunteering and paid employment, with that of caregivers who did not have these additional social statuses, and they found that the first reported on average better self-rated health. However, they pointed out themselves that these could be due to a self-selection process: do people in better health take on more obligations or do these additional social statuses contribute to good health (or both)?

Not always using the role theory vocabulary, a few studies have researched what effect filling out more than one social status has on older adults or what possible interactions there are between these multiple social statuses.

Baker, Cahalin, Gerst, and Burr (2005), whose study was based on data from the Americans' Changing Lives survey, have summed up roles of old adults, taking into account both the number of productive roles (defined as 'activity that is embedded in social networks', p. 452) and the time committed to them, and found that their findings were 'consistent with the existing research that suggests multiple roles, as reflected by participation productive activities, leads to a better quality of life, possibly through increases in social integration and improvements in self-esteem and self-efficacy' (ib.).

Burr, Choi, Mutchler, and Caro (2005) studied the relationship between caregiving and volunteering, and came to the result that volunteers were found more often amongst people who also had caregiving responsibilities. They suggested that caregivers tended to be part of social networks that fostered volunteering and found no clear evidence that caregiving was stopping people from volunteering. Yet two years later, Choi, Burr, Mutchler, and Caro (2007) focused on spousal caregivers and found that female caregivers were less likely to engage in formal or informal volunteering than non-caregivers, even when controlling for other characteristics. Burr, Caro and Mutchler (2007) have pursued their endeavours even further and established a typology of productive behaviour,

suggesting that activities indeed are patterned, rather complementing than competing against each other.

Social roles in this research project

Based on the information provided by the German Ageing Study and previous research in this area, four social roles were identified that are viewed as central areas of social interaction for older adults and for which detailed information is available:

- 1) Caregiving,
- 2) Volunteering,
- 3) Childcare, and
- 4) Social leisure activities.

These four social statuses are the ones connecting retirees with their social environments and are the vehicles for forming their social networks. The first two have received most attention in social ageing research so far, which is reflected in their overrepresentation in the literature discussion here. Childcare is more viewed from the perspective of supporting families, especially mothers, with a separate body of literature of grandparent – grandchildren ties and financial support. How the child carer status interacts with other social statuses has not received as much attention. Social leisure activities are often viewed in the light of the ‘young old’, often with a focus on physical activities or on the young old as relevant consumer group, not as a social status in a continuum of social statuses.

Before delving deeper into the existing literature on these statuses, a look at them through the lens of their societal and individual contributions will justify further why researching them is important. Following Merton’s work, each of these statuses has a range of both manifest and latent functions.

Caregiving as the provision of household help, assistance with body care, and/or medical aid in the home of the person in need of care allows this person to remain in their familiar social and physical environment and maintain as much independence as possible. Yet at the same time it also relieves the state from having to provide more facilities for professional, institutional care, and it in many cases lowers the (financial) cost of care. If a person can remain in their social environment, this may not only benefit their own wellbeing but also that of their friends and neighbours and their family, if they are able to interact with them (while it can put a strain on these if care is extensive and social

interaction no longer possible, because, for example, the person is demented and no longer able to recognise friends and relatives or even prone to bouts of aggression).

When regarding *volunteering*, it depends on the individual volunteer's motivation for their engagement when trying to distinguish between manifest and latent functions. A person very well may volunteer for the sake of supporting a good charity cause or their local social club or they may do so to be a part of a social group or to gain the gratification of having done a 'good deed'. In the latter case, the actual support of the organisation would already be one of the latent functions. Taking voluntary engagement in one of the many Christian and non-religious welfare organisations in Germany as an example, its manifest functions may be the feeling of doing good and the provision free food items for people with low incomes or the promotion of blood donations. The wider implication, the latent function, would be the support of a large network of organisations that have taken on the state's duty of providing help for the underprivileged but cannot do so from the tight budget that they are provided with by the state.

The manifest function of *childcare* these days will in most cases be making it possible for the parent to work or to spend some time with their partner. This is more essential in some geographical areas than others, where professional childcare provision is insufficient³. Latently, however, it will also allow the passing on of the experiences that older adults have gained throughout their lives, of value systems, the provision of emotional, financial, and educational support to children and parents, and the overall strengthening of the social ties within families and neighbourhoods.

Social leisure activities (leisure activities pursued in company) can also have manifold functions. For the actor, they can be a tool to overcome laziness and finally get more physical exercise by joining a running group; they can be taking regular walks with the neighbour because he or she has no one else to keep him/her company; they can be keeping in touch with the grandchildren by going to the cinema with them; they can be travelling with a companion, because it is simply more fun to share impressions with others. On the latent side, the wider societal implications can be just as manifold. Many leisure activities require investment: concert tickets, restaurant bills, the right sports equipment, playing cards, and so on. They are therefore supporting economy. Any kind of social interaction has the potential to strengthen existing social ties or form new ones and

³ There are huge differences in childcare provision between Eastern and Western Germany, for example, despite policy initiatives trying to guarantee childcare for toddlers.

be the basis for support. They may thus also be the entry points for other social roles: the wider the social network, the more likely an individual is to be offered the social role, e.g. of volunteer or babysitter.

This discussion of the social function of these roles makes apparent how diverse they are, even within one role category. The volunteer role of the treasurer of a bowling club will require different skills than that of a volunteer going into schools to teach children about first aid. Nevertheless, this categorisation of social roles is common, because within each of these categories, it is assumed, a similar range of factors is associated with whether a person takes on a social role of this category, and a similar attitude towards that social role is required.

Both to see the differences in the factors associated with these social roles and to justify our choice of explanatory variables in the later part of this thesis, the following subchapter will discuss the present knowledge about them.

I.1.3 Factors influencing the social statuses in later life

When looking at social behaviour and social statuses in later life, research is mostly concerned with the tasks that older adults take on or with the way they spend their time

- a) as a measure of how 'active' they are with the underlying assumption or to be tested hypothesis that this being more active means a higher likelihood of well-being, better health, higher life satisfaction, or decreased chance of mental illness, or
- b) as a measure of their contribution to society (often termed social participation).

Neither of these questions is directly relevant for the here presented research, but the widely spread interest in them also led to research into the factors that possibly promote or interfere with the acquisition of a specific social status.

The following three subchapters will discuss studies that have looked at volunteering, caregiving, childcare, and social leisure activities to identify relevant influential factors for these statuses. These factors will later be utilised as control variables, when regression models are built to test the hypotheses developed in this study.

It has to be noted that the terminology and operationalisations of concepts differ throughout the studies. Volunteering is sometimes called 'formal social participation',

whereas caregiving may be a part of 'informal social participation'. Many different types of activities are captured under the term 'leisure'. Some papers are merely looking at physical activities, others at solving puzzles and watching TV, partaking in cultural events etc. These were not considered here. Papers including social leisure activities are far and in between. Likewise, informal childcare has received less attention in social ageing research than one might expect. Grand-parenting is usually looked at from the perspective of the mother, not the child carers.

Socio-economic characteristics

Cohort differences. Broese van Groenou and Deeg (2010) used data from the Longitudinal Ageing Study Amsterdam collected in 1992 and 2002 to compare what they called the formal and informal social participation of 60 to 69-year-olds of two birth cohorts and examined in how far their levels of education, health, employment status and marital status, as well as sex, accounted for the cohort differences. They found that the influence of gender and health on volunteering and religious involvement changed between the two cohorts and predicted a higher level of formal and informal social participation in future cohorts.

A similar study was conducted by Rotolo and Wilson (2004) for volunteering in the USA based on a female sample from the National Longitudinal Survey of Labour Market Experience with the aim to explore generational differences. They find no cohort differences in the share of volunteers, though there are differences in the kind of volunteer work pursued.

Agahi and Parker (2005) looked at the participation levels of adults aged 77 and over in Sweden. Like van Groenou and Deeg, they compared figures from 1992 with figures from 2002 and found an increase in the activity levels.

Higher levels of education have been repeatedly shown to be positively associated with volunteering (Broese van Groenou and Deeg 2010; McPherson and Rotolo 1996; Musick, Wilson and Bynum 2000; Rotolo and Wilson 2004) and engagement in leisure activities (Paillard-Borg et al. 2009, Minhat and Amin 2012).

Good health, often measured as self-rated health, is also positively associated with the likelihood of obtaining any of the four statuses to be researched in this study, and just like education, it has been increasing from cohort to cohort, as was shown in the preface when discussing healthy and disability free life expectancies. It is both assumed that better health

makes it more likely (Li and Ferraro 2006; Bukov, Maas and Lampert 2002) as well as that the social integration resulting from carrying out the social roles connected to social statuses supports good health (e.g. Lum and Lightfoot 2004, Wethington et al. 2000). Lee et al. (2008) have shown the latter association between social participation ('defined as an individual having taken part in formal or informal group activities, as well as other social activities, during the past 12 months', p. 1044) and self-rated health with a large Korean sample encompassing people aged 25 and above; Li and Ferraro (2006) found volunteering to be a means of compensation for depression and confirmed other observations that 'functional health problems' were a barrier to volunteering (p. 68). Paradoxically, in Broese van Groenou and Deeg's study the overall health status of the cross-sectional samples worsened between 1992 and 2002, and this was according to the authors counter-acting the positive effect of, e.g., the higher level of education. At the same time, they found that the impact of physical limitations varied, at least for volunteering: in 1992, having physical limitations did impair a person's likeliness of being a volunteer; in 2002 it much less so (the interaction effect showing this was not modelled or at least not presented for other forms of participation).

Being in employment, however, is usually assumed to be negatively associated with also occupying other social statuses: the more time is spent in the employment market, the less time there is for other commitments (role strain theory).

Several authors have examined in how far a person's occupation is associated with their volunteering, and usually they found that employees were, in fact, more likely to volunteer. Wilensky already published a paper on this question in 1961, in which he adopted ideas about the influence of careers on social integration from Durkheim and Mannheim and came to the conclusion that men having predictable careers – which he describes as one job leading to another, with related function and an expectable rise in social status – on average have more memberships in formal associations and spend more time on these. This provides them with the opportunity 'for interacting with persons who differ from themselves in important social characteristics' (p. 532) and to be exposed to the major institutional spheres of society, and they will overall have a wider social network and be more involved in their local communities, thus also enabling them further their career prospects. Wilson and Musick (1997) based their research on the premise that volunteering was not merely a way of people with a higher socio-economic position to gain further ties with the community but that it indeed was a form of labour, just as paid employment,

housework, or care-giving and looked at the stimuli in people's paid work life that might lead them to undertake voluntary work. They argued with Verba et al. (1995) that someone who works self-directed in their paid work acquires a set of skills and resources that also make them a valuable volunteer – and this may well also work in the opposite direction: volunteering may enable the acquisition of new skills and social connections also useful in the employment market.

In contrast to volunteering, Burr, Mutchler and Caro (2007) view paid work and caregiving as 'examples of two activities considered to be obligatory and in competition with one another, especially when both require heavy time commitments' (p. S269). Doty, Jackson, and Crown (1998) examined the possible effects of increased female employment on elderly care provision and found 'that disabled elders with employed female primary caregivers tend to use more hours of help from other sources than disabled elders with non-employed female caregivers' (p. 340).

Marital status has been found by Rotolo and Wilson (2004) to have an impact on volunteering in all age groups: married people were more likely to volunteer than unmarried respondents; Christoforou (2005) came to the same result when looking at general group membership. However, they did not discriminate between widowers and widows, singles, and people not married yet living in a secure partnership. In the analysis of Broese van Groenou and Deeg, the marital status, measured in the categories 'never married', 'married', 'divorced', and 'widowed', did not have a clear effect on the social participation of the 60 to 69 year-olds; neither did it in Fidrmuc and Gërxhani's analysis of differences in social participation (they call it social capital) between EU countries and candidate countries (2008).

In the Malaysian context, Minhat and Amin (2012) have likewise found a positive effect of being married on social activities in later life, with spending time with grandchildren being counted into these activities.

There are *gender differences* in the number and characteristics of social statuses occupied: in Broese van Groenou and Deeg's study, men were more likely to volunteer than women, although the gap between them shrank from 1992 to 2002. Christoforou (2005) also found lower levels of participation in formal groups for women. Caregiving, on the other hand, is known to be a female dominated area (e.g. Folbre 2012).

Religiosity, especially when lived in a religious community, is positively associated with both formal and informal engagement in the community (e.g. Becker and Dhingra 2001,

Wilson and Musick 1997, Tienen et al. 2010) and filial caregiving (e.g. Gans, Silverstein and Lowenstein 2009). Within the literature that looks at social participation by relating it to social capital and basing both on trust, however, '[i]t is believed that in Protestant countries there is more social capital than in countries with dominant hierarchical religions, such as Catholic, Orthodox Christian or Moslem (Inglehart, 1990; Putnam, 1993; Fukuyama, 1995; van Oorschot et al., 2006)' (Kaasa and Parts 2008: 149).

Social and infrastructural environment

Having a large social network is commonly theorised to provide a person with more opportunities to obtain social statuses: they are, e.g. more likely to meet someone who is engaged in an organisation and asks them to volunteer as well, to have friends, family members or neighbours who require assistance in daily life, or to know someone that is grateful for help with childcare. However, social networks are rarely operationalised as part of an empirical model in activity research. Broese van Groenou and Deeg (2010) found their more recent Amsterdam sample from 2002 was 1.29 times more likely to have a large social network (defined as 19 or more people – the top 30% in the distribution of social network sizes within their sample) than the members of the 1992 sample. However, in their study they treated this as an outcome variable, finding that, just as other forms of social participation the size of the social network was associated with marital status, health, and level of education. When looking into using a measure of the number of social contacts as explanatory variable, these potential links have to be taken into consideration to avoid multicollinearity, but beyond that the potential link between a per se large social network and more social engagement also needs to be investigated. Here not only the quantity but also the quality matters: is it a network with many close or rather mostly very loose ties? Is the person embedded in a close-knit family of which many members live nearby or are relatives scarce and living far away?

The social network may also be a crucial factor in both encouragement of taking on a difficult status – as certain caregiving and volunteering tasks may be – and in providing support for these, which could enable the individual to maintain this status.

Studies examining social class and ethnicity differences for activities such as childcare or volunteering are sparse. For this study, considering the sample that consists largely of German citizens (the data is discussed in a subsequent chapter), and with German surveys, including the one used here, not providing measures of ethnicity, ethnicity differences do

not play a significant role. Social class was not captured for most waves of the survey used for this study but can be in part captured by factors such as education, (previous) occupation or income, and health.

Living in urban or rural areas, the average age in an area or area deprivation might be other factors influencing both access to and culturally formed motivation to engage in any of the four social statuses, but little research is available on this, partly due to the anonymization process of large social surveys that make area-based analysis difficult. Van der Meer (2008) found that older people living in deprived areas in the Netherlands tended to have the least diversity in and the lowest rates of leisure activities.

Personality and life course influences

The idea that the life course influences individuals' behaviour in old age has been present already in Havighurst's work (1968), who postulated that a person who has had multiple social statuses and status changes in the course of their life will find it easier to establish new social statuses after retirement, whereas a person who, for example, was very focused on their social status in their work life and did not establish social statuses as friend or volunteer, may find it harder to reorient.

Robert Atchley further developed the idea that life course experiences affect a person's decisions in later life with his continuity theory. According to him,

'A central premise of Continuity Theory is that, in making adaptive choices, middle-aged and older adults attempt to preserve and maintain existing internal and external structures and that they prefer to accomplish this objective by using continuity (i.e., applying familiar strategies in familiar arenas of life). [...] As a result of both their own perceptions and pressures from the social environment, individuals who are adapting to normal aging are both predisposed and motivated toward inner psychological continuity as well as outward continuity of social behavior and circumstances.' (1989: 183).

He argues that retirement behaviour will not stand in stark contrast to the life before but instead each person will seek to create continuity in their life. It thus stands to reason that people who have shown an interest, e.g., in volunteering already earlier in their lives are more likely to take up or maintain the status of volunteer as retiree compared to someone who has never held that status.

In 1986, David Ekerdt adopted the active ageing perspective once more to some degree in his essay on the 'Busy Ethic' by claiming that 'a society that traditionally identifies work and productivity as a wellspring of virtue would seem to need some justification for a life of

pensioned leisure' and therefore, pensioners feel the need to make their life appear 'earnest, occupied, and filled with activity' (p. 254). He combines this perspective with the newer ideas of continuity theory when he explains that the busy ethic is not only caused by the functionalistic work ethic surrounding the elderly but also by them imbibing this ethic throughout their lives and carrying it together with a set of other norms and values they have collected over time into their retirement.

The life course perspective has also been adopted by researchers of ageing, focussing on the historical and social provenance and environment of people throughout their lives and on important events in their lives to see how these might influence their handling of retirement and other events in later life (George 1993). Yet it is not as often taken into account in quantitative analysis of social behaviour in later life as it is in the medical sciences (see e.g. Blane 2005, Brandt 2012) or in social research on health and wellbeing (e.g. Umberson, Pudrovska, and Reczek 2010, Curtis et al. 2004, Hansen, Slagsvold, and Moum 2009, Thomas 2011).

Hyypä et al. (2007) examined the social participation of a subsample of the nationwide Mini-Finland Health Survey that had been interviewed 1978-80 and twenty years later about their engagement in clubs and voluntary societies, cultural and sports attendance, congregational activity, outdoor and productive activity, cultural interests, and hobby activity and concluded that their social participation was moderately stable. This would support the hypothesis that having had similar social statuses in their working life makes it more likely for retirees to also volunteer or socially participate in other roles in later life.

In their research on the impact of job displacement on social participation based on the Wisconsin Longitudinal Study, Brand and Burgard (1997) found that early to mid-career unemployment had a long-term negative effect on social participation (involvement in church-connected groups or at least weekly church attendance; involvement in charitable organizations; involvement in youth groups or community centres; involvement in civic or business groups, political groups or neighbourhood organizations; involvement in professional groups; and involvement in social or leisure activities including country clubs, sports teams or at least weekly social gathering with friends).

Another factor in the life course is the transition from work life into retirement. Brand and Burgard (1997) did not find a significant impact of job displacement in late work life on volunteering. However, Moen (2001) found that the transition phase can be a strain on

married couples, especially if the wife still works while the husband is retired. Since marriage was shown to overall have a positive impact on social relations and the likeliness of community engagement, what impact does a strain on it have?

Wheaton (1990) examined the mental health impact of life transitions comparing people's role stress prior to the transition. He came to the conclusion that people with chronically stressful situations prior to the event (retirement was one of nine events he looked at) tended to experience positively, and that therefore the idea of role transition per se having a negative impact on mental health was erroneous. This, however, gives no clear indication whether there is a correlation between pre-retirement role strain and post-retirement statuses.

Personality or character trait influences are, just as life course influences, rarely made a topic. Blekesaune and Skirbekk (2012) looked at retirement behaviour, by which they meant the timing of retirement, based on the five-factor model (neuroticism, openness, conscientiousness, agreeableness, extraversion), and their results indicated that an individual's personality can aid in predicting disability related retirement yet not retirement that is not related to disability and that within the five-factor model, men's and women's predictors for disability related retirement were different. While neuroticism is the dominant predictor for women, openness to experience rises to a significant predictor of disability retirement when also controlling for education and income for men.

The Australian psychologists Gregory, Nettelbeck, and Wilson (2010) looked at openness to experience, measuring openness to ideas and values as well as openness to fantasy (active imagination), yet their study was once more concerned with 'successful ageing', so 'openness' was used as explanatory variable that was automatically assumed to lead to higher willingness to accept new challenges, such as adopting new community roles. It was not explored where this openness came from or how much it was mitigated by other influences as they were discussed above.

Factors utilised in this study

Many of the factors influencing the four social statuses discussed above have been considered in the model building process of this study. Some contributed little to the models in the way they were captured by the survey (e.g. population size and type of the residential area), some information was not available in the survey (e.g. ever having had a

long-term unemployment experience, local area characteristics⁴). The above discussion aims to show the width of the factors that need to be considered in the research field, but in this study, the specific research questions allowed to narrow down the range of factors introduced into the models in favour of model parsimony and reducing complexity.

Consequently, the regression models discussed in chapters VI to VIII utilise predominantly socio-economic characteristics as control variables to examine the effects of a narrow range of life course characteristics (retirement reasons, retirement difficulty) and cohort differences.

⁴ Some of these are available when flying to the office of the survey conductors to run analyses there, which, however, only seems feasible if the focus of the study were on the effects created by these factors.

I.2 Event society as interpretative frame

I.2.1 An introduction of the theory

The academic literature discussed above is focussed on the social roles and statuses of people, how these might be associated with one another and how the status sets may develop over the life course. What they do not provide sufficiently is an explanation why these might change in the course of time. Since this study will show that there are changes in the rates of people holding the four social statuses, this subchapter will introduce a cultural sociological theory that will serve as interpretative frame in the conclusions.

Gerhard Schulze first published his work on the 'event society' in 1992. His theory is that of a gradual value shift in modern society that affects both individual behaviour and social structure. At its heart is the claim that a growing part of the German population has abandoned (or never adopted) the behaviour of carefully laying out long-term plans for their future, saving up money, choosing a safe occupation rather than one they are passionate about and instead adopted an approach to life that is much more concerned with living in the moment, with consuming what they fancy and with self-expression.

Even though he uses the book title 'Die Erlebnisgesellschaft', which suggests a radical change in the whole society, he emphasises that his concept of a shift towards an experience⁵ oriented lifestyle is not an attempt to characterise a whole society. Instead, he likens it to the concept of social class: it picks up on a new societal trend and aims to offer a new tool for identifying patterns in today's society where older tools (such as social class) lose their functionality. Not in every society will people have developed an equally strong orientation towards experience-driven lifestyles.

Schulze can thus not be counted amongst the authors who outlined a wider societal theory of postmodern development. Other German and international sociologists like Bauman, Beck, Giddens or Featherstone have developed ideas on postmodern society that

⁵ Why does this description alternate between the terms 'event' and 'experience'?

While 'Die Erlebnisgesellschaft' has received much attention in academia and the media of Germany and neighbouring countries and is even on occasion already called a 'sociological classic' (Rössel 2003: 82), it has not been translated into English. In the few instances when it is referred to in English (e.g. Mutz and Kämpfer 2013), it is commonly referred to as 'event society'. However, there is a difference between Ereignis (event) and Erlebnis (experience), and Schulze clearly means the latter. The mistranslation likely originates in the specific way in which the word 'event' has entered the German language: as term describing cultural events, such as concerts, that are part of the experience-focused culture Schulze examines.

may bear some familiarity to Schulze's work but far exceed it in scope. For Bauman, a theory of postmodernity captures the changing ideas in society away from a perception of society as "principally co-ordinated" and enclosed totality (a) with a degree of cohesiveness, (b) equilibrated or marked by an overwhelming tendency to equilibration, (c) unified by an internally coherent value syndrome and a core authority able to promote and enforce it and (d) defining its elements in terms of the function they perform in that process of equilibration' (Bauman 1992: 189) and away from the idea of history being a directional process. In their stead, social theories of postmodernity will explore the growing pluralism and variety in society.

In Kumar's interpretation (1995), few authors understand postmodernity as an entirely new era but more as a new, more self-reflective phase of modernity. Beck's concept of 'risk society', for example, explores the heightened awareness of all potential risks arising from a modern lifestyle – from the hazards of nuclear power and smog to the industrial treatment of food or – as Phillipson (2015) points out – the risks associated with longer life spans and an 'ageing society'.

Scheuch (2003), however, labels both Beck and Giddens as impressionist sociologists. Beck's analysis of the changes of today's society and the society of the future they will lead to are based on the observations in his personal social environment and, so Scheuch criticises, thus lacks a scientific grounding in rigorously collected and critically analysed empirical data. Perhaps slightly controversially, the author hypothesises that Beck himself is a postmodern phenomenon, one of the humanist scholars who in his view rebel against the dominance of rationality in modern society, including humanities and social sciences (which in Continental Europe are perhaps seen more as one than in Anglo-Saxon countries). Aiming for a more friendly interpretation, one could say that Beck's contribution lay in fuelling public debate, creating a more prominent place for Sociology in German society (and beyond)⁶. Schulze certainly benefitted from the same channels of German feuilleton that helped make Beck's work popular, but his theory is more focussed and – while not fully living up to the standards of scientific rigour – it does have an empirical base. Beck's work on the loss of significance of social institutions and heightened risk perception do hold

⁶ Although one could argue that he cast himself perhaps too much in the role of leading social scholar in light of books edited by him with a title such as "Ulrich Beck - Pioneer in Cosmopolitan Sociology and Risk Society" that contain a full page-staged photograph of the author and outline "Ulrich Beck's Scientific Leadership Profile" (a chapter written by himself; Beck 2014).

some relevance for ageing research, but Schulze's theory of the reasons for the changing ways in which individuals form their social networks is much more directly applicable to the research interest of this project.

In many ways, Schulze's theory has parallels to Inglehart's concept of value changes and other postmodern theories. Inglehart holds the view that economic, political and cultural development are closely linked and presents his empirical research based on the World Value Survey as support (Inglehart 1997). Like Schulze, he states that 'the values of Western publics have been shifting from an overwhelming emphasis on material well-being and physical security toward greater emphasis on the quality of life' (Inglehart 1977: 3). Adopting ideas by Maslow, Inglehart states that with rising economic and technical development individuals no longer have to concern themselves as much with satisfying their basic needs: people can earn enough money within a set period of time to go into shops that hold everything they need (food, clothes etc.) and to afford suitable accommodation. In the Western society, memory of war is distant, and health and security systems function well. This reduces the need for vertical distinction and frees people up to focus on other needs. In his terms, value orientations slowly drift cohort by cohort from materialist values to post-materialist values, from sustenance and safety needs over needs for love, esteem and belonging to 'goals related to intellectual and aesthetic satisfaction [...], which Maslow called "self-actualisation needs"' (Inglehart 1977:22). Schulze appears to close the gap between this observation of a shift in value-orientations on the individual level and what this means for the larger network of society.

For this study, Schulze's work was used because it was developed with the German society in mind. He claims that German society is undergoing a change in the fundamental semantics in which people are thinking about themselves and their encompassing social reality (2005: 249). If social structure is based on people looking to fit in with people that are similar to them, then the way in which they identify them as homogenous is undergoing a fundamental shift:

'Theoretically, there are infinite possibilities of creating relations of resemblances and differences; accordingly, the sum of imaginable fundamental semantics is large. To understand the present social change, it is essential to distinguish between outer orientation and inner orientation. Semantics of outer orientation are situational, inner oriented semantics are subjective. The categories of outer-oriented semantics reflect

the position of the subject towards an aspect of reality that lies outside the subject; categories of inner-oriented semantics reflect psycho-physical perceptions.'

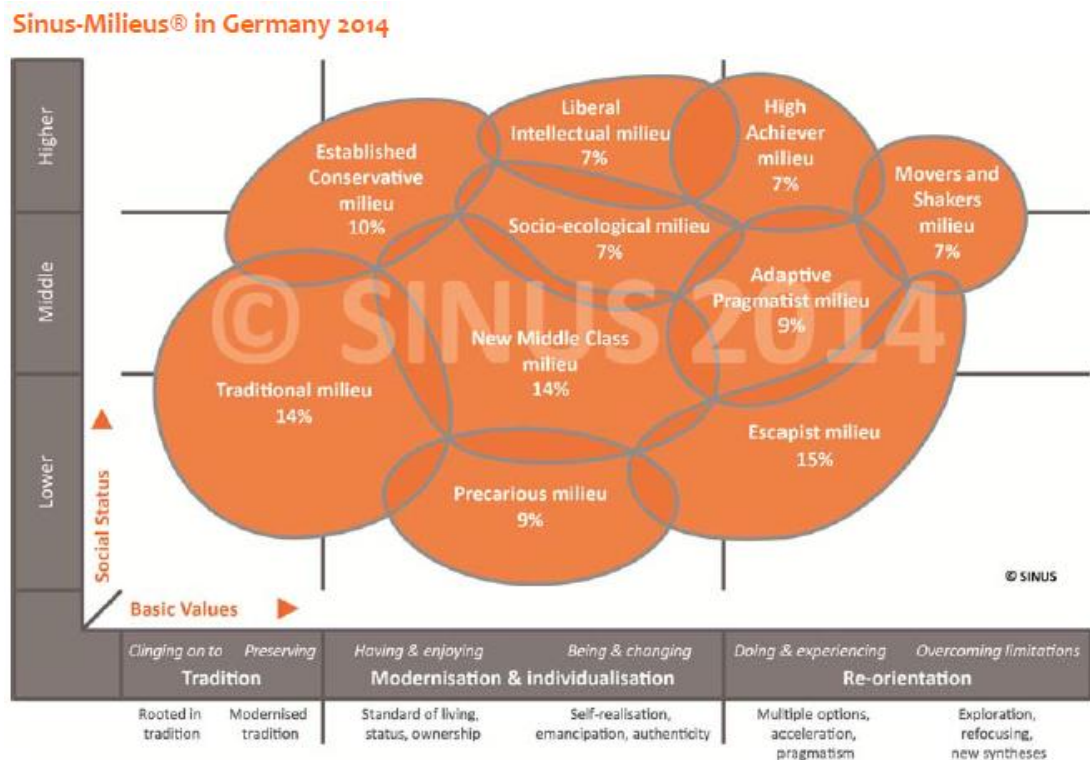
(Schulze 2005: 249, author's translation)

Based on his concepts of 'economic semantics' and 'psycho-physical semantics', Schulze states that society moves away from 'objective facts of social inequality to subjective facts of feelings' (p. 252). This does not mean social inequality no longer exists, but social mobility has increased, so that the question how much you earn has lost relatively in significance in comparison to the question what you do with that money. The claim 'that consumption has replaced production as the dominant identity' (Schrage 2007: 5) has already been made by other authors, but concludes that this shift in significance leads to a deeper change in social reality that takes roots in the whole social structure. Connected to this move towards 'psycho-physical semantics', towards an orientation towards personal wellbeing and enjoying the moment instead of worrying about the future, are the pluralisation of 'everyday life aesthetics' (taste) and the change of interpersonal relationships from relationships of necessity to relationships of choice.

The pluralisation of everyday life aesthetics shows parallels to Bourdieu's ideas about social distinctions but Schulze states that where once only high culture and popular ('trivial') culture stood out as distinctive social constructions of what was tasteful and what was worthless, there now is a rivalling third aesthetic, the aesthetic of excitement ('Spannungsschema', p. 153). People following this aesthetic like pop and rock concerts, action movies, physical activities, and going out – it is the aesthetic most closely related to an experience-focused lifestyle. This growing number of aesthetic schemes leads according to Schulze also to a loss of distinguishing power of each of these: it is no longer an essential part of education to be able to play an instrument or to have read the classics of literature. Social mobility has increased and distinctions are less a matter of position in the social hierarchy (though this aspect has not entirely disappeared) than of personal identity. So instead of determining who holds a higher position in society, everyday life aesthetics are a means of forming a types of lifestyles. The typical signs people pick up in social interaction – clothing, coiffure, manner of speech, level of education, personal opinions, taste in music etc. – are not utilised to determine which social class the other person belongs to (if it would be appropriate and beneficial to mingle with them) but whether their lifestyle is compatible; whether spending time with them would be enjoyable. Society is thus no longer strictly stratified into social classes but social groups are better described as social milieus that can co-exist on the same level in the social hierarchy.

Social milieus are a model of social structure commonly used in Germany (see Hradil et al. 2006). It is especially well established in market research, with the Sinus Institute being the leading, internationally operating provider of milieu analysis for marketing and social research purposes. They currently distinguish ten social milieus in Germany based on the relative position in the social hierarchy and the value orientations of the people belonging to the specific social group forming the milieu (Figure 4).

Figure 4: ‘Potato chart’ of social milieus as differentiated by Sinus Institut 2014



Source: Sinus Markt- und Sozialforschung, Heidelberg, 2014.

The above schematic holds basic value orientations on the horizontal axis and social position (lower class and lower middle class, middle class, upper class and upper middle class) on the vertical axis. These value orientations run from traditional values of holding on to the known and preserving over orientations towards modernisation and individualisation (labelled ‘owning and enjoying’ and ‘being and changing’) to new value orientations, such as ‘doing and experiencing’ and ‘overcoming limits’. Within these orientations and social positions, the Sinus Institute has differentiated ten groups of people for which it holds detailed descriptions of their lifestyles, consumption preferences and likely political preferences. In this graph, the groups are represented by a descriptive label (such as

‘traditional’ or ‘hedonists’) and their share within the population. According to this, about a third of the German population in 2015 adhered to values that correspond with Schulze’s experience-driven lifestyle. A closer look at the description of each group would reveal that those ‘potato bubbles’ on the right side of the chart represent groups that are on average younger.

It has to be noted that while some of the value orientations distinguished by the Sinus Institute appear related to Schulze’s observations, his model of social milieus differs from the institute’s. It was here decided to use the Sinus Institute’s version of social milieus because it appeared better rounded and based on a methodologically sounder approach and also because it is available for up to date data. A closer discussion of the differences between the two approaches will not be presented here because this study will not utilise the milieus – it was merely necessary to mention them for a full picture of Schulze’s theory.

1.2.2 What does experience orientation mean in the second half of life?

This study uses Schulze’s theory of social change as interpretative frame for changes in the social roles in later life and to argue that old age is an outdated dissection tool, yet paradoxically he does assert that age matters and says his own research clearly showed that. Invoking both common knowledge and empirical research from the 1970s and 1980s, he attests that ‘accompanying symptoms of old age’ are ‘increasing serenity and contentment with what you have got, as well as rigidity, feelings of being threatened by disorderliness, fatalism, distrust and disengagement.’ Furthermore he claims, ‘strong is the covariation between old age and the willingness for political subordination’ (2005: 190). Based on his empirical findings from twenty-five years ago, he saw no reason to believe that experience orientation would spread into later life.

However, even though back then the difference between older adults and younger adults was still very pronounced – this study shows that it still existed in 1996 – his data analysis was one dimensional. His conclusions about the ‘symptoms’ of old age are based on measuring the association between age and a range of indicators, amongst them health indicators, indicators measuring aspects matching his typology of everyday life aesthetics, and how often respondents met up with friends, in bivariate analysis with the help of Goodman and Kruskal’s gamma. No statistical controls for socio-demographic differences between the age groups were introduced. Still, the main issue with Schulze’s ideas about old age certainly is that they were heavily influenced by the common view of old age at the

time of their development. With Laslett's ideas about the third age only being published in 1996 and the disability free phase taking up a bigger and bigger part of life being a relatively recent discovery, Schulze did not yet have the tools to foresee the potential for a drastic change in later life.

Schulze sees the youth cultures of the 1960s as starting point for a wider experience orientation. This idea of changing lifestyles influencing old age has also been discussed by other authors. Gilleard and Higgs wrote in 2002:

The social and cultural transformation that took place in the second half of the century is of crucial significance in explaining the fragmentation that has since taken place in the experience and understanding of later life. Those whose adult lives were formed during this period have been the first to experience ageing in the context of an adult consciousness formed within the 'youth culture' of 'the long sixties' (Marwick 1998). This experience has no precedent – it is a social moment whose significance social gerontologists and social scientists generally have barely grasped. (p.376)

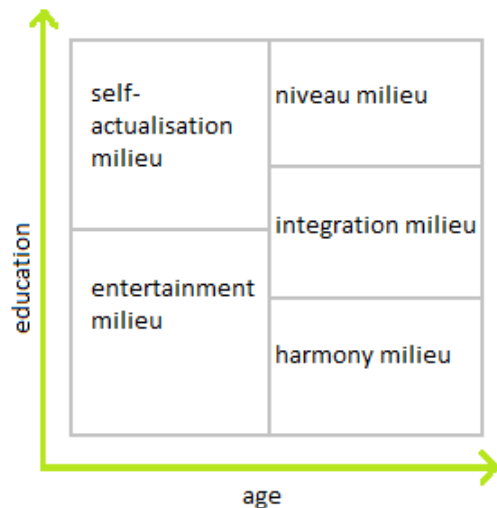
In Schulze's interpretation, they were the first cohorts to break out of the strict social structure in which youth was just a transition phase into adulthood intended for the preparation for work life. He describes youths prior to this time as strictly bound to the social class and lifestyle of their parents; the youth cultures, however, developed their own lifestyles, in some cases rebelling against the rigid social structure of their society and questioning the moral superiority of a parental generation in which many were contributors to the NSDAP⁷ regime. Instead of quietly moving through school and apprenticeship or university and treading in the footsteps of their parents, they took some of the 'youthful' elements of their lifestyle into adulthood and formed their own social milieus.

At the time of the first publication of Schulze's book, these cohorts were in their forties. Based on cognitive models of the life cycle, he speculated that they would likely now reflect on achievements, having reached the mid points of their lives. Furthermore he reasoned that following the aesthetic of excitement, of physical experience, may be harder in the second half of life due to worsening body condition. He therefore suggested that social milieus in the second half of life would continue to differ from the social milieus of younger adults. Looking at the development of the overall life expectancy and the healthy life expectancy, however, this reasoning does not appear convincing. Schulze's claim that people are likely to analyse their achievements at the midpoint of their lives already is

⁷ National Socialist German Workers Party, commonly referred to as 'Nazi party'.

flawed: this argument is founded upon studies conducted in the 1960s and 1970s – back then, people would have estimated their likely life span to be around 65 years, not today’s 80 to 85 years. Old age would generally not yet have been regarded as important life stage, but as (if at all) a few precious years of retirement. It is likely that people today have a different outlook on the second half of life, and only a small group would feel that their body condition stood in the way of a physically demanding lifestyle.

Figure 5: Schulze's milieu model



Source: translated from Schulze 2005, p.384.

Schulze suggests a milieu division into five milieus placed on the axes of education and age (see Figure 5) but divided with the help of the two dimensions of cognitive differentiation (inner oriented values of thinking, varying between simple and complex) and regulation (outer-oriented dimension of acting, varying between spontaneous and strongly regulated). In Figure 5, higher age is associated with a higher likeliness for a rule-focussed lifestyle. Higher education is associated with more complex ways of thinking. Thus, the ‘niveau milieu’, for example would be an older, well-educated part of society that is quite traditional in its need for orderliness and clear rules and leans towards high culture pursuits that signify, in Schulze’s line of argumentation, their tendency towards complex ways of thinking. Spontaneous, experience-oriented behaviour is primarily the domain of younger adults.

To use Schulze’s terminology, this semantic structure appears too simple. It was already argued against Schulze’s view on the effect of ageing. Moreover, Schulze’s idea of three distinct schemes of everyday aesthetics appears too simplistic and outdated from today’s perspective. High culture and popular culture are both appropriated by the millions of

producers of media content, ironically broken and entirely reshaped in their meanings. The above presented milieu typology by the Sinus Institute appears a better representation of social reality. This does not mean that members of specific milieus might not be more likely to be of a specific age, but variations from the statistical mean have become more common and accepted. The $-.44$ gamma value⁸ when trying to predict the frequency of spending leisure time with close friends with the help of the age of the respondent⁹, so this study will show, is clearly a matter of the past.

I.3. Summary

In this chapter, a brief overview of the classical theories of ageing was provided to set this study in the larger context of social gerontology that has influenced its research focus. It was discussed that the concepts of social participation and social roles are commonly used to look at volunteering, childcare and adult care (less so for leisure activities), whereas social capital is a rarely used concept. With some weighing of advantages and disadvantages of these concepts, it was decided to utilise the terms of social statuses as developed by Linton and Merton as tools to sharpen the focus on the research matter at hand.

Role theory allows to think about volunteering, childcare, adult care and spending leisure time with friends and family as different ways of positioning oneself within various social networks. Previous works have already discussed whether obtaining several of these positions leads to strain and conflict or whether multiple positions are mutually enhancing. These ideas were discussed here. Subsequently, the four social statuses at the centre of this research were introduced and their importance was discussed with the help of the ideas of manifest and latent functions of statuses.

In preparation of the regression models built to test the hypotheses of this study, an overview of previous research divided into three sections was presented. This overview is due to the wideness of this research area unavoidably incomplete, but it gives an indication of likely influences on the four social statuses that need to be controlled for. Not all of the

⁸ Data tables on the outcomes of Schulze's empirical work were omitted from the 2005 edition but can be found in the appendix of the 1992 edition of 'Die Erlebnisgesellschaft'.

⁹ This shows that the older a person, the less likely they are to be out and about with friends. $-.44$ indicates a moderately strong relationship between the two indicators.

identified influential factors could be used in this study's models, but they needed to be mentioned to avoid a too narrow view of them.

One central premise of this study is that older adults should not be viewed separately from other adults. While this research is still embedded within the context of social gerontology (established research and communication structures are hard to avoid), the study thus suggests a wider theoretical frame of societal change that might be utilised to explain the developments discussed in chapters V to VIII, a frame of value changes that was introduced in the last section of this chapter.

Before being able to present the findings of this study, three further steps need to be taken: the data source needs to be discussed, the specific context of older adults in Germany needs to be introduced, and some notes on the chosen methodology are required.

II. The data

In the early stages of this study, a nationally comparative research design was considered. It was only after carefully looking at the various potential data sources – social surveys, with a focus on but not restricted to ageing surveys –, that it was decided to base the study solely on German data. In this chapter, this choice will be elaborated upon and the German Ageing Survey will be introduced.

II.1 Available survey data on later life issues

A range of surveys that are conducted in the European Union cover at least some information about the topic of interest. Since the social roles in question are not restricted to later life, both surveys focussing on people above a defined age line and surveys covering a wider age range can provide this information.

The European Value Study contains a few question items on leisure time activities and volunteering, but they do not capture the respondents' actual behaviour, merely their general attitude towards leisure time and whether they volunteer at all. The European Social Survey explicitly asks the respondents whether they meet with friends or engage in social activities. However, despite some explanation of what may be meant by that, the questions still leave too much room for the interviewees to interpret instead of asking more specifically about a range of separate activities and thus minimising errors introduced by big variations in interviewee perception of the topic. Both cross-European surveys have a repeated cross-sectional design and country sample sizes of around 1,500 respondents per wave. Considering that only about a third of these are aged 60 and over, this does not leave much room for differentiations of groups within the population in later life.

The Study of Health, Ageing and Retirement (SHARE), which covers twenty European countries as well as Israel, on the other hand, is focussing on respondents aged 50 and over and their partners. Country sample sizes vary depending on the population size; for Germany, a sample of 3,000 respondents was reached in the first wave. Additionally, SHARE is designed as a panel study (repeatedly interviewing the same respondents), which opens up opportunities for research on the impact of life course events and of earlier person-based characteristics on later life outcomes. To address this, SHARE conducted life course interviews in its third wave to gather information about past life events that may influence respondents' later life health status and social connections. SHARE also includes question

items on childcare (with frequency of doing so), rendering help to others in and outside the own household (with frequency and kind of help provided), and a narrow range of leisure time activities that are likely to have a socialising component (frequency of attending an educational or training course, going to a sports-, social or other kind of club, taking part in a religious organisation [church, synagogue, mosque etc.], or taking part in a political or community-related organization). For a cross-national comparison of the social roles of older adults, SHARE would be a sufficient choice. However, it has only been conducted since 2004, thus merely offering a time span of six years of panel data with the latest wave available at the beginning of this research project being from 2010.

On the national level, the English Longitudinal Survey of Ageing, which is conducted bi-annually since 2002 and provides a large sample size, is unfortunately very much focussed on health, care needs, and financial issues. The few items on leisure activities in its questionnaire are seen as 'cultural capital' in Bourdieu's sense, and thus not connected to any information on their potential social aspect, and volunteering is not asked about.

There are, in contrast, several German Surveys that illuminate the various social roles better. The Socio-economic Panel (SOEP) measures the amount of time invested into childcare and adult care, it asks about the frequency of volunteering and informal help, as well as about time for hobbies and the attending of cultural events, sports and other leisure activities. The SOEP has a thirty-years-long history of panel interviews and a huge sample size that provides enough data even on only an age sub-sample (in 2011, more than 7,300 respondents of the complete sample [panel + newer respondents] were aged 60 and over). It would thus be an ideal data source in some ways, but its questions on hobbies and attending events were not seeking to capture whether these activities were in any way socially oriented.

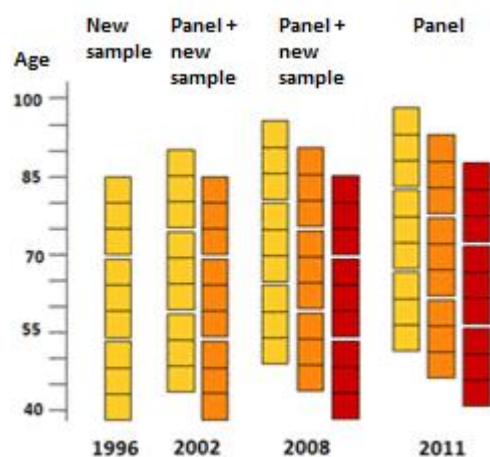
The German Volunteer Survey (Deutscher Freiwilligensurvey) has even bigger samples between 15,000 and 20,000 respondents per wave and presents a lot of information on their caregiving and volunteering roles. Conducted as cross-sectional study every five years since 1999, it, however, does not research into leisure time activities or grand-parenting.

Fortunately, while only having been conducted about half as long as the SOEP, the German Ageing Survey (GEAS) offers a combination of cross-sectional and panel data and covers a huge range of indicators that capture older adults' social roles in detail. It was therefore chosen as the data source for this study. The following subchapter introduces its main features and content.

II.2 The German Ageing Survey

The GEAS is a survey conducted since 1996 which is funded by the German Ministry for families, seniors, women and youth (Bundesministerium für Familie, Senioren, Frauen und Jugend). Up until recently, new samples of respondents were drawn every six years, while the participants of previous waves were re-contacted at the same times¹⁰. There are three cross-sectional samples available, from 1996, 2002 and 2008, spanning a time period of 12 years. Since 2014, the frequency of the interview waves has been increased: panel members are interviewed every three years (panel members over age 70 even annually), while new samples will continue to be drawn every six years. Therefore, the longitudinal data spans a range of fifteen years, from 1996 to 2011.

Figure 6: The waves of the German Ageing Survey with separate samples marked in different colours.



Source: Adapted from <http://www.dza.de/forschung/deas.html>

Considering the interest in changing social roles and social statuses of a whole population group, a twelve or even fifteen year span might seem short. Even if changes can be detected, their meaningfulness should be assessed carefully in the interpretation process, because the direction of their development may only be a small excerpt of a more

complex developmental curve that the data cannot yet show.

The German Ageing Survey draws its samples from all German speaking citizens living in Germany in private households between the ages of forty to eighty-five, calling itself ‘a survey of the second half of life’. Panel participants can overstep the age line and/or move

¹⁰ Figure 1 is a representation of the survey design. Each square in it stands for an age cohort spanning five years. Each new sample is given a different colour. You can therefore see that per survey wave a new sample is drawn, whereas earlier samples are maintained and slowly grow older.

into care homes and will still be asked to respond to the following wave as long as they are fit and willing to do so.

The sample of *wave 1* was drawn from the register of residents of 290 German local administrative districts. Included were German residents born between 1911 and 1956 living in private households. The sample is disproportional: older age groups, older men, and East Germans that make up a smaller proportion of the population are overrepresented to provide enough cases for analysis. To counterbalance this, weights were implemented that fit the data to the marginal distribution of the population structure.

The data set consists of 4,838 cases, out of which 67% were from Western German states.

Wave 2 consists of 3 samples with n=5,194 in sum. Sample 1 (B1996) comprises 1,524 cases from wave 1 (panel), aged 46-91. Consent for re-questioning was given by nearly two thirds of the interviewees, but health issues and mortality decreased the numbers. To control for systematic non-response, selectivity analyses were run and weights based on these were introduced.

Sample 2 (B2002; n=3,084) is a fresh sample drawn from the population aged 40-85 following the same procedure as in wave 1. Of the respondents, 71.6% lived in Western Germany.

Sample 3 (A2002; n=586) was drawn from the same registers, focussing on the non-German population (defined as people without German citizenship), without applying the disproportionate sampling of older age groups, older men and Eastern Germans.

Table 1: Sample sizes of the GEAS, waves 1-4

Sample	1996		2002		2008		2011
	West	East	West	East	West	East	
From 1996	3,242 (67%)	1,596	1,524		994		1,071
From 2002			2,622 (71.4%)	1,048	1,001		989
From 2008					4,120 (66.4%)	2,085	2,920
<i>Sum</i>	4,838		5,194		8,200		4,980

Wave 3 also comprised three samples. The continued panel samples from 1996 (n=994) and 2002 (n=1,001), as well as a fresh sample (including non-Germans this time; n=6,205). A2002 was discontinued due to the low willingness amongst the respondents to further participate.

For *wave 4*, whose data collection took place in 2011 and the beginning of January 2012, no new sample was drawn. It therefore continued the three samples from the previous waves (see Table 1 for the number of realised interviews).

Since this study centres on those people in later life that can actively choose how involved they are in their social surroundings, it is acceptable that there is a percentage of people that felt the need to move to care homes before they reached the age of 85 years excluded from the basic population of the GEAS. This, however, reflects a general weakness of the data collection that will affect this project's results: there are extreme cases that cannot be documented in the findings. These extreme cases are, firstly, people with serious health issues. When asking about the influence of the health status on social roles in later life, the more drastic cases of bad health will be underrepresented due to the person's unlikelihood of response. Similarly, very mobile potential respondents are more likely to slip through the net of the interviewers (each sample member was attempted to be contacted four times and there was a noticeable number of people that could not be contacted in the GEAS). It might furthermore be that especially socially inactive people would be misrepresented in the sample as well (for example because they are particularly eager for company and talking about themselves).

II.2.1 An overview of the survey content

Despite the over 2,000 indicators provided in the more recent waves and some changes in the questionnaire between waves one and three, the excellent data documentation and quick responses to queries by the GEAS team make working with the data comparatively easy. The GEAS covers many topics with in-depth questions that allow for an exploration into many different directions. The following discussion will illustrate this and thus support the choice of this survey over the previously discussed ones. A focus is here laid on the interview question items since none of the drop-off questionnaire items were used in this study.

The item catalogue commences with a range of questions on where and with whom the respondent grew up, details about their siblings, about their education and their professional career, especially capturing what they did in the five years before they retired (if they are retired already). A range of questions on their ideas about or reasons for retirement or early retirement and for working in retirement, as well as for not working if they are not yet retired, is posed. The survey proceeds to collect information about the present and previous partner, children (these do not have to be natural children), and grandchildren, including frequency of contact and geographical distance to the latter two. For the first 8 children, up to ten grandchildren each can be recorded; four further children are reportable, as well as own grandparents, uncles and aunts, cousins and nephews, parents and grandparents in law and the partner's siblings, so that an extensive picture of the family could be drawn. The survey also captures if the respondents think they have good family relations and how these evolved over the last ten years. It furthermore provides information on who the respondent lives with at present, if they have experiences of or plans for living abroad, and about their present accommodation.

Subsequently, their use of leisure time is explored. They can name up to nine 'groups for senior people' (Seniorengruppen) that they regularly attend and up to nine 'other' groups. For the first five of these, they are asked whether they have some kind of volunteering position in them and how much time they invest into this position. If they do not participate in such groups, they are asked about the reason. They are also asked about prior involvement in clubs, groups, or organisations, and whether they are generally interested in such involvement. Childcare responsibilities are also subsumed under the leisure time heading. These can encompass looking after own grandchildren as well as the children of siblings, friends, and neighbours, and the amount of hours invested into them is recorded. The amount of time spent on housework, arts and crafts, working with the computer, visiting friends, solving puzzles, attending political events, and gardening is captured. Following up on that, activities like going for a walk, sports and others are asked about not only to know how often they are pursued but also *with whom*.

A 21 item section on the perception of ageing (does it include continuing to realise many ideas, advancing skills, a worsening of health, feeling more often alone etc.?) is followed by a range of things (e.g. intimacy and sexuality, affluence, commitment to social ideas) for which the respondent is asked to say how much they influence their daily thoughts and activities.

Thereafter, the respondent is interviewed on their present subjective health, asked to respond to a number of statements made concerning their general wellbeing in the last week (e.g. 'was worried about matters that usually don't touch me', 'I enjoyed life', 'I didn't sleep well'), and their height, weight, eyesight, and listening ability is recorded. A set of potential limitations in daily life due to health problems is provided, the respondents can say where they would prefer to be cared for if they required more assistance, and all their illnesses and the frequency of the use of health specialists are collected.

The section on care contains information about who assists the respondent, how many hours per week, and what financial aid they are granted from the state; yet it also has items on the help that the respondent gives to others, how much time that absorbs, who else might assist in the care, and what formal help through care services or governmental financial aid is available or was denied.

Beyond the already detailed family network, the GEAS also portrays the non-familial social network of important people in the respondent's life. Up to eight can be named with their gender and age, the geographical and emotional closeness to the respondent, the frequency of the contact, and how long they are acquainted for. Just as for the family, the interviewee is once more required to assess the quality of the relation to their friends, how it has developed in recent years, and how they expect it to develop. They are also asked who they can ask for advice, who will give them support and cheer them up, and if this has happened within the last twelve months. The survey furthermore enquires whether there are people who give the interviewee cause for concern, annoy them, patronise them and constrain their independence, or give them great joy, and with whom they spend most time.

A long set of questions deals with given and received financial support, which is followed up by a range of opinion items on the social security of older adults and eventually with questions on income and living standard.

The self-completion questionnaire contains mostly subjective measures: more statements about old age, personal self-perception, life satisfaction, the positive and negative affect scale (PANAS; a 20 item mood assessment), perceived formative life events, interest and participation in politics, perceived relationship between old and young, enjoyed activities and reasons for these, subjective life expectancy, experienced ageism, media use and pets, hobbies and travels, frequency of occurrence of health issues and frequency of use of body care and health services (massage, pedicure, pharmacy,

ambulance etc.), use of aids (glasses, pacemaker), health behaviour, values (Schwartz-scale), Accomplishments (Brandtstädter & Renner sub-scale), financial situation, assessment of change due to German reunification, real estate and housing, and conflicts within society and with people close to them.

II.2.2 Non-response and attrition

While the German Ageing Survey is very appealing due to its large sample size and its detailed questionnaire, its response rates both for first as well as for repeat interviews are not great. Both in wave 1 and wave 3, the response rate was about 39% (with non-response caused by potential interviewees or primary household members refusing participation, inability to contact respondents, respondents being too ill etc.), which is about the same as in other big German studies relying on voluntary participation. The ALLBUS 2006, for example, had a response rate of 40% (Institut für allgemeine Sozialforschung 2009). Comparing these low response rates to the response rates of other national ageing studies, the difference is, however, striking. While, as Lynn (2005) points out, these rates do not have a shared standard of how they are calculated – e.g. when do units which dropped out of the survey in previous waves stop being eligible for re-questioning? –, variations in response rate measurement alone cannot account for the enormous differences. So Cheshire et al. (2011) calculated an initial response rate of 70.2% for the English Longitudinal Study of Ageing (ELSA) in 2002 and of 78% for the US-American Health and Retirement Study (HRS). The Survey of Health and Ageing in Europe (SHARE) shows big differences in response rates amongst the countries. The average household response rate in wave 1 (2004) was 61.6%, but it ranged from 38.8% in Switzerland to 81% in France. Noticeably, with 63.4% the German response rate was much better than it is in the German Ageing Survey (SHARE Project 2012b).

When turning the attention to the different forms of initial non-response in the GEAS, in 2008, 1,567 people could not be contacted, despite at least four attempts, which leads Engstler & Motel-Klingebiel (2010) to the conclusion that mobility has increased amongst the population. Further 1,027 potential interviewees were too handicapped or ill to participate. The loss of both groups within the population might lead to a skewed picture of social roles in later life, because both the very active (mobile) as well as the especially disabled might not be adequately represented in the sample.

Further missing data were created through partitioning the survey into interviews and subsequent, additional self-completion ('drop-off') questionnaires. While 89.1% of the interviewees (B2002) in 2002 also filled out the questionnaire, only 71.6% did so in 2008. The percentage of people filling out the questionnaire is a tenth higher amongst the panel members than amongst those first interviewed in 2008 (Institut für angewandte Sozialforschung 2009). This also showed in the 2011 wave: here, 83% of the interviewees also filled out the drop-off questionnaire, 90% took part in a numbers and symbols test to examine their 'psycho-motoric' speed, and 94% underwent a lung function test, tests that were newly introduced in that wave.

The conductors of the GEAS deem its attrition rate 'acceptable' (Engstler & Motel-Klingebiel 2010: 50), considering that part of the loss of panel members is due to mortality/health issues, yet it remains that by 2008 the first panel sample was reduced drastically. Out of the 4,838 initial respondents of 1996, 1,005 answered in wave 3 in 2008. The count drops further if the analysis aims to interpret data from all three waves: out of those 1,005 panel respondents in 2008, only 740 also responded in 2002. What remains is a drastically smaller number of panel cases. 740 cases can still hold a lot of information, but when forming smaller subgroups within this sample, the analytical power decreases.

In 2008, 2,534 people were registered as willing to participate in the panel from the original 1996 sample. 6.7% of these had died, and 7% had moved to an unknown location. 28.9% refused to participate, 5.9% were ill, and in 3.2% of the cases the interviewers were denied contact to the potential respondents by other people.

Table 2: Response rates in % for the first wave sample of HRS and ELSA¹¹.

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 8
ELSA	70.2	46.5	39.2	36.1	-	-
HRS	78	72.5	72	70.3	68.4	66.4

Source: Cheshire et al. 2011, p.135.

When again looking at the English Longitudinal Survey on Ageing (ELSA) and its US-American equivalent, the Health and Retirement Study (HRS; see Table 2), it is apparent that attrition is much higher in the English study, whereas the US-American study is very successful in motivating its original sample to continue participating.

¹¹ ELSA officially started with wave 0, this number has been altered here.

Banks, Muriel and Smith (2010) discussed possible reasons for the differences in initial response and attrition in ELSA and HRS. Comparing the attrition amongst groups of people with different health issues, they found that attrition was not related to these – meaning that once the group of people having passed away was taken out of the picture, the percentage of people dropping out of the survey for other reasons is roughly comparable for all health groups. *There is thus no indication for bias introduced through health-related attrition.*

Several reasons can be taken into consideration when trying to determine why the GEAS performs so poorly in the recruitment and retention of participants. For one, it starts at an early age: both HRS and ELSA look at people ages 50 and upwards, whereas the GEAS also includes those aged between 40 and 49. As Banks, Muriel and Smith point out, ‘younger working respondents tend to exhibit higher attrition’ (p. 11). The interview length, the long period of six years between each of the first three waves, a lack of incentives (whereas the HRS, for example, offers 100\$ per interview), and country differences can also be taken into consideration.

While not officially explaining it thus in their research documentation, the German Centre of Ageing (Deutsches Zentrum für Altersfragen) seems to be addressing the GEAS attrition problem: wave 4 being conducted only three, not six years after wave 3, as well as the scheduled annual interviews of panel members over 70, clearly show that they are aware of the disadvantages of large gaps between interviews. The participation profile now provided in a separate data file shows that the survey conductors were even successful in re-recruiting 164 panel members from 1996 that had not been interviewed in either of the two subsequent waves. Participation in wave 4 was rewarded with a small monetary incentive of ten euros.

II.3 Summary

After careful deliberation, the German Ageing Survey was identified as the best available data source for the project. It may suffer from some panel attrition issues and low response rates, but it offers a wide range of indicators that, in contrast to other ageing studies, are not focussed on health but on people’s social activities and social environments. While for a survey of this scale a few minor issues are unavoidable, the data quality and usability is very high in comparison to other European social surveys.

Having chosen a German data source, it is necessary to explore the specific context of older Germans. The following chapter will show that Germany has many demographic developments in common with other European countries and that older adults hold a similar socio-economic status in many of these. It will also introduce the differences within Germany, primarily the differences between Eastern and Western Germany, which make this country a particularly interesting case study.

III. Case study Germany

After having laid out the theoretical background to this study, justified the choice of dataset and discussed the knowledge already produced in the research field, a last step before discussing the methods and outcome of this study is to introduce the specific country it is based in – Germany – and to put this into the context of other countries with a growing share of older adults. The old age dependency ratio (population 65 and over to population 15 to 64 years) in 2011 was 26.4 in the EU-27; in Germany it was noticeably higher with 31.2, and in the UK it was 24.9. Italy is the only other European country with more than 30 people in old age for every 100 people in working age (Eurostat 2015a).

The federal republic of Germany lies in the heart of Europe. Its demographics and social policies resemble that of most European countries in many ways, rendering the findings of this study relevant to people interested in the EU context. The following pages will thus focus on a comparison with Germany's European neighbours. At the same time, Germany also offers a special set of data due to its history on both sides of the iron curtain. This history touches especially upon the age group this study focuses on.

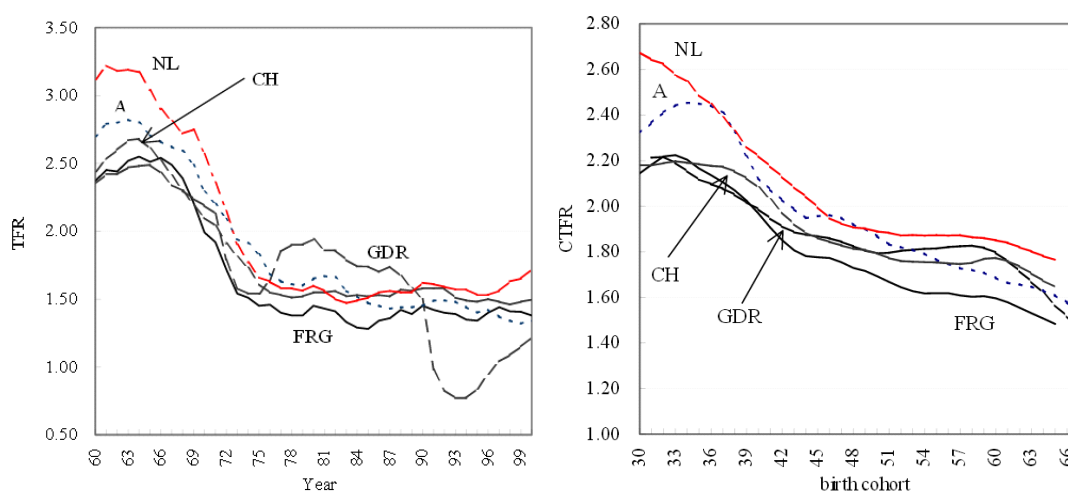
III.1 Germany in the context of European population trends

Demographically, the European countries grow more and more similar. The difference in fertility rate between the most and the least fertile country decreased from 1.7 children per woman in 1980 to 0.8 in 2011 (Eurostat 2012b). With a relatively stable fertility rate of 1.34 to 1.39 live births per woman over the last two decades, Germany is at the lower end of the European scale, but countries like Romania (1.25) and Hungary (1.23) formed the bottom in 2011, while Ireland with 2.05 live births per woman as the most fertile country was farthest away from the EU-27 mean of 1.58 and still slightly below the typically quoted 2.1 births replacement fertility (Espenshade et al. [2003] point out that the actual replacement fertility varies quite a bit from country to country). This represents the other side of the coin of the second demographic transition. The first side was already discussed in the introduction: the growing human lifespan and the resulting increasing share of older adults in the population, often referred to as 'population ageing'.

Germany's female life expectancy for under-1-year-olds in 2011 (83.2 years) is identical with the EU-27 average; the male life expectancy at this age is a year above the EU-27 average of 77.4 years. The average further life expectancy for people aged 65 in the EU in

2011 was 17.8 years for men (18.2 in Germany) and 21.3 for women (21.2 in Germany). The predicted further *healthy* life expectancy at age 65 was 14 years for males within the EU-28 (Eurostat 2015b; no information on EU-27 provided; Germany: 15.2 years) and 15.4 years for women (Germany: 16.9 years). However, in contrast to the overall growing European population figures, Eurostat projections (Eurostat 2012a) as well as all of the different projection models of the German Statistical Office (Statistisches Bundesamt 2009) expect a decrease in the German population, a trend which it mostly shares with the Baltic and other Eastern European states.

Figure 7: Total Fertility rate 1960-2000 and completed fertility rate by yearly birth cohorts from 1930 in Austria, Switzerland, the Netherlands, the German Democratic Republic, and the Federal Republic of Germany



Source: Hara 2003, p. 188.

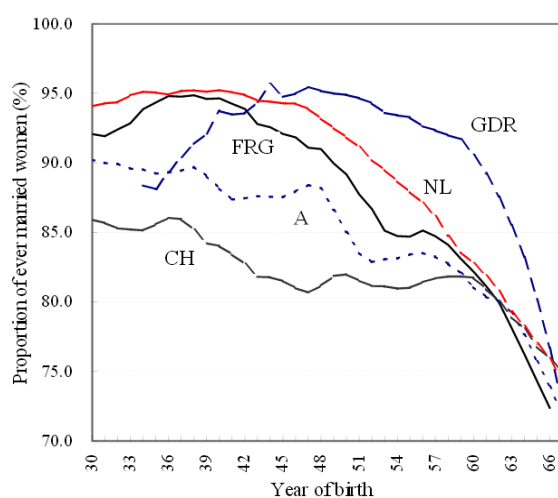
Nearly all of the EU-27 countries had a mean age of women at childbirth between 29 and 31 years, with Germany's mean of age 30.6 lying just half a year above the EU-27 average in 2011. While those figures were lower some decades ago, the overall trends in fertility rate and age at childbirth over the last fifty years were similar in Germany and its neighbouring countries (Hara 2003; see

Figure 7), albeit with some variation in the Eastern German figures, which were reportedly higher in the 1980s and dropped drastically as a consequence of the German reunification. However, these variations nearly disappear in the completed fertility rates, which are very similar for all five countries, especially for cohorts born since the start of the Second World War. Looking further into life course events, the rates of individuals entering marriage at all in their lives varies between countries; their overall trend however, is identical, with rates of women who entered marriage at some point in their lives starting

between 85 and 95% in the 1930 cohort and dropping to under 75% in the 1966 cohort (Hara 2003; see Figure 8).

These developments show that while there are cross-country differences in the key figures of life course events and population development, their trends are the same, so that the life course experiences of older adults in the EU, and more so in Central Europe, can be assumed to be similar as well: a large percentage of the older population has had a marital partner and children at some point, but their children in turn are likely to have either married later in their lives or not at all, and grandchildren are born later and in fewer numbers.

Figure 8: Proportion of ever married women by age 50 (%)



Source: Hara 2003, p. 187.

III.2 Economic status in later life in Europe

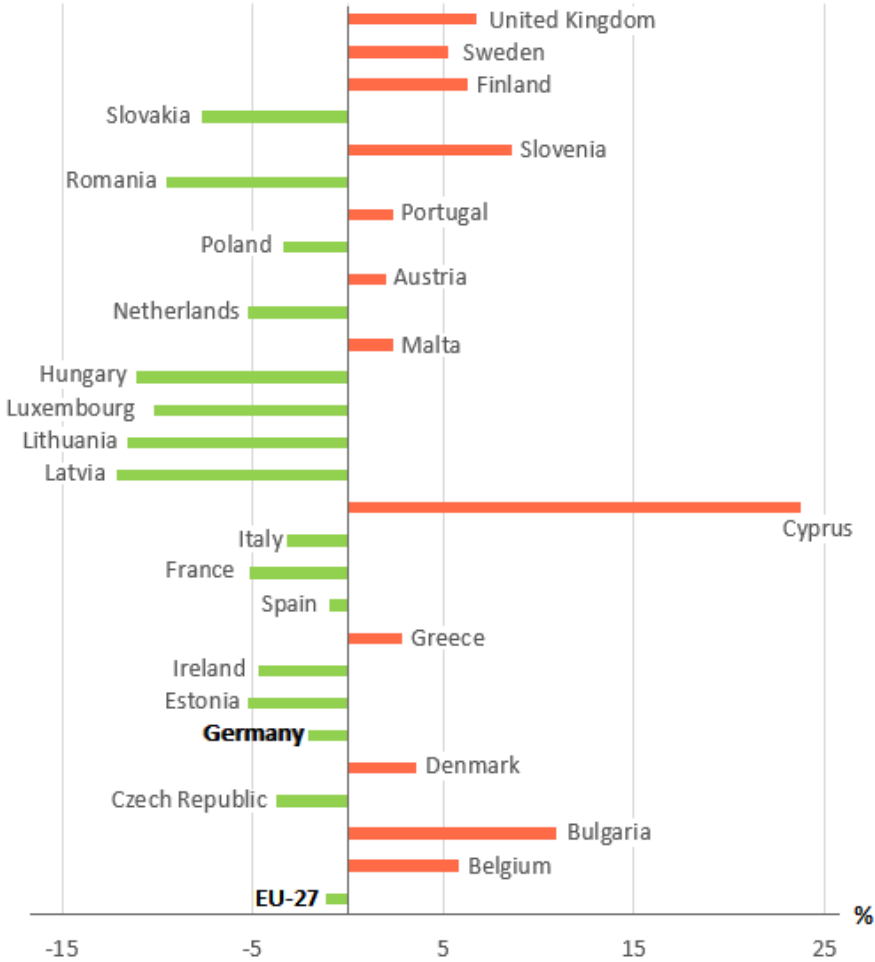
Economically, retirees in Germany are comparatively well off. This ties in well with the perspective on them as a growing consumer group. In all of Germany, the relative poverty rate¹² of those aged 71 years and over lies at 10.4% (in comparison to an average of 12.6% in the whole population; 13.3% for women of all ages). In Eastern Germany, merely 7.4 per cent of this age group are categorised as (relatively) poor (whereas overall in Eastern Germany, the poverty rate is at 18.8%).

Looking at the development of pensioner incomes in East Germany (Datenreport 2008: 194), in 1991 the 61- to 74-year-olds merely had about half of the average income (the

¹² Below 60% of median income

over-75-year-olds even less than that: 44%), whereas until 2006, their income rose up to over four fifths of the average German income (even up to 86% for the 75+ group).

Figure 9: Percentage of population age 65+ at risk of poverty compared to percentage of population below age 65 at risk of poverty, 2011



Data source: based on data from Eurostat 2014.

Within Europe, the income of people aged 65 and over is (except in Luxembourg) always lower than that of the population between the ages of 16 and 64 (Eurostat 2014). However, when comparing the poverty rates of these two population groups in each country, the income gap is not directly translated into a higher rate of people at risk of poverty (living on less than 60% of the average income). While German pensioners had on average about 2,400 Euros annual income less than people below official retirement age in 2011 (Eurostat 2014), they still overall show a 2.1% lower poverty rate (14.2% for 65+/16.3% amongst 16- to 64-year-olds). This roughly mirrors the EU-27 averages (Figure

9). It thus follows that retirement incomes tend to be more homogenous than employment-based incomes in Germany and that the much discussed 'Altersarmut' (poverty in old age) is less of an issue than occasional public debates make it seem¹³.

III.3 Differences within Germany

A very interesting point about Germany are its manifold divides. There are many residuals of distinct local traditions and attitudes, although many of these are marginalised these days and do not directly feature in the here presented analysis. The most prominent differences lie between Eastern and Western Germany and are born out of the forty years of different political regimes. These have led to systematic differences in infrastructure (such as childcare provision) and economic strength that should not be overlooked. As will be shown in chapter VI and VII, there are significant differences in the rates of engagement in the four social statuses discussed in this study between the two country parts.

Figure 10 illustrates the economic differences between Eastern and Western German states: even over twenty years after the reunification, all of the non-city states in Eastern Germany¹⁴ are still clustering very closely together, with merely 4.5% difference in the gross domestic product between the economically strongest and weakest state. Despite having caught up a little in the early 1990s, they are still 14% below the economically weakest Western German state (Schleswig-Holstein) and 41.7% below Hamburg, the state with the highest GDP per capita (Bundesministerium des Innern 2013). The average Eastern German who does not live in Berlin generated a yearly revenue of just under 23,000 Euros in 2012, whereas the average Western German generated over 34,200 Euros.

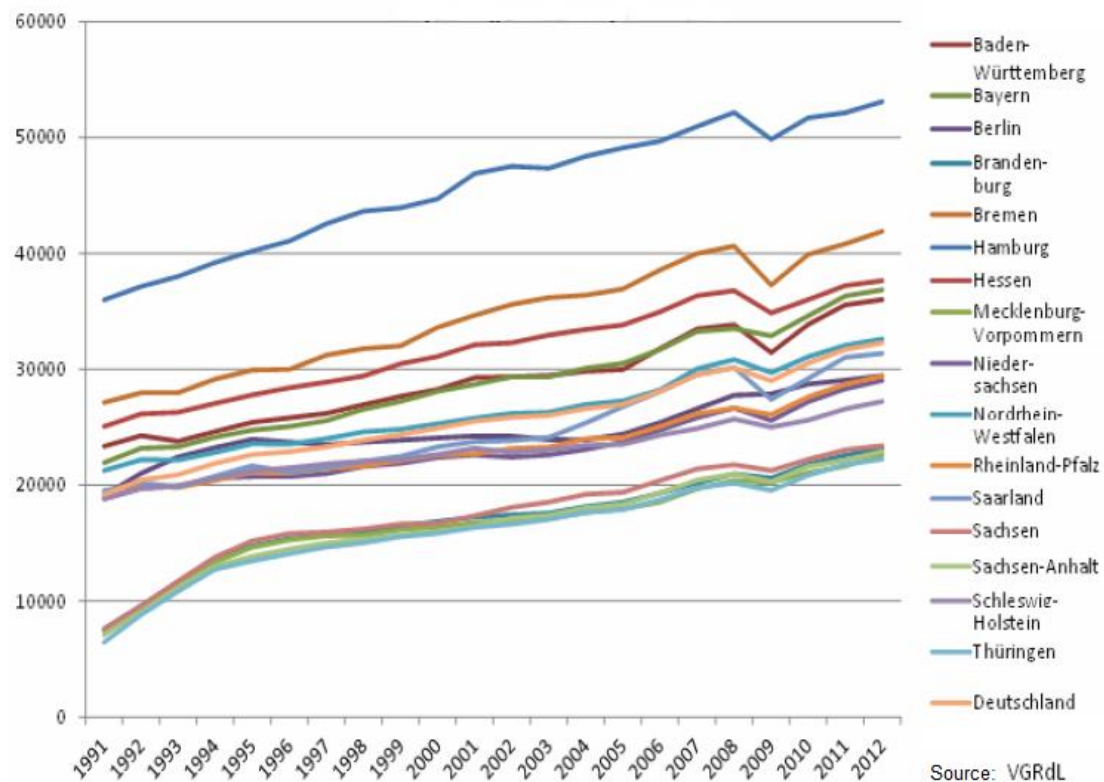
The unemployment rates mirror this economic division (see tables 3 and 4), with 7% difference for men and 8-10% difference for women¹⁵ between the Eastern and Western German population.

¹³ This discussion last took hold in the German media in November 2014, when newest statistics showing an increase of retirees in need of basic security benefits led to headlines like 'The coalition forgets the poor old' (Zeit, 4.11.2014) or 'Poverty in old age is becoming an everyday occurrence in Germany' (Welt, 4.11.2014).

¹⁴ Berlin, Bremen, and Hamburg are considered city states.

¹⁵ Notice the numbers for 'working' and 'not working (other reasons)' for women – they show that women in both parts of the country are seeking to enter the labour market. The latter also show to some extent the difference in family concepts: Eastern German women stay less often at home out of their own volition.

Figure 10: GDP per capita (price-adjusted) 1991-2012 for all 16 German Länder



Source: Bundesministerium des Innern 2013, p. 41.

The term 'Wendeverlierer' (losers of the reunification; see, e.g., Welt Online 01.12.2006) is often used to describe those Eastern Germans who lost their jobs and were subsequently unable to adapt to the new labour market demands when many of the nationally owned enterprises of the German Democratic Republic could not compete against Western companies. According to Welt Online (20.07.2009), every fourth Eastern German considers him- or herself to be amongst those that were disadvantaged by the reunification¹⁶. Those around and over forty years of age in 1990 and thus approaching retirement age now are especially affected, while younger people – and amongst these women more often than men – are¹⁷ more likely to migrate into more prosperous regions in Germany and the German speaking alpine countries.

¹⁶ 1900 people were interviewed by Sozialwissenschaftliches Forschungszentrum Berlin-Brandenburg.

¹⁷ The Ministry for Interior Affairs reports dropping figures of emigration in Eastern Germany and already speaks of a stop of the outflow of people (Bundesministerium des Innern 2013), but if this is a lasting development has yet to be seen.

Table 3: Male employment rates in % given separately for Eastern and Western Germany 1999-2009.

Men	Western Germany			Eastern Germany		
	1999	2004	2009	1999	2004	2009
year						
working	81	79	81	74	69	75
Full time	73	70	70	67	58	65
Part time + marginal employment	5	5	6	3	7	6
Not working	19	21	19	26	31	25
Registered unemployed	6	9	7	13	18	14
Not working (due to employment market)	2	2	2	1	2	1
Not working (other reasons)	9	7	6	10	9	5

Source: Datenreport 2011, p.110.

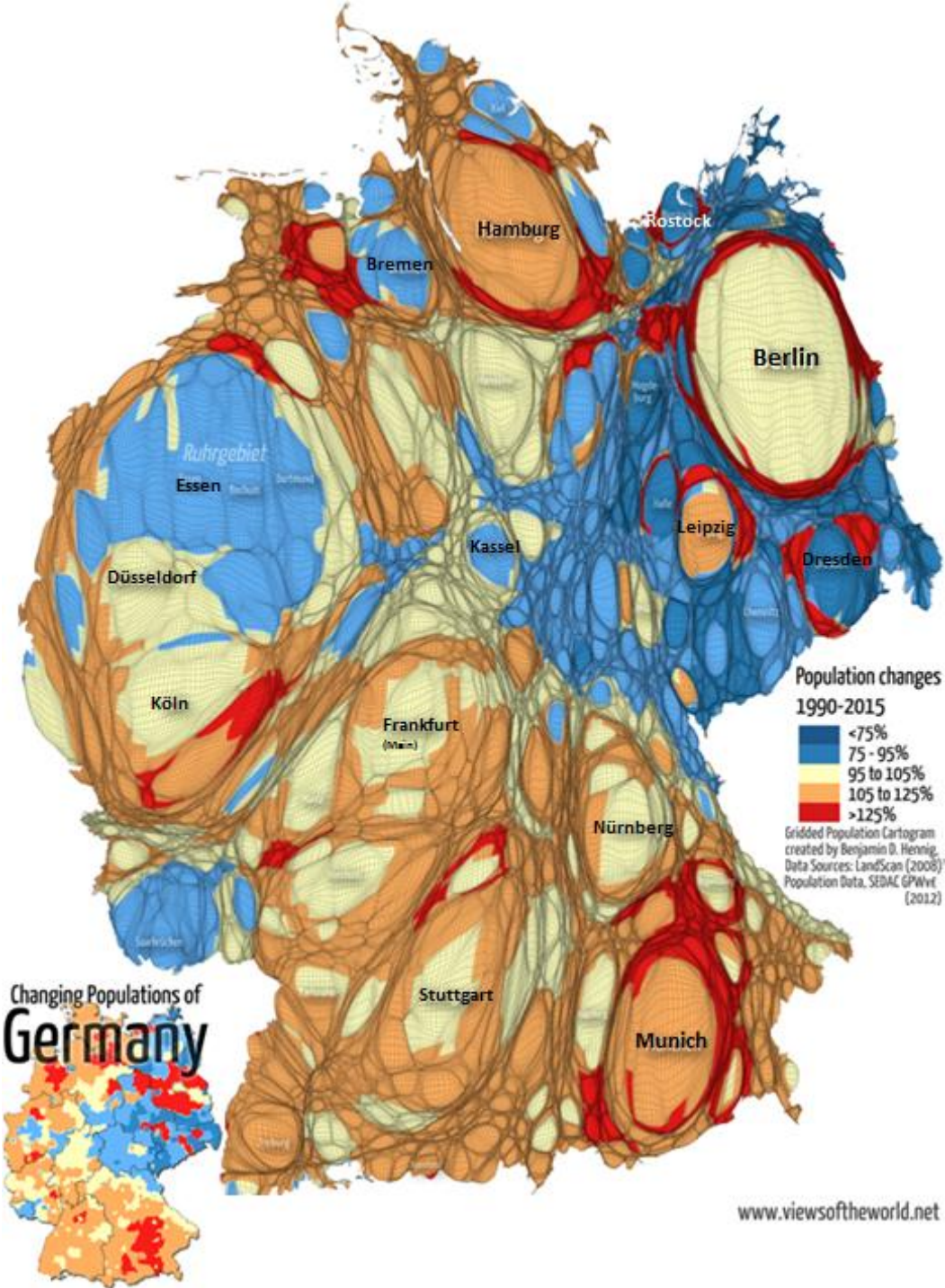
Table 4: Female employment rates in % given separately for Eastern and Western Germany 1999-2009.

Women	Western Germany			Eastern Germany		
	1999	2004	2009	1999	2004	2009
year						
working	61	65	70	58	61	68
Full time	32	31	34	40	35	38
Part time + marginal employment	26	31	34	16	22	27
Not working	39	35	30	42	39	32
Registered unemployed	5	7	5	14	15	15
Not working (due to employment market)	5	5	4	3	2	2
Not working (other reasons)	22	16	12	17	12	7

Source: Datenreport 2011, p.110.

These economic differences had consequences. Figure 11 shows a rendition of the population density in Germany where each grid cell (unit: 1 km²) is resized according to the total number of people living in that area based on the LandScan 2008 population model. This is overlaid by a prognosis of the change in population from 1990 to 2015 (based on SEDAC population estimates by districts). A smaller map at the bottom shows this development without the map distortion produced by the LandScan model. Brandenburg – presumably due to its proximity to the capital Berlin – gains strongly in population, yet the other Eastern German states show moderate to strong population losses. The 2013 annual report on German unity (Bundesministerium des Innern 2013) stated that 1.8 million people moved from Eastern to Western Germany since 1990.

Figure 11: Map of population density in 2008 (denser = bigger grid) and population development (colour) in Germany 1990-2015 (prognosis).



Source: Hennig 2012.

‘Demographic changes occurred earlier and wider in the East than in any other European region,’ the Minister for Interior Affairs Friedrich said in 2012 when presenting

the annual report on German unity and added, 'According to calculations by state and federal statistics offices, the number of 15 to 25-year-olds in eastern Germany in 2015 will be nearly 40 percent less than in 2008' (Gessat 2012). Only some of this can be attributed to migration. The extreme drop in the Eastern German fertility rate in the 1990s (see

Figure 7), which only recently fully recovered to a level slightly above Western German fertility (Bundesministerium des Innern 2013), also contributed to this development. This is relevant to this study in two ways: on the one hand, it means that in some regions of Eastern Germany, the age structure is skewed, with many young people having moved away and old people being left behind in often very sparsely populated areas with thus poor public transportation and long ways to essential services. On the other hand, it also means that Eastern Germans are less likely to be grandparents or to have small children in their closer social network.

The Federal Ministry for Interior Affairs used the old age dependency ratio (people aged 65 and above in relation to people in working age 20-65) and the youth dependency ratio (people under age 20 in relation to people in working age 20-65) to measure the population's age structure¹⁸. The former rose from 2000 to 2012 from 27 to 38 older adults for every 100 working age adults in Eastern Germany and from 27 to 33 in Western Germany. It is expected to rise up to 67 (west: 51) in 2030. The youth ratio, in contrast, which dropped from 32 to 24 (west: 35 to 31, expected to remain steady), is expected to change the direction of its trend and climb to 29 youths per working age adult (Bundesministerium des Innern 2013). However, in sum that still leaves large parts of Eastern Germany with a high mean age.

III.4 Summary

In this chapter some socio-economic characteristics of older adults in Germany and in Europe were discussed to demonstrate that results derived from analysing German data are relevant to this wider context. In terms of 'population ageing', Germany is slightly ahead of other European countries with an especially low birth rate and a male life expectancy that is a year above the EU-27 average, as well as an overall higher healthy life expectancy.

¹⁸ This definition differs from the one used for the Eurostat statistics quoted at the beginning of this chapter, which defines old dependency ratio (1st variant) as population 65 and over to population 15 to 64 years.

However, the general population trends are very similar throughout Europe so that the German results are merely showing where other countries are heading.

With its two sections of a typical Western and a post-communist society, Germany also serves as a study of the differences that may arise within Europe between these two historical backgrounds of countries. Eastern Germany may have received more financial aid through the German inter-state fiscal adjustment (Länderfinanzausgleich) between the sixteen German states than other Eastern European countries, but its economy is still weaker than the Western German's and its average income and employment rate is lower. As will be shown in chapters VI to VIII, the differences are not solely economic but are also reflected in different rates of engagement in social statuses, perhaps due to cultural differences.

Yet one chapter is required before the results of this chapter can be presented and interpreted: the chapter discussing how these results were produced.

IV. Methodology

This chapter presents information on key methodological decisions made throughout this study. These include the operationalisation and computation of the four social statuses, as well as justifications for the grouping of respondents for binary analyses, information on computed explanatory variables, how the retirement panel sample was arrived at and missing case issues in this sample. It also holds brief notes on why this study looks at people aged 40 to 85 when its title proclaims that it researches later life, as well as on weighting.

All variable and model computations were run in SPSS 21. McFadden's adjusted R^2 was calculated in Stata, with the FITSTAT module.

In the introduction chapter, the postmodernist ideas were discussed that values change from contributing to society through work – earning money to raise a family and pay taxes – to a more hedonistic, experience-driven lifestyle. It was suggested that this would also alter people's behaviour in later life. Various approaches were considered to capture this hypothesised shift.

Because consumption is a key factor in Germany's society today and has been for the last century (e.g. Schrage 2012, Bublitz 2005), some interesting research on lifestyle changes is conducted by market research institutes. In the planning phase of this study, an adoption of milieu analysis techniques was considered that would allow a detailed portrayal of the heterogeneous groups within the German population 50+ based on political attitudes, values and lifestyle attributes (Hradil 2006). These techniques, however, have been developed by a private company and are thus difficult to access without financial investment. Due to the wealth of data and cases they require, they are not easily replicable with academic survey data.

Moreover, social milieu analysis may also have produced too complex a picture that would have made answering the final research questions hard. It is more suited to describing consumer groups to be able to define precisely which ones are the target group for a specific product or marketing campaign. Social milieus may be too static to help examine life course transitions, such as retirement, since they are rooted in value orientations and typified based on social classes. Having been developed primarily for commercial purposes, they do not capture social participation in full detail, even though the Sinus Institute does collect information on volunteering. Even for social leisure activities,

social milieu analysis is more concerned with the forms of activities pursued than the amount of time invested.

Having started off with the idea of literally painting a picture of various types of people in later life, as social milieus are typically rendered in graphical form as well as more detailed description (Figure 4, chapter 1.2.1), a following idea was to operationalise a range of key social statuses (the four social statuses used in this study) and submit them to latent variable analysis in the hope of finding distinct groups, e.g., a group of people that are not engaged in any status, a group of people so busy with care work that they have no time for anything else, a group of people spending a lot of time with their friends, and a fourth group both spending time with friends and also volunteering. These could then be followed through the various waves of the GEAS to see if some groups gain members and others lose them. Employing latent class analysis in MPlus, however, no such groups could be found, suggesting that there is no strong pattern of participation arising from the four status types. Instead, all possible combinations of statuses are present, although some are more likely than others.

Having not been able to establish a clear interconnectedness between the social statuses, it was decided to look at each of them separately.

The following subchapters will explain what manipulation of the data was conducted to operationalise the four social status types. They will discuss how respondents were grouped based on their work- and retirement status, how the retirement sample was extracted from the overall sample, and how indicators used as explanatory variables in the statistical models were computed from the survey data. Some missing data issues are addressed.

IV.1 Operationalising social status

In chapter one of this thesis, different concepts of social roles were discussed. While George Herbert Mead is most often referred to when discussing this concept, it was asserted that Robert K. Merton's work, which is based on Linton's differentiation of social roles and social statuses, provides a better conceptual basis for this study. According to them, it is useful to differentiate between the social position or *status* and the rights and behavioural expectations connected with it (social role). Any person is bound to have several social statuses that can in combination be regarded as a status set. Merton

furthermore points out the changeability of these status sets and thus introduces the idea of status sequences.

Especially relevant here is the status sequence that is most commonly connected with the different phases in the life course: the sequence that turns a person from a school pupil to a university student or apprentice, which subsequently ideal-typically leads to some status within the working population until finally they enter retirement. The aim of this study is to examine how this change in social status from economically active to retired affects the other social statuses in this sequence.

In order to be able to operationalise these potential other social statuses beyond the economic activity status and make reliable, statistically representative conclusions about them, they have to be established through regular rather than singular acts, so that they can be captured in some form within the German Ageing Survey.

There is a narrow range of 'roles' that are frequently looked at in social ageing research, usually because they have broader, societal significance. First and foremost amongst them is *volunteering*, which is occasionally termed 'civic engagement' and sometimes also paraphrased as and split into formal and informal social participation (e.g. Broese van Groenou and Deeg 2010). The former of these forms of social participation refers to a regular helping role within an organisation, whereas the second can encompass a range of helping activities for relatives, friends and neighbours, many of which may also fall into the role of *carer*. These two roles attract most attention and researchers often narrow their focus on one of them (this can be seen in the dominance of literature on volunteering and caregiving in the literature overview chapter).

Bukov, Maas and Lampert (2002), on the other hand, worked with a similar aim as this study: using data from the Berlin Ageing Study (BASE), they were interested in three types of social participation in 'very old age' and what led people to engage in them: collective social participation, productive social participation and political participation. The authors justified their differentiation of the forms of social participation by saying they were based on 'the consequences of activities for the social environment' (p. 510). This ties in well with the here utilised social status approach: social statuses are defined by their relation to the social environment. They fulfil specific societal functions (both latent and manifest). Some of these statuses will be more altruistic (e.g. adult care), whereas others are more leaning towards serving the needs of the status owner, e.g. by being part of their lifestyle, a visible expression of their identity.

This study, however, will neither follow Bukov et al.'s differentiation of forms of social participation nor their hierarchical structuring of these. The authors' concept of social participation is based on resources; following their logic, the more resources a form of participation requires, the less it will be pursued and the higher it is in the social participation hierarchy. 'Collective social participation' is therefore the sharing of time with others, 'productive social participation' requires time and skills, whereas 'political participation' additionally requires 'social knowledge'. This operationalisation is not unappealing, but it makes a pre-empted judgement of these forms that would be better founded on results of actual data analysis. Can volunteering and caregiving really be subsumed into one category (productive participation)? The findings of this study will suggest that they cannot.

Nevertheless, Bukov et al.'s study is one of very few that looks at the spending of leisure time in company by treating it as worthy of attention per se, without the added association of how the individual profits from this status. This acknowledges what is too often overlooked: that any kind of social interaction is a societal contribution, whether as part of the constant stream of communication that forms our norms and values, as a means of emotional support, as gateway to other statuses or as vehicle for consumption (through going together to pubs, the theatre, gyms etc.).

A fourth role not as often made a topic in the general discussion of societal contribution of older adults as one might expect is that of grand-parenting. The data of the German Ageing Survey even encompasses other forms of *childcare*, such as looking after a friend's or a neighbour's child. Grand-parenting is often addressed in intergenerational (e.g. Tarrant 2010) and family research (e.g. Lundholm 2009), but social gerontology pays it little attention, and usually not in relation to other social 'roles'.

Another status that needs to be addressed is that of *working in retirement*. The figures of people working, for various reasons, while also receiving their pension reportedly rise. A study commissioned by Deutsches Institut für Altersvorsorge (2015) and based on data from the German Socio-Economic Panel that the share of working retirees had risen from 4% to 6% for men from 2000 to 2011 and from 2% to 4% for women. Within the German Ageing Survey only a very small number of pensioners – 2.7% (170 respondents), for example, in the 2008 cross-sectional sample – were in some form of employment. This renders too small a sample to examine this phenomenon more closely in this study.

This leaves four social statuses that can be operationalised with the help of the German Ageing Survey: friend, caregiver (to an adult), volunteer and child carer.

IV.1.1 The friend status

Individual Activities

'Friend' or 'friendship' is a term that in this context does not adhere to the narrow definition of 'nonkin ties that involve a comparatively high degree of liking and solidarity, generally incorporating elements of shared sociability and broad reciprocity of exchange' (Allan and Adams 2008: II-123) but focusses on the aspect of shared sociability. It describes leisure time activities whose purpose (at least in part) is to be with others. It is a placeholder in absence of a broader term describing any kind of relationship to a person that is more based on spending leisure time with one another than on working together to fulfil the requirements of a status (such as the status of relative, worker or volunteer). Whether these 'others' are blood relatives, friends, neighbours, or casual acquaintances is not important for this measurement.

To get a full picture of the social status of *friend*, a whole range of indicators from the GEAS needed to be examined and combined. Generally, the friend status was operationalised based on indicators from the question battery on leisure activities. Items from one set of leisure activities (ranging from housework to gardening) are covered in the survey without collecting any further details about them, so that only two of them could safely be identified as activities in pursuit of the friendship status, because it can safely be assumed that they require some social interaction: participation in political events and visiting friends. The other items from this set covered housework, gardening, computer use, solving crossword puzzles, needlework, and other crafts. Some of these may be pursued in company, so that it may be that this study underestimates the friendship activities.

For seven other activities (see Table 5), information was collected on with whom they were pursued (alone, with their partner, with friends, with other relatives, in a club, other). Only if the person pursued them in company of any kind, which can include the partner or a relative, were they counted into the 'friend' status.

For each of these nine activities, the GEAS collected both information on their frequency (daily, several times per week, once per week, 1-3 times a month, less often, never) as well as on the actual hours spent on them. Unfortunately, the latter indicator was

collected in full hours per day for the first two activities (political events and visiting friends) – an absolutely unsuitable scale for activities that may well only be pursued for two hours a month. The resulting data cannot be assumed to be reliable and can therefore not be used for the analysis. The survey designers seem to have noticed this error themselves, as since 2008 the hourly measure is no longer included in the questionnaire. The lack of a reliable time measure is regrettable and an ongoing issue also for some of the other social statuses. On the other hand, they would only have been a retrospective estimation, which is known to be an unreliable data source.

Due to this restriction, it was necessary to fall back on the more robust frequency indicators. In order to be able to combine these, they had to be ‘weighted’; in other words, it had to be taken into account that some of the activities were likely to be pursued more often than others. This is shown in the lack of variation in some of the indicators. While, for example, in 1996 ‘Taking walks in company’ had much variation between all six categories (1 = never, 2 = less often than once a month, 3 = once to thrice a month, 4 = once a week, 5 = several times a week, 6 = daily), with almost every category attracting at least ten per cent of the respondents, ‘Visiting cultural events’ showed hardly any variation in the latter three categories. Together, they merely held 32 of the 4767 people answering this question. When aiming to combine the indicators, it was therefore important to account for the different frequencies in which these activities are pursued even by those who are very engaged in them. While someone enjoying walks might well take them on a daily basis – even in company –, the most passionate theatre-goer or cineaste is unlikely to watch a movie or a play more than once a week.

Someone seeking a counter argument to this logic might point out that no matter what the activity is, the time spent in company remains the same and should therefore not be weighted differently. However, the time spent in company is only one aspect that forms a social status. A social status is a social construct. It is not an objective measure of a person’s activities; it is formed through how these activities are interpreted by the social environment based on the current cultural values attached to them. That granny Hilde goes for a walk with her neighbour every week will be *perceived* as less active than granny Ursula visiting the theatre with her group of friends every Friday or Grandpa Fritz never missing a match of his favourite football team.

Consequently, each of the six response categories was recoded into a point on a scale from 0 to 5. Two things had to be taken into consideration when deciding on the value

attributed: 1) How likely is it that an activity is pursued that often – this includes not only the statistical likelihood as represented in the data distribution but also the practical possibility of, e.g. going to the football stadium or the theatre every day - , and 2) How does that impact a person’s life? While visiting friends less often than once a month is pointing towards very little social contact, visiting political events at all is remarkable and a sign of engagement with societal matters. It was thus valued higher. Category 3 (engaging in an activity one to three times a month) proved to be difficult to estimate. Doing sports once a month is not the same as physical exercising three out of four weeks.

The majority of indicators were treated equally, acknowledging weekly events as rather active and more often occurring events as very involved in the friendship status. Only walks – that might not be considered particularly active if a person took them once a week for twenty minutes always on the same route with a neighbour –, visiting political events, and visiting friends were attributed different values (see Table 5).

Subsequently to this recoding, the nine indicators were summed up to form an indicator with a scale of 0 to 45 points, measuring not only if the respondent adopted the social status as friend at all but also how active they were within it. Only if the respondent had not answered any of the questions were they counted as missing. The underlying assumption to this rule was that respondents would be most likely to not answer questions that were not relevant to them.

The advantage of this methodology is that it creates a variable with a scale that can be treated like an interval scale in the analysis. Yet how can this be interpreted?

325 people in 1996, a little over 6.7% of the respondents, did not score at all on this social leisure activity scale. About a quarter had less than 5 points. Nearly half of them earned no more than 7 points; four fifths scored no higher than twelve points. What does that mean?

Regard the following examples to illustrate the scale:

4 points

Example 1 – The person enjoys seeing the local football team play once a month with a former colleague (2 points), and goes to the movies once a fortnight with his wife (2 points). Yet otherwise, there are few visits to friends or other events. They are on the border to inactivity in their status as ‘friend’.

Example 2 – The person participates in a weekly arts course (4 points). They are also on the border to being inactive.

Example 3 – The person visits a friend who lives in a different town once a month (2 points), they see the ballet once a year with said friend, and they go for a walk with their granddaughter once a fortnight. They are inactive in their status as ‘friend’.

7 points

Example 4 – The person exercises once a week with a friend or in a group (4 points), visits friends every two weeks (2 points), and watches a theatre play every three months (1 point). This person could be categorised as moderately active.

Example 5 – The person draws with her grandchild when he/she comes for a visit twice a year (1 point), takes the occasional walk with the neighbour (1 point), visits the theatre once a year (1 point), is subscribed to a gymnastics course but doesn’t go to each weekly session (2 points), plays cards with friends every once in a while, and always goes to the readings of her favourite author whenever they’re in town (1 point). This person is not very engaged in any activity, yet enjoys a range of activities from time to time, thus also making her moderately active.

Example 6 – This person is very much politically engaged. He joins a number of political discussion groups and other related events (4 points). Apart from that, he only very occasionally visits friends (0 points), infrequently visits the cinema or a museum with his daughter (1 point), and enjoys a monthly lecture on political topics at the local university (2 points). He might in fact be not a very sociable person, but his engagement in political matters keeps him moderately active.

12 points

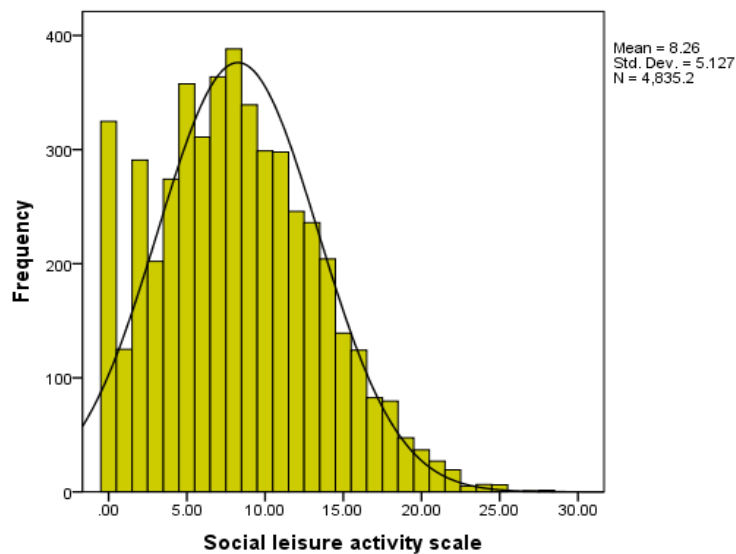
Example 7 – The respondent meets daily with a friend for a run (5 points), visits another befriended couple once a week (4 points), participates in psychological courses every two months (1 point), and enjoys a poker night every three weeks (2 points). They are on the border to very active.

Table 5: Overview of weighting of the frequency of 9 social leisure activities (never and missing = 0)

Indicators	Frequency in % (1996)	New code	Original code	Indicators	Frequency in % (1996)	New code
Visiting political events	17.9	1	Less often	Visiting cultural events in company	35.2	1
	4.4	3	1-3x/month		11.6	2
	.6	4	1/week		.5	4
	.4	5	Several times/week		.2	5
	0	5	daily		0	5
Visiting friends	24.5	0	Less often	Visiting sports events in company	12.4	1
	41.6	2	1-3x/month		4.8	2
	18.9	4	1/week		2.3	4
	7.8	5	Several times/week		.3	5
	.5	5	daily		0	5
Doing sports in company	7.9	1	Less often	Playing parlour games in company	19.1	1
	6.5	2	1-3x/month		17.6	2
	11.3	4	1/week		11.6	4
	6.7	5	Several times/week		6.5	5
	1.1	5	daily		1.5	5
Taking walks in company	10.6	0	Less often	Visiting courses + lectures	4.1	1
	6.4	1	1-3x/month		1.8	2
	16.5	3	1/week		.6	4
	15.6	4	Several times/week		.2	5
	11.8	5	daily		0	5
Art work in company	1.3	1	Less often			
	.8	2	1-3x/month			
	1.8	4	1/week			
	1.0	5	Several times/week			
	.2	5	daily			

While the values ranged from 0 to 28 points in 1996, the borders between spending very little or no time on enacting one's social status as friend, spending a moderate amount of time on it and enacting it very often lie somewhere around 4 and 12 points. This is also in accordance with the mean of 8.26, which should ideally be situated in the centre group of the moderately active, and the tail running out towards the right (see Figure 12) indicating that the high values are extreme values.

Figure 12: Histogram of computed social leisure activity scale 1996 (weighted)



A visual inspection of the histogram shows a distribution close to the normal curve with a slight positive skew (.394 in 1996; .382 in 2008). Noteworthy are the frequencies for the values 0 (those that do not enact the friendship status) and 2. The latter is related to the recoding system, yet alternative coding only shifted the problem to a different value.

Group Activities

Beyond leisure activities that are individually, informally organised, the GEAS also collects information on group memberships. Participants are asked in detail about up to five memberships in groups and how often they meet up in these, as well as if they hold an office (a formal, unpaid position). They are furthermore asked about any participation in special groups for 'old' people.

There are 14 response options when asking about the nature of their social club or organisation:

1. Selbsthilfegruppe (support group)
2. Bürgerinitiative (citizen's initiative)
3. Wohltätige Organisation (welfare organisation)
4. Freiwillige Feuerwehr (volunteer fire brigade)
5. Hobby-/Sammelverein (hobby/collectors' club)
6. Gesellige Vereinigung (social club)
7. Sportverein (sports club)
8. Flüchtlingsverband [2008: Flüchtlings- und Vertriebenenverband] (Association for fugitive or displaced people)
9. Gewerkschaft (union)
10. Unternehmensverband [2008: Unternehmens- und Berufsverband] (professional association)
11. Politische Partei (political party)
12. Kirchliche Gruppe (church group)
13. Heimat-/Bürgerverein (club devoted to the maintenance of local / regional traditions and characteristics)
14. andere (others)

In 2008, the response options were amended to include:

- Kulturverein (cultural club)
- Musik- und Tanzgruppe (music and dance group)

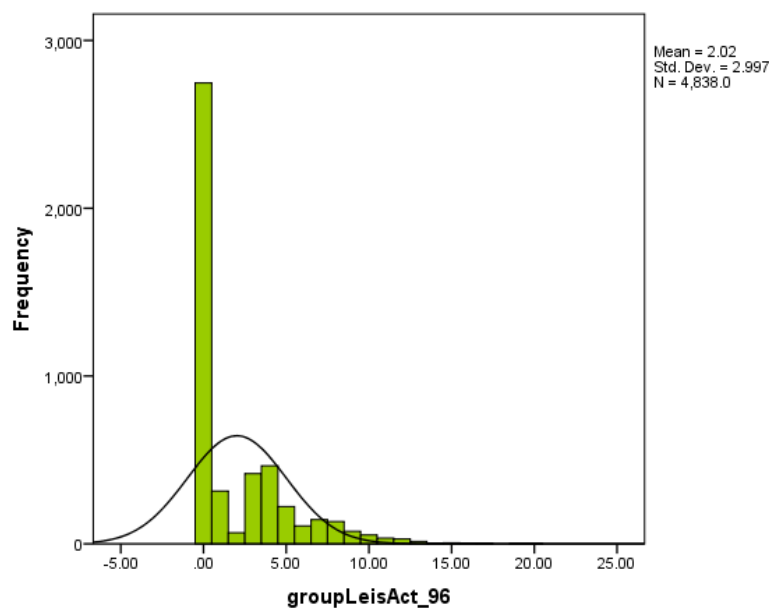
Concerning the groups specifically for old adults, respondents can choose from the following categories:

1. Vorruhestandsgruppen (early retirement groups)
2. Seniorenselbsthilfegruppe (support group for old adults)
3. Freiwillige Tätigkeit (volunteering)
4. Parteien etc. (parties)
5. Seniorenuni (university programmes for old adults)
6. Betriebsgruppen (group formed by colleagues working/having worked in the same company)
7. Freizeitstätten (leisure centres)
8. Andere Seniorengruppe (other groups for old adults)

Because these are closely linked with volunteering (see below), it was chosen to calculate group membership separately from individually organised social leisure activities. The group leisure activity indicator is, however, likewise based on a recoding system: meeting the group several times a week scored five points, once per week scored four, at least once a month scored three, several times a year scored one and less often/never scored zero points.

Due to the much larger number of non-participants, the group leisure activity indicator is much farther away from a normal distribution.

Figure 13: Histogram of computed group leisure activity scale 1996 (weighted)



IV.1.2 The volunteer position

For each of the above listed groups and organisations, the GEAS questionnaire also asks whether the respondents hold any formal, unpaid positions in them and how much time they invest into these. However, due to the time measurement issues already discussed in the friend status section as well as the large number of people simply not volunteering, it was decided to rely on the binary computed indicator already provided in the datasets.

IV.1.3 The carer for one or more adults

The set of questions on adult care was relocated in the questionnaire between waves one and two. Originally, it was an independent topic, surprisingly located between asking for information on people living in the household and on migration experience. Respondents were asked:

- (323.) "Gibt es innerhalb oder außerhalb Ihres Haushalts Personen, die Sie aufgrund einer Hilfe- oder Pflegebedürftigkeit privat oder ehrenamtlich pflegen oder denen Sie regelmäßig Hilfe leisten?"
Are there people in or outside of your household that you – due to a need for support or care – take care of or aid in private or as a volunteer?¹⁹
- (324.) „Seit wann machen Sie das?“
Since when do you do this?
- (325.) „Und welche Personen werden von Ihnen gepflegt?“
Which person do you take care of?
- (326.) „Wie viele Stunden wenden Sie durchschnittlich dafür auf?“
How many hours do you spend on average on this task?

Since 2002, questions on care provision follow after the section on care and support that a respondent may receive. The care questions were not just shifted within the questionnaire but were also expanded upon – to include items on what kinds of state subsidies had been applied for and which had been received²⁰ and whether the respondent is the lone carer – and slightly rephrased. In 2008 some of the new questions were dropped again, but the place in the questionnaire remained the same. The questions already included in 1996 were now presented as follows:

- (539.) "Gibt es Personen, die auf Grund ihres schlechten Gesundheitszustandes von Ihnen privat oder ehrenamtlich betreut bzw. gepflegt werden oder denen Sie regelmäßig Hilfe leisten?"
Are there people that due to poor health are being taken care of by you in private or as a volunteer or that you support regularly?
- (540.) „Welche Person oder Personen unterstützen Sie in diesem Sinne?“
Who do you support in this sense?
- (553.) „Wie viel Zeit wenden Sie pro Woche auf, um der von Ihnen (am meisten) unterstützten Person zu helfen? Bitte geben Sie die **wöchentlich** im Durchschnitt anfallende Zahl der Stunden an.“
How much time do you invest per week on helping the person you take care of the most? Please state the average amount of hours per week.
- (Former #324 was dropped.)

As can be seen, the question about care-giving in general changed in so far as the specification that care (physical care) or support (other aids, such as shopping or helping with paper work) can take place in the own household or elsewhere was removed. Since care questions no longer follow directly on household questions in the questionnaire, it was not deemed necessary.

¹⁹ Translated by the author of this paper.

²⁰ Fair and easy subsidy allocation is public debated and an important topic in social policy.

That the question enquiring into the duration of this engagement has been removed is regrettable, because it would have allowed differentiating between effects that care has on the caregiver from the start and long-term effects.

Most noticeable is the change in the last question: since 2002, the survey focuses on the care engagement that the respondent perceives as their main engagement. If the respondent spent five hours a week on the care of their mother and three hours on caring for their father, only the former would be recorded in detail. It might be assumed that this is supposed to make the answering process more straight forward, but apart from the fact that the care may not always be so strictly divided, it also can obscure a part of the commitment – further care receivers are recorded, but not the time investment – and thus underestimate the importance that the carer status and its enactment has in a respondent's life: in 2008, 131 of the 748 respondents with a carer status had more than one person to take care of; 33 said they were taking care of more than two people.

The editing of the care indicators also creates an inconsistency when aiming to compare or combine the measures of time spent on care in the different years of the survey. Where necessary, since in 1996 respondents could choose the time unit (per day, per week per month, per year) and in 2002 and 2008 time invested in care was captured in hours per week, the indicators had to be turned into hours per month, just as the other time measures for statuses were to have a consistent reference period. Months were assumed to have 28 days, so that days were multiplied by 28, weeks were multiplied by 4 and years were divided by 12.

According to the computed indicator, 88.3% of the respondents did not have a caregiver status in 2008. Of the respondents who did, slightly over half invested up to 20 hours per month in it. Just under a quarter spent between 21 and 40 hours per month on it. The remaining quarter is spread widely, with extreme values of up to 672 (indicating that they have to be available all the time).

As is the case for volunteers, the high percentage of non-caregivers suggested that there would not be enough variation to use the indicator on an interval scale, so a dummy variable (no caregiver/caregiver) was created. However, to at least differentiate between respondents for whom the caregiving status means a lot of time investment and those for whom it does require only a limited amount of time, a categorical indicator was created. This indicator differentiates non-caregivers from caregivers who spend up to 28 hours per month (one hour per day) on this responsibility and care-givers who spend more than 28

hours per month on it. This threshold is set lower than in some other studies. In a policy briefing from 2009, for example, Glendinning et al. discriminate between those taking care of someone for at least 20 hours per week and those doing so for at least 35 hours per week. This, however, seems to suggest that less than twenty hours per week (or eighty hours per month) are not noteworthy and that only a time investment equalling fulltime employment can be regarded as 'substantial responsibilit[y]' (p. 1f.). By setting the threshold noticeably lower, at one hour per day, two things are accomplished:

- a) People whose ward only needs a limited amount of time and attention – perhaps one accompaniment to a shopping trip or to the GP per week – are separated from more serious cases of care and support needs. This is thus not only taking the actual time invested into account but also the difference between care types (from light support to actual physical care) and the space that the carer status takes up in a person's life. Spending, e.g. 2.5 hours a day (17.5 hours a week) on the wellbeing of another person is different from meeting the elderly neighbour for a walk to the nearby supermarket each Monday.
- b) A certain amount of variation is maintained in the data: a threshold of eighty hours per month (20 hours per week) and another at 140 (35 hours per week) would – for 1996 – partition the respondents into a great majority of 96.4% who belong into the lowest category, 1.9% who spend 80 to under 140 hours on care per month, and 1.4% in the most engaged category. With the threshold chosen here, however, only 88.5% fall into the lowest category (all non-carers), 5.4% into the second (up to one hour per day), and 6.1% into the last (more than 1 hour per day/28 hours per month).

IV.1.4 The child carer

The child carer can be defined as a person who regularly looks after children that are not his or her own without being a childcare professional. In the GEAS, six binary indicators are provided to capture this. They provide information on whether the respondent took care of

- grandchildren,
- children of siblings,
- children of neighbours,
- children of friends,

- other children,

or was not involved in childcare at all. In addition, there is once more a time measurement indicator provided, again in the complicated set-up of letting the respondent choose the time frame. However, the four different predefined time scales are not day, week, month, and year but day, week, month, and *less often*. This makes it hard to interpret what, for example, the two respondents meant that said in 1996 that they were looking after a child less often than monthly for fifty hours. Do they mean fifty hours per year, per quarter, ...? Furthermore, in 1996, only fourteen of the 79 respondents choosing the 'less often' response option also provided a number of hours (2002: 17 out of 47). It was therefore assumed that these people only so rarely looked after children that this does not as such establish a regular child carer status. The hourly measure was thus calculated in the same manner as the one for adult caring had been, with the exception that the 'less often' category was set to mean 0 hours per month.

At the same time, the survey already provides a binary indicator simply stating whether the respondent has the child carer status or not. This reveals that 81.9% of the respondents in 1996 were no child carers. It was consequently concluded that any measure of time investment into the childcare status would again show too little variation to gain much from it in statistical models.

IV.2 Grouping respondents

The aim of this research is to explore how social status sets develop over the life course and how this may have changed in recent cohorts, with a focus on the impact of retirement. For descriptive purposes, it is thus useful to differentiate several groups within the researched population based on this aim. Two suggests potential influences on these social statuses arise from the conventional Gerontological perspective on this topic: on the one hand *age* and on the other hand the respondents' position in the job market.

When working with age categories, it was chosen to let these reflect the conventional entry into retirement. Five age groups are distinguished in the cross-sectional samples:

- 40 to 55 years is an age group in which the majority of people is likely to work.
- 56 to 65 years is an age range in which retirement becomes more and more a topic. Most women in the samples retired under the old retirement guidelines

which suggested a retirement entry age of sixty for women. Yet there are other arrangements, such as *Altersteilzeit*²¹ (old age-related, state-supported part-time work) and early retirement that can enable respondents to retire already in their late fifties. In the 2008 sample, in which disability pensions seem to have been included, 15.2% of the respondents retired before reaching age sixty, 46.1% by age sixty, and 95.9% by age sixty-five.

- The 66-to-68-years age range is perhaps the least common choice. It was made to narrow the focus down on those formative first years within a new chapter in people's lives – the years just after they have lost the social status that previously has dominated their lives. This categorisation cannot capture every newly-retired, but about a fifth of the respondents of both the 1996 and the 2008 waves retired at age 65 and over forty percent retired between the ages of 62 and 65. These early years of their retirement are the ones with the highest likelihood of good health and years in which the 'busy ethic' (Eckert 1986) from their work life may still have the strongest hold on them.
- The age groups of 69 to 75 and 76 to 85 are distinguished to account for the changing circumstances in old age. Women are with progressing age less and less likely to have a partner due to the shorter male lifespan, and for both sexes the risk of developing health issues grows that may stand in the way of obtaining and actively living the social status of volunteer, child carer, or carer for adults.

However, as the wide range of the retirement entry age already showed, age only has a limited association with a person's relation to work life. There are still a number of people who have never worked or have stopped working with the advent of their first child. The civic engagement of jobseekers is reportedly especially low (Morrow-Howell 2010, Li and Ferraro 2006). When looking at the effect of retirement on people's likelihood of engaging in specific social statuses, it is necessary to take these diverse life courses into consideration. They may provide people with different attitudes towards these social statuses – for a person who is not employed, a volunteering task or the support of a relative

²¹ While old age related part-time work suggests a continuation of work with fewer hours, in reality it can be equal to early retirement due to the more often used 'Blockmodell' in which the employee works fulltime for a defined period and then stays home for an equally long period thereafter until their official retirement.

will take a more prominent position in their perception than for someone who is also fulltime working – and with different social networks through which they can obtain these social statuses.

Thus, for the purpose of this research, eight work and retirement groups were differentiated. Four of these capture the diverse realities of people of working age: fulltime and part-time employees, job-seekers, and those who are presently economically inactive, such as home keepers, people on maternity/parental leave, people in vocational training and others. A fifth category are those who have never worked and thus have also never retired. The remaining three groups capture various states of retirement: early retirement, the first ten years of regular retirement, and respondents who have spent more than ten years in retirement. Below, these eight groups will be characterised in more detail. A ninth group is formed due to some respondents not providing information on when they retired.

The indicator was derived from several separate question items in the survey: firstly, one that enquires whether the respondent is retired (everyone aged 60 and over was asked this). Secondly, one asking about the current occupational status (put to everyone below age sixty or who had said they were not retired). The first indicator is binary. The second one started with nine categories in 1996 and had evolved to eleven categories by 2008, some of which were combined for the purpose of the work and retirement status indicator. Lastly, the retirement year was subtracted from the year of the interview to arrive at the retirement duration.

When determining the nine categories, both conceptual and data distribution issues were taken into consideration. Seven categories were predetermined by the relation to work life: the distinction between part-time and fulltime workers is necessary, because it was found in previous research that part-time employment is positively associated with engagement in voluntary organisations (Choi 2003) and the likelihood of being a caregiver (e.g. Dautzenberg et al. 2000). The 'other inactive', the people who have never worked, the retired and the early retired as well as the unemployed, on the other hand, should theoretically have more time for engagement in childcare, adult care and social leisure time activities. However, their situations are distinct.

'Other inactive' Germans are temporarily removed from the job market. On the one hand, they may thus be preoccupied with a specific task that caused them to enter this status – this task may be child rearing (of an own child or a grandchild, the latter of which would be relevant here), professional reorientation, the care of someone, health issues or

other matters that use up their time resources. On the other hand, in contrast to people who have never worked, they may have adopted a certain work ethic in their previous work life. Especially volunteering is often discussed as a replacement of work, since it entails rendering services that would be paid for in other circumstances (Chambré and Einolf 2008). Some research aims to explain why people volunteer with the help of continuity theory: if someone was very involved in their work and found it rewarding, it is often hypothesised, they will seek a similar occupation 'as a way of regaining the prestige, social contact, and sense of value and purpose that they lost when they left their paid jobs' (ibid, p.13).

This applies even more to retirees who have completed their work life and are facing a span of years to fill with a new purpose. A distinction between retirees and people in early retirement is made to discern if the different circumstances of the ends of their work lives affect their retirement behaviour.

In contrast to the previously discussed forms of economic inactivity, job seekers enter this status involuntarily and indeed may see it as their job to find new employment while suffering from the loss of their status as economic contributor and the loss of their work-related social contacts. Unemployment has been found repeatedly to have negative repercussions on people's social participation (see chapter I).

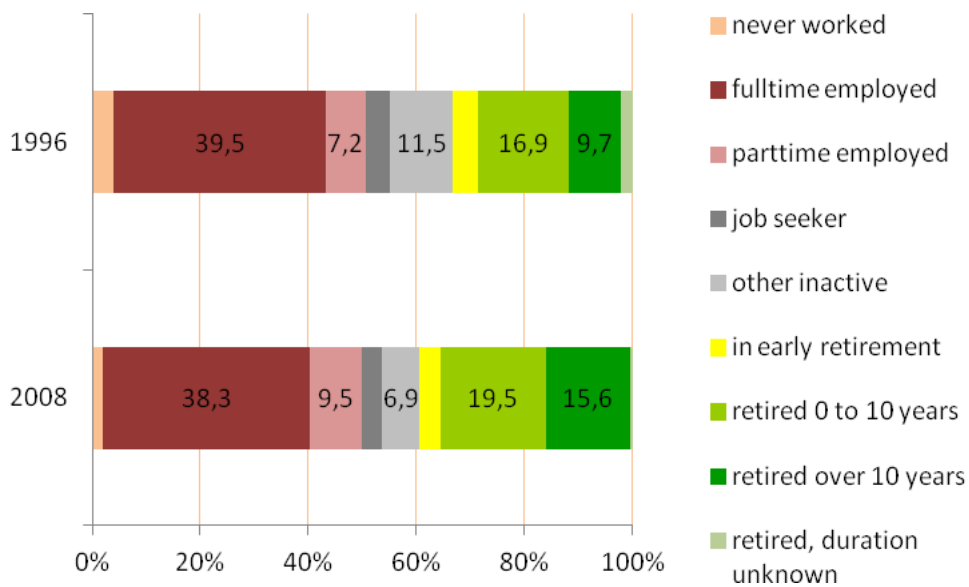
A further division of the pensioners was undertaken to be able to sound out possible effects of long-term removal from professional life. The time shortly after entering retirement may be a time of adjustment within new circumstances and reorientation as to one's purpose in life, as it was already argued when defining the 66 to 68 age group. Over the course of the retired life, however, attitudes may shift from the busy ethic to a more casual approach to life, or the respondent's health may worsen. Additionally, generational differences in the approach to retirement may be observable, so that at least a rough division of the large number of pensioners seemed appropriate. A more detailed division as it was conducted for the age groups was decided against in favour of sample sizes that would allow making reliable conclusions about differences. This division, however, created a small group of cases for which the retirement duration was unknown. These were mostly excluded from the discussion of the descriptive findings.

A comparison of the distribution of the work- and retirement groups within the samples of 1996 and 2008 (Figure 14) shows that, expectably, the retirees have become more numerous, by the factor of 1.3. Likewise, part-time work has become more common.

However, the proportions of economically inactive people and people who have never worked in their lives have shrunk significantly to nearly half of their previous numbers.

On the following pages, the nine work and retirement groups will be compared in terms of their basic characteristics: the age and gender distribution of their members, their self-assessed health, and their household income. Age and health are reported on to tie in with the research findings that social participation is negatively associated with bad health and progressing age (Choi 2003, Lee et al. 2008).

Figure 14: Share of work and retirement groups 1996 and 2008



Data source: GEAS 1996 + 2008, cross-sectional samples.

The gender distribution is relevant due to its association with caregiving roles (Backes et al. 2008). Finally, income is positively associated with volunteering (Butrica et al. 2009) but negatively associated with caregiving (Choi et al. 2007). According to Olk, intergenerational relationships, which undoubtedly influence the chances for a grandparental child carer status, are found to vary amongst social classes (which are, in turn, related to income): 67% of young adults in middle class but only 40% of young adults in lower class say they are getting on well with their parents (Olk 2012, based on Shell Jugendstudie 2010).

IV.2.1 Fulltime employees and part-time employees, job seekers and other inactive people

The 2008 sample rendered 2372 fulltime and 588 part-time workers. 238 respondents were job seekers and 425 were inactive for other reasons.

Fulltime employees were defined by the GEAS as people working thirty hours or more per week. In the 2008 cross-sectional sample which encompasses people between the ages of forty to eighty-five, the mean age of both full-time and part-time employees was 50 years with a range of 37 years (from age 40 to 77). In comparison to 1996 when the average was slightly lower and the range much narrower (27 years for fulltime employees, 24 years for part-time employees), workers' age profile has diversified (however, in 2008, still 99.7% of them were aged 65 or below). Job seekers' mean age, on the other hand, lay at 52.3 years and that of other inactive people at 55.6 years. The latter category – both in 1996 and in 2008 – has an age range that spans the full sample, with about three in ten people who are inactive on the employment market in 2008 being over sixty years old and nearly sixteen percent being over age sixty-five.

Concerning the gender distribution, there is still a clear divide visible: in 2008, 65.9% of the fulltime employed yet only 8.2% of the part-time employed were male. However, in comparison to 1996, a small trend towards more equal working arrangements is detectable: in the first wave, 69% of the fulltime employees were male and only 5.1% of the part-time workers. Likewise, nearly eighty-five percent of the inactive people in 2008 were female. In contrast, amongst the job seekers the genders were almost balanced.

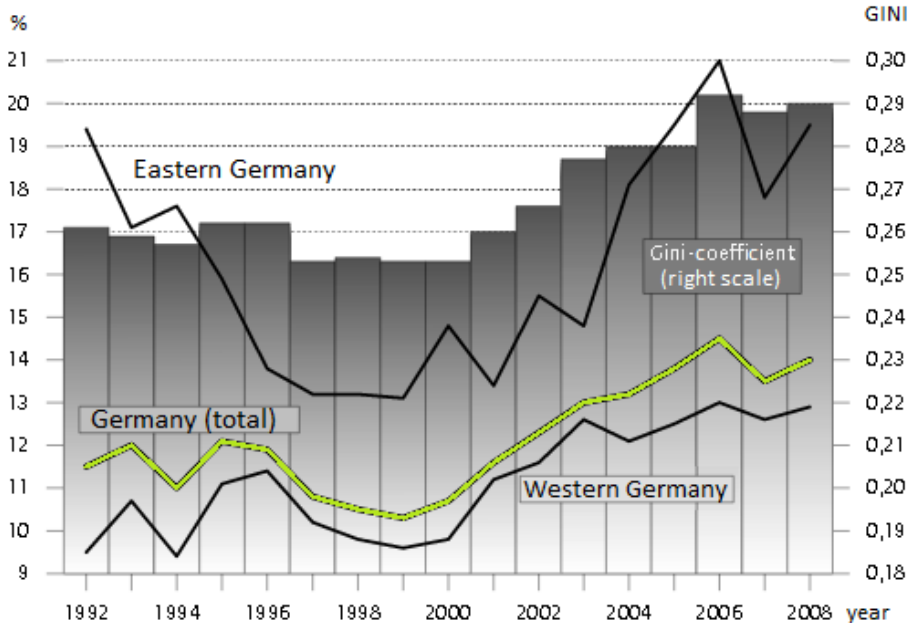
Since health is one key factor influencing people's likeliness of engaging in any of the four social statuses and is at the same time a key characteristic assumed to decline amongst retirees, it needs to be mentioned here. Over two thirds of the workers assessed their health as good or very good. About a quarter chose the 'middle' category and only about 5.5% felt it was bad or very bad. Amongst the job seekers, on the other hand, only half thought they were in good or very good health. Over a third located themselves in the middle category and sixteen percent said they were in bad or very bad health. While not feeling as badly as jobseekers, home keepers, people on maternity/parental leave, people in vocational training, and others had lower health assessments than workers as well, with twelve percent feeling in bad or very bad health.

A general observation that can be made about the monthly net household income is that it has increased by 400 to 600 Euros from 1996 to 2008 in all groups – apart from the job seekers²². Likewise, both the ranges and the standard deviation of the net monthly

²² When looking at the monthly net household income, extreme cases over 10,000 Euros per month are excluded. In the 1996 sample, 4180 out of 4838 had named their income and earned up to 10,000 Euros (13.6% missing: 33 cases had an income over 10,000 Euros; 619 did not provide

household income have risen noticeably, giving evidence to a greater heterogeneity of incomes. This trend was also observed with the help of other surveys, such as the socio-economic panel. The GINI coefficient rose from 0.25 in the late 1990s to 0.29 in 2008 (Grabka and Frick 2010; see Figure 15)²³. These data show that income differences are much more pronounced in Eastern Germany than in Western Germany, which may lead to more variation in pension payments later on. This may also point to a smaller middle class and a larger working class in Eastern Germany and aid in explaining the lower volunteer rates in this country part.

Figure 15: People living in relative poverty (60% or less of OECD based equivalent income) and income inequality in Germany 2008



Source: Adapted from Grabka and Frick 2010, p. 5. Based on SOEP 2008.

Surprisingly, 1.1% of the fulltime employed say they have a household income of 500 Euros or less per month, with a minimum value of merely 250 Euros²⁴. Taking the monthly equivalent income into account, which adjusts for the number and age of people living in

information on their monthly household income); in 2008, data on 758 household incomes was missing and 48 had household incomes beyond 10,000 Euros (missing: 13%). The utilised indicators included information from both the interview and the drop-off questionnaire.

²³ Having continued their observations 2009 and 2010, Grabka, Goebel and Schupp (2012) found the trend turning toward a decrease of income inequality, which, however, is not relevant when looking at the available GEAS cross-sectional data.

²⁴ This is surprising because minimum wages and financial support from the state are in place to counteract low incomes.

the household based on OECD guidelines, 9.2% of the fulltime working respondents lived in a household with an income of less than 925 Euros, the threshold to relative poverty for single households in 2008 (threshold taken from Grabka and Frick 2010). Of the part-time employed, 16.2% remained below the 925 Euro threshold – as did 22.2% of the other inactive people and 72% of the job seekers. In comparison, according to Grabka and Frick (2010), about 13% in Western Germany and 19% of the Eastern German population lived below this threshold in the SOEP 2008 sample; households in which all adults are fulltime employed had merely a ten percent lower chance of poverty than an entirely non-working household.

IV.2.2 In early retirement, up to ten years retired and more than ten years retired

Thirty-nine percent of the freshly drawn sample in the 2008 interview wave were retired or in early retirement. The average age of respondents in early retirement was 57.6 years, with the first person already having gone into early retirement at age 40²⁵. The average age of people in their first ten years of retirement has increased by three quarters of a year from wave one to wave three, arriving at 67.7 years. The average age of people having retired over ten years ago is affected by the sampling frame's age cap at 85 years²⁶, thus being only about nine years higher.

While in 1996, two thirds of the early retirees were male, in 2008 the genders in this group were balanced. With 51.2%, men were slightly more numerous amongst people having retired within the last ten years before the interview, yet due to the shorter male life span, their share had decreased to 44.9% amongst those over ten years in retirement.

Amongst both the early retirees and the new pensioners, an upwards trend in their subjective health perception can be observed. Three in ten early retired respondents said they were in good or very good health in 1996. By 2008, four out of ten said so. People in the first years of retirement started off with better health in 1996, with 45.9% saying they were in good or very good condition, but by 2008 this had further improved to 52.5%. However, amongst the early retired, this change was mostly derived from a slimming of the

²⁵ There are retirement forms for people who can no longer work in their job due to permanent health issues.

²⁶ According to the most recent census, 1.92% of all Germans were older than 85 years in 2011.

numbers opting for the 'middle' response category. Here, the people saying they were in bad or very bad health also increased to 29%. The health of people in the later stages of their retirement remained relatively stable. 37.2% were in good or very good health and 21.3% assessed their health as bad or very bad.

Recently retired respondents had – with 2246 Euros per month – on average 100 Euros more income than early retirees and nearly 300 Euros more than people who had retired more than ten years ago. However, the range of incomes is much narrower amongst early retirees than amongst regularly retired respondents. 27.6% of the early retirees had less than 925 Euros per month equivalent household income; amongst the recently retired, only 17.6% fell into this income group, and just over one in five of the long-term retired did.

IV.2.3 Never worked and unknown retirement duration

3.8% in 1996 and 2.1% in the 2008 sample said they had never worked, nearly all of which were female. They were evenly distributed amongst all ages.

The number of people with unknown retirement duration was reduced from 2.1% in 1996 to 0.4% in 2008.

IV.3 Computed explanatory variables

A range of variables had to be combined: the research questions concerning the impact of retirement require to look at the characteristics of the interviewee during their first interview, when they were still active in the employment market, compared to their characteristics as retiree in 2011. This first interview could have taken place in 1996, 2002 or 2008, and thus the separate indicators for each of these waves needed to be turned into one indicator for each characteristic. The response categories for most indicators remained consistent throughout the survey, although coding practices for missing values and 'not applicable' cases varied. Frequencies were carefully checked to ensure a correct computation.

For some explanatory variables, a set of indicators needed to be combined, e.g. when calculating the distance to the closest living child.

The SPSS software syntax for these operations is available on request.

IV.4 Filtering out a sample of people who retired during the survey

To explore the effect of the life course event *retirement*, a dataset was created based on the 2011 panel wave that only contained respondents who had retired in the course of the survey. This required a complex filtering process based on 8 indicators: for each of the four interview waves, there is one indicator which measures whether the respondent is retired or not. This question was only put to individuals aged sixty and over. A second indicator with eleven response options captures the economic status of the respondents, also including a range of response options that are or can be treated as a form of early retirement:

1= Vorruhestand (early retirement based on a specific law that is no longer in operation)

3= Freistellungsphase der Altersteilzeit (part-time employment for older workers is in most cases split into a work phase and a stay-at home-phase: this is the latter – a de facto early retirement with a continued, though lower, income)

4= Frührentner (early retirement)

5= frühpensioniert (early retirement due to occupational invalidity)

In a first step, everyone who had not yet retired or entered early retirement by 2011 was eliminated from the sample. The correctness of the filtering syntax was checked through a comparison of the frequency tables of the two variables from the 2011 wave before and after filtering.

Subsequently, in a separate step for each interview year, all those who had entered the survey in that year were filtered by whether they were already retired. Since the aim was to only include people who entered the survey as still economically active and retired during the survey, those in retirement or early retirement were excluded. After each step, the checks were repeated.

After they had stated to be retired for the first time, the respondents were asked a range of questions pertaining to their retirement. Unfortunately, for respondents who were first interviewed in 1996 and retired between 1996 and 2002 *but did not participate in the 2002 interview wave*, this data was never collected, even if they subsequently re-entered the survey.

There is also an inconsistency pertaining to the retirement entry years. Panellists first stating that they were retired, were asked in which month and year they retired. 2.3% of the created sample of 867 people having retired during the survey and having been

interviewed in 2011 stated that they retired before 1996. However, when looking, for example, at the four people who claimed to have retired in 1990, during their first interview in 1996, three of them said they were homemakers and one was employed. They had also been explicitly asked whether they were retired and had denied this.

Since only women over sixty and men over sixty-five could retire (the point in time of early retirement was not asked about), only these could indeed have been retired – despite denying so – in their first interview. This is the case for two people first interviewed in 1996, six people first interviewed in 2002 and twenty-one respondents first interviewed in 2008. Due to the majority of them already stating not to be active in the labour market in 2008 (as home makers or not working for other reasons), it was decided to exclude these cases from the analysis that is focussed on the effect of the loss of the status as economically active person.

IV.4.1 Missing case issues

The indicator measuring how difficult respondents found retiring, which was used to test hypothesis 3b) (VIII.3.2), showed similar symptoms as the retirement duration indicator discussed above: had the respondent not participated in at least one interview wave after first having been interviewed, their chances of not providing an assessment of how difficult they found retirement was much higher than that of respondents who had continuously participated (Table 6). So there was no information on retirement difficulty for 66.1% of the respondents who were first interviewed in 2002 but did not participate in 2008, as opposed to mere 14.2% of respondents who did participate in the 2008 wave. Of those respondents who had a gap of 2 waves between interviews, 76.9% did not answer the question.

Table 6: Whether respondent provided information on how difficult they found retirement by their participation profile

Info on retirement difficulty?	Participation profile 1996-2011							Total
	____.____. 2008.2011	____.2002. _____.2011	____.2002. _____.2011	1996.____. _____.2011	1996.____. _____.2011	1996.2002. _____.2011	1996.2002. _____.2011	
No	36.0%	66.1%	14.2%	76.9%	35.7%	52.7%	16.5%	34.6%
Yes	64.0%	33.9%	85.8%	23.1%	64.3%	47.3%	83.5%	65.4%
Total count	172	56	141	78	70	93	231	841

Source: GEAS 1996-2008. ____ stands for a year in which the interviewee did not participate.

This shows that once more the practice of only asking respondents about their retirement experience if they have retired in the six years before the interview has led to gaps in the data. The question whether the missing cases cause a bias in the data is hard to answer. Are the reasons for respondents' intermittent refusal or unavailability to participate in the survey related to volunteering and retirement difficulty? It can neither be excluded that respondents were so struggling with adjusting to their new life in retirement that they had no mind for lengthy interviews nor that they were too busy enjoying it to pay attention to the survey. Nor can the possibility be excluded that their nonresponse does not affect the here presented analysis at all.

To assess the influence of the non-response to some degree, the outcome of the first block of analysis for the binary logistic regression model of the influence of retirement difficulty on volunteering was run both with the full sample and with the sample reduced by the missing cases in the retirement difficulty indicator (see Table 28). The effect sizes of most explanatory variables show little difference. The effect of having a higher degree of education, on the other hand, was clearly underestimated by the reduced sample. However, all effect directions are the same. The non-response may thus have had some influence on the model outcome, but it has likely not produced results that are contrary to what would have been found if the data had been complete.

IV.5 On the matter of age

It is a key assumption followed in this study that there is no good theoretical justification for an 'age cut-off'. It was therefore chosen to base the analysis on the full sample of 40 to 85 year-olds provided by the GEAS.

IV.6 Weighting and missing case counts

The GEAS provides two kinds of weights: as it is divided into an interview and a self-completion part and not every person who has been interviewed subsequently sent back the self-completion questionnaire, there are separate weights for each. The indicators used in this study all stem from the larger sample of the interviews. Because wave 1 was based on a sample of German citizens, to maintain comparability this study is only based on the German samples.

The design weight adjusted for the deliberate overrepresentation of some sub groups within the sample, based on age groups, gender and country part (east-west) distribution. Residents of Eastern German states, for example, made up a third of the respondents in 1996, even though according to the 2011 census, they amounted to less than a fifth of the population in 1995 (DESTATIS 2016). According to Dittmann-Kohli (1997), the Zentrum für Deutsche Altersfragen decided, however, not to implement weights adjusting for marginal distributions as they might, for example, have been gleaned from the Mikrozensus, “due to the incalculable effects (see E.g. Rothe 1990)” (ibid: 2, translated). The exact procedure, e.g. the weighting formula, has not been provided in the survey documentation.

The weights were applied throughout this study. Models and bivariate analyses for which the number of missing cases was not supplied have a share of less than 2% missing cases. Overall, apart from the discussed missingness in the retirement sample, the missingness in the statistical models was small. The only explanatory variable leading to heightened missingness would have been income (a common issue), which it was chosen to use a simpler, binary indicator that worked better in the models and did not result in large numbers of missing cases.

IV.7 Summary

This chapter laid out a range of operational details that form the background for the following four chapters. Having discussed the theoretical base, the data, the specific case study and the methodology of the analysis, it is now finally time to look at the results.

V. Social statuses of Germans aged 40 to 85: An overview

In the introduction, four main hypotheses were presented:

1. Older adults in Germany today on average obtain more social positions for which they fulfil the associated social roles after retirement.
2. Social statuses associated with an experience-driven lifestyle are more popular in the German society than social statuses connected to other values.
3. Retirement has no significant impact on which and how many social statuses a person occupies.
4. Retirement does have an impact on the time invested into the friendship status.

In this chapter, the first of these will be addressed. The chapter is thus an introduction to the changes in the social statuses by looking at them as a summary figure. It will look at the status sets of older adults in Germany and compare their compositions. Based on this analysis, it will show that there is an increase of the number of social statuses older adults adopt. Furthermore, some of the variations of the number of social status types by retirement length and age will be explored.

Unfortunately, because there is no reliable data on the amount of time invested into childcare and volunteering, it was not possible to compute a summary indicator for the overall time investment. It would have been interesting to investigate the distribution of time between social statuses and to see whether time is just rearranged or more time is invested into the statuses over all.

V.1 A comparison of the change of status sets of different age groups in Germany over time

This study questions in how far the social statuses of Germans are affected by their age. It also aims to explore in how far they are evolving. The GEAS offers a comparison of cross-sectional data from 1996, 2002 and in 2008. This is still a relatively short period of time for observations of trends within a population, yet within that span of twelve years, some

interesting shifts can be observed in the data²⁷. It will be interesting to further follow these developments when the 2014 survey data will be published in 2016.

At a very first glance, the overall number of social statuses in the whole population of 40 to 85 year-olds captured by the GEAS does not appear to have increased much. Correlating the survey year with the number of social statuses results in a value of R of .03²⁸. Distinguishing retirees and non-retirees within this sample shows that the correlation for retirees is twice as high, meaning these have increased their number of social statuses more than the working population. These developments still may seem small, but as will be shown in the next sections, this is due to only two of the four social statuses having gained in popularity and the limited observed time span.

A look at Figure 16 illustrates the changes in more detail: the graph focuses on the retirees to explore age differences amongst those having given up the status as economically active person²⁹. Amongst the 56- to 65-year-olds, the changes are small, but the other three age groups show a clear shrinking of the share of people who do not occupy any of the four social statuses at all and a noticeable increase of those with two or more social statuses as volunteer, carer, child carer or friend. This share rose by a third amongst the 66 to 68 year-olds and by about a quarter amongst the 69 to 85 year-olds, although, based on the 95% confidence intervals, it cannot be excluded that these effects are exaggerated in the sample. However, chapter VII will present strong evidence that some social statuses have significantly gained in popularity.

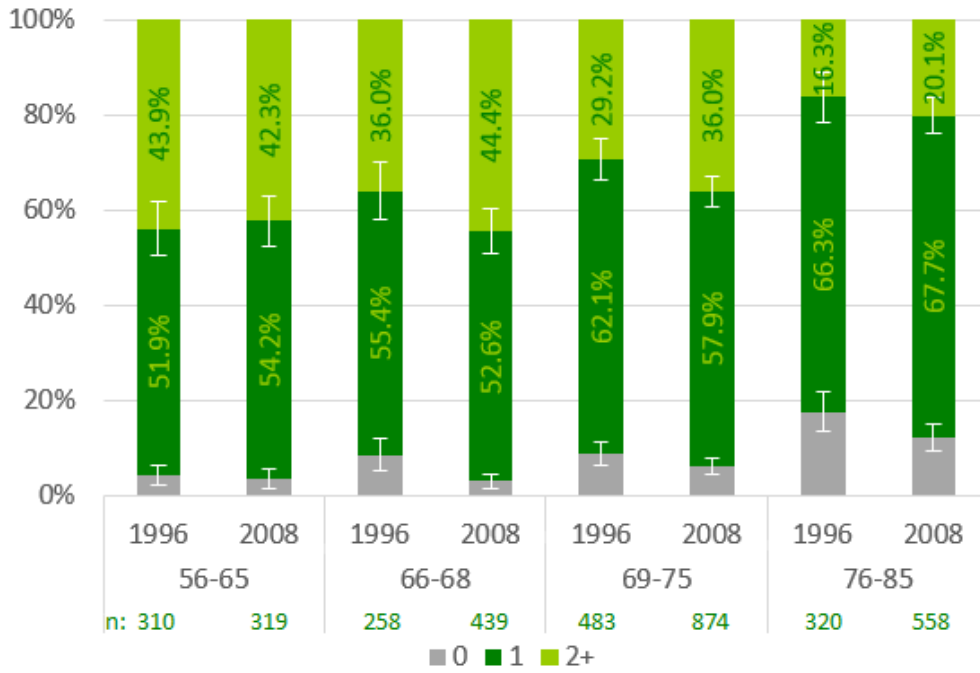
An analysis of age differences within each cross-section reveals that amongst the economically active, age has literally no influence on the number of their other social statuses. Amongst retirees, age group membership has a weak, negative influence.

²⁷ The 2002 data does not always support the overall trend, but this may be partly due to the smaller size of the 2002 sample.

²⁸ That this correlation is still statistically significant is no surprise with 13937 cases included in the analysis.

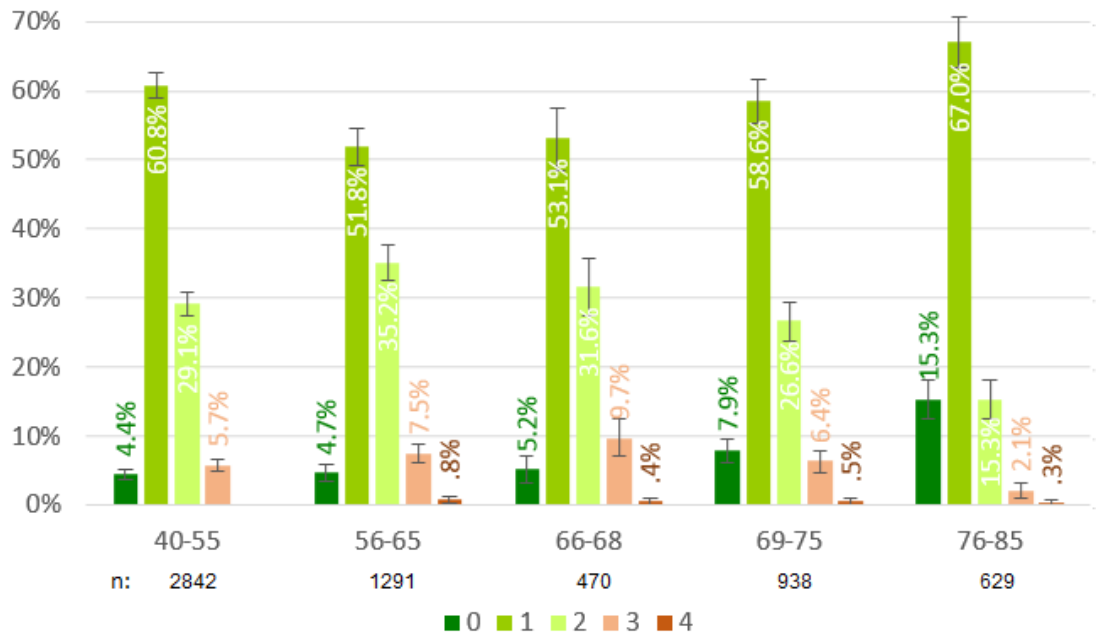
²⁹ Some studies show that a rising number of people in state pension age still work – data from the German Mikrozensus, for example suggests an increase from 2.6% to 5.1% of people aged 65 and over still being in some form of employment, most of which receive a pension at the same time (Institut Arbeit und Qualifikation der Universität Duisburg-Essen 2014). This is, however, still too small a group to be represented well enough in the GEAS.

Figure 16: Number of social statuses occupied by retirees in 1996 and 2008 by age group



Source: GEAS 1996 and 2008, cross-sectional samples; 95% CI in white.

Figure 17: Number of social status types by age group in 2008



Data source: GEAS 2008, cross-sectional sample. 0.6% missing, 95% confidence intervals in grey.

In fact, in 2008, there were only minor variations in the numbers of different social statuses that the respondents held when comparing age groups between the forty to seventy-five-year-olds. Only roughly four to seven percent in each age group never met up with friends, did not volunteer, and were not a carer either. The majority of respondents said they only held one type of social status – and this was in almost all cases that of ‘friend’, of spending leisure time with friends, their spouse, and/or family members. Amongst the forty- to fifty-five-year-olds, merely one out of over seventeen hundred cases who only acquired one of these statuses was a volunteer, three had childcare responsibilities, and five were fulltime caregivers, claiming to spend 140 hours or more per month on this responsibility.

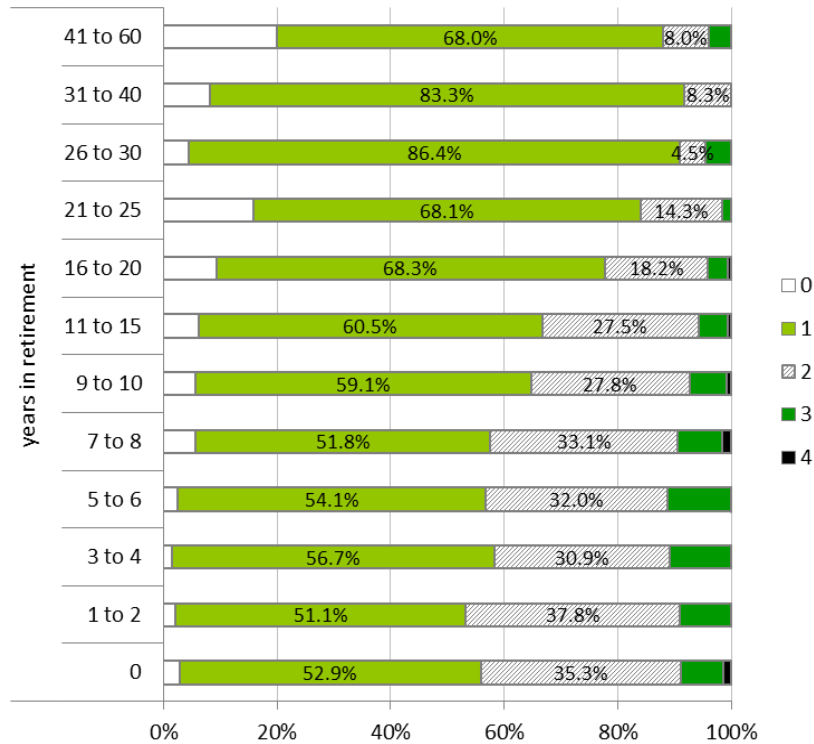
More interestingly, the rates of people acting out roles in two or more social status types amongst the 56- to 68-year-olds Germans (about 42%) was higher than amongst the younger Germans (34.6%), and the 69-75 year-olds roughly matched the value of the 40- to 55-year-olds (33.5%).

High social involvement appears most pronounced amongst the age group directly after the official retirement line, with slightly elevated numbers of people with two, three and even four social statuses in the 66- to 68-age-group. Since, however, the actual average retirement age lies far below 65 and varies widely, for an accurate picture of people in their first years of retirement it is necessary to move away from the age orientation.

Figure 18 shows the distribution of the number of social status types by the duration that respondents have spent in retirement on a more finely distinguished scale. Respondents that were in the first six years of their retirement in 2008, maintained a quite stable distribution.

With increasing years of retirement, a continuous shrinkage of the groups of people with many diverse statuses and a swelling of the groups of people with one or none can be observed, although amongst those between 26 and 40 years in retirement, having none of the four social statuses is less common than the previous curve would indicate. Here, the dominance of people with one social status type is even more pronounced. Those retired for more than 25 years, however, are a small group of 59 respondents, most of whom have retired very early and thus have possibly a distinct approach to their *expectably* long phase of retirement, whereas most of their fellow retirees will be less certain of the duration of this phase of their lives.

Figure 18: Number of different social status types by years in retirement



Data source: GEAS 2008, cross-sectional sample. 1.7% missing; 0 represents freshly retired.

When looking at absolute numbers, it becomes clear that the likelihood of a person being permanently involved in more than two status types is small per se and trying to explain the variation would not illuminate much: of the 2164 cases of people receiving some form of pension in the 2008 sample, only 144 held statuses in three types, and mere 14 were caregivers, child carers and volunteers and still found some leisure time to meet with friends or family. Furthermore, it is possible that someone with a status each in three of these types in fact invests much less time and other resources into these than someone with just one status.

V.2 Reasons for the change: age, period, and cohort effects

Having established that a complex set of social statuses has become more common, a more detailed examination of this development is a logical next step. Is this a development introduced by new cohorts entering retirement? Is it because the baby boomers weigh in and make the population of retirees on average younger and thus more active? Or has

something about the quality or the social construction of retirement changed across the cohorts?

Empirically, a clear telling-apart of age, cohort, and period effects with surgical precision is difficult, if not impossible. However, they are theoretically distinct.

Age effects describe the changes that are commonly found in people throughout their life courses. A commonly assumed age effect is that young people are more prone to radical ideas, whereas older adults are on average more conservative in their attitudes. Here an explanation based on the developments over the life course might be that young people at the beginning of their lives do not yet have much to lose. They are more willing to take a risk because it will be relatively small and the chance of making a mark, of distinguishing themselves, is more appealing when there is a whole life to reap the fruits. Older adults, conversely, will aim to preserve what they have already built for themselves.

Period effects are the influences exerted on a person by living in a specific place at a specific time. The people living in Paris during the Second World War will have been shaped in a different way by the events and the specific way in which they were reflected by French society than people living in a rural area in Wisconsin at the same time.

Cohort effects stem from the specific circumstances in which people grow up. They thus group individuals together that have been born at a similar point in time and space and that grew up in similar circumstances. The concept of cohort effects therefore focuses on the effects of early socialisation, whereas period effects can be shared by people of various ages.

Glenn Firebaugh (1997) illustrated well the difficulty of telling the three types of effects apart with the help of entering them into a statistical formula:

$$\hat{Y} = \beta_0 + \beta_1 \text{Period} + \beta_2 \text{Age} + \beta_3 \text{Cohort}$$

(Read:

The estimate of Y equals the constant β_0 plus population parameter 1 times period effect plus population parameter 2 times age in years plus population parameter 3 times year of birth.)

Typically in a regression model, the effect of one influential factor is examined by controlling (fixing) the effect of the others. However, the factors are too strongly interlinked to do so: the age and the birth year, for example, are inseparable. Keeping one

fixed, automatically disables any variation in the other. This makes a clear distinction of the three effects impossible.

When discussing older adults, for example their community engagement or how well they handle the transition between work life and retirement, the majority of researchers adopt a momentary, a snapshot view of their matter of interest. Too rarely is reflected how the experience or the decision making process of, e.g., a sixty-five-year-old today might differ from that of a sixty-five-year-old twenty years ago. Sometimes the fact is neglected that the age difference between a sixty-five-year-old and a seventy-five-year-old might represent more than an added ten years of life experience and health development, and it thus may not be sufficiently accounted for by adding age and health to a statistical model.

The GEAS provides three separate cross-sectional samples. With these, it is possible to observe several distinct cohorts at various ages. Table 7 compares six-year birth cohorts. Since the survey waves lie six years apart, this allows to directly compare the mean number of social statuses for these cohorts. People born in the period from 1923 to 1928, for example, were aged 68 to 73 in 1996 and held on average 1.28 social statuses per head. Twelve years later the cohort of those born between 1935 and 1940 had reached this age span and held on average 1.45 statuses per person.

On the other hand, there is no indication that the 62- to 67-year-olds in 2008 hold more social statuses than the 62- to 67-year-olds in 1996 did.

Table 7: Mean number of social statuses by interview year and age group with 95% CI

	1996			2002			2008		
	mean	lower CI	higher CI	mean	lower CI	higher CI	mean	lower CI	higher CI
80-85	0.90	0.80	1.01	0.89	0.79	0.99	1.00	0.93	1.06
74-79	1.14	1.07	1.21	1.13	1.04	1.21	1.27	1.20	1.34
68-73	1.28	1.21	1.35	1.30	1.21	1.39	1.45	1.40	1.50
62-67	1.46	1.38	1.53	1.53	1.46	1.61	1.48	1.42	1.54

Source: GEAS, cross-sectional samples; N=1383 (1996; 0.8% missing), 1122 (2002), 2191 (2008).

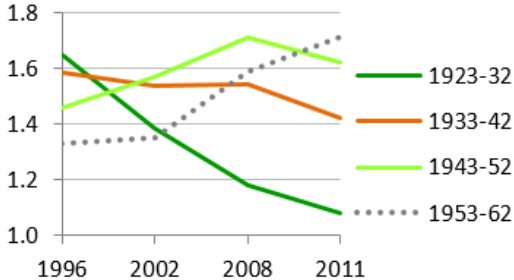
A look at actual panel data spanning fifteen years illuminates this further.

Figure 19 shows the average number of social status types for the 1996 GEAS panel sample in all available survey years. The panel data shows that the development over time

widely differs amongst cohorts. The respondents born between 1953 and 1962 have increased their average number of status types from 1.3 in 1996 to 1.7 in 2011 – the overestimation in 2008 (1.6) and 2011 in comparison to cross-sectional data is likely a result of the self-selection of the panel members that may favour more active people/people in better health. Likewise, the 1923-32 cohort shows a strongly pronounced drop.

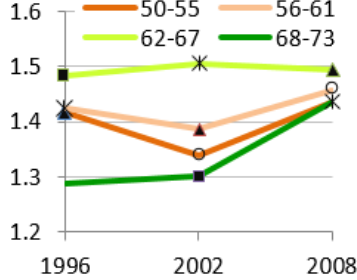
The development of the average social statuses is consistent with the findings from the cross-sectional data, with a slightly overestimated but again roughly stable average of around 1.5 status types, but this stability appears to be a result of some cohorts moving towards a higher and some moving towards a lower average of status types, effectively masking each other’s development in a summary measure.

Figure 19: No. of social status types of 1996 panel sample by survey year and cohort



Data source: GEAS 1996-2011. N=1040. Missing cases: 1996 – 3.1%, 2002 – 32.4%, 2008 – 38.3%, 2011 – 2.7%.

Figure 20: Comparing the average numbers of status types in four different age ranges based on 6-year birth cohorts



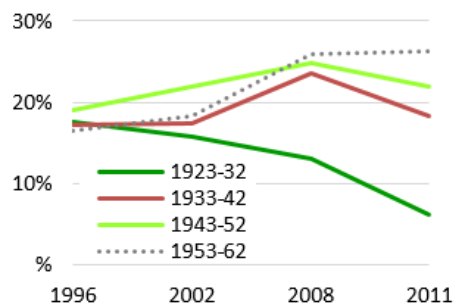
Data source: GEAS 1996-2011, panel sample. Cohorts: ▲ 1938-42; ■ 1928-32; * 1933-37; ○ 1943-47

A strong life course effect should – even despite the limited age-overlap between the cohorts due to a survey span of only fifteen years – result in the cohort lines being similarly shaped: if, say, the 1923-32 cohort dropped by 0.2 average status types between 1996 and 2002, the 1933-42 cohort should follow suit between 2002 and 2008. This is clearly not observable in the panel data³⁰.

³⁰ With a sample of n=1,040 and noteworthy numbers of missing cases in 2002 and 2008, not all points on the curves are statistically significantly differing from the curves’ previous points. However, the differences between the 1996 and 2011 points of each curve are statistically significant at the 95% confidence level. Only for the 1933-42 cohort there is a slim chance that the average remained the same, because the CI just overlap.

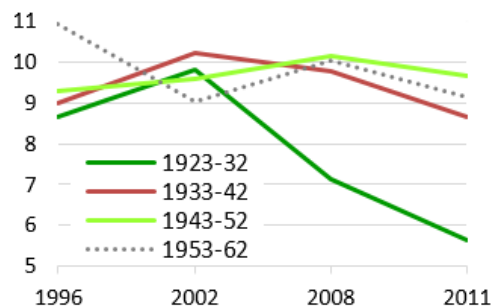
Figure 20 aims to make birth cohorts more directly comparable by lining them up by 6 year age groups. By distinguishing 6-year cohorts and six-year age groups, each cohort switches into a different age group for each survey wave. So in 1996, the 1938 to 42 cohort had an age range of 50 to 55 years; in 2002 it had completely moved to the 56 to 61 age range. For more solid sample sizes, it is based on the full 1996, 2002 and 2008 cross-sectional samples. The graph allows to track both birth cohorts and age groups. With only twelve years of survey data (and the 2002 data being less significant due to a smaller sample size), there is not enough age overlap between cohorts to analyse it visually. Looking at both Figure 19 as well as Figure 21 and Figure 22 which repeat the same visualisation of ten-year-birth-cohorts for the friendship and volunteer status alone, an age effect can be suspected from the drop of the curves of the oldest cohort.

Figure 21: Share of volunteers in cohort by survey years



Data source: GEAS 1996-2011. N=1040. Missing cases: 1996 – 3.1%, 2002 – 32.4%, 2008 – 38.3%, 2011 – 2.7%.

Figure 22: Average social leisure score of cohort by survey year



Data source: GEAS 1996-2011. N=1040. Missing cases: 1996 – 4.1%, 2002 – 33.5%, 2008 – 38.8%, 2011 – 3.1%.

V.3 Summary

A look at a summary measure of all four social statuses shows some change from 1996 to 2008. The p-value of the Pearson product-moment correlation coefficient (R) suggests that there is a significant increase in the number of social statuses held by Germans within these twelve years. It appears to be twice as strong amongst retirees as it is amongst economically active people aged forty and over.

However, binary analysis and visual inspection of the numbers of social statuses by age groups and birth cohorts do not provide an easy answer to the question whether this is a cohort or period effect. For some age groups, a clear upwards trend can be established; for others, there is no proof of a significant change.

More advanced analysis techniques of distinguishing cohort, period and age effects might be of help here, yet the limited number of data points might render them ineffectual. Furthermore, as the following two chapters will demonstrate, the summary measure would not be the right target variable for such a model: while it does give evidence to change amongst the social statuses, it also masks it to some degree. Not all social statuses increased in popularity, and one even showed a slight decline. The following two chapters will thus discuss the four social status types and possible reasons for why people engage in these separately.

VI. The caregivers

Rather than withdrawing from their social statuses due to their advancing age, it was shown in the previous chapter, older adults have experienced a jump in the number of their social statuses in society. Yet the fact that, overall, respondents from 2002 and 2008 invested more time into a wider variety of social statuses does not mean that all of these statuses experienced an identical increase in popularity. In fact, for the status of a caregiver to one or more adults, the development is best described with the word 'stagnation', whereas the status of child carer is even on the decline.

The following chapter is divided into two sections – one on caregivers and one on child carers – and will describe the current situation of these statuses in Germany and their development between 1996 and 2008. In this discussion, various population groups and potential factors influencing a person's likelihood of taking up a status will be looked at in more detail.

Overall, this chapter will contribute to exploring the hypothesis that some social statuses are more popular than others because they are more in line with an experience-focused lifestyle.

VI.1 Caregiving

1.76 million people in Germany are cared for in their own home, according to the German Care Statistics³¹ (Statistisches Bundesamt 2011). That is seventy percent of all people in need of care. For 1.18 million people this care is solely provided by their own friends and relatives. These are the numbers derived from the German statutory nursing care insurance, and they count those cases in which financial support for care was filed for and has been awarded. According to Geyer and Schulz (2014) there are nearly a quarter of a million cases in which informal care by family and friends is combined with mobile nursing services. Additionally, they calculated that 3.26 million are informally supported with or without the help of professional services without receiving any financial support from the state. In other words, 4.68 million Germans, 5.8% of the population, rely on private carers. Only a quarter of these receive any kind of financial support for this work.

³¹ These, by the way, hold no information whatsoever about the characteristics of the carers. Even though the majority of people in need of care are aided by a private caregiver, the statistics focus solely on professional care.

This underlines the importance of the carer status in German society. Since the demographic changes lead to concerns about the expectedly rising number of older people in need of support, it is important to also consider the same population groups in terms of their potential contribution to meeting this need.

While the number of people aged forty and over with an carer status is stable with caregiver rates around eleven and a half percent (Table 8), a small trend can be detected when looking at the time investment. Carers show a decrease in people who spend more than 28 hours per month on their care responsibility – a change that is statistically significant when comparing the 95% confidence intervals of investing more than 28 hours per month on caregiving.

Table 8: Time investment into adult care 1996-2008 in % of cases (95% confidence interval)

	1996	2002	2008
0 hours/month	88.5 (87.6% to 89.4%)	89.9 (88.8% to 91.0%)	88.3 (87.5% to 89.1%)
Up to 28 hours/month	5.4 (4.8% to 6.0%)	4.9 (4.1% to 5.7%)	7.1 (6.5% to 7.7%)
More than 28 hours/month	6.1 (5.4% to 6.8%)	5.3 (4.5% to 6.1%)	4.6 (4.1% to 5.1%)
<i>All caregivers</i>	<i>11.5</i> (12.2% to 12.8%)	<i>10.2</i> (8.6% to 11.8%)	<i>11.7</i> (10.6% to 12.8%)
<i>N</i>	<i>4838</i>	<i>3084</i>	<i>6205</i>

Source: GEAS 1996-2008. Missing <1.2%.

With 12.5% and 11.8% in 1996 and 11.7% and 11.4% in 2008 respectively, Western and Eastern Germany show very similar adult care rates in the population aged 50 and over.

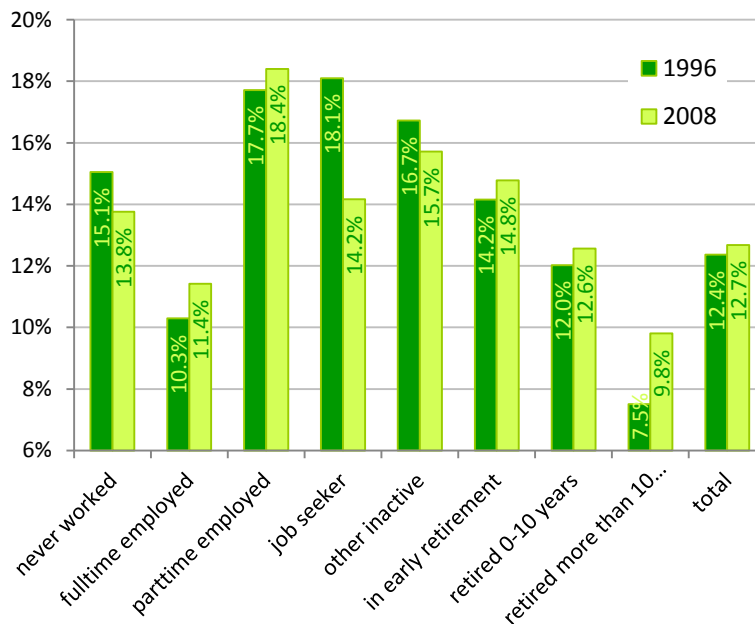
VI.1.1 Caregivers and their work and retirement status

In chapter 1.2.3 it was already mentioned that the question in how far multiple statuses are compatible has received some attention in social research. Terms such as role conflict, role strain and role enhancement are used to capture the ideas that multiple roles (or in Linton and Merton's terminology: multiple statuses) could draw upon the same resources – such as time and energy – and thus investing into one of these social statuses may have a

negative impact on the other. Alternatively, they may indeed be beneficial to one another, because, e.g., skills learned or social connections made in one social status may likewise be useful in the other.

The question of how far caregiving, for example, influences work life and vice versa has been researched various times with varying results. Dautzenberg et al.'s research (2000) suggested that a possible role strain was taken into consideration within the family already when deciding who should take care of the family member in need of support. As a consequence, the person with the least demanding work responsibilities was likeliest to become the caregiver, in so far as there was the option to choose between several potential carers at all.

Figure 23: Percentage of caregivers within work and retirement status groups 1996 and 2008



Source: German Ageing Survey, cross-sectional sample; retired people with unknown retirement duration (n= 102 [1996], 24 [2008]) excluded.

This observation seems at least in part to be corroborated by the findings presented in Figure 23: when comparing fulltime employees (working thirty hours per week or more) to part-time workers, their carer rates lie consistently about six percent apart. Overall, apart from those who have spent more than ten years in retirement, all groups seem to be more likely to adopt the carer status than those in full employment. However, while the fact that this was found in three separate samples (1996, 2002, and 2008) supports this conclusion,

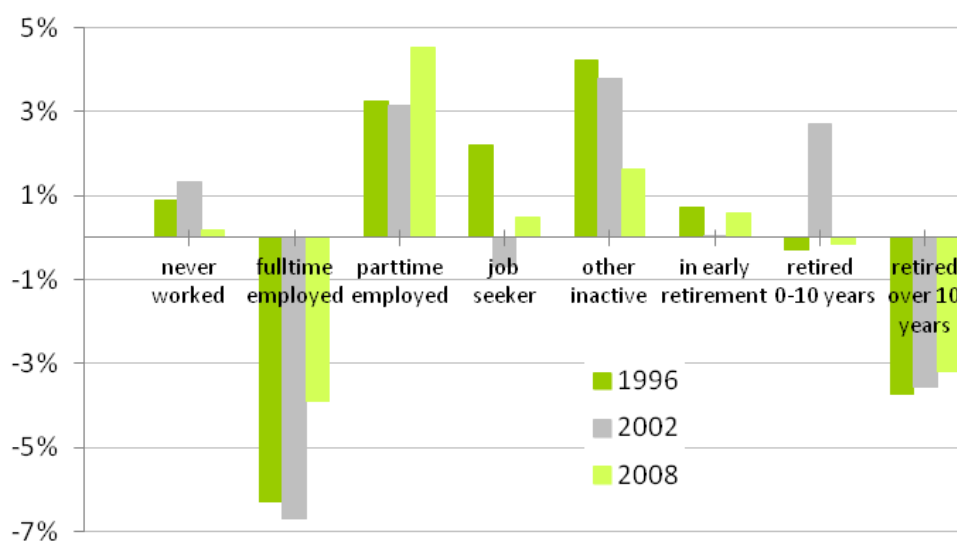
the 95% confidence intervals do not in all cases do so. In the 1996 data, part-time employees, job seekers and other inactive people (herein are combined housewives, people on maternity/parental leave, people in vocational training and others) are so distinguished from fulltime employees that it can be assumed with reasonable certainty that their carer levels would also have been found to be higher if the whole population had been surveyed. However, only part-time employees maintain this distinction throughout the subsequent survey waves.

Likewise, the development curves presented for each work- and retirement group do not represent statistically significant differences between the years. While for employees and people who have been retired for more than ten years there is an upward trend visible, this has to be further observed.

A different way of looking at the contribution of the various work status groups to Germany's overall need for caregivers is presented in Figure 24. This takes two distinct facts into consideration: on the one hand the relative share of the work status group within the whole population (as measured within the survey) and on the other hand the share of this group within all caregivers. While in 1996 39.4% of the people aged forty and over were fulltime employed, they provided only 33.2% of the carers. The findings suggest that in the first twelve years since the GEAS was conducted for the first time, a shift took place: *both fulltime and part-time employees took on more care responsibilities*. This can be partly explained by the dwindling numbers of people who have never worked or are otherwise inactive: the former went from 3.9% of the German population in 1996 to merely 1.8% in 2008; the latter made up 11.5% of the German population in the first survey wave and only 6.8% in the third. These groups were dominated by women (one person out of the 185 people who said they had never worked in 1996 was male, and more than nine out of ten in the 'other inactive' group were women).

It appears that a changing cultural attitude towards female employment is further marginalising the model of the person who stays at home to take care of children and 'the elderly'. Indeed, even amongst the part-time employees few name as a reason for their shortened work time that they needed to take care of an ill person. This may account for the shift in time investment into the carer role: with a dwindling number of voluntarily not employed people *in the population below retirement age, less time resources are available for unpaid care work*.

Figure 24: Share in overall adult caregivers by work and retirement status groups in relation to their overall share in the sample 1996-2008



Source: German Ageing Survey, cross-sectional sample; retired people with unknown retirement duration excluded.

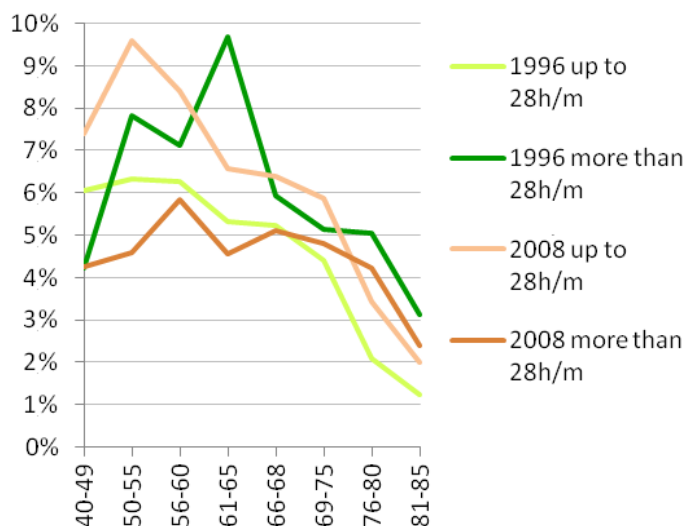
In light of this finding, it would appear all the more vital to mobilise the growing ranks of people who have retired from their time consuming occupations, yet Figure 24 suggests that there is little change to be observed. However, the graph is misleading. It, for example, suggests that those who are retired for more than ten years are contributing disproportionately little to adult care. In fact, they have almost *doubled* their contribution to care from providing just under six percent of all carers in 1996 to just under twelve percent in 2002 – and eleven percent in 2008. This development is mostly hidden in the above figure because at the same time their overall share in the population grew by about the factor 1.5. This relativises the often roused worries about demographic changes: *even the most senior citizens, those longest in retirement, do not only grow in numbers and thus increase the amount of people potentially in need of care, but they also increase the ranks of caregivers*. More than one out of ten caregivers has spent more than ten years in retirement.

VI.1.2 Who is taken care of?

The statistics above are just figures of those people who do not need care themselves. *The GEAS does not ask people who are receivers of care if they are at the same time also caregivers*. This is an important point.

For most caregiver groups, their caregiver status is obtained through their mother's need for support – in 2008, just under half of all fulltime-employed carers, over a third of all part-time employed and job-seeking carers, and two in five carers in early retirement said they were responsible for their mother's well-being when asked about the person on whose care they spent most time. With progressing age, this naturally loses significance. Instead of taking care of blood relatives and in-laws, long-term retired respondents were concerned more and more with supporting other people the further they progressed into retirement (see Table 9): their partners, neighbours, people they had no previous relevant tie to³², friends (4.8%) and acquaintances (3.6%)³³. One in five carers in this group was still concerned with taking care of a family member.

Figure 25: Time invested into care by age group in 1996 and 2008



Source: GEAS 1996 + 2008, cross-sectional samples.

If over half of the most senior caregivers look after their partners, it is well possible that they themselves are just the person *less* in need of care in the household. Imagine the following: a couple lives together in their own household. The wife can still take care of herself and the daily household chores but requires aid with the shopping and with handling the bills. The husband is bound to a wheelchair and receives help from a mobile nursing service with his personal hygiene for 15 minutes each morning, a task his wife is no longer able to take on. However, she does otherwise prepare his medication, organises

³² The GEAS offers a wide range of relations that include all possible degrees of blood relation and social relations (over thirty in sum) and yet some chose the response option 'other'.

³³ Their rates are named here, because they were not included in the table due to the many response options.

appointments with the GP and the physiotherapist and so forth. Despite her own need for assistance with complicated financial matters and heavy lifting, she is very much a carer – but the GEAS would not capture that.

Table 9: Person on whose care respondent spends most time by work and retirement status, 2008

Work and retirement status	People most often cared for			Total care givers
	1st	2nd	3rd	
Fulltime employed	Mother (47.7%) and mother of partner (12.7%)	Father (5.2%) and father of partner (3%)	Partner (7.1%)	268
Part-time employed	Mother (37.3%) and mother of partner (17.3%)	Father (5.5%) and father of partner (3.6%)	Child (9.1%)	110
Other Inactive people (home keeper, parental leave, vocational training, others)	Mother (30.8%) and mother of partner (10.8%)	Father (7.7%) and father of partner (3.7%)	Partner (13.8%)	65
retired 0 to 10 years	Mother (20%) and mother of partner (10.3%)	Partner (24.1%)	Neighbour (8.3%)	145
retired over 10 years	Partner (50.6%)	Neighbour (10.8%)	Other (6%)	83

Source: GEAS 2008, cross-sectional sample. Work and retirement groups with less than 40 carers excluded.

At the same time, it was observed earlier that younger people spend on average less time on their care responsibilities. Figure 25 shows that those who have the carer status amongst the oldest age groups (between the ages of 76 and 85), were more likely to invest a substantial amount of their time in 2008: amongst them, there were more people looking after someone for more than 28 hours per month (seven hours a week) than people who invested less time. With an average of 76 hours per month, they invested the most time into their caring responsibility compared to all other age groups (69-75: 59h/m, 66-68: 55h/m, 56-65: 46h/m, 40-55: 37h/m)³⁴. This might partly be explained by the large number amongst them who nurse their partners and thus live with their care-receiver. In all other age groups, the time investment figures are reversed.

³⁴ These numbers may be affected by extreme values, such as someone claiming to carry caring responsibilities 24/7. With care in some cases requiring getting up at night to change diapers or administer medication, it was not deemed possible here to find a fair cut-off line for what constituted an unrealistically extreme case.

VI.1.3 The gendered nature of care

The change from parental to partner care is also associated with the shift in the gender balance (or rather imbalance) of the carers. That being a carer is predominantly a female social status is a well-established fact (e.g. Doty et al 1998, Stiegler 2008). However, looking at the carers in full employment, one might think otherwise: nearly 58% of them in the 2008 sample are male. It is only when focussing on part-time employed and 'other inactive' carers that the gendered nature of care becomes visible: in these groups, ca. nine out of ten carers are female.

The gendered nature of care is even underrepresented in the GEAS in comparison to other studies. In a report commissioned by the German Federal Department of Health, the research institute Infratest stated that only 8% of all carers in 2010 were under forty; the GEAS thus represents the vast majority of all carers (TNS Infratest Sozialforschung 2011). Still, with only 60.4% of all carers in the 2008 cross-sectional sample being female (the 1996 results were similar), the female carer rate was twelve percent lower than it was recorded in the Infratest survey.³⁵ This survey showed that this rate dropped by eight percent from 1998 to 2010, suggesting that men have become more involved than they did in the past.

Nevertheless, the responsibility of taking care of one's partner leads to a sharpening of the gendered nature of care in the later phases of life. To bring this fully to light, it is necessary to switch from the focus on the point of retirement back to the actual person's age, since the phenomenon is related to the different healthy and disability free life expectancies of men and women: men's average age at death (74.2 years) still lay seven years below that of women (81.3 years) in 2012 (DESTATIS 2014a), and – as was mentioned in the preface – according to Pinheiro and Krämer (2009), men on average spend more time of their lives with disabilities than women.

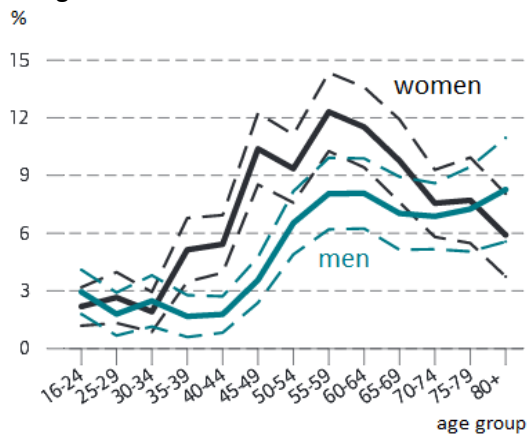
While in all other age groups the women were more likely to be carers, amongst those over age eighty, the balance toppled: here men were more likely to be caregivers than women. With a relatively small sample of carers in the survey, these findings are only tentative, but they are supported by Geyer and Schulz's (2014) findings which are based on wave 29 of the German Socio-Economic Panel (Figure 26).

A look at the distribution of single men and women (Figure 15) delivers an easy explanation: amongst the forty- to sixty-year-olds, the ratio of single men and single

³⁵ This survey was based on 1500 interviews and had a response rate of 59.6%.

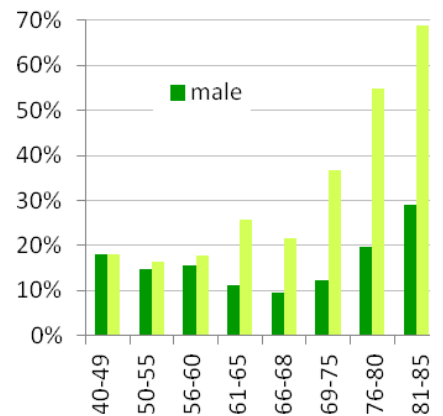
women is almost equal. However, over age sixty, women are twice as likely to not have a partner and even more than that when they are over age seventy. With nearly three quarters of the men still in a relationship when they are over eighty and over two thirds of the women over eighty having to make do without a partner, it stands to reason that men have a higher chance of becoming a caregiver for their partner.

Figure 26: Proportion of carers by age groups and gender in 2012



Source: Adapted from Geyer and Schulz 2014, p. 296. Based on SOEP 2012. Dashed lines represent 95% confidence intervals.

Figure 27: Respondents without a partner by age group 2008



Data source: GEAS 2008, cross-sectional sample.

VI.1.4 Summary

1.76 million Germans receive care and support in their own homes. People who are retired or in early retirement render just over a third of this help (GEAS 2008). The caregivers in this group spend on average more time on the responsibilities that come with their carer role: with on average 57 hours per month, those within their first ten years after retirement spent more than twice as much time on care than fulltime employees and people who had never worked and ten hours more than part-time workers. In contrast to their overall low number of only around 11 percent of all caregivers, carers who had retired more than ten years ago even spent an average of 68 hours on care. Only other economically inactive people, such as home keepers, surpassed their time investment.

While for employees and other people of working age the care of their parents and parents in law is most common, people who have been retired for more than ten years are most likely to take care of their partner or other people closer to their own age, such as friends or neighbours. The overall share of retirees amongst the caregivers has risen from 22.5% in 1996 to 30.39% in 2008. With a peak of the numbers of caregivers amongst the

people around sixty today, it will be interesting to see how caregiving evolves in the next twenty years, when even the oldest old have absorbed the idea of 'active ageing' and experience even better rates of disability free living which will enable them physically to take on care responsibilities.

A knowledge gap is created through the GEAS' assumption that receiving care excludes from giving care. The here presented figures may thus underestimate the actual share of caregivers.

VI.2 Childcare

Where it was possible to detect an upwards trend for caregiving among the retirees, even if in the overall population the carer status has not spread, the decline of the child carer status is indisputable. At the same time, neither can it be denied that people in regular or early retirement carry a large part of childcare, which is defined as looking after children that are not one's own, such as grandchildren or children of neighbours, friends, or siblings.

Table 10: People with child carer status, people with children and people with grandchildren 1996-2008 in % of cases (95% confidence interval) ³⁶

	1996	2002	2008
Child carers	18.1 (17.0% to 19.2%)	17.6 (16.3% to 19.0%)	14.7 (13.8% to 15.6%)
People with living children of all ages	86.6% (85.6% to 87.5%)	85.4% (84.2% to 86.7%)	84.8% (83.9% to 85.7%)
People with grandchildren of all ages	41.7% (40.3% to 43.1%)	44.2% (42.4% to 46.0%)	40.7% (39.4% to 41.9%)

Source: GEAS 1996-2008.

18.1% of all Germans aged forty and over held the child carer status in 1996; this number had decreased to merely 14.7% in 2008. Table 10 also takes into consideration whether respondents had own children and grandchildren, which gives an indication of their chances of being needed as child carer.

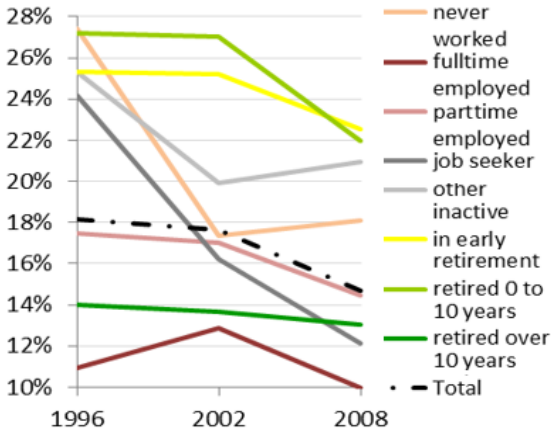
VI.2.1 Child-carers, their work and retirement status and their changing family networks

Looking at the graph in Figure 28, reveals that the downward trend of child-carers can be observed in all work and retirement groups, though the relative ranks of them remain similar: with nearly a quarter of people in early retirement and over a quarter of people in the first years of their regular retirement looking after children other than their own in 1996, these two groups were by far the most active in this area. Yet by 2008, only about 22% of both groups still held the child carer status. People who never had worked or were inactive at the time of the survey used to be at the top of the child carer hierarchy as well;

³⁶ A presentation of the time spent on childcare was not possible here due to imprecise data categorisation (the time frame 'year' was substituted with the time frame 'less often [than once to thrice a month]', which does not allow for a reliable computation).

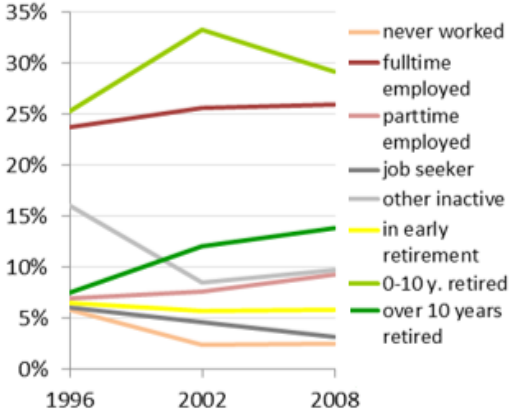
however, with both their child carer rates having dropped drastically and the absolute numbers of people in these groups dwindling (as was shown in the previous subchapter), their contribution to childcare has shrunk even more drastically. This is portrayed in Figure 29: it shows the absolute share of the various groups amongst the child carers. It makes clear that while the rates of people looking after children amongst the fulltime employed is low with merely one in ten, due to the fact that close to forty percent of the population are fulltime employed, the absolute numbers of working child carers is large. Similarly, with growing numbers of people having spent more than ten years in retirement, their contribution to child care likewise increased from seven and a half to nearly fourteen percent of all child carers. Still, the people in the first ten years of their regular retirement carry about a third of all the non-parental and unpaid childcare in Germany.

Figure 28: Childcare rate within work and retirement status group 1996-2008



Data source: German Ageing Survey 1996-2008; retired people with unknown retirement duration excluded.

Figure 29: Absolute share of work and retirement status group within all child carers 1996-2008



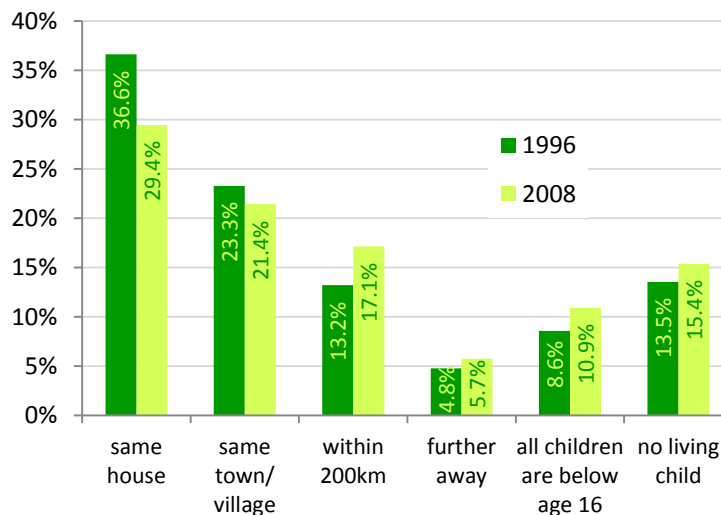
Data source: German Ageing Survey 1996-2008; retired people with unknown retirement duration excluded.

With employees being least likely to have grandchildren (around one in five have a grandchild, with a downwards tendency) and a higher chance for people who have been in retirement for a longer time to have grown up grandchildren, the opportunities for childcare can be expected to be lower for these groups. Even the extreme (and thus despite small sample sizes statistically significant) drop in people with the child carer status amongst the job seekers – a halving of the original numbers within only twelve years – can at least partially be ascribed to the drop in grandparent numbers from just over forty to just under thirty percent in this group.

VI.2.2 Missing grandchildren

However, the matter is more complex than that. Not only are there less grandchildren to take care of, but these are farther dispersed. Assuming that most grandchildren of an age in which they require looking after live in their parents' household, their dispersion is best examined by looking at how far the respondents' children live from the respondents' homes³⁷ (Figure 30). In many studies, it is emphasised that despite claims that the modern job market demands higher flexibility and mobility from employees, a majority of the families still live within close proximity to the grandparental generation. In the report 'Familien in Baden-Württemberg' from autumn 2012, for example, it is pointed out that about half of all adults with children in their household lived within ten minutes travelling distance from their parents in Germany, and only a fifth lived farther than one hour's drive away from them (Ministerium für Arbeit und Sozialordnung, Familie, Frauen und Senioren Baden-Württemberg 2012). However, this neglects to check for any trends over time.

Figure 30: Where children over age 16 live in relation to their parents (only closest living child included)



Data source: GEAS 1996 and 2008, cross-sectional samples.

³⁷ Furthermore, it was decided to examine the children's rather than the grandchildren's distance due to the data structure in the GEAS. To compute the residential distance of the grandchildren, it would have been necessary to handle 44 sets of indicators about the birth years of the grandchild, how far away they lived and the year of the interview. Additionally, this information on grandchildren was only collected since 2008, rendering a comparison impossible.

The results of the GEAS suggest that there is a clearly growing distance between the respondents and their children (here included are all living children aged 16 and over³⁸; counted for each respondent is the closest living child): the number of people living in the same house or even household as their children has shrunk by a fifth from 1996 to 2008. While in 1996, three out of five respondents had at least one child living in the same town (including living in the same house), in 2008 this number had decreased to just over half of them. A hypothesis could be formed that this development is influenced by improving healthy and disability free life expectancy that reduces the number of cases – especially in the ages of 40 to 70 - in which cohabitation is required to be able to render sufficient support to the older generation. Indeed, the number of people in the first decade of their retirement which live in one house with their child has dropped from 22% to 15.4% (with stagnating figures of children who do not live in the same house but in the same town). For those beyond that first decade of retirement, the figure has dropped by only 0.9% to 17.9%, and the number of respondents in this group with children living at least in the same town has increased. However, this development is also related to the increase of people who have children at all in this group: in 1996, nearly one in five respondents who had retired over ten years before the interview claimed to have no living children; in 2008 only 13% did so. This anomaly (in comparison to the overall drop in child rates) is a late outcome of the Second World War: about sixty percent of all respondents who had retired more than a decade ago in 1996 were born between 1911 and 1920. They were the generation that was in the right age to found a family when the Second World War and the first years after the war brought a drop in birth rates (after especially high birth rates in the early nineteen thirties). In comparison to them, the people born between 1923 and 1940, who made up 97.6% of the people over ten years into their retirement in the 2008 sample³⁹, were the parents of the ‘baby boomer’ generation and thus especially rich in children.

In 1996, childcare figures differed greatly for Eastern and Western Germany. 28.6% of the people having lived predominantly in the GDR said they had childcare responsibilities as opposed to only 20.1% of those having spent most of their lives in the Federal Republic of

³⁸ This age definition is partly conceptual and partly data driven: in 1996, the GEAS itself only asked the living distance question for children over 16, so to keep the numbers comparable, this definition had to be kept in place. At the same time, children are looked at as potential parents of grandchildren – which they are most likely to be when they are no longer children themselves.

³⁹ Reminder: the GEAS cross-sectional sample only includes people up to age 85.

Germany. A part of this might be explained by the women's labour market participation rates: according to the German statistics office, these were 59.7% in Western Germany and 73.3% in Eastern Germany (WSI GenderDatenPortal 2013). Despite much better established professional childcare, the grandparent generation may have been needed more in Eastern Germany than in Western Germany to enable this labour market participation. On the other hand, being on the job market is not the same as actually having a job: the employment rates for women in the two parts of Germany are less than three percent points apart – this rules this explanation out.

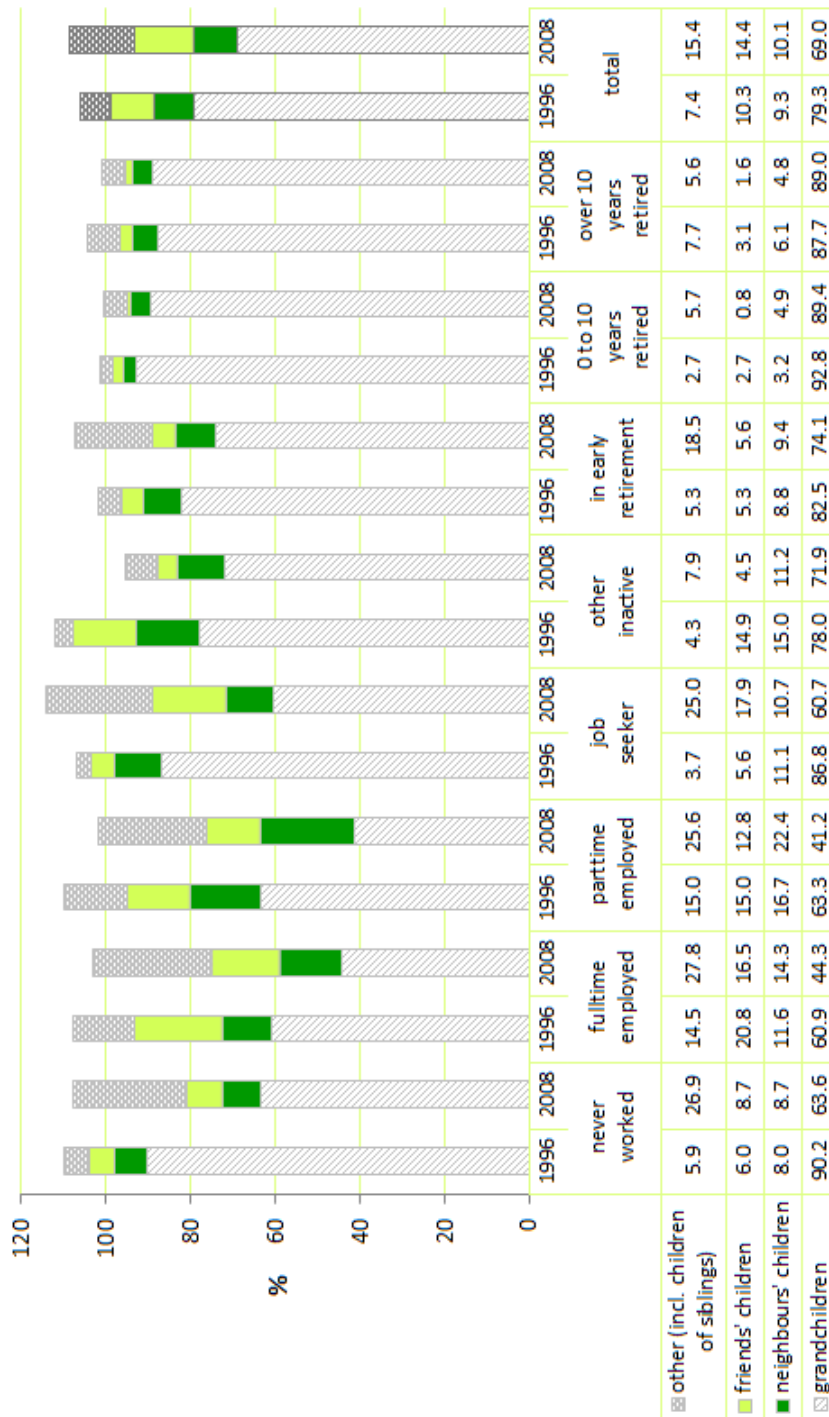
Looking at the development over time, the gap had closed in 2008. With child-carer shares of 14.3% and 16.4% respectively, the Eastern German rate had even dropped below the Western German rate. Returning to the geographical distance between the parent and grandparent generations in families shows that in 1996, Eastern Germans were more likely to live at least in the same town or village as their closest living child (68.6%) than Western Germans (60.9%). They were also less likely to be childless (8.1% compared to 15.3%). By 2008, the figure of people in Eastern Germany living in the same town/village as their closest child had plummeted to 54.9%. Yet again, the Western German rate had also decreased, albeit less drastically, to 54.3%. The reason for this development may thus need further research.

VI.2.3 Grand-parenting without familial ties

A possible consequence of the wider distance between grandparents and grandchildren could be the observable change in who is looked after by the respondents. Naturally, amongst the population groups who are less likely to have grandchildren of their own (e.g. employees), respondents are more likely to take care of friends', neighbours', or siblings' children, not least because they will have more peers with small children. However, in all groups (apart from those who are over ten years retired) looking after grandchildren has lost some of its importance and other forms of childcare are on the rise (Figure 23). In the whole population of child carers aged forty to eighty-five, nearly four out of five said they were taking care of their grandchild in 1996. In 2008, only 69% did so.

The actual distance to the grandchild is likely only one of several factors influencing this. The classical family model of the homemaker mom is losing more and more importance in society: in 2008, there were nearly half as many economically inactive respondents and people who had never worked in their lives than in 1996. Thus, parents require more support with childcare than previously and may build a wider network of potential helpers.

Figure 31: Children cared for 1996 and 2008 by work and retirement group



Data source: GEAS 1996 and 2008, cross-sectional samples; retired people with unknown retirement duration excluded. Sum of above 100% possible due to multiple responses being allowed.

Amongst these helpers, aid from retirees is not only beneficial because it is more widely available but also because it is less gendered. While for people before retirement, childcare is clearly much more likely to be carried out by women (even in early retirement), beyond the retirement line the gender ratio is much better. It generally improved over the course of the survey: in 1996, men were 0.61 times as likely to be child carers as women; by 2008 this factor had increased to 0.69. Amongst the fulltime employees, this factor morphed from 0.54 to 0.69, *while amongst those more than ten years in retirement, the ratio appeared to be entirely balanced in 2008.*

VI.2.4 Summary

With a steadily low birth rate of around 1.4 live births per woman and 22 of 100 women between the ages of 40 and 44 years in Germany being childless (DESTATIS 2014b), the number of children to look after is slowly decreasing. Additionally, the physical distance between adult children and their parents is growing, thus reducing the opportunities for grand-parenting.

As a consequence, not only has the number of child carers in the GEAS samples decreased from 18.1% to 14.7% within twelve years, but this care is less often given to own grandchildren, with care of other children (such as friends', neighbours' or siblings' children) in 2008 making up almost a third of all childcare.

Childcare is becoming less of a typically female occupation: in 1996, 69% of all child carers were female, in 2008 only 61%. Amongst long-term retirees, men are as likely to be child carers as women, though the data does not provide reliable information on their time investment.

Due to a decline of the absolute numbers of people having never worked or being presently economically inactive and of the relative share of child carers within these groups, retirees (including people in early retirement) have gained a more prominent role in childcare, now making up about half of all child carers, with fulltime and part-time employees having a share of about 35% amongst all child carers.

VI.3 The dwindling importance of caregiving responsibilities

Above, three trends were established for caregiving. On the one hand (1), overall the relative share of caregivers in the German population aged 40 to 85 remained stable throughout the years of the German Ageing Survey. (2) The share of carers amongst all

categories of retirees has increased, and most prominently so amongst those retired for more than ten years. At the same time, the share of people retired for over ten years in the overall population has grown even more quickly.

On the other hand (3), in the overall population captured by the GEAS the average time investment by each carer has shrunk. Still, older carers are much more likely to devote a large amount of time to their caring responsibility, often to take care of their partner.

Childcare, on the other hand, underwent a decline. Due to 9.4% of all child carers (in the 1996 sample) choosing the 'less often than once a month' category to quantify their time investment, a reliable measure of time is not available in the GEAS. But an emerging trend identified here is a gain of importance of the care of children that are not blood relatives.

What conclusions can be drawn from these findings for this study?

It was assumed early on in this study that motivations for engaging in the four social statuses vary. Schulze binds his theory of social change to the binary categories of 'inner orientation' and 'outer orientation' (2005: 249), on whether a person puts their focus on personal wellbeing and a life rich in physical and emotional experiences or on their societal position and physical and financial safety. With some love for simplification, one could argue that caregiving responsibilities have more to do with the personal outer circumstances, with being needed as carer even if one's own inclination leans towards other commitments. One could argue that caring is part of a larger societal contract: a person's logic for accepting the unwanted responsibility might be 'If I do it now, I can expect the favour to be reciprocated should I require help later on'.

Social reality is certainly more complex than that: many will find especially childcare an emotionally rewarding pastime – which can, perhaps, be supported by the rising number of people looking after children they are not related to by blood. On the other hand, adult care may not only be not the preferred manner of spending time but also physically and emotionally taxing – especially for people for whom this commitment takes up a large part of their daily lives. It is thus likely doubly unattractive for people who are centring their lifestyle on their personal wellbeing and emotional fulfilment. Looking at Table 11, it is clear to see that while some adult care activity seems to have a significant positive effect on the carer's likeliness of spending their leisure time with others, perhaps due to a wider network established through the carer status, investing more than 28 hours per month (the equivalent of one hour per day) on this task entirely negates this effect.

Table 11: Average friendship score by time invested into adult care 2008

caregiving in 3 categories	Mean	N	Lower 95% CI	Upper 95% CI
not a caregiver	9.0	5458	8.9	9.2
up to 28h/month	10.8	436	10.3	11.3
more than 28h/month	8.6	284	8.0	9.2

Data source: GEAS 2008, cross-sectional sample.

So far, the various socio-demographic characteristics have been looked at individually. However, to be able to assess their influence properly, they need to be regarded in the context of all combined influencing factors. Due to the large number of non-carers, a statistical model of adult caregiving cannot be run as linear regression – the relationships between the dependent and the explanatory variables cannot be linear. It was therefore decided to run a binary logistic regression model to see which of the discussed personal characteristics actually help predict whether someone is likely to be a caregiver. This model was based on pooled data from all three cross-sectional waves of the GEAS.

The model confirms that from 1996 to 2008, there was no significant change of the relative number of caregivers, although it does suggest that there were less of them in 2002⁴⁰. It also shows how little the personal characteristics of an individual actually contribute to predicting their likeliness of acquiring the status of caregiver to an adult: the whole model merely reached a Nagelkerke R²-value of 0.033. It confirmed, however, that women were 1.5 times as likely as men to be a caregiver. Furthermore, the model suggests that having a high education has a similarly big and significant effect as gender, and it confirmed the effect of part-time work, while assessing the positive effect of unemployment higher than the bivariate analysis suggested. This lack of overall explanatory power of the model is likely to be explained by outer circumstances having a greater influence on caregiving than personal preferences – the reason why it was looked at separately from the statuses of volunteer and friend.

⁴⁰ The 2002 sample size was noticeably smaller than the 1996 and 2008 samples and such variations have also been observed for other social statuses. That said, at the 95% confidence level, the model does suggest this finding is not just a sample-specific variation.

Table 12: Binary Logistic Regression Model of providing care to an adult (coded: 0=not a caregiver, 1=is a caregiver)

	Exp(B)	B	Std. Error
Gender (ref: male)	1.51***	.415	0.06
Age	1.00	.000	0.00
Has partner? (ref: no)	1.30**	.263	0.08
Network size	1.07***	.065	0.01
Place of residence before reunification (ref: Western Germany)			
GDR	0.95	-.048	0.07
Abroad	0.77	-.268	0.15
Level of education (ref: low)			
Medium	1.23*	.208	0.09
Sophisticated ⁴¹	1.38**	.319	0.12
High	1.50***	.404	0.11
Self-assessed Health (ref: very good)			
Good	1.16	.148	0.10
Fair	1.26*	.234	0.10
Bad	0.99	-.007	0.14
Very bad	0.83	-.186	0.25
Year (ref: 1996)			
2002	0.83*	-.182	0.08
2008	1.00	-.004	0.06
Economic activity status			
Never worked	1.43	.358	0.18
Part-time	1.35**	.301	0.10
Jobseeker	1.60***	.468	0.13
Other inactive people	1.37**	.317	0.10
In early retirement	1.35*	.304	0.14
Retired 0-10 years	1.17	.159	0.11
Retired more than 10 years	0.79	-.233	0.15
Retired, duration unknown	0.70	-.358	0.41
Constant	0.03***	-3.66	0.30
Nagelkerke R²/McFadden's adjusted R²	0.03/0.02		
Hosmer & Lemeshow Test Sig.	0.99		

Data source: GEAS 1996-2008, cross-sectional samples. N=14127 (508 missing).

⁴¹ The 4 levels of education were predefined by the GEAS and refer to the highest level of vocational training. No qualification and unknown qualification were labelled as 'low education'. Apprenticeships and equivalent schooling were labelled as 'medium' level of education; people who had gone on to take advanced training for managerial positions (Fachschule), which also includes the German 'Handwerksmeister' (master craftsman) were deemed 'sophisticated'. Level 4 captures people with university education.

Table 13: Binary Logistic Regression Model of being a child carer (coded: 0=not a child carer, 1=is a child carer)

	Exp(B)	B	Std. Error
Gender (ref: male)	1.548***	.437	.056
Age	1.005	.005	.004
Has partner? (ref: no)	1.271***	.240	.068
Network size	1.129***	.121	.009
Self-assessed Health (ref: very good)			
Good	1.077	.074	.088
Fair	1.171	.158	.091
Bad	1.018	.017	.117
Very bad	.525**	-.644	.235
Year (ref: 1996)			
2002	.848*	-.164	.067
2008	.754***	-.282	.056
Economic activity status (ref: fulltime)			
Never worked	1.594**	.466	.156
Part-time	1.085	.081	.100
Jobseeker	1.697***	.529	.124
Other inactive people	1.681***	.520	.093
In early retirement	2.545***	.934	.117
Retired 0-10 years	2.129***	.756	.093
Retired more than 10 years	1.002	.002	.134
Retired, duration unknown	1.182	.168	.292
Distance to nearest child (ref: same house or household)			
Same town/village	1.622***	.483	.065
Within 200km	1.100	.095	.075
Farther away	.450***	-.798	.142
No child	.472***	-.751	.102
Child under 16	.839	-.175	.113
Constant	.026***	-3.649	.272
Nagelkerke R²/McFadden's R²	0.12/0.08		
Hosmer & Lemeshow Test Sig.	0.19		

Data source: GEAS 1996-2008, cross-sectional samples. N=14127 (616 missing).

A binary logistic regression model of childcare (Table 13) with the factors discussed above proves more helpful, with a Nagelkerke R^2 of 0.116. The predominant place of residence before the German reunification and the level of education were not contributing to the model and had to be dropped as explanatory variables. The economic activity status and information on whether the respondent has children and how close these live, as well as their general network size, a factor added due to the repeated assumptions made about the positive effect of this, contribute significantly.

Again, the model confirms the previous findings that with ongoing time the likeliness to be a child carer declined amongst the target population.

It was shown in this chapter that despite the overall trend of rising numbers of social statuses amongst Germans aged 40 to 85 between the years 1996 to 2008, carer statuses did not gain in popularity. The following chapter will show that this stands in stark contrast with the development of the statuses of volunteer and 'friend'. It will be argued that this supports hypothesis two of this study: that social statuses associated with an experience-driven lifestyle are more popular in the German society than social statuses connected to other values.

VII. The Rise of the Volunteer and 'Friend' Statuses

This chapter will help address the first two of the four hypotheses of this study:

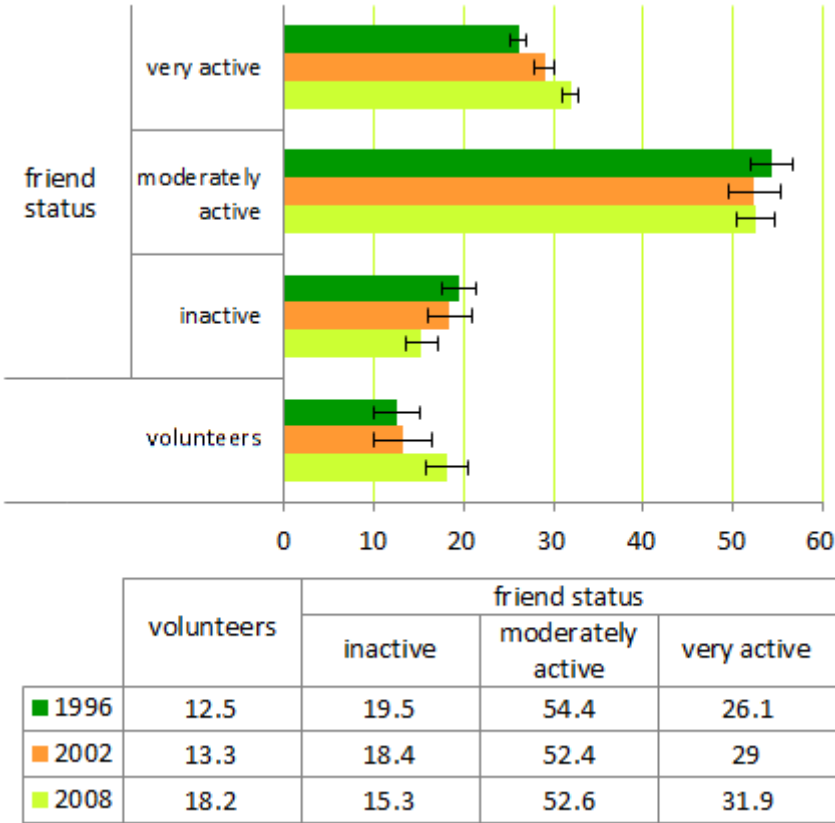
1. Older adults in Germany today on average obtain more social positions for which they fulfil the associated social roles after retirement.
2. Social statuses associated with an experience-driven lifestyle are more popular in the German society than social statuses connected to other values.

It was established in the previous two chapters that the carer statuses did not contribute to the overall rising average number of social statuses per person in the target population of 40 to 85 year-olds in Germany. In the case of child carers, the numbers even dropped. This chapter will show that volunteer and 'friend' are the two social status types with an upward surge. It will be argued that these are much more associated with an experience-driven lifestyle.

The data shows a clear development that ideas of the 'young old' and 'active old' refer to. Overall, the German adult population aged forty and over increased its number of people investing comparatively much time into their friend status from 26.1% in 1996 to 31.9% in 2008. At the same time decreased the number of people not or hardly investing time in their relationship with friends and family from 19.5% to 15.3%⁴². Even more astounding is the rise of volunteering figures: in 1996, 12.5% of all respondents volunteered; in 2008 18.2% did so! As Figure 32 shows, the increase of volunteers and the increase of people very actively pursuing their friend status is statistically significant: the 2008 volunteer rate lies at least 3.9% higher than in 1996 and the rate of the very active has increased at least from 28.5% (upper 95% CI in 1996) to 29.9% (lower 95% CI in 2008).

⁴² People are considered 'inactive' if they scored 0-3 points on the leisure activity scale, moderately actives 4-11, very active respondents scored 12 or more points. For an explanation of this categorisation see Methodology chapter.

Figure 32: Share of respondents with inactive, moderately active and very active friendship status and volunteer status by year in %, 95% CI provided.



Data source: GEAS 1996-2008, cross-sectional samples. For friendship status n=4821 (1996), 3057 (2002), 6191 (2008). For volunteering n=4808 (1996), 3038 (2002), 6195 (2008).

In the following two subchapters, the trends in volunteering and social leisure activities will be described in more detail and possible causes for them will be discussed.

VII.1 The growing popularity of the volunteer status

In the research on civic engagement in later life, volunteering is often discussed as a status retirees take up, or with which they increase their time investment, in order to fill the gap left by the loss of their status in the employment market. Their interest could literally lie in the prestige of being regarded as a ‘valuable contributor’ to society, but it could also just be having a general purpose in life, the opportunity to meet and spend time with other people, or plainly finding *any* use for their time.

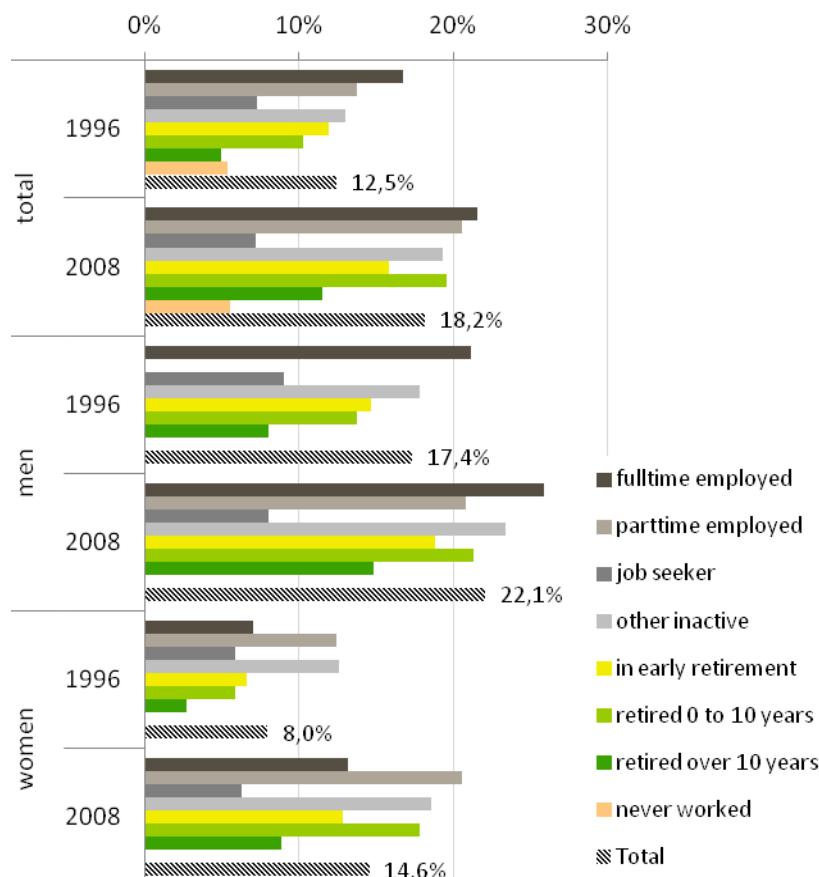
VII.1.1 Age, gender, and economic activity status amongst volunteers

Volunteering is widely discussed as a central means in recruiting pensioners for the public welfare, yet it has grown in popularity also amongst the younger age groups. The

share of volunteers amongst the 40- to 55-year-olds has grown by a quarter and nearly doubled amongst the 56- to 65-year-olds. However, most remarkable is the increase of volunteers amongst the 66- to 68-year-olds: only one in ten of them was a volunteer in 1996. In 2008, nearly one in four stated that he or she had some form of voluntary position.

The oldest two age groups in the cross-sectional samples likewise developed a heightened interest in formally organised community work: those aged 69 to 75 nearly doubled their number of volunteers (from 8.4% to 15.5%), and the 76- to 85-year-olds came close to tripling their (admittedly comparatively low) number of volunteers from 3% to 8%.

Figure 33: Volunteer numbers by gender, work- and retirement status and year of interview.



Data source: GEAS 1996-2008. People who have never worked not presented for different genders and male part-time workers in 1996 excluded due to small sample sizes.

To get a more accurate picture, however, turning towards the work- and retirement groups is again more useful. The upper third of Figure 33 shows that only two groups in the population have been unaffected by the volunteering trend: the job-seekers and those who have never worked. In 1996, there was a clear hierarchy of groups in terms of which work-

and retirement group had the largest share of people with a volunteer status, with the fulltime employed on top and the long-term retired at the bottom. Volunteer numbers in 2008 were much more evenly distributed.

Fulltime employees, part-time employees, people in the 'other inactive' category, and people retired in the ten years before 2008 were placed head to head in the distribution of volunteers, with each of the groups counting about a fifth of their members as volunteers. This shows that taking up the volunteer status does not seem to be connected to other time investments – fulltime employees were in fact most likely to volunteer. In second place were the early retired with just under sixteen percent volunteers. The bronze medal fell to the long-term retirees, who had increased their volunteers more than any other group, bringing them from mere 5% to 11.5%, but still have to go some way to catch up.

Due to the relatively larger increase amongst older adults and their overall growing share in the population, their share of the number of volunteers has likewise grown: in 1996, 14.7% of the volunteers were older than 65 years; by 2008, their share had risen to 27%.

Figure 33 also illustrates the differences in volunteer numbers between men and women. Previous research has shown that men are more likely to volunteer (e.g. Moen and Flood 2013). In the 1996 GEAS data, they were more than twice as likely to do so as women. However, German women's interest in organised community work has evolved quicker than their male counterparts' since then: while male volunteer rates grew by just over a quarter, female volunteer rates rose by over eighty percent from 1996 to 2008. Amongst retired women (independent of their retirement duration), it tripled.

VII.1.2 Volunteering in Eastern and Western Germany

There is an additional, important dimension to volunteering in Germany: the differences between Eastern and Western Germany. These reveal that in fact, the race by female volunteers to catch up with the men has mainly taken part in the Western German states. While Eastern German men's volunteer numbers rose by close to 27% and Eastern German women's by 34%, Western German women's volunteer numbers doubled – rising more than three times as much as their male counterparts' (29%; see Table 14). There is thus a big difference between both the level of volunteering in Eastern and Western Germany and its development.

Since the data indicates that the developmental differences are mostly to be found amongst the women, there is value in looking at these differences more closely, using their work status as point of departure (Figure 34). Part-time employed women have increased their voluntary engagement to similar degrees in both parts of the country and the early retirees in Eastern Germany have reduced the difference to their Western German equals. However, fulltime employees, inactive and retired women (both within the last ten years and beyond) – three groups who used to have nearly equal female volunteer levels in 1996 – showed a wide gap between Eastern and Western Germans in 2008. For the female job seekers, volunteer rates have been turned on their head; this, however, is a possibly unreliable result, since there were only just over 100 of them in each wave, rendering the Eastern and Western German subsamples even smaller and leading to overlaps of the confidence intervals.

Table 14: Volunteer rates by gender and country part 1996 and 2008.

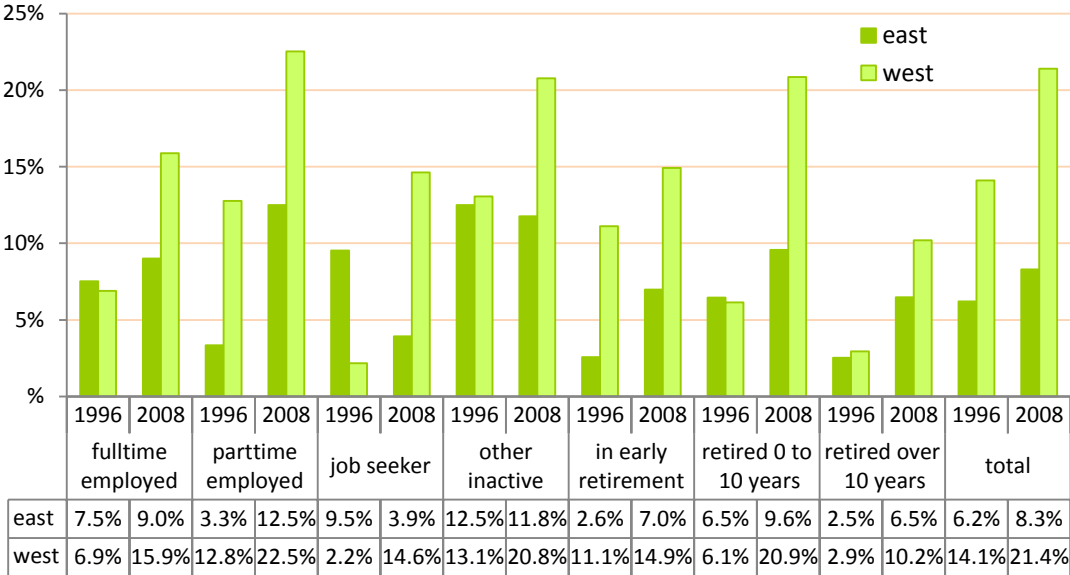
		east	west	all
men	1996	10.1%	19.8%	17.4%
	2008	12.8%	25.6%	22.1%
women	1996	6.2%	8.7%	8%
	2008	8.3%	17.3%	14.7%
all	1996	8%	14.1%	12.6%
	2008	10.5%	21.4%	18.3%

Data Source: GEAS 1996 and 2008. Based on cross-sectional sample of 40- to 85-year-olds. People having predominantly lived abroad only included in 'all'.

Drawn from the presented findings, the conclusion would be that the work- and retirement status alone does not fully answer why Eastern and Western German women's differences in likeliness of becoming a volunteer have grown. It is not that the growth spurt has taken place in one particular work and retirement group which happens to be more dominant in Western than in Eastern Germany. The drifting apart of the female volunteer rates has taken place in five out of seven groups. Admittedly, the higher rates of pensioners in Eastern Germany (48.9% of the women aged 40 and over in Eastern Germany and only 38.3% in Western Germany were retired or in early retirement in 2008) can contribute to explaining the lower Eastern German volunteer rates, but it does not explain the differences in development within the separate work- and retirement groups.

However, there is another difference not yet discussed that may shed further light on the question: the development of the female volunteer ratio to the male volunteer ratio in each country part (Table 15). This clearly shows that the growth in the Western German female volunteer rate merely brought it up to the ratio of women volunteers to male volunteers already found amongst the 40- to 64-year-olds in Eastern Germany in 1996. A look at the ratio for Eastern German 65- to 85-year-olds show that the women amongst this group used to have a volunteering likelihood just under half as high as their male equivalents – as had the *younger* Western German women in 1996. Is it thus only a delayed development amongst Western German women that is captured here?

Figure 34: Female volunteer numbers by work- and retirement status, year of interview and predominant place of residence in the past 40 years (Eastern or Western Germany).



Data Source: GEAS 1996 and 2008. Based on cross-sectional sample of 40- to 85-year-olds. ‘Never worked’ excluded due to very small sample sizes in Eastern Germany. Western Germany: 5.8% in 1996; 4.8% in 2008.

Table 15: Volunteer rates as female:male ratio by country part and age group

Year	Age group	In past 40 years predominantly lived in...	
		Eastern Germany	Western Germany
1996	40-64	0.66	0.48
	65-85	0.47	0.40
2008	40-64	0.65	0.68
	65-85	0.69	0.70

Data Source: GEAS 1996 and 2008. Based on cross-sectional sample of 40- to 85-year-olds.

People who have never worked have the lowest numbers of volunteers (see Figure 33). This group is almost exclusively female. In 1996, of those aged 65 and over, 2.5% of the Eastern German women fell into this category in contrast to 9.9% of the Western German women. In 2008, these figures had shrunk to 1.5% and 4.2% respectively. This might be a part of the explanation of the development in female volunteer rates.

In any case, by 2008 Eastern *and* Western German female volunteer likelihood lay at about two thirds of the men’s likelihood to volunteer.

VII.1.3 The influence of living circumstances

Some previous studies have found a connection between a person’s social environment and their likeliness to volunteer: a higher likeliness was observed for both married people and people with children under age 18 (Rotolo and Wilson 2007).

While based on the classical gender roles one would assume that the presence or absence of children in the household would affect women’s lives the most, the household type or the number of minors in the household appears to influence men’s likeliness to volunteer more than women’s. A computed indicator with six categories that capture if the respondent lives with a partner or not and whether there were children under age 18 or adult children in the same household found only a weak association with volunteering in 2008 (Cramer’s $V=0.15$ for men and 0.09 for women; $p<0.001$). This, however, may be partly explained by the predominance of households without minors in the sample (83.8%).

Table 16: Volunteer rate by household type and gender in 2008.

	volunteer rate by gender		Total n
	men	women	
without partner or children	13.6%	13.1%	1235
with partner but without children	19.9%	12.3%	2501
with at least 1 under age child but without partner	34.5%^	15.4%	120
with at least 1 adult child but without partner	9.7%	12.7%	220
with at least 1 under age child and partner	31.2%	21.7%	877
with at least 1 adult child and partner	27.6%	17.2%	1189
	2969	3173	6142

Data source: GEAS 2008. ^n=10; there were 29 lone parenting men in the sample.

Taking a closer look at the relative numbers of volunteers in each household type by gender (Table 16) shows that in fact it does matter with whom the respondents share their daily lives. However, in contrast to role strain theory that would suggest that an increased amount of other obligations (such as sharing time with their partner or looking after underage children) makes an individual less likely to engage in further social roles due to constraints in time and other resources, living together with a partner and underage children makes volunteering *more* likely to engage in them. This effect is more pronounced in the male sample: ca. 14 out of 100 men without partner or a child volunteer, 20 out of 100 men who have a partner that they live with (in fact, having a partner is essential, no matter if they are cohabiting, as further examination revealed), and about 31 in 100 men who have both a partner and an underage child in their household do.

This finding is likely connected with a widening of the social network due to their partners and children: people with children of school age are known to be more likely to volunteer (Knoke and Thomson 1977; Rotolo 2000).

VII.2 The rise of the friendship status

As previously mentioned, the term 'friend' is utilised here to subsume all private activities that serve the purpose of, or are encompassed by, spending time with friends and acquaintances but *also* with family and partners outside of a person's own home. This limitation was chosen in order to focus on the active pursuit of spending time with others, rather than the unavoidably shared time, i.e. in front of the TV with their partner.

The friendship status has gained more importance in German people's lives in the course of the twelve years that the cross-sectional part of the GEAS cover. One might expect that most people do have this status to some degree – after all, humans are considered inherently social beings – but as Figure 32 showed, there is a relevant number of Germans investing very little time in maintaining contact with others through shared activities.

Before interpreting these numbers in more detail, one distinction has to be made: Figure 32 referred to shared activities that have been informally organised. These are by far more prominent in the Germans' lives. However, there are also formally organised groups in which they can participate. Because the boundaries between membership in such a social group and volunteering, e.g. as its treasurer, are fluid, the two activity areas are separated here for more precise analysis.

These group activities have been summarised with a scoring system similar to that for individually organised shared activities. Participating in a group several times a year scored one point, doing so at least once per month scored three points, a weekly meeting gave four points and a frequency of more than once a week gave five.

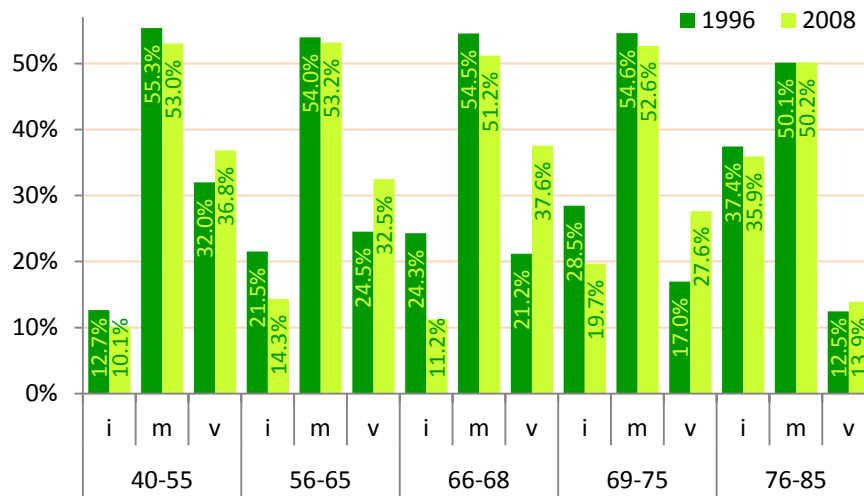
In 1996, a fifth of the 4835 people who answered questions about their individually organised leisure time activities scored no more than three points on the scale, which means they likely engaged in these less than once per week. By 2008, this figure had shrunk by a quarter to 15.3%. While the numbers of people in the moderately active category declined slightly, the numbers of the very active rose significantly – from 26.1% to 31.9%. Likewise, more people were formally organised in groups: in 1996, 43.2% of the respondents were members of such a group, by 2008 this figure had risen to 48%. They also invested more time in their group: at the start of the survey, 26.7% of the respondents scored at least four points on the scale, meaning they met with at least one group at least weekly. In 2008, 30.8% did so.

VII.2.1 The effects of old age and retirement on the friend status

These figures in themselves are, however, of limited use in light of the research questions on the effects of old age and retirement. Figure 35 thus presents a more detailed picture: it shows that while small changes are observable amongst ages 40 to 55, the three age groups that would classically be labelled the ‘young old’ show the starkest shifts.

Amongst the 56- to 65-year-olds, the inactive group has shrunk by a third and an equal number of people have moved into the very active group. The 69- to 75-year-olds can point to a very similar development.

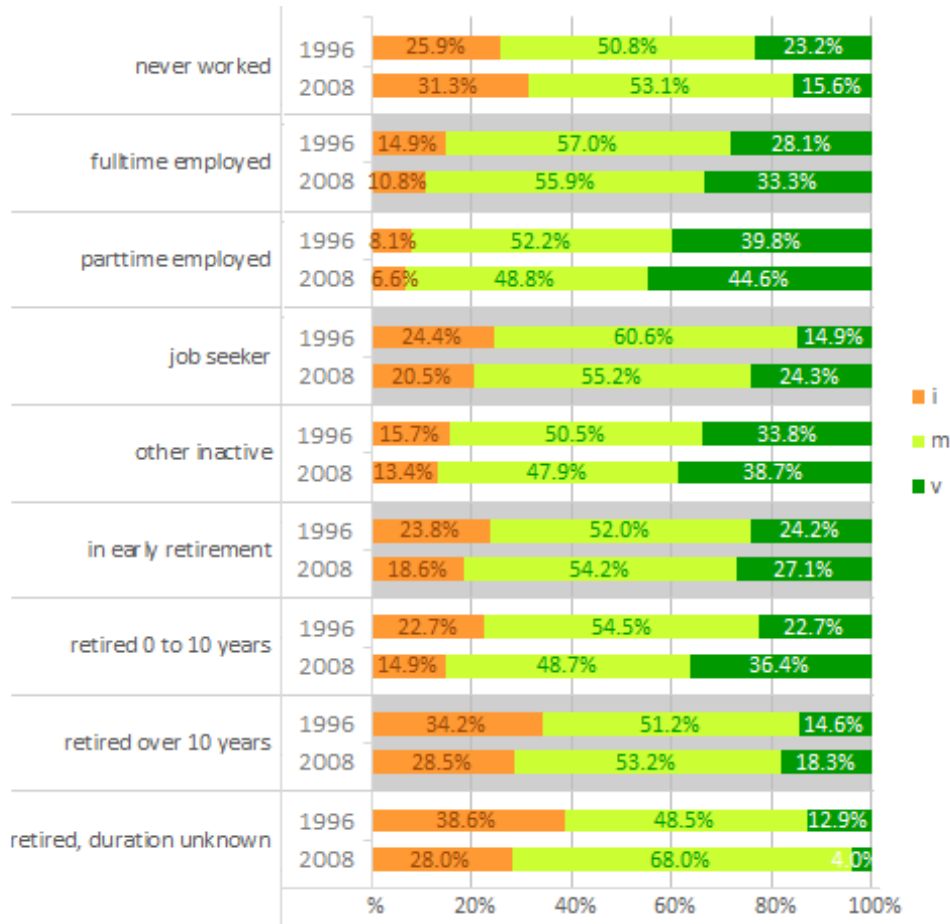
Figure 35: Changes in the time investment into the friendship status by age groups



Data source: GEAS 1996 and 2008, cross-sectional samples. i=inactive, m=moderately active, v=very active.

Most prominent is the shift from inactivity to being very active among the 66- to 68-year-olds: in 1996, nearly a quarter of them met up with friends or relatives less often than once a week; in 2008 this share had dropped to about eleven percent. At the same time, the very active amongst them had multiplied from just over a fifth to not far from two fifths. This finding is also reflected in Figure 36, which looks at the work and retirement status of the respondents: amongst the relatively recently retired, both the inactive and the moderately active are on the decline. People on average spent more time on shared leisure activities with others outside of the own home.

Figure 36: Changes in the time investment into the friendship status by work- and retirement status



Data source: GEAS 1996 and 2008, cross-sectional samples. i=inactive, m=moderately active, v=very active.

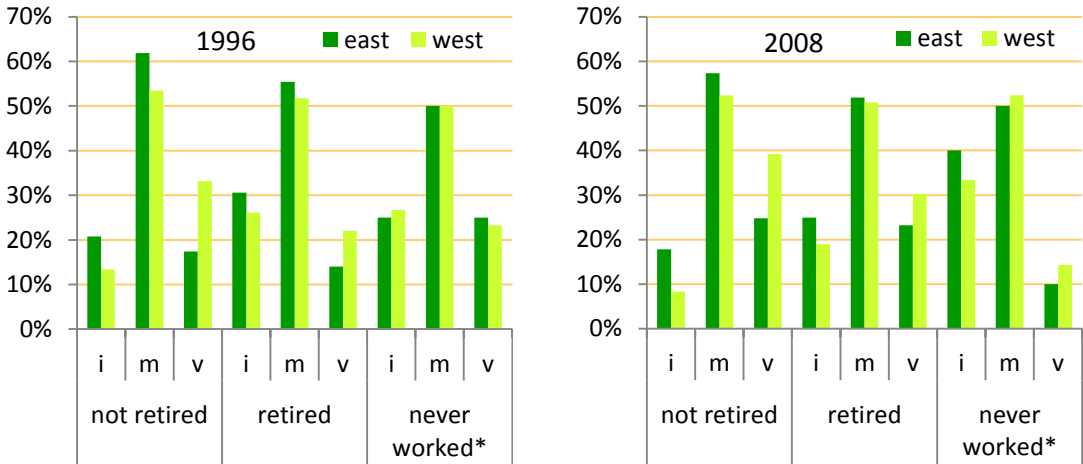
The overall gender differences in friendship status are negligible. The data suggests that there are gender differences in friendship status in the age groups – so for example, amongst the 76 to 85 year- olds, men were 1.6 times as likely to be very actively investing time into their friendship status as women in 1996. However, dividing by gender, age and activity level leaves too small samples (e.g. only 147 men are included in this relative likelihood figure) to render statistically significant results.

VII.2.2 Are Western Germans ‘friendlier’?

On the other hand, just as with volunteering, there is also a clear difference between people having lived in the GDR before the reunification and those having lived in Western Germany concerning the maintenance of their friendship status (Figure 37). In 1996, people having lived in the GDR before reunification were only half as likely to be very actively

taking care of their friendship status; in 2008 this ratio had increased to 0.6. Retired Eastern Germans already fared slightly better in 1996: they were 0.6 times as likely as Western German retirees to be very active (though overall retirees did less for their friendship status than working people). In 2008, they had further caught up to a relative likelihood of being very active of 0.8. A T-test further supported that the friendship score for people having lived in the GDR and in the Federal Republic of Germany are significantly different (both the mean and the variance).

Figure 37: Friendship status by retirement status and country part lived in before reunification 1996 and 2008

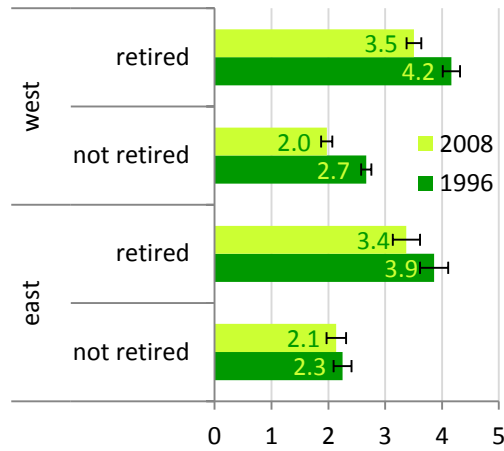


Data source: GEAS 1996 (1.2% of 4838 missing) and 2008 (0.4% of 6200 missing). *Never worked sample very small in Eastern Germany: 8 in 1996; 10 in 2008 (west: 172, 108).

It has to be mentioned, however, that spending less time with friends and family in more or less organised leisure time activities is not the same as staying at home more often. As Figure 38 illustrates, there is no significant difference between the amount of days people stay at home each week between Eastern and Western Germans. There was a slight difference amongst the working people in 1996: those having lived in the GDR before the reunification on average had fewer days in which they did not leave home, but this difference had disappeared by 2008.

The reasons for the catching up process of Eastern German pensioners getting closer to Western German pensioners' levels of pursuing activities with friends could be manifold. It could happen due to a lessening of the cultural differences between East and West, due to improving infrastructure in Eastern Germany that provides more opportunity to go out, or due to an improvement in income – which is especially observable amongst Eastern German pensioners, as was discussed in the data chapter.

Figure 38: Average days in a week the respondent did not leave home by retirement status and country part lived in before reunification, incl. 95% CI (1996 and 2008)



Data source: GEAS 1996 and 2008, cross-sectional samples.

One indicator for cultural differences is familiarity with electronic devices. The internet allows for quicker and more intensive communication than ever before, which has a great impact on social networks. The GEAS is a little behind on these developments. There is no information on computer usage for the 1996 wave and only a narrow range of questions in 2002 and 2008. However, even with these there is a distinct difference distinguishable between east and west: of those *not yet in retirement*, three quarter of Eastern Germans and ca. 84% of Western Germans used a computer in 2008. Of these computer users, 92% in Eastern Germany and 96% in Western Germany had internet access. Amongst pensioners, 29% of people from the GDR and 41% of people having spent most of their lives in Western Germany used a computer; 76% and 90% respectively of the retired computer users had internet access. In a Finnish study, Näsi, Räsänen and Sarpila (2011) found a strong positive association between internet usage and the pursued number of leisure activities amongst older adults.

Similarly, in 2008, 29% of Eastern German pensioners said there was no mobile phone in their household, in contrast to 20% of Western German pensioners. The difference in means of communication, which is also still observable between age groups, means a difference in ease and pace of getting in touch with one another and agreeing on meetings. Being 'fluent' in the usage of modern technology allows for a spontaneity that can lead to a higher frequency of shared activities.

Unfortunately, there is no information in the GEAS on the infrastructure available to the respondents, such as time required or transport connections available to get to essential services.

Another striking feature is the income difference between the country parts: while the mean income for Western Germans is 1829 Euros (with a large standard deviation of 1373 Euros), Eastern Germans had an equivalent household income of merely 1287 Euros (with a much tighter standard deviation of 690 Euros). In fact, this difference has grown: in 1996, the Eastern and Western Germans in the sample were only 330 Euros apart. With a Pearson's R of .127 ($p < .001$) the equivalent household income shows a (weak) positive association with the friendship activity score in the 2008. The ongoing and even, by these figures, rising gap between Eastern and Western German incomes may therefore be an important factor in the measured gap in organised social leisure activities – and indeed also in volunteering. This is not only because a smaller income equals smaller means for going out and a potentially larger need to spend time on paid labour but also because it may – more so when occurring in one and the same society – constitute a real or perceived social exclusion.

VII.3 Summary models

Descriptive statistics are a good first indication of what can be found in the data, but they can be misleading. One could argue that the older German population does not find the social statuses of volunteer and friend more attractive now than it did in the mid-1990s but that it has merely due to the health improvements discussed in the introduction of this thesis become better able to pursue these statuses.

A look at health suggests otherwise. The share of volunteers increased throughout all respondents, no matter if they had very good health (a rise from 16.3% to 26.1% for those aged 50 and over) or bad to very bad health (from 5.6% to 9.1%; categories collapsed due to small sample in very bad health) from 1996 to 2008. Likewise, apart from the respondents in very bad health, all self-assessed health categories showed an improvement in the frequency with which they pursued activities pertaining to their status as friend.

Table 17: Binary Logistic Regression Model of the impact of the interview year on the likeliness of being a volunteer (0=not volunteer, 1=volunteer)

	Exp(B)	B	Std. Error
Has partner? (ref: no)	1.38***	.320	.07
Gender (ref: male)	.67***	-.396	.05
Place of residence before reunification (ref: Western Germany)			
GDR	.45***	-.799	.07
Abroad	.19***	-1.648	.21
Self-assessed Health (ref: very good)			
Good	.96	-.037	.08
Fair	.87	-.135	.08
Bad	.63***	-.470	.13
Very bad	.27***	-1.327	.33
Age	.99***	-.013	.00
Level of education (ref: low)			
Medium	2.66***	.977	.12
Sophisticated ⁴³	3.68***	1.302	.13
High	4.56***	1.517	.12
Year (ref: 1996)			
2002	1.06	.055	.07
2008	1.54***	.430	.06
Constant	.128***	-2.057	.20
Nagelkerke R²/McFadden's adjusted R²		.11/.07	
Hosmer & Lemeshow Test Sig.		.15	

Data source: GEAS 1996-2008, pooled cross-sectional data. N=14127 (175 missing).

However, entering the interview year together with the control variables age, gender, partnership status, predominant place of residence before reunification, education and health⁴⁴ into a binary logistic regression model of volunteering confirmed the observation

⁴³ The 4 levels of education were predefined by the GEAS and refer to the highest level of vocational training. No qualification and unknown qualification were labelled as 'low education'. Apprenticeships and equivalent schooling were labelled as 'medium' level of education; people who had gone on to take advanced training for managerial positions (Fachschule), which also includes the German 'Handwerksmeister' (master craftsman) were deemed 'sophisticated'. Level 4 captures people with university education.

⁴⁴ Income measures in the GEAS have – like most other surveys – a higher rate of missing answers. Inserting the measure for the equalised household income did not change the effect size of the interview year.

made with the help of the descriptive statistics (see Table 17): while the difference between 1996 and 2002 is not statistically significant, respondents were 1.5 times as likely to volunteer in 2008 than they were in 1996, controlling for everything else – this ratio is somewhat stronger (1.7) when only looking at the retirees alone (see Table 26 in the appendix).

A linear regression model built with the same control variables to predict social leisure activity also showed a clear positive effect (Table 18). In contrast to volunteering, for the friend status the effect was already present at a statistically significant effect size in 2002 (B= 0.37) but had grown further by 2008 (B=0.84). It was more pronounced and set more strongly from the outset amongst retirees (B=0.94 in 2002 and 1.03 in 2008).

Table 18: Linear Regression Model of the impact of the interview year on the likeliness of being a ‘friend’ (whole samples; friendship score is measured on a scale from 0 to 45)

		Unstandardized Coefficients		Standardised Beta Coeff.	VIF
		B	Std. Error		
(Constant)		7.49***	0.35		
Age in years		-0.05***	0.00	-0.10	1.190
Female		0.99***	0.09	0.09	1.100
Has partner?		2.13***	0.11	0.16	1.099
Predominantly lived in GDR		-1.57***	0.10	-0.12	1.023
Predominantly lived abroad		-1.95***	0.21	-0.07	1.021
Health (reference: very good)	Good	-0.29*	0.14	-0.03	2.639
	Fair	-1.08***	0.15	-0.09	2.600
	Bad	-2.57***	0.19	-0.14	1.643
	Very bad	-4.33***	0.32	-0.12	1.210
Education (reference: low)	Middle	1.31***	0.13	0.12	1.594
	Sophisticated	2.17***	0.18	0.13	1.615
	High	2.69***	0.16	0.20	1.340
Interview year (reference: 1996)	2002	0.37**	0.11	0.03	2.740
	2008	0.84***	0.10	0.08	1.170

Data source: GEAS 1996-2008, pooled cross-sectional data.

It has thus been clearly established that the rising share of volunteers and the increase of the average frequency of leisure activities pursued with friends and family cannot be solely attributed to changing demographics and health-related life courses.

VIII. Does Retirement affect the Volunteer and 'Friend' Statuses?

VIII.1 Introduction

Having discussed the changes in social statuses amongst the 40 to 85 year-olds in Germany between 1996 and 2008 above and shown how much the older age groups have increased their engagement as friends and volunteers, it remains to be discussed how this relatively bigger growth of popularity of these statuses amongst older Germans can be explained. Schulze's ideas about value change have provided some potential explanations, but according to him, there should still be a clear distinction between 'old' and 'young' adults, with people re-thinking their value orientations at some point in their later life.

At least amongst men, fulltime employees still had the highest share of volunteers in 2008. The rates of very inactive friends were still lowest among the fulltime employed and the rates of very active friends the highest. Is Germany merely experiencing a general surge of these statuses, with the older age groups only being in a temporary catching up process, so that the figures will eventually settle to show that there is still a difference between economically active people and retirees? Or is the effect of retirement that binary analysis suggests just a product of a range of other factors?

Retirement still appears to best signify the point in people's lives when the idea of a limited life span becomes tangible. It is society saying 'Come on, you are getting old. Take some time off and let others take your place.' Is this message, despite ever longer healthy life spans, heard by retiring Germans, and does it affect their lifestyle choices?

This chapter will look at the potential effect of retirement from various angles. It is divided into a section on retirement and volunteering and one on retirement and the friend status. Both sections explore differences between retirees and economically active Germans based on the 2008 cross-sectional sample, as well as the potential effect of retirement as a life course transition with the help of the retirement panel sample. Various theoretical approaches to the topic will be explored before presenting the empirical findings, and conclusions will be drawn at the end.

VIII.2 Volunteers and friends in retirement - a brief recapitulation of the theoretical approaches

In 2010, Morrow-Howell discussed what the next steps should be in the research of volunteering in later life. One of the questions she asked was, 'What Is the Relationship of Volunteering to Other Social Activities?' She went on to state that 'To date, most studies of co-occurring activities have focused on productive activities, excluding leisure, religious, or social activities' (p. 263). Within the topic of this chapter, Morrow-Howells question translates to how the loss of the status as economically active person affects the other social statuses. Does an economically active person have more opportunities and incentives for friendship and volunteering due to meeting people through their job and needing to maintain a certain image? Does that mean retirement automatically leads to less opportunities to maintain or acquire the friend or volunteer status? Or is it true that work life occupies much of a person's time, which is freed up by retirement, time that can then be invested into other statuses?

A US study from the Corporation for National and Community Service (2007) specifically examined retirement and – focussing on which factors influenced whether people remained volunteers – found that "[i]t appears that moving out of the workforce is most likely to reduce volunteer retention among Baby Boomers⁴⁵, while losing one's job is most likely to reduce volunteer retention for volunteers born before 1946" (p. 12). Mutchler, Burr, and Caro (2003), however, found that for people who had not previously volunteered, not being in work⁴⁶ increased their likelihood of taking up volunteering.

In the academic literature, two discussions are linked to the question of the influence of retirement on volunteering. On the one hand, there are the different theories around how having multiple roles affects a person that was discussed in chapter I; on the other hand, there is a body of literature around the question of how volunteering needs to be viewed and how it is motivated.

Role theory provides two contradictory approaches to the question of whether and in what way working influences volunteering. On the one hand, role strain theory (e.g. Goode 1960) would suggest that work and volunteering draw upon the same resources – such as time and energy – so that having the status of worker should be detrimental to the chance

⁴⁵ In the study, baby boomers are defined as born between 1946 and 1964.

⁴⁶ The paper did not clearly distinguish between retirement and other forms of not being in work.

of also being volunteer and the amount of time invested in that role(s) associated with that status. On the other hand, role enhancement theory (e.g. Marks 1977) proposes that there are advantages to be drawn from each social status that might benefit other social statuses. Thus, a person might only be asked to volunteer through the social network they built up at work. They might also have acquired useful contacts and expertise at work that they can apply as volunteer or vice versa.

Besides the role theory approach, some authors have explored how volunteering can be placed within the continuum of social activities and how different motivations and personal characteristics affect the likeliness of volunteering. Following the popular belief that volunteering can replace the function of work in retirees' lives (see e.g. Moen et al. 2000; Putnam 1993; Wilson 2000; Wilson & Musick 1997, Chambré 1984), Chambré and Einolf (2008) examined how far volunteering could be viewed as work, leisure activity or pro-social behaviour. Basing their analysis on 470 US-American respondents and hypothesising that those respondents who were used to full-time working throughout their lives and experienced high job-satisfaction should be more inclined to volunteer after retirement than those who did not, they found only "weak and inconsistent support for the theory that volunteering by the elderly is a replacement for work" (p. 20). Although people in helping careers were more likely to volunteer in retirement than people in managerial careers and for former low-wage workers having been in employment before retirement had a small positive effect on their likeliness to volunteer, whereas for high-wage employees this had no effect. In their study, pro-social behaviour was operationalised through a range of attitudinal variables as well as religious commitment and family care-giving. Leisure was operationalised through measures for an extroverted character, participation in social groups and frequency of social contacts. The authors found support for volunteering was related to both.

Moen and Fields (2002) looked at retirement as transition of the work status, with the suggestion that "[f]or those not seeking employment following retirement, formal community participation as a volunteer for one or more organizations may serve many of the same integrative functions as paid work, providing role identities, routines, relationships, meaningful activity, and a sense of purpose" (p. 22). It is evident that there is an overlap of these authors' definition of the social status of work with the operationalisation of both work and leisure in Chambré and Einolf's research. In the end, Moen and Fields could not find any difference of volunteer rates between people before

and people after retirement in their US-American sample of 762 people aged 50-72 years. In 1984, Chambré came to the same conclusion in a similar study. She, however, found that while people were not more likely to take up volunteering in retirement than they were before, those who continued volunteering often increased their commitment:

“The work-substitute function is confirmed when only active volunteers are considered. The commitment scores of homemakers and retirees were significantly higher than those of respondents who were in the labor force. This indicates that, among volunteers, the lack or loss of work roles is associated with greater time commitment⁴⁷. These data are consistent with the 1981 National Council on the Aging study, which found that employed elderly persons were more frequently volunteers but that, among volunteers, retirees spent more time doing volunteer work.” (p. 294)

In the European context, Bekkers (2005) aimed to combine the perspectives of Sociology, Politics and Psychology on volunteering to develop a more holistic model of predicting civic engagement (group membership and volunteering) with the help of Dutch data. He found that most psychological measures of character traits were intermediated by socio-demographic characteristics and political interests and preferences. His multinomial logistic regression model was based on a sample of $n=1,283$. It consisted of six socio-demographic variables, seven indicators of psychological character traits, three political values – measuring political party preference, political interest and attitude extremity – as well as a measure for post-materialist values. And yet, it overall, only reached a Pseudo R^2 value of .074. This illustrates how difficult it is to predict volunteering even with a diverse set of information to draw upon.

The hypotheses 3 and 4 that were presented in the introduction of this study are based on the existing academic knowledge discussed above. The friend and the volunteer status are measured in different ways: while it was possible to compute an indicator of the frequency of leisure activities pursued with friends and relatives, for the volunteer status

⁴⁷ Time commitment was measured in the GEAS. However, the respondents could elect to answer the question in various time units: in hours per day, week or month *or* in days per year. The later makes it impossible to calculate an accurate number comparable to the hours measure: does volunteering 60 days per year mean 60 times 8 hours or 60 times half an hour or 60 times however long it took? Thus, assuming the respondent continued using the same unit of measurement, it would be possible to determine if they've increased their volunteer hours after retirement, but it is not possible to reliably compare volunteer hours of retirees with volunteer hours of workers based on this survey.

only a binary indicator of whether the respondent lays claim to the status or not is available.

Hypothesis 3 states that *Retirement has no significant impact on which social statuses a person occupies*. It is supplemented by two sub-hypotheses that focus on the volunteer status

- a. *Retirees are as likely to volunteer as people who have not yet retired, controlling for everything else.*

This hypothesis arises mainly from the question raised in the preface: is there a tangible difference between middle-aged and older adults at all that would justify the strict differentiation between these two groups of the adult population? Retirement is here often seen as the demarcation line. However, studies discussed above found no difference between volunteer rates before and after retirement to justify this distinction (see Moen and Fields 2002). It remains to be seen how this plays out within the German context.

- b. *Retirement as a life course transition has no effect on a person's likeliness to volunteer.*

Whereas the first hypothesis only looks at the population at large, this hypothesis concerns the influence of retirement in the individual's life course. It stipulates that if someone is unlikely to volunteer before retirement, they will be unlikely to do so as well after retirement. This is in line with continuity theory (e.g. Atchley 1989).

These will be examined in the first subsection of this chapter.

The second section focusses on the friend status. With the help of the more detailed indicator for this status, the question is explored if the loss of a time-consuming job leads to an increased time investment in the other social statuses. It is hypothesised that *Retirement does have an impact on the time invested into the friendship status*. Again, two sub-hypotheses explore this issue in more detail:

- a. *Overall, having one social status makes a person more likely to obtain further social statuses.*

This goes in line with role enhancement theory: each of the four social statuses discussed here potentially leads to a larger social network that enhances a person's opportunity to be asked to make further social commitments – whether that is to join in the local history enactment group (volunteering), go to

the cinema (leisure), help with the shopping because someone has mobility problems (care) or look after someone's children.

- b. *However, intense time investment in caregiving reduces the likeliness of maintaining other social statuses.*

This is where role strain theory comes into play. Underlying this hypothesis is the assumption that some social statuses are more demanding on their status owner than others. The status of caregiver is more likely to meet this criterion because in contrast to especially the volunteer or friend status, it is often taken up out of necessity, rather than out of choice. While caregiving may lead to a wider social network through, e.g., meeting fellow carers, and thus to opportunities to make friends and be asked to volunteer, extensive caregiving may cause physical and emotional strain and consume the time that other commitments would require.

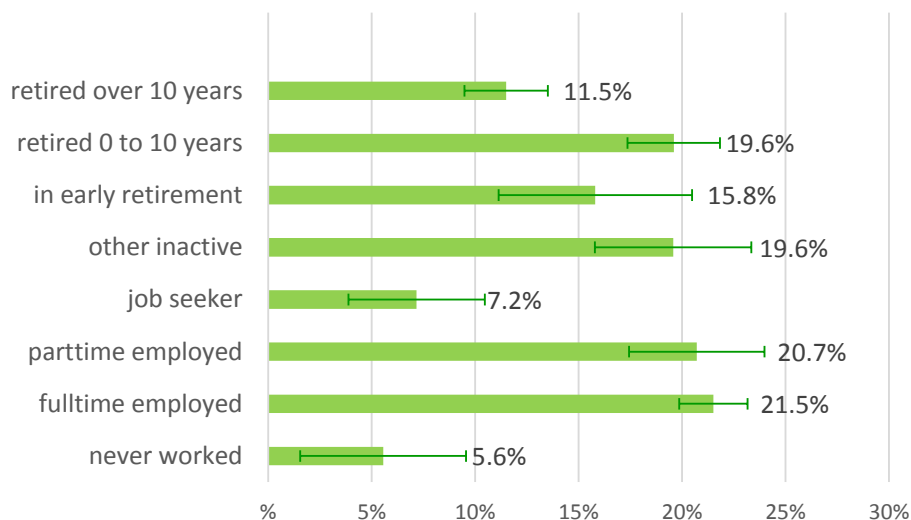
VIII.3 Does retirement influence volunteering?

In order to explore the hypotheses, two distinct data sets will be used. For hypothesis 3a), which deals with the potential differences of volunteering workers and volunteering retirees, the most recent cross-sectional sample of the German Ageing Survey from 2008 will be utilised (the new 2014 sample survey data is likely to be published only in 2016). To test hypothesis 3b), which is concerned with the influence of retirement on the life course of volunteers, panel data is required. A special data set consisting only of people who retired in the course of the GEAS was compiled.

VIII.3.1 Is there a difference between volunteer rates based on economic activity status?

A quick glance at Figure 33 does not provide an easy answer. It compares the volunteer rates of people in different economic statuses and shows a wide variation. Job seekers and people who have never worked had by far the lowest volunteer rates in 2008, followed by people who have been retired for more than 10 years. With some of these groups being represented in small numbers in the sample, the 95% confidence intervals overlap in some cases, but in line with findings from other studies ('The lowest rates of volunteering are found among those not in the labor force', Wilson 2000: 220), employees are most active in volunteering. However, people who retired less than ten years ago are not far (and not significantly) behind.

Figure 39: Volunteer rates by work- and retirement status.



Data source: GEAS 2008. Error bars indicate 95% confidence intervals.

To be able to control for a range of factors that are known to be associated with a person's likeliness to volunteer and could potentially account for some of the variation between the economic activity status groups, a binary logistic regression model was built. Its **dependent variable** was a binary indicator provided in the survey that measures whether the respondent volunteered at the time of the interview or not. The **control variables** entered into the model were age, gender, predominant place of residence in the past 40 years, education, partnership status and health.

Religiosity, a further characteristic often discussed in the academic literature around volunteering (Becker and Dhingra 2001), was not asked about in the GEAS. Religious denomination was only captured in the additional drop-off questionnaire, which was not answered by all respondents. The equivalent household income that was used to control for income differences did not show any significant effects and was thus removed from the model for reasons of parsimony.

Even though the hypothesis only mentions the retirement status, the underlying assumptions in fact require differentiating the economic activity status in more detail. When researchers and policy makers consider retirement to have a potentially positive effect on a person's likelihood to volunteer, this is often explained with the increasing amount of time available to retirees, because they no longer go to work (e.g. Moen and Flood 2013). However, not all adults in the pre-retirement stage of their lives work fulltime. So in order to be able to compare retirees to fulltime workers and determine what effect other forms of economic activity have in contrast to the two here examined, eight different categories will be entered into the model, with fulltime work (1) being the reference category:

2. Never worked
3. Part-time employed
4. Job seeker
5. Other inactive people
6. Early Retirement
7. Retired 0-10 years
8. Retired more than 10 years.

The three forms of retirement – early retirement, retired within the last ten years, retired more than 10 years ago – are distinguished because of the further assumption found in many publications that retirees have imbibed a work ethic (Ekerdt 1986) that will drive them to seek alternative opportunities to stay active and productive once they have exited work life. Early retirement requires either more determination of the individual to exit work life (due to a negative perception of their job, due to poor health or due to other important commitments) or could be the result of a lack of success in the employment market – both of which might be detrimental to their motivation or ability to do unpaid work. Being long-term retired, on the other hand, simply means that work life has long passed and the busy ethic may have weakened.

In Table 19, the result of the binary logistic regression model is presented. It shows that the economic activity status indicators provide only a very small contribution to the overall explanatory power of the model, with a minimal improvement of the -2 log likelihood. Moreover, the only significant differences in the likelihood for volunteering, when controlling for age, gender, health, education, partnership status and place of residence before reunification, are to be observed for unemployed people and other inactive people. It was shown in previous studies that unemployment has a negative effect on civic engagement (e.g. Brand and Burgard 1997, Eurofound 2012), so it is unsurprising that jobseekers are 40.4% less likely to volunteer than fulltime employees in the model. 84.9% of the 425 'other inactive' people in the sample are female. This group is furthermore predominantly found in Western Germany, with 91.3% of all other inactive people having grown up there. It can be concluded that a large part of the other inactive people are housewives that have chosen this status for themselves. That this is more common in Western Germany due to different traditions in the understandings of the female social role in society in Eastern and Western Germany has been observed in previous studies (e.g. Bauer and Dähler 2010). Housewives have more time for community engagement without the negative repercussions of the perceived exclusion of unemployment and may in fact perceive this as part of their societal role. 53.76% of the 'other inactive' people are living with at least one child while more than five in six of them is aged under 65 years, suggesting the care of children under age 18. Research has repeatedly shown that parents are more likely to be volunteering in relation to their children's social activities – in school, in clubs for leisure activities etc.

Table 19: Binary Logistic Regression Model of Volunteering regressed on economic activity status

	Block I: Control Variables			Block II: Econ. Activity Status		
	Exp(B)	B	SE	Exp(B)	B	SE
Has partner? (ref: no)	1.36**	.31	.10	1.31**	.27	.10
Gender (ref: male)	.76***	-.27	.07	.71***	-.34	.08
Place of residence before reunification (ref: Western Germany)						
GDR	.41***	-.88	.10	.44***	-.83	.10
Abroad	.145***	-1.92	.39	.15***	-1.88	.39
Self-assessed Health (ref: very good)						
Good	.96	-.04	.11	.96	-.04	.11
Fair	.92	-.08	.11	.92	-.08	.12
Bad	.69*	-.37	.178	.689*	-.37	.18
Very bad	.28**	-1.29	.47	.26**	-1.34	.47
Age group (ref: 40-55 years)						
56-65 years	.90	-.10	.09	.87	-.14	.10
66-68 years	1.25	.23	.123	1.09	.09	.19
69-75 years	.85	-.16	.11	.74	-.31	.19
76-85 years	.43***	-.84	.167	.37***	-1.00	.26
Level of education (ref: low)						
Medium	1.95***	.67	.17	1.84***	.61	.17
Sophisticated ⁴⁸	3.02***	1.10	.189	2.86***	1.05	.19
High	4.11***	1.41	.17	3.94***	1.37	.18
Economic Activity Status (ref: fulltime empl.)						
Never worked				.65	-.43	.43
Part-time employed				1.18	.17	.123
Job seeker				.64	-.45	.26
Other inactive people				1.41*	.34	.15
Early Retirement				1.03	.03	.201
Retired 0-10 years				1.19	.18	.16
Retired more than 10 years				1.23	.20	.22
Constant	.12***	-2.1	.21	.13***	-2.05	.21
Nagelkerke R²/McFadden's R²	.12/0.07			.12/0.07		
Hosmer & Lemeshow Goodness of Fit Sig.	.20			.42		
-2LL	5266			5253		
Block Sig.	.00			.08		

Data source: GEAS 2008, cross-sectional sample.

N=6205 (91 missing). *p<0.05; **p<0.01; ***p<0.001.

⁴⁸ The 4 levels of education were predefined by the GEAS and refer to the highest level of vocational training. No qualification and unknown qualification were labelled as 'low education'. Apprenticeships and equivalent schooling were labelled as 'medium' level of education; people who had gone on to take advanced training for managerial positions (Fachschule), which also includes the German 'Handwerksmeister' (master craftsman) were deemed 'sophisticated'. 'High' captures people with university education.

Bivariate analysis of work status and volunteering had suggested that fulltime employees volunteer the most. However, once entered into a model with the previously discussed control variables, a different picture is drawn. While not significantly different, the effect sizes of all three retirement groups show that they are more likely to volunteer than the reference group of the fulltime employed when taking factors like their on average lower level of education and gender into consideration: amongst those retired for more than ten years, there is a slight overrepresentation of women in the sample and women are less likely to volunteer in Germany. While even a sample of 967 people who were retired for more than ten years could not ascertain that this group was indeed more active than the reference group, the outcome does suggest that they are at least keeping up very well and any idea about older adults retreating from their societal responsibilities cannot be supported.

However, the model does suggest an effect of old age: 76- to 85-year-olds are significantly less likely to volunteer, an effect not mitigated by controlling for their work status. 66- to 68-year-olds, in contrast, an age group that was formed following the assumption that it captures a large number of newly retired and that these might be more active volunteers due to their busy ethic and loss of paid work, indeed showed the opposite effect. The 470 respondents in this age group were nearly a quarter more likely to volunteer than their forty- to fifty-five-year-old reference group. This effect was noticeably reduced with the introduction of the work status into the model, which allows for the conclusion that the observed effect is indeed a retirement effect.

The hypothesis that *retirees are as likely to volunteer as people who have not yet retired, controlling for everything else* is supported by the findings of this model. The failure to find a significant difference between the volunteer rates of fulltime employees and retired people allows for an acceptance of the hypothesis that there is no association between whether the respondent has retired from work life and their likeliness to volunteer.

However, for regularly retired respondents, the effect sizes give reason for pause: in the 2008 GEAS sample, respondents retired within the last ten years were ca. 1.2 times as likely to volunteer as fulltime employees, respondents who retired more than ten years ago showed a slightly higher likeliness. These are not huge effects, but they could signify a heightened motivation for retirees to volunteer if they could be confirmed by further

research, thus supporting assumptions made about the potential workforce available for community tasks amongst older adults (e.g. Erlinghagen and Hank 2006).

VIII.3.2 Volunteering in the life course

Hypothesis 3b) is concerned with the potential effect of retirement on the individual life course. While the cross-sectional model suggested that there was no significant association between retirement and likeliness to volunteer, it could have been misleading. It only took into account the different rates of volunteers in the various work status groups, without being able to establish whether retirement did not have a different effect on different people, making some stop their volunteering whereas others started. In fact, exactly this is observable when analysing the GEAS panel data: 71.1% of the respondents who retired during the survey have neither volunteered at the time of their first interview nor in 2011. 9.7% have started volunteering since their first interview and 9.9% stopped volunteering. Likewise 9.9% of them – that is 50% of all people who were volunteers during their first interview – still volunteer. This means that although the composition of the group of volunteers changed, the overall volunteer rate remained steady. Unfortunately, there is no information available on the reasoning for why people stopped volunteering, why they never took it up at any point in their life, or why they chose to take it up after retirement.

In order to be able to look at the effect of retirement, everyone who had already retired by the time of their first interview, and everyone who had not yet retired or gone into early retirement by 2011 was excluded from the sample. This provides a sample of 841 people who had retired at some time during the survey and were interviewed in 2011, 839 of which provided information on their volunteering. Of these, 172 had first been interviewed in 2008, 197 had first been interviewed in 2002 and the remaining 472 were from the very first wave in 1996. The genders were reasonably well balanced with a rate of 49.7% women. As might be expected, due to the gradual ageing of the panel sample, only one in fifty respondents was aged forty to fifty-five, yet nearly two in five respondents were aged fifty-six to sixty-five. Just under a quarter were in the 66-68 age category at the time of the 2011 interview, just under a third were 69 to 75 years old, 2.5% were 76 to 85 years old and only one respondent surpassed this age.

Included in the analysis were only people who had named at least one of these retirement reasons, reducing the sample to 690 respondents, 673 of whom were included in the final model. This reduction in sample size was unavoidable, since the missingness was

not exclusively produced by a refusal to answer or a decision that none of the reasons applied but by an error in the survey conduction: respondents were only asked about their retirement reason(s) in the survey wave directly following their retirement. Had they not taken part in that wave but re-joined the panel later on, information on their retirement reasons was not collected.

Hypothesis 3b) was phrased as follows:

Retirement as a life course transition has no effect on a person's likeliness to volunteer.

To test this hypothesis, another binary logistic regression model was built, once more aiming to predict whether a person volunteered or not. Into this model, a range of retirement indicators were entered to test if they have any impact on a person's likeliness to volunteer. There were two distinct sets of these: one captured the respondents' assessment of how difficult they found retirement, from not difficult at all to very difficult. The second set covered a range of retirement reasons and how they affected volunteering. Due to missing case issues⁴⁹, the two sets were tested in separate models.

The first model tested whether finding retirement hard had any impact on a person's likelihood of volunteering. This treats retirement as a process that might be perceived as positive or negative, or easy or hard to cope with. Finding retirement difficult could have two diametrically opposite outcomes: the retiree could struggle so much to find a new direction in life that their psychological motivation to engage in volunteering is impaired, or their struggle could lead them to the realisation that they need a new role, such as volunteering.

The second model examined the respondents' reasons for retirement. Was it a sudden or unwelcome life course event or was it anticipated, even yearned for? Was it entered because it was time or because some responsibility other than work (e.g. caring for an ill

⁴⁹ These seem, again, to be related to the participation pattern of the interviewees: if a person participated in every survey wave after their first interview, their chance of having responded to the question on the difficulty of retirement was much higher than if they had skipped one or two waves. This suggests the assumption that those who did not participate in the survey wave that chronologically followed their retirement were never asked this question, as is the case with other retirement questions (see methods chapter).

person) took precedence or because the respondent could no longer succeed in the employment market?

Overall, eleven different retirement reasons were captured in the survey, each in a separate binary indicator:

- a) reached retirement age,
- b) wanted to retire as early as possible,
- c) conflicts between work and private life
- d) partner retired
- e) sufficient time for myself
- f) caring for an ill person
- g) family reasons
- h) health reasons
- i) encouraged by employer
- j) became unemployed
- k) other

These factors capture three dimensions: (1) the dimension of agency, (2) perceived connection to the community, and (3) the dimension of competing roles.

(1) Agency refers to whether it was the respondent's decision to retire (e.g. b and e) or something they were forced to by circumstances (e.g. h to j). Some of the response categories could represent both ends of the spectrum. Reaching retirement age, e.g., could be seen both as the welcome end of one journey (work life) and the beginning of another with newly-gained freedom, or it could be viewed as being forced to give up a well-liked social status.

(2) The dimension of connection with the community is especially present in i) and j) – both of which signify an active act of exclusion from the employment market: i) potentially ranging from a very lucrative offer to not being given a choice, and j) being a clear dismissal that has been shown in numerous studies to have a negative effect on a person's willingness to engage in community activities (e.g. Eurofound 2012).

Dimension (3) once more brings up the question of whether multiple roles are mutually enriching or hindering. Does retiring for family reasons or to care for an ill person mean they have less time for volunteering than other retirees or will their potential networks born out of these social statuses (caregiver/child carer) actually bring volunteering closer to them?

Two thirds of the respondents named only one retirement reason, but some named up to four. The binary variables are thus not mutually exclusive and could not be treated like dummy variables. There is thus no 'reference reason'. It cannot be said, for example, that becoming unemployed has a negative effect in comparison to retiring because the respondent had always wanted to retire early. It can only be said that retiring due to unemployment has a negative impact compared to not having retired based on that reason.

The control variables show some differences to the previous model: the partnership status and self-assessed health contributed little to the models for the panel sample and were thus dropped. Instead, a new binary indicator only provided in 2011 which measures whether the respondent's income is equal to more than 200% of the average equivalent income was utilised⁵⁰. In the previous model, controlling for income with the available indicators had shown little effect, but the new binary indicator does produce reasonable effect sizes and in one case significant results.

Overall, the hypothesis that the retirement circumstances do not significantly influence a person's likelihood to volunteer is supported by the regression results. The models suggest that both retirement difficulty and retirement reasons may have a small effect and help slightly to improve the ability to predict volunteering, but in both cases the contribution was small and – with the given sample sizes – insignificant (apart from one retirement reason).

In the available sample of 504 respondents, the indicator measuring the perceived difficulties during retirement achieved a minuscule improvement of the correct prediction of whether the respondents volunteered from 80.8% to 81%. While Nagelkerke R^2 also showed a small improvement, McFadden's adjusted R^2 hardly changed and the block holding the retirement difficulty dummies remained insignificant. In line with that, the -2LL hardly decreased, nor could the retirement difficulty indicator or any of the dummies created from it reach significance based on the 95% confidence intervals.

Despite that, the effect sizes indicate that there might be a weak but noteworthy association: while finding retirement 'hardly difficult' or 'somewhat difficult' appears to make a person less likely to volunteer in comparison to people who don't experience any difficulties at all – retirement being described as 'somewhat difficult' making the respondent about half as likely to volunteer –, finding it 'very hard' or 'rather hard' has the

⁵⁰ 7% of the sample had an income above 200% of the average equivalised household income.

opposite effect. It makes the respondent about 1.5 times as likely to volunteer as people who found retirement easy, controlling for gender, residence before reunification, age, education and income (Table 20).

Table 20: Binary logistic regression of retirement difficulty on volunteering (0: no volunteer, 1: is volunteer)

	Block 1: Control Variables			Block 2: Retirement Difficulty		
	B	Std. Error	Exp(B)	B	Std. Error	Exp(B)
Gender: female	-.23	.25	.79	-.20	.25	.82
Residence before reunification (ref: Western Germany)						
GDR	-.92**	.29	.40	-1.00**	.30	.37
Age group (ref: 56-65)†						
66-68	.03	.29	1.03	.00	.29	1.00
69-75	-.10	.29	.91	-.08	.29	.92
76+	-1.19	1.07	.31	-1.16	1.08	.31
Level of education (ref: low)						
medium	1.50	1.04	4.48	1.53	1.04	4.62
sophisticated	1.85	1.08	6.36	1.90	1.08	6.66
high	1.88	1.06	6.54	1.95	1.06	7.02
More than 200% of average equivalent income?	.54	.38	1.71	.44	.38	1.56
How difficult was retirement? (ref: not difficult at all)						
very or rather difficult				.40	.35	1.49
somewhat difficult				-.73	.47	.48
hardly difficult				-.25	.34	.78
Constant	-2.69*	1.06	.07	-2.67*	1.07	.07
Block Sig.	.002			.151		
Nagelkerke R ² /McFadden's R ²	.08/-0.01			.10/-0.01		
Hosmer and Lemeshow Test Sig.	.91			.72		
-2 Log Likelihood	467			462		

Data source: GEAS 1996-2011. n=831 (people having predominantly lived abroad in the past excluded⁵¹; 40.1% missing) – retirement difficulty indicator not available for many cases⁵².
*** p<0.001, **p<0.01, *p<0.05, †age group 40-55 not represented in sample

⁵¹ They were a distinct category in the predominant place of residence before unification but too small a sample to yield reliable results for this subpopulation.

⁵² Please see the methodology chapter for a discussion of this issue, which arrived at the conclusion that the sample is not biased.

Table 21: Binary logistic regression model of volunteering (0: no volunteer, 1: is volunteer) on retirement reasons

	Block 1: Control Variables			Block 2: Retirement Reasons		
	B	Std. Error	Exp(B)	B	Std. Error	Exp(B)
Gender: female	-.31	.21	.73	-.51*	.24	.60
Place of residence before 1990: GDR	-.76**	.24	.47	-.66*	.26	.52
Age group (ref: 40-55)						
56-65	.41	.79	1.50	.12	.80	1.13
66-68	.32	.80	1.37	-.02	.82	.98
69-75	.25	.80	1.28	-.12	.82	.89
76+	-.87	1.30	.42	-1.21	1.32	.30
Level of education (ref: Low)						
Medium	1.73	1.03	5.64	2.01	1.05	7.48
Sophisticated	2.05	1.06	7.79	2.33*	1.07	10.24
High	2.20	1.05	9.01	2.49*	1.06	12.05
More than 200% of average equivalent income?	.52	.34	1.68	.55	.35	1.73
Retirement reason 1: Retirement age reached				.26	.29	1.30
Retirement reason 2: Planned to retire as early as possible				-.03	.34	.97
Retirement reason 3: Conflicts between work and private life				.23	.51	1.26
Retirement reason 4: Partner retired				.72	.46	2.05
Retirement reason 5: Sufficient time for myself				.47	.34	1.61
Retirement reason 6: Caring for ill person				.22	.57	1.25
Retirement reason 7: Family reasons				.76*	.34	2.14
Retirement reason 8: Health				-.02	.29	.98
Retirement reason 9: Encouraged by employer				.12	.28	1.13
Retirement reason 10: Became unemployed				.21	.38	1.23
Retirement reason 11: Other				.32	.42	1.38
Constant	-3.25*	1.27	.04	-3.54**	1.30	.03
Block Sig.	.00			.50		
Nagelkerke R ² /McFadden's R ²	.08/.00			.11/-.05		
Hosmer and Lemeshow Test Sig.	.97			.94		
-2 Log Likelihood	599			589		

Data source: GEAS 1996-2011 retirement panel, only people having named a retirement reason included. n=690 (56 missing). *** p<0.001, **p<0.01, *p<0.05

In the second regression model using retirement reasons, the ability to predict volunteering could not be improved, and the retirement reason block remained statistically insignificant for the model, despite the second model having a larger sample size (Table 21).

The respondents could name multiple retirement reasons, so that an easy comparison with one reference reason was not possible. Instead, each reason had to be entered as separate binary indicator. This begs the question what the effects are compared against – especially since all of them are calculated to be positive. Rerunning the regression with the order of the blocks being swapped, so that the retirement reasons are entered on their own, reveals that without the controls, some reasons appear to not have any effect at all, such as a conflict between family and work life commitments, caring for an ill person, health reasons, and having been unable to find a new job. These are reasons one might have assumed to have a negative effect: people who need to give up their paid job due to health reasons or other commitments should be unlikely to take up an unpaid job; the negative impact of unemployment has been previously discussed. The confidence intervals indeed leave the possibility open that this is the case, yet in this sample such an effect was not found.

In contrast, retiring because the partner has retired, because the respondent wanted more time for him/herself, for family reasons or other reasons made the respondent more than 1.5 times as likely to volunteer as other respondents that did not name these reasons. These effects have been altered (for some reasons increased, for others slightly lessened) with the introduction of the control variables, but they are still visible.

Despite these effect sizes, which are for some retirement reasons calculated relying on relatively small sample sizes (only 23 respondents, for example, said they retired in order to take care of an ill person, 30 named work-life balance as reason, 33 the retirement of their partner), for others based on a sounder sample size (228 respondents said they retired because they'd reached the pre-defined age; 157 named health reasons), only one reason turned out to be statistically significant in the model – and that only when controlling for everything else.

In light of the complete failure of retirement reasons to help improve the prediction of volunteering and the very small contribution of the retirement difficulty indicator, it can indeed be concluded that there is little support for the claim that retirement – viewed as life course event – affects a person's likeliness of volunteering. Some qualitative research, however, suggests that people who continue volunteering into retirement often increase

their time investment (Wealleans 2014). The GEAS data does not provide a reliable indication of this for volunteering, yet it is possible to look at the time investment via a frequency score for the friendship status.

VIII.4 The friend status and retirement

In a society in which older adults make up a large and still growing number of the population, their participation in all forms of community life is of vital importance. Pursuing leisure activities strengthens the economy. More specifically, social leisure activities, whether pursued informally or in groups, are the foundation of vibrant communities. Additionally, these have been shown in numerous studies to have positive effects on people's wellbeing (Adams et al. 2010). This study has previously already shown that social leisure activities are on the rise. Retirement is often portrayed as the golden period in a person's life in which they suddenly can pursue all the interests they did not have time for before. Does retirement indeed have an effect on leisure activities, especially those conducted in company?

As Adams et al. (2010) pointed out, there are many different typologies of activity or social participation in the scientific literature, even when just focussing on leisure activities. While the picture of retirement as the land of freedom was invoked earlier, and this is often associated with travelling, this study focuses specifically on everyday life activities conducted outside of the respondents' home (with the possible exception of the GEAS' item 'regularly meeting up with friends' that could also take place in the respondents' homes) and in company. With a good range of activities asked about, the GEAS clearly tries to cover all possible leisure activities from taking walks over doing sports, attending readings or arts classes to a range of classical cultural participation categories, such as theatre, cinema and sports events. However, a complete coverage is not guaranteed due to the closed nature of the questions.

To guide the research into the possible effects of retirement on the friendship status, the already employed hypotheses from the volunteering section were adapted:

4a) Retirees are more likely to score higher on the scale of social leisure activities than people who have not yet retired, controlling for everything else.

While the preface does suggest there are no tangible qualitative differences between middle-aged and older adults, retirement does bring the big advantage of spare time. Volunteering is often portrayed as something that 'looks good on the CV' and is often connected to the workplace or the children's school or leisure time activities. Yet in retirement, both work and care of their own children drop off most people's schedules so that even if they start or continue volunteering,

there is still plenty of time to pursue other interests. These are also opportunities to maintain an active social life that may for some replace the social network they had at the workplace. The widely spread image of especially young pensioners is thus that of people very active in their chosen hobbies – it will be examined here.

4b) Retirement as a life course transition affects the amount of time a person spends on cultivating their friendship status.

This moves beyond the first hypothesis by not only saying that retirement provides more time but also arguing that the retirement process in itself can be experienced in numerous ways which may have detrimental or positive effects on a respondent's motivation to invest time into the upkeep of social statuses, such as that as friend and friendly relative.

VIII.4.1 Friendship status: differences between retirees and non-retirees

For the closer examination of hypothesis 3a), a model based on the 2008 cross-sectional data of the GEAS was built. This was aiming to predict the 2008 social leisure activity score, which approximates a ratio variable, so that the model could be computed with the help of least square regression. Apart from a number of control variables, three dummy variables measuring whether the respondent was retired, not retired, or had never worked were entered into the model. The control variables were age in years, gender, predominant place of residence before the reunification, subjective health (five dummies ranging from very good to very bad), education and whether the respondent was in a relationship.

The resulting model explains 16.2% of the variation in the Social Leisure Activities indicator. The addition of the information on whether the respondent is retired or not does improve the model significantly, but the model only based on the control variables already reached an adjusted R^2 of 0.155 – the effect of retirement is thus a small one. Table 22 shows the coefficients of the model. Increasing age and a negative health assessment are showing a clearly detrimental effect on social leisure activities, as does low education.

Having a partner, being a woman and being retired, on the other hand, increases the respondent's likelihood of reaching a higher score on the scale⁵³.

Table 22: Coefficients in linear regression models of social leisure activity by retirement status

		Unstandardized coefficients		Standardized beta coefficients	VIF
		B	Std. Error		
Constant		10.61	0.60		
Age in years		-0.10***	0.01	-0.22	2.78
Female		1.02***	0.13	0.09	1.08
Has partner?		2.16***	0.16	0.16	1.06
Lived mostly in GDR		-1.55***	0.16	-0.11	1.04
Lived mostly abroad		-1.91***	0.28	-0.08	1.06
Health (ref: very good)	Good	-0.16	0.21	-0.01	2.64
	Fair	-0.94***	0.22	-0.08	2.60
	Bad	-2.47***	0.29	-0.13	1.64
	Very bad	-4.54***	0.47	-0.12	1.21
Education (ref: low)	Middle	1.42***	0.22	0.13	2.90
	Sophisticated	2.02***	0.28	0.12	1.97
	High	2.92***	0.24	0.23	2.63
Retirement status (ref: not retired)	Retired	1.40***	0.21	0.13	2.75
	Never Worked	-0.67	0.49	-0.02	1.17
Adjusted R ²		.162			

Data source: GEAS 2008. N=6154 (of 6205). *** p<0.001, **p<0.01, *p<0.05

Table 23 shows that the effect of retirement on group membership (in charity organisations, churches, hobbyist groups, self-help groups etc.) is likewise positive and statistically significant, but to a smaller degree: the adjusted R² improves by only .004 when adding the retirement status indicators, thus presenting a prime example of a case in which statistical significance says nothing about the importance of an effect: it is clearly negligible.

Age does not appear to have an impact on group membership. The effect of health is also estimated to be smaller. The model suggests that both having lived abroad and having

⁵³ It was chosen not to control for income, because even the measure for income with most responses – the monthly equivalised household income based on OECD standards assembled from information gained from the interviews and the drop-off questionnaires – would have reduced the sample by 908 respondents. A model including this measure shows a small positive effect of income and slightly increases the positive effect of being in retirement.

lived in Eastern Germany for the majority of their lives makes respondents less likely to be member of such a group.

Table 23: Coefficients in linear regression models of group leisure activity by retirement status

	Unstandardized Coefficients		Standardized beta coefficients	VIF
	B	Std. Error		
Constant	1.50***	0.37		
Age in years	-0.01	0.01	-0.03	2.78
Female	0.18*	0.08	0.03	1.08
Has partner?	0.49***	0.10	0.06	1.06
Lived mostly in GDR	-1.17***	0.10	-0.15	1.04
Lived mostly abroad	-1.12***	0.17	-0.08	1.06
Health (ref: very good)	Good	-0.22	0.13	2.64
	Fair	-0.28*	0.13	2.60
	Bad	-0.95***	0.18	1.65
	Very bad	-1.43***	0.29	1.21
Education (ref: low)	Middle	0.72***	0.13	2.90
	Sophisticated	1.42***	0.17	1.97
	High	1.49***	0.15	2.63
Retirement status (ref: not retired)	Retired	0.65***	0.13	2.75
	Never Worked	-0.27	0.30	1.17
Adjusted R ²	0.068			

Data source: GEAS 2008. N=6154 (of 6205). *** p<0.001, **p<0.01, *p<0.05

Overall, the model explains only about six percent of the variation in the group leisure activity indicator. Clearly, it does a poor job of capturing what leads to the acquisition of the friendship status via group membership. A likely factor in this is group availability and group accessibility: how many groups are open for membership near the respondents and have the respondents both physically and socially access to them, i.e. through public transport and through friends/acquaintances encouraging group membership? It is, just as with volunteering, also likely that group membership has an especially strong life course dependency: behavioural patterns of how to socialise will have formed over the life course, based on cues from the social environment or triggered by life events (e.g. joining self-help groups after a crisis). The stark difference between mere 5% of all respondents in 2008 not scoring a single point on the individually organised social leisure activities scale compared to 52.5% not scoring a single point on the group leisure activity scale suggests that the

latter way of maintaining the friend status is much less established amongst 40- to 85-year-olds in Germany.

VIII.4.2 Retirement as a life course transition and its effect on the friendship status

The exploration of hypothesis 4b was based on the retirement panel sample. With linear least square regression, a model was built that aimed to predict the 2011 social leisure activity score with the help of a number of control variables and a range of eleven binary variables provided by the survey that explored reasons for why the respondent retired when they did.

The respondent had...

- Reached the appropriate age,
- Wanted to retire as early as possible
- Perceived a clash between family life and work life,
- Followed their partner into retirement,
- Wanted sufficient time for themselves,
- Caring responsibilities for an ill person,
- Family reasons for retiring,
- Health reasons for retiring,
- Been encouraged to retire by the employer,
- Become unemployed, or
- Other reasons.

The control variables – age, gender, predominant place of residence before the reunification, subjective health (five dummies ranging from very good to very bad), education and whether the respondent was in a relationship – were entered in the first step of the model, the eleven retirement reasons in step two. Step one reached an adjusted R^2 of 0.074; step two explained one percent more of the variation in the social leisure activity score. Step two did not lead to a significant F-change, but this is connected to the low sample size.

Of the eleven potential retirement reasons, only the conflict between family and work commitments contributed significantly to the model (see Table 24). With a larger sample size, the care of an ill person and ‘other reasons’ may have achieved significant results as well, yet looking at the overall R^2 change, it can be concluded that – at least in the way they

were measured in the GEAS – retirement circumstances have a very small influence on how actively pensioners engage in social leisure activities afterwards.

As was the case in the previous chapter, the model again performs only half as well when trying to predict respondents' group leisure activity score with it (Table 25). The utilised control variables accounted for three percent of the variation of the score; with the retirement reasons the model explained four percent. This improvement was not statistically significant but would likely have proven so with a better sample size.

In this model, whether the respondent had spent most of their life in Eastern Germany and whether they had retired because their partner had retired were the two explanatory variables that stood out most. Still, overall the model is an insufficient tool to predict whether a respondent holds the friend status through group membership.

It was also tested whether finding retirement difficult (on a four point scale from rather/very difficult to not difficult at all) made a difference. This information was only available for a sample of 536 respondents, of which 327 found the transition 'not difficult at all', 95 found it 'hardly difficult', 59 found it 'somewhat difficult' and 69 admitted to it having been 'rather' or 'very difficult'. For both group and individual social leisure activities, the measures (with 'not difficult at all' as reference category) did not help to predict the score at all.

In conclusion, hypothesis 4a) can provisionally be accepted. Controlling for a range of known influential factors, being retired as opposed to being fulltime or part-time employed, unemployed or an otherwise inactive person (housekeeper etc.) had a small but statistically significant positive effect, both on the likelihood of participating often in formally organised leisure activities in groups and more so on arranging informally organised meet-ups with friends and family to pursue activities together on a regular basis.

However, at the same time it has to be noted that the effect size is smaller than the large amount of time freed up through giving up the status as economically active person⁵⁴ might suggest.

⁵⁴ In the GEAS 2008 cross-sectional sample, of those who were non-retired employees, men worked an average of 46 hours per week and women of 32.5 hours per week.

Table 24: Model Summary for Linear Regression Model of Social Leisure Activity by retirement reasons

	Unstandardized Coefficients		Standardized beta coefficients	VIF	
	B	Std. Error			
Constant	4.17	3.36			
Age in years	0.04	0.04	0.03	1.23	
Female	1.31**	0.45	0.12	1.32	
Has partner?	2.27***	0.52	0.17	1.09	
Lived mostly in GDR	-0.89	0.46	-0.08	1.25	
Health (ref: very good)	Good	-0.07	0.76	-0.01	3.79
	Fair	0.36	0.80	0.03	3.75
	Bad	-2.65*	1.03	-0.14	2.10
	Very bad	-4.47*	1.90	-0.10	1.25
Education (ref: low)	Middle	0.02	0.98	0.00	6.26
	Sophisticated	1.21	1.08	0.08	4.08
	High	1.23	1.05	0.10	5.40
Retirement reason (no reference)	Retirement age reached	-0.74	0.55	-0.07	1.76
	Planned to retire as early as possible	-0.03	0.67	0.00	1.22
	Conflicts between work and private life	-2.03*	0.99	-0.08	1.10
	Partner retired	1.48	0.96	0.06	1.12
	Sufficient time for myself	1.00	0.71	0.06	1.16
	Caring for ill person	1.79	1.12	0.06	1.08
	Family reasons	-0.20	0.68	-0.01	1.41
	Health	-0.41	0.59	-0.03	1.57
	Encouraged by employer	-0.46	0.54	-0.04	1.28
	Became unemployed	-0.61	0.68	-0.04	1.35
Other	-1.45	0.85	-0.07	1.14	
Adjusted R²	0.084				

Data source: GEAS 1996-2011. N=673 (of 841). *** p<0.001, **p<0.01, *p<0.05. Dependent variable: friendship score on a scale from 0 to 45.

Table 25: Model Summary for Linear Regression Model of Group Leisure Activity by retirement reasons

	Unstandardized Coefficients		Standardized beta coefficients	VIF	
	B	Std. Error			
Constant	-4.48	2.40			
Age in years	0.09**	0.03	0.12	1.23	
Female	0.74*	0.32	0.10	1.32	
Has partner?	0.33	0.37	0.03	1.09	
Lived mostly in GDR	-1.16***	0.33	-0.15	1.25	
Health (ref: very good)	Good	0.09	0.54	0.01	3.79
	Fair	0.39	0.57	0.05	3.75
	Bad	-0.57	0.74	-0.04	2.10
	Very bad	-1.37	1.36	-0.04	1.25
Education (ref: low)	Middle	0.67	0.70	0.09	6.26
	Sophisticated	1.18	0.77	0.12	4.08
	High	1.10	0.75	0.13	5.40
Retirement reason (no reference)	Retirement age reached	-0.53	0.39	-0.07	1.76
	Planned to retire as early as possible	0.20	0.48	0.02	1.22
	Conflicts between work and private life	-0.88	0.71	-0.05	1.10
	Partner retired	1.77*	0.68	0.10	1.12
	Sufficient time for myself	0.26	0.51	0.02	1.16
	Caring for ill person	0.57	0.80	0.03	1.08
	Family reasons	0.07	0.48	0.01	1.41
	Health	0.01	0.42	0.00	1.57
	Encouraged by employer	-0.23	0.38	-0.03	1.28
	Became unemployed	0.32	0.49	0.03	1.35
	Other	0.77	0.61	0.05	1.14
Adjusted R ²	0.041				

Data source: GEAS 1996-2011. N=673 (of 841). *** p<0.001, **p<0.01, *p<0.05. Dependent variable: friendship score on a scale from 0 to 45.

Hypothesis 4b) could not be sufficiently corroborated. At least when looking at the effect of the reasons why the respondent underwent the life course transition from work life to retirement as measured in the German Ageing Survey, they contributed little to predicting the score of the respondent on either the group or the individual social leisure

activity scale. Taking the respondents' self-assessed difficulty with transitioning into retirement into consideration did not help at all.

VIII.5 *Did retirement influence Germans' likelihood of being active as friend or volunteer?*

Gerhard Schulze's (2004) claim that people have turned from outer values of financial security to inner values of self-fulfilment and an experience-rich life could explain why retirement has no influence on other social statuses. More precisely, it suggests retirement has no impact *anymore*, but it likely had an impact in the past. Observers reported that many people with a rich work life struggled with the transition into a life without gainful occupation, with finding new purpose in life (e.g. Kleist 2006). Havighurst claimed that people who had no hobbies and spent little time with their families found the transition especially hard, and he consequently advised taking up other activities early on (1954). Yet – so it can be concluded from Schulze's reasoning – this is less and less often the case. The analysis presented in the previous subchapters shows that retirement has little or no effect when controlling for other factors.

However, what has not yet been established is whether it *ever* had an effect. Analysis in chapter VII showed that at least for social leisure activities, the interview year had a much stronger impact on the predicting model for retirees than for the sample of 40- to 85-year-olds as a whole, suggesting that retirees are catching up on younger adults in their engagement in the social status of friend.

To test this, the models for the retirement influences discussed above were rerun for the 1996 data. The 1996 and 2008 samples still have many overlapping cohorts, so this is not an ideal empirical test for Schulze's theory of cohort based value change. Still, in the 1996 data, only the youngest retirees (women born in 1936 were just retiring in 1996) grew up in a society with consumption oriented youth-cultures. If Schulze's theory were right that a) there is a shift in value-orientation occurring (as discussed, he is by far not alone with that claim) and b) that this shift is not a period but a cohort effect, the likely outcome of re-running the model of volunteering based on the 1996 cross-sectional data would be the discovery of a significant difference between people in the employment market and retirees. In the 1996 sample of the GEAS this effect could not be found.

Two interpretations of this result present themselves:

- 1) On the one hand, it could be that implicitly made assumptions about the life of retirees have always been wrong. Perhaps they were more fuelled by generational differences in lifestyles that made older adults' activities look too old-fashioned and unexciting to be regarded as active lifestyle to the younger. Perhaps older adults'

conservative views appeared too much in the way of the growth and evolution of the local community and wider society to be fully valued.

- 2) On the other hand, Schulze may well simply underestimate the sway of consumer culture. The differences between Eastern and Western Germany suggest that culturally-determined value orientations cannot be wiped out within ten or twenty years, but the rise of volunteer numbers and the increase of the average friend score observed in all cohorts shows that whatever it is that affects this change exerts its influence throughout the whole population. It can therefore not be a pure cohort effect but likely both a cohort effect and a period effect.

Schulze's idea is that cohorts who grew up after the Second World War in the German *Wirtschaftswunder* (the time of rapid economic growth and prosperity in the 1950s and 1960s) are unfamiliar with material worries and instead formed a new set of values based on a greater focus on their personal happiness and on rich experiences. With near *Vollbeschäftigung* (full employment) the cohorts being teens and young adults in that time were entirely free of worries about scratching a living. Had the unemployment rate been at 11% in 1950, the first post-war-year for which it is available, it had dropped to the all-time low of 0.7% in 1962, which it held with minor variations until the mid-1970s. At the same time, Germans grew more mobile, both geographically and socially: the number of automobiles rose from 4.5 million in 1960 to nearly 18 million in 1975 and to over 23 million five years later (Kraftfahrt-Bundesamt 2015). With workers being sparse, new career opportunities opened up for people who would not have been as successful in a more competitive job market. It was thus possible for (especially Western) Germans to move out of the closely-knit social network with clear social hierarchies they grew up in and instead build up a new life with self-determined relationships, rather than pre-determined ones. Today, communication is no longer restricted to face-to-face interaction and an occasional letter but can bridge thousands of miles in seconds. It is not even limited by such requirements as making someone's physical acquaintance first. Poverty has been relativised: as long as they conform to the clearly set out societal rules, everyone will receive financial support sufficient to rent living space, buy clothing and food and a little bit extra – everyone can afford some choice of lifestyle. It thus stands to reason that such all of the German society to some degree profit from and participate in these new developments,

even if early socialisation does create some differences between cohorts and Eastern- and Western Germans.

IX. Conclusion

In social gerontology, it has long been recognised that old age is undergoing a process of change. Terms such as ‘the young old’ or the differentiation between ‘third agers’ and ‘fourth agers’ reflect academia’s attempts to adapt its theoretical base accordingly.

In light of the shift in and diversification of lifestyles in later life, two central questions have been raised in this study:

1. Does this shift in lifestyles lead to a change in the social statuses attained by older adults?
2. Does retirement as key event in later life and outer sign of the transition into ‘old age’ have an impact on these social statuses?

The answers to these questions are important contributions to overcoming well-established but obsolete patterns of thinking. They show that policy makers’ focus on work-life-related measures does not reflect the social reality of a growing number of people whose lives are organised around completely different values.

Following the assumption that there is no qualitative difference in the social behaviour between middle-aged and ‘older’ adults, the empirical results of this study have been interpreted using Gerhard Schulze’s ideas of a general shift of German society towards an experience-driven lifestyle.

IX.1 Summary of the findings

IX.1.1 The development of social statuses: an indication of the changing nature of later life in Germany

According to Gerhard Schulze (2005), there is a shift in the manner in which Germans socialise from intergenerational to peer relationships, or put differently, from vertical to horizontal relationships. An underlying assumption is that in the past, family ties were the key social relationships, whereas in the present, people choose who they spent their time with based on mutual interests, on similar lifestyles. The findings of this study support this theory.

Throughout all age groups, the number of people holding the four examined social statuses of volunteer, child carer, friend, and carer for adults has risen significantly from 1996 to 2008. Being social, being ‘active’ outside of one’s own home, has clearly gained in

importance. A differentiation has to be made, however, between self-chosen statuses and statuses that are a product of necessity: volunteering and spending time on leisure activities with friends, partners and relatives fall into the first category, the caring responsibilities into the latter (although especially looking after children that are not part of the family may well be a freely chosen pastime).

The only social status slightly losing significance over the course of the first three waves of the German Ageing Survey is that of the child carer (18.1% in 1996 and 14.7% in 2008 said they took care of children). It was shown that while the number of people with grandchildren did not drop significantly, the respondents' children (and thus also their potential grandchildren) tended to live further away from them in 2008 than they had in 1996. As a consequence, it was also shown that those people who did look after children were less likely to look after their own grandchildren but more likely to look after children from neighbours, friends and other people. People providing care for an adult maintained a steady share among the target population, but they on average invested less time in their care responsibilities.

The social statuses that are much more typically self-selected are, in contrast, on the rise. Volunteers increased their numbers from about one in ten in 1996 to one in four Germans over 50 years of age in 2008; the number of those not tending to their friendship status sank from one in five to less than one in six, and those tending to it very actively increased their number from one in four to almost one in three. While the time invested in volunteering was not captured by the survey, there was a recorded widening of the range of time invested in developing a friendship status.

A range of common theories around social roles and activity in later life have been discussed throughout this dissertation. Many of these seem to hold merit, even though some of them seem contradictory.

There is clear evidence in the data that having pursued an active lifestyle (here measured primarily as being involved in society through work) throughout their life course has a positive impact on a person's likelihood to invest time into the social statuses that are choice-based rather than obligatory. People who have never held a job are by far the least likely to hold a status as very active friend or as volunteer. They are, in fact, not as pronouncedly overrepresented amongst the caregivers as one might expect, given that choosing the person with no or low occupational commitments for the carer role is an

efficient way of allocating a family's resources. Job seekers have similarly high inactivity rates. The German Ageing Survey, however, did not provide sufficient information to investigate whether unemployment experience in the life course has effects reaching into retirement.

It was mentioned in the methods chapter that attempts to identify a clear pattern of social status acquisition through latent class analysis failed: there are no strong associations between the statuses of volunteer, care giver, child carer and friend that would lead to a set of groups in the population that lean towards specific social statuses. When taking into consideration the already discussed fact that two of the four statuses are often not chosen but are a matter of obligation, this stands to reason. There is, however, a broader pattern that supports the idea that social statuses are mutually enhancing. While the association between social statuses is weak, it is consistently positive: having obtained one social status makes a German more likely to also hold others. The only exception are people who invest a lot of time into caring for another adult person: their likeliness of investing much time into other social statuses is smaller than that of people who do not have a caring responsibility.

What these results suggest, is that family obligations are not neglected, as one might conclude from Schulze's theory. The decrease in childcare appears associated with outer circumstances of families living farther apart, and some people even seek to fill the space left by a lack of nearby grandchildren through caring for children of friends or neighbours. Caregiving may be better organised with the help of technology and external helpers, but the share of people taking on care responsibilities remains unchanged. The lifestyle-oriented activities, which were here measured through the volunteer and friendship status, are an addition, not a substitution.

IX.1.2 The impact of retirement

A core point in Schulze's theory is the shift from values that emphasise the importance of work as a means to support your family to an experience-driven lifestyle. The findings of the regression models built to identify the impact of retirement support this theory: the loss of the economic status had little to no impact on the respondents' uptake and maintenance of the social statuses.

Being retired (in contrast to various statuses in the employment market) was not found to have any significant impact on the likeliness to volunteer. The model did suggest an effect of being in the 76- to 85-year-old age group, which may support Schulze's claim of a

gradual shift in value orientation and resulting behaviour by cohorts which started with the cohorts born after WWII.

For the friendship status, retirement clearly had a positive impact. It can only be assumed that this is connected to the freeing up of time resources. In face of the question why volunteer numbers then did not rise in presence of a retiree status, it can be suggested that the incentive to volunteer for people in the job market because 'it looks good on the CV' is no longer relevant. One can also point to research that suggests that volunteering is an activity pursued because of positive experience with it in the life course. Findings from the panel sample that half of the Germans volunteering in retirement were continuing engagement already commenced during their work life offer some support for this.

These results allow the conclusion that retirement as an event does not trigger an adjustment of the value orientation of adults in light of their progressing age and towards a perceived change in their social position. If at all, they intensify their engagement in already obtained social statuses. This conclusion of a lack of an impact of the retirement-experience is supported by the analysis of the influence of retirement reasons on the likeliness to volunteer: none was found. The results of the same analysis for the friendship status were similar. If there had been a conflict between work life and family life that led to the decision to retire, this had a slightly positive effect on a person's likelihood to invest more time in the upkeep of their friendship status; all other reasons had no impact. To a noticeable but in the small sample insignificant level, the care of an ill person had the same impact. Both factors are largely based on a lack of the already mentioned time resource.

Overall, it can be confirmed for Germany what Hyde et al. had already found for the UK in 2004: retirement has long lost its significance as a point of transition in the life course that heavily influences a person's behaviour.

IX.1.3 Differences between Eastern and Western Germany

Schulze's work heavily draws upon the effect that living in consumer society has on individual value-orientation and self-identity, the building of social networks, and thus the social structure. It stands to reason that people having spent the majority of their lives in a different economic system, in which consumption was heavily restricted by a lack of product diversity and general availability, would not be joining in on this development to the same degree as those who have always lived in a consumption-oriented society or helped establish it. With the unique history of Germany, it was possible to explore this assumption.

Indeed, Eastern Germans are less likely to adopt either the volunteer or the friend status. Over the course of the survey, volunteer numbers in the East were consistently about half as high as they were in the West. For the friend status, the numbers have drawn closer together over the course of the survey: in 1996, Germans having mostly lived in the West throughout their lives were only 0.74 times as likely to be very inactive for this social status; in 2008 this number had increased to 0.93 times, to nearly identical levels. Conversely, Eastern Germans were merely 0.55 times as likely as Western Germans in 1996 to be a very active friend. This rate had increased to 0.68 in 2008.

IX.2 Contribution, limitations and suggestions for further research

This study set out to explore later life from the perspective of social change. Being often perceived as data rich but theory poor, social gerontology has taken note of the changes in overall life expectancy and in healthy life expectancy, and it has also to some degree acknowledged the heterogeneity of later life by distinguishing third-agers and fourth-agers, the 'young old' and the frail old. However, heterogeneity amongst the older adults is much more complex than that, and this complexity is still researched too little.

Here, Gerhard Schulze's cultural-sociological theory of a societal value shift is introduced to explore how cultural values influence the social statuses in later life. Older adults are still too often viewed as one mass about which one can make generalised statements based on their health, income, marital status etc. Apart from the occasional qualitative project capturing life course influences, the socio-cultural context receives no attention.

While this study draws upon Schulze's theory to suggest a possible interpretation of its findings, it is not an attempt to operationalise the theory itself. This is partly caused by a lack of suitable value indicators that have been part of the questionnaire throughout the waves of the GEAS⁵⁵. Were the focus of this study on examining value orientations in detail, such analysis would require deeper reflection on the most suitable theory of cultural values – Schulze throws a comparatively small light when regarded next to Schwartz, Hofstede, Triandis, Inglehart, or GLOBE (Schwartz 2011).

⁵⁵ Value question batteries are present, but they have been varied over the years, dropping some, adding others, and then dropping these again. One suitable battery of value-related question items may be that based on Shalom Schwartz' work, which, however, was only introduced in 2008, thus allowing for cross-sectional but not for longitudinal analysis. Thus cohort differences might be discovered, but period and age effects might lead to a distorted picture if they cannot be controlled for in the model.

The primary contribution of this study lies in questioning the prevalent practice in academia and social policy to treat older adults as distinct and potentially problem-causing part of the population. Although many studies have discussed the diversification of the life-course (e.g. Tanaka et al. 2013, Komp and Johansson 2015), the idea of fixed life stages still underlies most research projects, perhaps not least of all because it is the foundation of the discipline of gerontology and much of its funding is based on the perceived risks associated with 'old age'. This study shows the similarities between the social statuses adopted by working and retired adults, and it found no relevant impact of the retirement process on people's likeliness of engaging in these. It thus argues against the established practice of looking at specific age groups by providing empirical evidence against the underlying assumption that different age groups are associated with different behaviours and interests and against the assumption that retirement as the change of the economic activity status is a central life transition.

It is not denied that with advancing age, certain health risks grow. However, they also affect younger adults, even if to a lesser degree, and it is thus proposed here to not introduce an arbitrary age line when looking at a specific issue but define the target population by the issue itself.

Many research projects could be conducted following this theoretical perspective. For example, it would be useful to explore the various social milieus in later life and how these affect a variety of key questions in social gerontology from volunteering levels to care needs. Perhaps some of these analyses have even already been conducted by the Sinus Institute for a private contractor, but they are not part of the academic knowledge pool.

Additionally, a rather rough, summarising operationalisation of the four social statuses was utilised here. It would stand to reason that people who are experience-focused lean to different social and volunteering activities than people with a strong sense of duty, a dedication to doing what needs to be taken care of. Results of analysis of what leisure time activities and volunteering opportunities the different cohorts are attracted to should thus be included in our understanding of the social changes in later life.

If Schulze is correct in his observation that experience-orientation develops out of a feeling of economic safety and a rich consumer culture, it would be worthwhile to explore how the recent recession and banking crises in many countries has affected this trend. In general one might expect to find differences in this development even between European

countries based on their differing histories of economic development and stability after WWII – here Germany (and even more so its Western parts) paradoxically stands out on the positive end of the spectrum.

When looking at social statuses, it matters not only if they are obtained but also how much time is invested into these. Due to issues with some of the indicators in the GEAS, it was only possible to look at two social statuses in light of the time invested into them: caregiver and friend. These showed how important this perspective is: caregiver numbers were stable, yet their time investment decreased between 1996 and 2008. It was not only found that more people take up what is here referred to as the friendship status by spending time with peers and relatives, but it was also shown that more people invested high amounts of time into these activities and that the most active in this area were more active in 2008 than the most active in 1996.

It would therefore be just as necessary to look at the time invested for child carers and volunteers and consider these in the overall picture.

In his research on family caregiving in the USA, Alex Janus (2015) made similar observations of caregiver numbers remaining constant but caregiving hours decreasing. He explored a variety of explanations, with use of technological help for care amongst them, but it might be suggested that this area could also be explored in the light of value change (beyond the usual frame of family values).

Caregiving is also an area in which the GEAS has measurement issues, as previously discussed. Especially amongst cohabiting older adults it needs to be considered that caregiving is not one-dimensional, flowing from the giver to the receiver, but that people may hold both statuses: that of the giver and the receiver.

A further aspect of Schulze's theory that this study was unable to devote much attention to is his claim that the same societal developments that brought about the shift in value orientations also led to a reorientation in personal relationships, from pre-determined, often intergenerational relationships to self-determined peer relationships. With the help of longitudinal data on the composition of social networks and frequency of spending time with people in these social networks future research could examine these claims. A qualitative study could look at the dynamics in social networks and how these relate to taking up specific social statuses. These may differ noticeably between social milieus.

Later life in Germany has undergone drastic change. Was it once family-centred as well as focussed on the maintenance of personal home and garden, these activities have now been joined by more experience-driven activities outside of the home, such as volunteering, going out with friends or pursuing late life education. Even post-retirement work-commitments are becoming more common again. This drive to more activity and a wider social network is a population-wide trend and shows that more attention should be paid to wider cultural developments in social gerontology.

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Appendix

Table 26: Binary Logistic Regression Model of being a volunteer (only retirees)

	Exp(B)	B	Std. Error
Has partner? (ref: no)	1.42**	.349	.12
Gender (ref: male)	.77*	-.268	.10
Place of residence before reunification (ref: Western Germany)			
GDR	.50***	-.698	.12
Abroad	.09	-2.449	.82
Self-assessed Health (ref: very good)			
Good	.78	-.251	.16
Fair	.71*	-.350	.17
Bad	.37***	-1.004	.22
Very bad	.14***	-1.940	.51
Age	.97***	-.032	.01
Level of education (ref: low)			
Medium	2.22***	.806	.17
Sophisticated ⁵⁶	2.57***	.944	.21
High	4.44***	1.492	.19
Year (ref: 1996)			
2002	1.227	.205	.131
2008	1.887***	.635	.110
Constant	.578	-.548	.508
Nagelkerke R²/McFadden's adjusted R²		.13/.08	
Hosmer & Lemeshow Test Sig.		.41	

Data source: GEAS 1996-2008, pooled cross-sectional data. *** p<0.001, **p<0.01, *p<0.05. N=6679 (90 missing).

⁵⁶ The 4 levels of education were predefined by the GEAS and refer to the highest level of vocational training. No qualification and unknown qualification were labelled as 'low education'. Apprenticeships and equivalent schooling were labelled as 'medium' level of education; people who had gone on to take advanced training for managerial positions (Fachschule), which also includes the German 'Handwerksmeister' (master craftsman) were deemed 'sophisticated'. Level 4 captures people with university education.

Table 27: Linear Regression Model of the impact of the interview year on the likeliness of being a 'friend' (only retirees)

		Unstandardized Coefficients		VIF
		B	Std. Error	
(Constant)		11.32***	.83	
Age in years		-.11***	.01	1.09
Female		1.43***	.15	1.23
Has partner?		2.15***	.16	1.18
Predominantly lived in GDR		-1.44***	.17	1.04
Predominantly lived abroad		-1.73***	.46	1.02
Health (reference: very good)	Good	.31	4.97	2.64
	Fair	.32***	5.08	2.60
	Bad	.35***	3.07	1.64
	Very bad	.47***	1.63	1.21
Education (reference: low)	Middle	.19***	1.88	1.59
	Sophisticated	.28***	1.51	1.62
	High	.26***	1.71	1.34
Interview year (reference: 1996)	2002	.19***	1.38	2.74
	2008	.16***	1.41	1.17

Data source: GEAS 1996-2008, pooled cross-sectional data. *** p<0.001, **p<0.01, *p<0.05.
Dependent variable: friendship score on a scale from 0 to 45.

Table 28: Binary logistic model of volunteering (0=not volunteer, 1=volunteer) based on full sample and biased sample

	Block 1a: reduced sample Exp(B)	Block 1b: full sample Exp (B)
Gender: female	.79	.73
Residence before reunification (ref: Western Germany)		
GDR	.40**	.50**
Age group (ref: 56-65)		
40-55	not in sample	1.09
66-68	1.03	1.00
69-75	.91	.96
76+	.31	.21
Level of education (ref: low)		
medium	4.48	6.89*
sophisticated	6.36	10.00*
high	6.54	11.02*
More than 200% of average equivalent income?	1.71	1.86*
Constant	.07*	.04**
Block Sig.	.002	.000
Nagelkerke R ²	.08	.08
Sample size (missing cases)	550 (6.7% missing)	831 (8.1% missing)

Data source: GEAS 1996-2011, panel of people first interviewed in 1996.

*** p<0.001, **p<0.01, *p<0.05.

Declaration

This thesis has been composed by me, Anna Schneider (born 19.03.1985). It is entirely my own work. Where I draw upon other people's research, the relevant publications have been cited.

This research has not been submitted for any other degree or professional qualification.