



# The role of personality for subjective well-being in the retirement transition – Comparing variable- and person-oriented models



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## ABSTRACT

In this study we investigated the role of personality for wellbeing in the retirement transition. In a sample of Swedish older adults ( $N = 2,797$ ) around retirement age (60–66), included in the Health, Aging and Retirement Transitions in Sweden (HEARTS) study, we tested if personality types and/or traits moderated the effect of retirement on change in subjective well-being across one year. We identified four personality types in a latent profile analysis. Using latent change score models, we found that those who retired between assessments showed stronger increases in subjective well-being compared to those not retiring. For one group with low openness, agreeableness, extraversion and conscientiousness, but high neuroticism, retirement was associated with a decrease in well-being. When only personality traits were included, we found a moderating effect of agreeableness so that high scores on agreeableness enhanced the increases in well-being after retirement. The results are compared and discussed in the light of research on personality and retirement.

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## 1. Introduction

### 1.1. Well-being in the transition to retirement

Retirement is an important event and often marks the transition into a new life phase with new roles, expectations, challenges and opportunities. Older theories of aging have implied that retirement represents a threat to the individual; losing the work place and thus the work role should harm individual well-being (George & Maddox, 1977). In contrast, current research shows that retirement does not have a negative impact on most people's well-being (Henning, Lindwall, & Johansson, 2016). According to recent approaches to retirement adaptation (e.g. Wang, Henkens, & van Solinge, 2011), the transition is an ambiguous event that is variously experienced. While most people do not experience substantial changes in well-being after retirement, subgroups seem to benefit or suffer from retiring (Pinquart & Schindler, 2007; Wang, 2007). Many moderators of the effect of retirement on well-being have been identified (Henning et al., 2016).

While much research has concentrated on predictors of well-being after retirement on the macro or job level, less is known about the individual level, particularly psychological factors. However, perceived control (Kim & Moen, 2002), and adjustment style (Kubicek, Korunka, Raymo, & Hoonakker, 2011) have been found to predict better well-being after retirement.

### 1.2. Personality in the retirement transition

Personality is so far one overlooked potential predictor of well-being after retirement. In general, there is some support for the idea that personality traits moderate the impact of life events, even though there are no clear patterns established (Boyce & Wood, 2011; Boyce, Wood, & Brown, 2010; Pai & Carr, 2010; Spinhoven et al., 2011; Yap, Anusic, & Lucas, 2012). Reis and Pushkar Gold (1993) argue that personality plays a crucial role in shaping post-retirement lifestyle and individual coping with the changing environment. Their model is based on the “Big Five” neuroticism, extraversion, openness, agreeableness and conscientiousness (Goldberg, 1993).

There are two general pathways how personality can moderate the effect of retirement. First, personality might directly affect the way people respond to the “task” of retirement adaptation, which is their way of coping with losses, using new chances, and finding new roles. Reis and Pushkar Gold (1993) assume that extraversion might help individuals to be more active during the retirement transition, find it easier to establish new friendships, deal with retirement-related institutions and persons, and view the whole retirement experience more positively. Conscientiousness should be related to more effective coping with age- and retirement related problems. Openness should ease to establish new meaningful activities, and agreeableness should facilitate new friendships. Neurotic retirees should tend to have difficulties coping with problems, view retirement itself as more negative, be self-focused and have a negative self-view.

Second, there is an indirect pathway: Throughout the life-course, cumulatively, personality traits influence (increase or decrease), the total

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resources a person has, and thus also influence the situation people find themselves in when facing retirement. Support for this idea comes from studies relating personality to financial preparedness (Hershey & Mowen, 2000), reasons for retirement (Robinson, Demetre, & Corney, 2010) and the need for disability pension (Blekesaune & Skirbekk, 2012). Reis and Pushkar Gold (1993) assume that extraverted retirees should have more social support during the transition, conscientious retirees should be healthier and well-prepared for retirement, and neurotic retirees should be less prepared and have less social support.

The role of personality for retirement adjustment has received surprisingly little attention in previous research. Cross-sectional studies show associations of Big Five personality traits with life satisfaction and retirement experiences (Robinson et al., 2010), respectively retirement satisfaction and activity in retirement (Löckenhoff, Terracciano, & Costa, 2009). But, these cross-sectional results leave us uncertain about the direction of these effects – people with certain personality traits might have been more satisfied all their lives, or personality might have changed in response to retirement (Löckenhoff et al., 2009; Specht, Egloff, & Schmukle, 2011). Prospective studies are thus needed to examine if personality might ease or hamper the transition. To our knowledge, only one study has examined this research question so far. Using data from the British household panel survey, Kesavayuth, Rosenman, and Zikos (2016) found in female retirees high conscientiousness to be associated with worse outcomes after retirement, and high openness to be associated with better outcomes; but no significant effects in male retirees. Their results regarding conscientiousness are in contrast to the model by Reis and Pushkar Gold (1993) mentioned above. The authors do not offer a potential explanation for their findings; however, the findings correspond to the results from another study that found conscientiousness to be related to specific drops in life satisfaction after job loss (Boyce et al., 2010). The authors of this study argue that conscientious people might experience a particular bond to the work role and to the need to achieve success, which might also be a problem in retirement.

### 1.3. From personality trait to personality type

Researchers have not only focused on the impact of single traits, but also on the interaction of traits. The individual effect of one personality trait might vary, depending on other personality traits. A focus on interactions highlights that personality represents not only distinct and unrelated traits. Interactions of personality traits have been found to predict for example anger (Pease & Lewis, 2015), distress (Bardi & Ryff, 2007) or cultural intelligence (Li, Mobley, & Kelly, 2006). Using three-, four- or even five-way interactions (e.g. Pease & Lewis, 2015) with regard to the Big Five, however, tends to produce very complex patterns, often hard to detect statistically and difficult to interpret in a meaningful way. A more direct approach is offered by the identification of personality types, defined as groups of people with prototypic patterns of covariation among personality traits; i.e. subgroups of people scoring similarly on a number of specific personality traits (see Donnellan & Robins, 2010; for a review).

Different person-oriented analytical approaches can be used in identifying specific and common “types” of personality based on similar trait scores (Specht, Luhmann, & Geiser, 2014). While the aim of factor analysis is to identify items that people commonly score similarly on (variable-centered), these techniques are instead designed to identify related groups of persons that score similarly on specific items (person-centered, see e.g. Bergman & Andersson, 2000; Bergman & Magnusson, 1997). Authors of recent studies mostly use latent profile analysis (Marsh, Lüdtke, Trautwein, & Morin, 2009).

Personality types, derived from latent profile analysis, have been proven helpful in recent studies in predicting for example psychological health in students (Merz & Roesch, 2011), or drinking behavior in younger adults (Zhang, Bray, Zhang, & Lanza, 2015). Number and characteristics of personality types vary between studies, but many studies often

tend to find three groups (see e.g. Specht et al., 2014), already established in earlier decades (e.g. Block, 1971; Robins, John, Caspi, Moffitt, & Stouthamer-Loeber, 1996): “resilients”, “undercontrollers”, and “overcontrollers”. The group characteristics differ between studies, but show similar patterns. Resilients are often described by particularly low scores on neuroticism and high scores on the other traits (Robins et al., 1996; Specht et al., 2014). Undercontrollers often score low on openness, conscientiousness and agreeableness (Dubas, Gerris, Janssens, & Vermulst, 2002; Klimstra, Hale, Raaijmakers, Branje, & Meeus, 2010), and overcontrollers score low on extraversion, but high on neuroticism (Asendorpf, Borkenau, Ostendorf, & van Aken, 2001; Klimstra et al., 2010). Resilients experience favorable outcomes in most studies, while over- and undercontrollers show differential negative effects (e.g. Steca, Alessandri, & Caprara, 2010).

To our knowledge there is no study so far that has examined the role of personality profiles in the adaptation to retirement.

### 1.4. Research questions

In the present study, we investigate the role of personality for well-being in the retirement transition phase. We compare the traditional, trait-focused models of personality with person-oriented personality types, using two waves of a Swedish longitudinal study on retirement and aging. The following research questions are addressed:

- Does retirement influence within-person change in well-being across one year?
- Can distinct personality types based on the Big Five personality traits be identified?
- What effect do personality types and traits have on the association between retirement and change in well-being?

## 2. Material and methods

### 2.1. Sample

Data was drawn from the first two annual waves of the Swedish HEARTS (Health, Aging, and Retirement Transitions in Sweden) study, which is a longitudinal study specifically designed to examine adaptation processes, as well as change and continuity in psychological health during the pre- and post-retirement years.

HEARTS started in spring 2015 when a nationally representative sample of people aged 60–66 ( $N = 15,000$ ) was drawn from the national registry. The study is mainly conducted as a web-survey, using the internet test platform “Qualtrics”. A paper-pencil version of the survey was offered in the second and final reminder. The HEARTS survey includes questions on socio-demographics, work life and retirement, health, lifestyle, well-being, social relations and personality. 5,913 individuals (~40%) participated in the first wave (69% web, 31% paper-pencil). Wave 2 was conducted in spring 2016. 4,651 (78.7%) participated in the follow-up.

For the present analyses, we selected only those participants who were not retired in 2015, resulting in a subsample of 3,792 participants. We included all participants who worked at the first time point, and not only those retiring. This was done purposely to be able to understand whether personality traits or types moderate the effect of retirement. In a study with only those retiring between waves, we would not know if the effects of personality on change in well-being are restricted to the retirement transition, or if these are other differences and changes.

We excluded participants being unemployed or on sick leave in 2015 ( $n = 653$ ), as we know that the retirement transition of unemployed people differs from the one of employed people (Wetzel, Huxhold, & Tesch-Römer, 2015). This resulted in a subsample of  $n = 3,139$ . For the analyses we selected only those  $n = 2,797$  for whom we had enough information on the personality subscales for the latent profile analysis.

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