A Decade of Change and Continuity in Midlife

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By

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PREFACE

In this book we look at change and continuity over a ten-year period in the lives of a group of middle age adults. We look at events that they experienced and how these events impacted their lives. We look at their views of life including their values and leisure perceptions, as well as their perceptions of life structure—the extent to which they believed they were reassessing or building on their previously made life priorities. Most important, we examine the interlocking threads of these elements. We look at differences between individuals, but also differences in individuals' experiences over time. And, we examine why these differences appear.

Our work is based on a unique data set chronicling human development in midlife that Dr. Carpenter conceived and directed beginning in the late 1980s: *A Study of Leisure during Adulthood (ASOLDA)*. *ASOLDA* was a ten-year longitudinal study that developed and evolved from her scholarly interests that met at the intersection of human development and leisure. On the bulletin board in her faculty office at the University of Oregon, she posted: "This work is important because it is attempting to demonstrate how the adult life experience might be more fully explained when leisure is introduced in a serious and thorough manner. In doing so, we enhance our understanding of leisure and the role it plays during midlife development." Perhaps a bold statement at the time, this mantra helped initiate and motivate this long-term study. Moreover, now, many years later, we can see how the essential tenets of the statement were supported. The data that we report in this book provide valuable insights into adult development and the ways that leisure is an important contributor to how people interpret and handle the ups and downs of their lives.

As a university professor, Dr. Carpenter was fully immersed in teaching courses that covered social-psychological aspects related to leisure behavior that were required of university students preparing to facilitate leisure experiences and manage recreation, leisure, and arts organizations. The courses included content related to human development. But, as in other academic disciplines, more was known about experiences during childhood and youth than adulthood. Thus professors could only speculate on how the existing age-related knowledge would transfer to adult populations. Clearly more data were needed.

As time passed, leisure scholarship expanded to encompass studies of motivations and benefits of leisure across the lifespan, including middle adulthood. Theoretical writings and research broadened conceptualizations of leisure, showing that leisure, in and of itself, was a value and that this value was related to behaviors. At the same time, Dr. Carpenter noted that empirical knowledge of leisure and the leisure experience in the field of adult development was limited. Often adult and developmental theorists, including those whose work provided important foundations for this study, reported leisure as simply involving recreational activity or free time. They rarely examined the *meaning* or *values* associated with leisure. As a result Dr. Carpenter concluded that scholars needed to know much more about midlife development and leisure, broadly defined—not just as time and activities but encompassing leisure values, perspectives, and meanings.

She also realized that a great deal of the existing literature on adult development focused on normative life patterns. Stages and transitions described in theoretical writings usually dealt with "typical" life patterns. Much of the knowledge about adults involved married couples with children, grandchildren, and careers, looking at what was considered the traditional path through middle adulthood at the time. Dr. Carpenter wondered why midlife development studies rarely included adults living less traditional life patterns. She concluded that her study of adult development would need to be conceptualized within a theory that recognized non-traditional life patterns and would accommodate adult life patterns irrespective of predictable stages.

The first wave of data collection for *ASOLDA* occurred in the fall of 1987. Over the next ten years, a group of dedicated middle aged adults dutifully returned their questionnaires. About half of the participants also met with Dr. Carpenter for lengthy interviews in which they reflected upon their life views and experiences. Reflecting her concerns with the existing literature, Dr. Carpenter was careful to include indicators of leisure that looked at values and perspectives as well as behavior and time. In addition she recruited study participants who had chosen both traditional and non-traditional life patterns, including married couples but also those who were single and some who were not officially married but in committed relationships, including same-sex partnerships. The study participants also differed in age, with approximately equal numbers in the early, middle and later years of midlife.

As the data accumulated Dr. Carpenter began to publish articles and give research presentations based on the data, often focusing on case studies of the experiences of the study participants. In the early years of the study her interactions with doctoral students in the Leisure Studies and Services Department at the University of Oregon were especially important. The Department had a Social Psychology Research Interest group that met weekly to study and explore the body of knowledge about leisure as students sought to identify their own dissertation research interests. Those who were most drawn into concepts associated with *ASOLDA* included Brenda Robertson, Acadia University, Canada; Ian Patterson, University of Queensland, Australia; Barbara Delansky, Lane Community College, Oregon, USA; and Frank Hendrick, University of Oregon. These emerging scholars were instrumental in generating publications and presentations on longitudinal approaches in leisure research, leisure perceptions and preferences for midlife couples, and the importance of specific variables used in *ASOLDA* involving leisure attitudes, valuing leisure, and perceived freedom in leisure. As time went on, Dr. Carpenter also worked with a number of established leisure researchers, all distinguished scholars at their respective universities. These interactions yielded essential contributions to managing longitudinal data (Bryan Smale, University of Waterloo, Canada) and generating journal publications (Drs. Robertson, Patterson, Delansky, and Susan Murray, University of Wisconsin-LaCrosse, USA; Megan Janke, University of South Florida and now at East Carolina University, USA; Laura Payne, University of Illinois, USA; and L. R. Kahle, University of Oregon and Pace University, USA) and symposia papers (with Smale and Peter Morden, Concordia University, Canada; Ian Patterson, University of Queensland, Australia).

Dr. Stockard, the co-author of this book, and Dr. Carpenter were colleagues at the University of Oregon. Although we taught in different areas of the University we shared many conversations over coffee through the years. As a quantitative sociologist Dr. Stockard became increasingly fascinated by the vast potential of the *ASOLDA* data set. Thus, when we began to retire from full-time teaching, our conversations over coffee shifted to ways that we might collaborate in exploring our many questions about values and experiences of middle age adults. Our twenty-year journey of coffee, conversations, and collaborations culminated in our most exciting and rewarding experience with *ASOLDA* yet—the writing of this book with Cambridge Scholars Publishing.

The first two chapters of this book provide an overview of *ASOLDA*, the context in which it was conducted and the research design used to examine change and continuity in values and life perceptions of middle aged adults over time. We begin in Chapter One by exploring the importance of studying midlife within a context of human development theory. We identify developmental theorists, concepts, and key research findings that contributed to our understanding of adult development during middle age at the time that the study began. Chapter Two describes the research design, instrumentation, and procedures of data collection and analysis. We have tried to write this description for the general reader, placing technical discussions and extended information in an Appendix.

The next three chapters summarize our research findings. In our analysis we used multivariate statistical techniques especially suited for longitudinal data as well as qualitative techniques to examine the lives of twelve study participants. We also include, albeit briefly, discussions of how our findings relate to theoretical views of midlife development that became more prominent after *ASOLDA* began. We were especially interested in change and continuity in individuals' views and experiences over time, or intra-individual variation; as well as differences between individuals, or inter-individual variation.

In Chapter Three we examine change and continuity in our participants' life views: their general values and their leisure perceptions and experiences including the ways in which these views were, or were not, related to status characteristics such as gender, marital or partnered status, and age. Chapter Four looks at our participants' life events over the decade. We examine the types of events they experienced, the impact these experiences had on their lives, and the ways in which they were related to their life views. Chapter Five examines the trajectory, or pattern, of our participants' lives in more detail. We look for trends in the impact of their life events, examining factors that might be related to increasingly positive or negative experiences. We also look at change and continuity in their assessments of their unique life structure, the extent to which they were either reassessing or reaffirming various aspects of their lives, and how these perceptions of life structure were related (or not related) to status characteristics, life views, and life experiences.

In the concluding chapters, we step back to reflect upon our findings. Over the decade of the study, all of the participants reported life events that were more or less difficult or rewarding. But the impact of these events was

stronger for some participants than others. Moreover, the same type of experience might be more difficult for individual participants in some years than in others. One of the most consistent, and important, influences on the ways that individuals handled events involved the extent to which an event was expected as part of the aging process. Another was their views of life, and, especially, their perceptions of leisure. In Chapter Six we summarize these, and other, results and discuss their implications for theoretical understandings of adult development, for future research with adult populations, and for all of us who have experienced or will experience middle age.

Midway through writing this book we began to wonder what *ASOLDA* participants thought about their involvement in the study and their experiences after data collection ended. We decided that we needed to include an "epilogue" in which, as in books and plays, the main characters get the *last word* about what happened. In this decision we were inspired by the remarkable story of the Delany sisters in their book, *Having Our Say,* in which they recalled their 100-plus years of life (Delany and Delany 1993). While none of our participants are centenarians, all of them are now in their late 60s or older, and we felt it important to allow them to tell us what happened after our study ended and their insights about the work. Their reflections are in Chapter Seven.

We include two appendices. Appendix A will be most useful to those who want to study adult development. It includes material used in our surveys and interviews, citations to scholarly articles and presentations that used the *ASOLDA* data, and reflections of scholars, mentioned above, who collaborated with Dr. Carpenter over the years. These reflections provide important insights into the importance of longitudinal studies of adult development, leisure behavior, and life values that we hope are closely examined by future researchers. Appendix B includes information on our analysis that may be of special interest to researchers, providing details not included in Chapter Two and complete statistical results for the analyses summarized in Chapters Three through Five.

In addition to the collaborators noted above, we would like to acknowledge and thank two people who were especially important in the completion of this project. We are grateful to Adam Rummens, Commissioning Assistant at Cambridge Scholars Publishing, for gently encouraging us to move forward with this book. After ten years of retirement from teaching, we thought we were through generating publications using *ASOLDA* data.

However, Adam's interest in our work, and the fact that we enjoyed exploring the data, prompted us to pursue this project, and we are very glad that we did. We also thank Susan Quash-Mah, Ph.D., for her invaluable and highly skilled editorial assistance in the later stages of this project. At the same time we must stress that any errors in this book and all opinions are solely our own responsibility.

In closing, we want to express our gratefulness to all of the middle aged adults who faithfully returned their questionnaire surveys to us every year and to those who agreed to extensive interviews regarding their perceptions. The commitment demonstrated by the participants was indeed heart-warming. At the start of the study, we believed most would soon drop out, but the vast majority persisted throughout the ten-year period. As will become clear in the chapters that follow, they were all leading very full lives. Their midlife years were not uneventful or static, but instead embodied change and reflections upon life. We very much thank the participants for sharing their perceptions and reflections regarding their midlife values, joys, and disappointments.

We hope that this book will be read by scholars interested in midlife, adult development, and leisure including gerontologists, leisure scholars, and other social scientists, as well as their students. We also hope that those who find themselves with a copy of our book find a passion for understanding the multiple aspects of aging such as those uncovered in our analysis. To you the reader, whether you are not *there* yet, are in the middle of *there* now*,* or you have already been *there,* we sincerely hope that you will enjoy your journey through middle age with our *ASOLDA* study participants.

CHAPTER ONE

HUMAN DEVELOPMENT IN MIDLIFE: SCHOLARLY VIEWS THAT INSPIRED THE STUDY

The twentieth century was an active time for researchers exploring human growth and development. Although scholars examined all ages, from infancy and childhood through old age, the most in-depth analyses in the early years of the century focused on childhood and youth, times of rapid physical growth and mental development. While this emphasis remained through most of the century, over time researchers also turned their attention to older adults, often looking at processes of physical and mental decline. But, human development researchers initially showed far less interest in middle adulthood—the years between youth and old age.

One frequently implied reason for the lack of interest in human development during middle adulthood was that, when compared to other periods in the life span, and particularly childhood and old age, there was little evidence of physical, mental, or emotional development. In addition, the time span for studies of children and youth (ages 2 to 17) and older adults (ages 65 and older) was relatively short, encompassing ten-year to fifteen-year intervals. Midlife lasts thirty and more years, roughly ages 30 to 64, requiring twice the time to study.

By the 1970s interest in human development during the middle years began to increase and empirically-based studies began to be published. By the early and mid-1980s, interest in middle adulthood was also apparent in the popular press. Midlife stage theories that tended to "bag and tag" various facets of midlife in predetermined and often age-related categories were common. The term "midlife crisis" entered the lexicon as books describing this supposed phenomenon began to appear (Fried 1967; Mayer 1978). The titles of popular books regarding midlife illustrate the themes used to characterize the ways in which people dealt with this period in life:

Wonderful Time (LeShan 1973), *Women of a Certain Age* (Rubin 1979), and *Men in the Middle* (Filene 1981).

These historical trends in interest in and the study of human development paralleled demographic patterns in the age structure of the society. Through the early years of the twentieth century the society was young, with proportionately more children and youth. As the century progressed and life expectancy increased, the number of older people in the society also increased. By the last decades of the twentieth century those born in the post-World War II baby boom were starting to enter midlife. Just as the presence of the baby boom generation influenced many areas of social life, from schools to youth organizations to popular culture, it may well have influenced the intellectual interests of researchers and the general public.

As the body of theoretical literature regarding human development grew, empirical studies of change and continuity in midlife became more common. In addition, the literature regarding leisure grew dramatically and understandings of leisure became more nuanced and complex. Yet, there were few, if any studies that examined linkages between change and continuity in midlife and individuals' conceptions and experiences of leisure. Our study, entitled *A Study of Leisure during Adulthood* (*ASOLDA*), began in the mid-1980s and was designed to begin to fill that gap.

In the remainder of this chapter we describe the literature that informed our work and addressed our primary research interests involving midlife development, leisure, and life values. This review is selective and far from comprehensive. Instead, it is designed to illustrate the theories and approaches that influenced the conceptualization and design of our study at the time it began. We first review scholarly views of adult development commonly cited in the 1980s that helped inspire the project. We then briefly describe scholarly understandings of values, leisure, and life experiences that influenced the data that we gathered and our analysis.

Some Twentieth Century Theories of Adult Development

A number of social psychological theories of midlife development incorporate analyses of the life course and notions of individual change and continuity through time. We built our work on several theoretical traditions, including the historically important psychoanalytic approach, writings that

emphasized the role of social context and roles, stage theories, and the concept of life structure.

Psychoanalytic and Neo-Freudian Views

The founder of psychoanalysis, Sigmund Freud (1856-1939), emphasized personality development during childhood. He regarded adulthood as a time in which people re-enacted early unconscious conflicts rather than a time of further development (Levinson 1978b). In contrast, his one-time follower, Carl Jung (1875-1961), wrote about personality development and identity across the life span, founding a field called analytical psychology. Jung postulated that the life cycle comprised two stages with the first lasting until approximately age 40 when the individual eliminated the last remnants of childishness in finding solutions to earlier childhood experiences. During the second stage, the individual was involved in a process of inner growth and development that Jung called individuation. The aim of this process was one of self-realization and discovery of one's self (Bradbury 1975).

Erik Erikson (1902-1994) extended the broad psychoanalytic tradition and has been called the "father of adult development" (Dychtwald 1989). After the publication of his book, *Childhood and Society* (Erikson 1950), he turned his attention to development across the life cycle. He identified a sequential model that included eight stages of psychosocial human development. According to Erikson, certain psychological tasks must be resolved before an individual can move to the next stage. In resolving these "crises" the person addresses problematic issues in relation to the external world. Erikson's first five stages involved age segments from infancy to eighteen. The eighth stage focused on ages 65 and older, and as Erikson grew older himself, his later publications explored human development well beyond age 65 (Erikson 1959, 1967, 1982; Erikson, Erikson, and Kivnick 1987; Kivnick and Wells 2013).

Erikson's sixth and seventh stages intersect with the years of midlife. One, termed Intimacy vs. Isolation, was thought to occur between the ages of 18 and 40; and the other, Generativity vs. Stagnation, was thought to occur between the ages of 40 and 65. Erikson suggested that in the first of these stages people try to reach a balance between emotional closeness to others and separation. In the second they reach a balance between concern with establishing and guiding the next generation and self-indulgence or passivity. At various life stages individuals may deal with psychological crises associated with ego development that influence personal values,

motivations for behavior, patterns of life involvement, and the meanings, significance, and satisfactions derived from various activities including leisure (Osgood and Howe 1984).

Based on a large study of adults at different ages, the psychiatrist Roger Gould suggested that the crises described by Erikson could be seen as a continual process, rather than discrete stages that were firmly resolved before moving to the next. Gould found that while people in their 30s began to question their life course, these questions continued into the next decade when adults began to sense the finiteness of time and their lives. People in their mid- and late-40s in his study had begun to live with, or resolved, these questions, while those in their 50s showed more self-acceptance as well as greater intimacy with partners (Gould 1972, 1978).

The concept of adaptation was particularly important to our work and especially in understanding the ways that individuals reacted to the events encountered in their middle years. Adaptation has been defined as the process of adjusting oneself, both inwardly and outwardly, to new situations or environments. When people successfully adapt to life events they are more likely to be happy and satisfied with their lives (Atchley 1983, Pfeiffer 1977). The psychiatrist George Vaillant (born 1934), who built on Erikson's insights, suggested that ego defense mechanisms described in the psychoanalytic literature, such as projection, repression, and sublimation, provide the means of adaptation or the way that individuals work through the developmental crises described by Erikson. Vaillant based his conclusions on a longitudinal study of the mental health of a group of adult men in which he examined the way they altered themselves and the world around them in order to adapt to life. Those with the best outcomes regarded the midlife period from ages 35 to 49 as the happiest in their lives. Prior to this time period, they had worked hard to gain occupational prestige and devoted themselves to their families while tending to sacrifice play. To Vaillant, mental health, or the successful negotiation of developmental crises, results from adaptation (Vaillant 1977, 2002; Whitbourne 1986, 237).

Social Roles, Social Contexts, and Stage Theories

A variety of social scientists outside the psychoanalytic tradition also influenced the development of our study and, especially, our understandings of how human development occurs within, and is influenced by, social contexts, experiences, and roles. These authors generally avoided

psychoanalytic terms such as crises or defense mechanisms and instead described the ways that adults adapt to the experiences and expectations associated with social contexts and roles. In their views adults are continually influenced by their community environments, age-associated norms and expectations, their demographic characteristics, available opportunities and constraints, and the general pace of social change. They are also influenced by roles and expectations associated with their status in society and in their networks and social groups. Major changes that may occur during the middle years and require adaptation include change of job or career, divorce and remarriage, moving to a new dwelling, and the "empty nest" period when the youngest child leaves home. Any of these events could be viewed by an adult as a gain or a loss in that they were "shaped by both personal and situational influences" unique to the individual (Knox 1977, 548). People must inevitably make adjustments during midlife as they encounter changes in interpersonal relations, work, and other areas of life. At the same time, they may interpret and adapt to the experiences and tasks of middle age in different ways, in part because of differences in personality traits and orientations (Neugarten 1977). The paragraphs below summarize theories and studies from this tradition that were seminal in the original development of *ASOLDA*.

As interests in midlife adult development increased, theorists identified characteristics and tendencies that appeared to provide continuity across specific times and situations from year to year. At the same time, while de-emphasizing the concept of "crisis" used in the psychoanalytic tradition, they noted shifts throughout the adult life cycle in areas such as self-concept, decision-making, attitudes, moral development, and adaptation. Some of these scholars described stages of adaptation and development in midlife.

Robert Havighurst (1900-1991), for instance, identified six stages of life (infancy and early childhood, adolescence, early adulthood, middle adulthood, and later maturity) for his theory of growth and development. Each stage consists of developmental tasks that arise at a certain period of an individual's life. In his view of lifespan development, successful achievement of a task at one stage promotes happiness and successful achievement of later tasks, while failure would contribute to unhappiness in the individual, disapproval by society, and difficulty with later tasks. In Havighurst's view, middle age included seven tasks, or role responsibilities: achieving adult civic and social responsibility, establishing and maintaining an economic standard of living, assisting teenage children to become responsible and happy adults, developing adult leisure-time activities,

relating to one's spouse as a person, accepting and adjusting to the physiological changes of middle age, and adjusting to aging parents (Havighurst 1963, 1972).

While Havighurst delineated age-associated responsibilities for various life stages, Marjorie Lowenthal (1914-1992) and colleagues focused on transitions from one life stage to another, including middle age and pre-retirement, and the way that people adapt to these life changes. They found a period of relative stability prior to an event, followed by a period of anticipation prompted by the knowledge that an event would occur, the event taking place, then a somewhat disorganized period when individuals began to restructure their lives, and concluding in a post-event period of relative stability. They suggested that the types of concerns described by the psychoanalytic theorists, such as intimacy or generativity, could be involved in the ways individuals adapted to life transitions throughout adulthood and not just at certain ages. In addition, they stressed the ways in which these life transitions were influenced by status variables such as gender (Lowenthal, Thurnher, and Chiriboga 1975; Lowenthal and Weiss 1976).

Not all scholars who wrote about the life course embraced the notion of "stages," most notably, those writing from a sociological perspective. For instance, Bernice Neugarten (1916-2001) challenged age-specific assumptions and proposed a social-clock theory of the life cycle that involved three dimensions: life time, reflecting chronological age; social time, reflecting societal age-related norms and expectations; and historical time, reflecting the norms of a particular social system or historical era. Taken together these forms of time produce a system of age grading and age expectations that shape the life cycle. In Neugarten's view, the combined passage of life time, social time, and historical time produces a system of age norms that create a social clock that is superimposed upon the biological clock, producing orderly and sequential change in behavior and in self-perceptions throughout life (Neugarten 1968a, b; 1977, 633; Neugarten and Datan 1973).

Over her career Neugarten conducted a number of empirical studies and her insights from this work regarding the process of adaptation helped inform our analysis. Most important, Neugarten challenged the notion of human development as a series of "crises" that must be navigated to promote mental health and instead emphasized the strong influence of age-related norms and expectations. As she wrote,

> Adults carry around in their heads, whether or not they can easily verbalize it, a set of anticipations of the normal, expectable life cycle. They internalize expectations of the consensually validated sequences of major life events– not only what those events should be but when they should occur. They make plans, set goals, and reassess those goals along a time-line shaped by these expectations (Neugarten 1976, 18).

In numerous studies Neugarten showed that events of midlife such as menopause, children leaving home, or retirement from work were not reported as traumatic or producing anxiety or stress, except when such changes were somehow unexpected or unplanned. Similarly, widowhood and approaching death of oneself were found to be much more difficult when the events were unexpected and occurred at younger ages than would be predicted.

Levinson's Theory of Life Structure Development

As we began our study we believed that the research of Daniel Levinson (1920-1994) embodied the essential concepts described by other theorists. In his view, adult development has its own distinctive character and has to be studied in its own right, not simply as an extension of childhood or a prelude to old age. Levinson based his conclusions on extensive biographical interviews of men and women in a variety of occupations. From these interviews he identified a sequence of developmental periods in the adult life cycle. While these developmental periods have a certain form and degree of stability, Levinson stressed that what may appear to be a relatively stable time does not mean that it is stationary or static. Instead, it involves a continual development of the *life structure*, encompassing personality, occupational career, family, and all aspects of a person's life. At any given time, an individual's life structure has a unique pattern or design and, when examined, demonstrates continued growth and development throughout the life course. As adults' lives evolve, their life structures also evolve (Levinson 1978a,b, 1996).

Levinson identified three main aspects that make up an adult's life structure: 1) their socio-cultural world, such as their family, occupation, and religion; 2) personal aspects, involving their feelings, anxieties, and values; and 3) their experiences, involving relationships with others and social roles such as friend, spouse, or parent. At any point in time, adults are in a process of either reaffirming their present life structures or questioning their present life structures, processes he termed, respectively, "structure-building" and "structure-changing." When structure-building, adults are in the process of making key choices and decisions that maintain their present life structures.

In structure-changing, adults are in the process of reassessing their present life structures.

Whether adults make a transitional modification in their life structures is not particularly the point. Rather, the point is that the ongoing process of maintaining or questioning one's life structure that occurs during adulthood describes the essence of adult development. Evidence of structure-changing does not require an actual modification in one's life structure. Rather, evidence is reflected in the adult's act of reassessing or questioning. If a modification in the adult's life structure takes place as a result of this questioning, the individual reverts to structure-building as they are again in a process of reaffirming a revised life structure. Adults' life structures, then, are characterized by periods of relative stability and reaffirmation of previous choices and decisions, termed structure-building, and reassessment and change in personal choices and life decisions, structure-changing.

Levinson described the way in which the process of structure-changing can involve a transitional period. This period involves three tasks: termination of the existing life structure, individuation, and initiation of a new life structure. The tasks do not necessarily follow in order and are likely to be interwoven throughout the transitional period. The transitional periods could be midlife crises as described by other theorists. But Levinson's adult development theory of life structure is not defined solely in terms of specific life events such as marriage or retirement. Perhaps most important, he distinguished between developmental crises and adaptive crises, noting that they are qualitatively different. A stressful situation is more likely to produce an adaptive crisis if it occurs within a developmental period that is problematic in other ways. Likewise, the severity of a developmental crisis will be increased by a highly stressful event. Like other theorists, Levinson reaffirmed that negotiating through various stages was necessary and would occur, but that the prescribed means or timing for doing so would be distinctive, in large part because individuals' life structures are shaped by a wide range of social-historical and physical environment features involving family and other areas such as religion, race-ethnicity, and economic status (Levinson 1996).

Levinson's finding that the life structure was the essence of adult development was central to our understanding of midlife. We believed that this theory was crucial to developing a fuller understanding of change and continuity of leisure, life perceptions, and values in middle age. In fact, understanding the linkages between life values, leisure perceptions, life

events, and life structures is the focus of the analysis presented in this book. In the next section we briefly discuss the role of each of these areas in our study of midlife adults as they were understood when *ASOLDA* began.

Studying Change and Continuity in Life and Leisure

To truly understand adult development in midlife we believed it was essential to have longitudinal data, looking at changes and continuities in individuals' lives over an extended period of time. We felt it was important to know about their life experiences, how those experiences affected them, and their views of life structure through the years. Just as important, we wanted to know how individuals' values and leisure perceptions were related to their life experiences. These interests and the design of our study were informed by literature available when the study began and this literature is described briefly below.

The Importance of Longitudinal Studies

Some researchers who study adult development use cross-sectional designs, comparing the experiences of a range of people at different life stages. But, throughout our literature search, we were drawn to studies that used longitudinal panel designs. Panel designs are generally considered superior to cross-sectional approaches, or other types of longitudinal designs, because they allow researchers to examine intra-individual change, changes over time in individuals' lives, and inter-individual change, differences between individuals in experiences and the process of change (Baltes and Nesselroade 1979; Bergman 1993; Schaie 1983). A key element of our analysis was looking at intra-individual and inter-individual variations.

Panel studies of human growth and development, while not overly common, have been conducted for many years. Early longitudinal research likely involved parents studying their children. The French writer Philippe de Montebeillard is credited with the earliest longitudinal study on record by conducting a study of his son in the mid-eighteenth century (Baltes and Nesselroade 1979). Several longitudinal studies of child development, some of which continued into adult years, began in the 1920s including the Fels Institute study of children, the Berkeley Growth study of children and their parents, and Lewis Terman's studies of highly gifted children (Block and Haan 1971; Burks, Jensen and Terman 1930; Kagan and Moss 1962; Maas and Kuypers 1974; Mednick and Mednick 1984; Terman and Oden 1947). This was followed, starting in the 1970s, with a number of longitudinal

studies of adults (e.g., Chiriboga 1984; Fiske and Chiriboga 1990; Levinson 1978b, 1996; Lowenthal et al. 1976). Each of these studies helped inspire *ASOLDA*'s panel design.

Life Experiences, Stress, and Midlife

The theorists described in the first part of this chapter stressed the multiple roles typically played by adults during midlife. Starting in the 1960s a parallel literature emerged regarding the relationship between life stress and health (e.g., Chiriboga 1977; Dohrenwend and Dohrenwend 1982; Holmes and Rahe 1967; Rahe and Lind 1971; Rahe, McKean, and Arthur 1967; Rahe and Paasikivi 1971; Wyler, Masuda, and Holmes 1971). This literature was especially influential in our decisions regarding how to measure change and continuity in midlife and the nature and impact of midlife experiences. We sought an instrument that was comprehensive enough to record and track each individual's life experiences.

As explained more fully in Chapter Two, we decided to use the Life Experiences Survey (LES) developed by Sarason, Johnson, and Siegel (1978). This instrument grew out of a rapidly developing body of research on life stress and determining the best way to understand this phenomenon through survey research. The literature included debates about how to capture the desirability of events, group different types of experiences, and score results (Mechanic 1975; Sarason, de Monchaux, and Hunt 1975; Sarason, Levine, and Sarason 1982; Yamamoto and Kinney 1976). The version of the LES that we used was a modification of a measure called the Schedule of Recent Experiences (SRE) developed in the 1960s (Holmes and Rahe 1967). The survey instrument included a long list of adult life events, allowed participants to add their own important events to the list, and asked them to quantify the extent to which they perceived the events as positive or negative. Most important, the instrument recognized the vast array of experiences that can occur in midlife and recognized the potential variability of the impact that such events could have for different individuals and, over time, for any given person. In our view the modified LES (Sarason et al. 1978) was appropriate for our goal of studying change and continuity in midlife.

Values and Midlife Development

In addition to life experiences, we were interested in adults' values in midlife. The term *values* refers to deep-seated views or beliefs about what is important. Values represent something important in human existence and are seen as central to individuals' beliefs and attitudes as well as their adaptations to life changes (Bem 1970; Fraenkel 1973; Kuhlen 1970). When *ASOLDA* began, research regarding values often built on the work of the social psychologist Milton Rokeach (1918-1988). He suggested that the concept of values was a key element within all the social sciences, spanning analyses of culture, society, and individual personalities and stressed that values were especially important in influencing individuals' behaviors and views of life events (Rokeach 1968, 1973; see also Kahle and Timmer 1983; Spates 1983).

Marjorie Lowenthal and colleagues looked at midlife adults' values and how these values changed in the adaptive process. They found that both men and women gave priority to interpersonal-expressive values such as intimacy, friendship, and sociability. Changes in values could be self-generated or influenced by social-role expectations at particular life stages. Like all pre-transitional groups, midlife adults believed they had changed more in the past than they were likely to in the next ten years. Women reported an increase in interpersonal and expressive values as well as those termed social-service, such as helping others and engaging in community service. Men reported an increase in interpersonal-expressive values, such as intimacy, friendship, and sociability, but had a pronounced lessening of values associated with personal-growth (Lowenthal et al. 1975; Lowenthal and Weiss 1976). As described fully in Chapter Two, we looked at change and continuity in life values using two general measures.

Leisure and Midlife Development

Understandings of leisure and midlife development were central to the development of *ASOLDA*, reflecting Dr. Carpenter's doctoral studies and long-time research interests. At the time *ASOLDA* began, knowledge regarding leisure was exploding. Researchers from a range of disciplines, including psychology (Mannell 1980; Neulinger 1971, 1974, 1981), sociology (Kaplan 1975; Kelly 1983; Parker 1971, 1983; Roberts 1970), and marketing were actively pursuing studies in the area. This work would continue to expand through the 1990s (Driver, Brown, and Peterson 1991; Iso-Ahola 1980; Jackson and Burton 1999; Kelly 1996; Kleiber 1999;

Mannell 1980; Mannell and Kleiber 1997; Stebbins 1992) and in the years after *ASOLDA* data were collected. Throughout the 2000s, many encyclopedic books and volumes related to leisure studies were published (e.g., Jackson 2005; Kleiber and McGuire 2016; Kleiber, Walker, and Mannell 2011; Walker, Kleiber, and Mannell 2019).

Historically scholars and philosophers have seen leisure as a source of life meaning contributing to human development (de Grazia 1962; Dumazadier 1967; Gray 1971; Pieper 1952). Max Kaplan described leisure as a relatively self-determined experience that is psychologically pleasant in anticipation and recollection, covers a range of commitment and intensity, contains norms and constraints, and provides for personal growth (Kaplan 1975, 26). John Neulinger (1981) described leisure as the search for meaning in life.

As in the broad range of human development theories, empirical studies of the role of leisure in human development began with research on childhood and adolescent growth and development (e.g., Anderson, Caldwell, and Walters 2011; Barnett 1980, 1984; Barnett and Chick 1986; Barnett and Schiller 2011; Ellis, 1973; Kelly 1983). Studies of leisure and older adults appeared as gerontological research flourished (e.g., Dupuis 2008; McGuire, Boyd, and Tedrick 1999; Osgood and Howe 1984; Patterson 1996; Teague 1980). But the thirty years and more that make up middle adulthood seemed to be of less interest. This pattern started to change by the early 1980s largely due to the efforts of leisure researchers with developmental and interdisciplinary perspectives. Chapters in books and entire books on the social psychology of leisure and recreation research linked leisure socialization, determinants of leisure behavior, and leisure across the lifespan (e.g., Iso-Ahola 1980; Kelly 1983; Kleiber and Kelly 1980; Mannell 1980); and leisure research that emphasized the years of midlife gained attention (e.g., Carpenter 1989, 1992; Freysinger 1995; Freysinger and Ray 1994). *ASOLDA* was launched in this climate of increasing interest in leisure and midlife adult development, an interest that has continued through the present (Kleiber and McGuire 2016; Kleiber and Liechty 2016; Payne and Zabriskie 2014).

Many of the scholarly writings related to leisure focused on trying to develop a clear definition of leisure, and *ASOLDA* was very much influenced by those writings. Leisure theorists asked if leisure should be seen as free time, or as a recreation activity, or as some kind of human experience defined by the individual? Building on these writings we determined that certain characteristics inherent in leisure were important to