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The Importance of Social Groups for Retirement Adjustment: Evidence, Application, and Policy Implications of the Social Identity Model of Identity Change

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Previous work in the social identity tradition suggests that adjustment to significant life changes, both positive (e.g., becoming a new parent) and negative (e.g., experiencing a stroke), can be supported by access to social group networks. This is the basis for the social identity model of identity change (SIMIC), which argues that, in the context of life transitions, well-being and adjustment are enhanced to the extent that people are able to maintain preexisting social group memberships that are important to them or else acquire new ones. Building on empirical work that has examined these issues in the context of a variety of life transitions, we outline the relevance of SIMIC for one particular life transition: retiring from work. We identify four key lessons that speak to the importance of managing social group resources effectively during the transition to retirement

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from the workforce. These suggest that adjustment to retirement is enhanced to the extent that retirees: (1) can access multiple important group memberships and the psychological resources they provide, (2) maintain positive and valued existing groups, and (3) develop meaningful new groups, (4) providing they are compatible with one another. This theory and empirical evidence is used to introduce a new social intervention, GROUPS 4 HEALTH, *that translates SIMIC's lessons into practice. This program aims to guide people through the process of developing and embedding their social group ties in ways that protect their health and well-being in periods of significant life change of the form experienced by many people as they transition into retirement.*

For many people, retirement is an inevitable part of aging. Nevertheless, successful adjustment to this transition—whether indexed through retirement satisfaction, health, or general well-being—is far from straightforward. Research shows that up to 25% of people find the transition highly stressful and experience a marked reduction in well-being (e.g., Bossé, Spiro, & Kressin, 1996; Wang, 2007). Among the many factors that could contribute to such stress (e.g., economic conditions, voluntariness of retirement, national policies on retirement), insufficient planning has been identified as the major source (Agnew, Bateman, & Thorp, 2012; Quine, Bernard, & Kendig, 2006). In this, though, much of the focus in planning is on managing finances through pensions and investments, and not on other changes that are inevitable in the transition (e.g., changes in professional status, in social relationships within and beyond the workplace, and in day-to-day activities). However, the fact that adjustment can prove problematic despite financial planning is testament to the fact that successful transition into retirement is about much more than having sufficient funds.

Recognizing this, models of retirement adjustment have highlighted various factors that influence the transition, including subjective health status, individual differences (e.g., in coping styles, personal mastery), attitudes toward retirement, and social relationships and roles (e.g., Atchley, 1982; Donaldson, Earl, & Muratore, 2010; Hesketh, Griffin, & Loh, 2011; Moen, Kim, & Hofmeister, 2001; Wang, Henkens, & van Solinge, 2011). Among these, social relationships have recently gained particular prominence in light of their demonstrated capacity to protect health and well-being in a range of challenging and adverse situations—notably in the context of health decline (e.g., Holt-Lunstad, Smith, & Layton, 2010), social disadvantage (e.g., Marmot, 2015), and, pertinent to the present analysis, life changes (e.g., Iyer, Jetten, Tsivrikos, Postmes, & Haslam, 2009). Added to this, there is growing evidence that our sense of connectedness, or identification, with meaningful *social groups* to which we belong (e.g., with family, friendship, work, community, and interest groups) has especially beneficial effects in these contexts (e.g., Gleibs, Haslam, Haslam, & Jones, 2011; Haslam et al., 2010; Haslam, Cruwys, & Haslam, 2014; Jetten et al., 2015).

In the present review, we examine the role that social groups play in retirement adjustment and use the social identity model of identity change (SIMIC)—a model of life change informed by social identity theorizing—to support our analysis and practice recommendations. In this, we focus on four key lessons derived from SIMIC, provide evidence in support of each, and then introduce a program that integrates these lessons as part of a novel intervention to help people engage in social planning for retirement.

Adjusting to Life in Retirement

Retirement is an inevitable life change for many, but what it actually entails can differ markedly between people. For some, retirement involves exiting the full-time labor force. However, this need not mean stopping all forms of work, as some people still choose to engage in unpaid work (e.g., in a voluntary capacity) or to continue working in a part-time capacity. The latter is often referred to as bridge employment, which can involve part-time work for payment either in the same occupation that the person had prior to formal retirement or in a new occupation. As these possibilities highlight, retirement is best conceptualized as a variegated process that for some people involves formally exiting their career work, alongside the physical and psychological withdrawal this entails, but for others involves periods of engagement and disengagement with the workforce with no single retirement event or date.

Relatedly, and probably as a consequence of the varied ways in which people retire, there is no single measure of retirement adjustment. This is because successful adaptation to a life in retirement involves coming to terms with many things such as changes in daily routine, income, status, social contacts, alongside development of a new postretirement lifestyle, which may or may not involve working in some capacity in addition to engaging in various forms of leisure or other activities. What the retirement literature recognizes is that these changes take time and that, as a result, a person's experience of adjustment may fluctuate depending on factors such as the nature of a person's work when employed (e.g., as fulfilling or stressful), their general health and well-being, their financial standing, their work exit conditions, and their networks of support (Wang et al., 2011). To try and capture these various influences and experiences of retirement, adjustment is often indexed by a diverse range of measures including satisfaction with retirement, general life satisfaction, happiness, mental health, and physical health. Using diverse measures such as these is critical if we are to understand the extent to which people navigate the retirement transition successfully.

While much of the focus in helping people transition successfully is on financial planning and management, there is increasing recognition that this alone is insufficient. This message is reinforced by a growing number of studies that have highlighted the role of other factors that account for negative adjustment experiences; particularly, the contribution of social relationships (e.g., Adams & Rau, 2011; Hershey, Jacobs-Lawson, & Austin, 2013; Leung & Earl, 2012; Taylor-Carter, Cook, & Weinberg, 1997; Yeung & Zhou, 2017). These relationships are central to our lives—influencing where we live, what we do, and who we spend our time with. Yet, they tend to be low on our list of priorities when planning for retirement. Where they are considered, researchers' emphasis has typically been on understanding the contribution that relationships with particular individuals (i.e., a spouse, a partner, or a close friend) make to adjustment. Here, marital relationships have been the main focus of investigation but there is mixed evidence on the question of whether people who are married adjust better to retirement than those who are not. Some research shows that having a marital partner can contribute positively to life satisfaction and adjustment in general (Etaugh & Bridges, 2013; Trudel et al., 2008), but other studies have found no support for this relationship (Dorfman, 1995; S. Kim & Feldman, 2000; Pinquart & Schindler, 2007; Price & Joo, 2005). Clearly, there are other dynamics at play in this context that might account for these discrepancies, such as the working status of one's partner and the impact of the transition on the partner's role in the relationship (e.g., Johnson & Favreault, 2001). In addition, there is evidence that relationships with individuals other than one's partner (e.g., another family member or a friend) can be similarly protective of well-being during the transition (e.g., Damman & van Duijn, 2017; S. Kim & Feldman, 2000).

While there has been considerable emphasis on these one-on-one relationships as an important source of interpersonal closeness, to date the retirement literature has offered little insight into the effects that other ways of connecting to people might have on adjustment. On this point, a growing body of work speaks to the role that memberships in *social groups* (e.g., family, professional, sporting, leisure, or other groups) might play in retirement adjustment. Importantly, because these groups form the basis for a person's sense of *social identity* (Tajfel & Turner, 1979)—they are often central to a person's self-definition, helping the person to understand who they are, where they belong, and how they make sense of the world. When a person's sense of self is informed by their membership in a particular group (i.e., where their social identity as "us members of the Jones family," "us teachers," "us cyclists," or "us readers" is *salient*), then this structures their thoughts and behavior, affecting how they feel, what they say, and what they do in different situations. Importantly too, these groups serve as a basis for *social influence* so that other members of one's group function as a source of self-defining norms that inform standards of behavior (Turner, 1991). Likewise, they are an important psychological *resource*—providing a basis for connection, support, meaning, self-esteem, and control (Cruwys, Haslam, Dingle, Haslam, & Jetten, 2014b; Greenaway et al., 2015; Haslam, Jetten, Cruwys, Dingle, & Haslam, 2018b; Jetten, Haslam, Haslam, Dingle, & Jones, 2014).

It is only when we understand this connection between a person's group memberships and their sense of self that we can see why their loss affects us so deeply. And such loss is more likely in periods of life change. So, when a person's social group memberships change in the course of retirement—as is common when a professional group or work team is lost as a result of leaving the workforce—then so does their sense of who they are after the transition, and so do the resources they can draw on to help them adjust to this transition. Put simply, identity change is inevitable when people experience significant life change, and careful negotiation of the groups that support one's social identity is required to manage this transition successfully.

Yet, if social groups have a critical role to play in determining people's psychological trajectories during periods of life change, one might ask why they have not been prioritized in the area of retirement. As alluded to earlier, one reason is that financial considerations often dominate retirement-related discourse. In many ways, this is entirely understandable. No one would deny the importance of maintaining a reasonable standard of living into retirement and awareness of this is reflected in the growing number of superannuation and pension organizations that cater to people's financial needs in the context of retirement. Nevertheless, a preoccupation with these considerations has meant that the social determinants of successful retirement have rarely been prioritized. What is needed then is an integrated model that accounts for the impact that social groups have on the health and well-being of people going through retirement. It is this gap that the present review seeks to address. Here, we introduce a new model of retirement adjustment that draws on social identity theorizing in ways that extend and elaborate upon existing accounts of adjustment, and then use this to provide direction for practical intervention.

Understanding Retirement Adjustment: The Social Identity Model of Identity Change

Existing models of retirement adjustment emphasize different features of the retirement experience—the impact of change in work roles (Role Theory), how one has managed previous experiences of life change (Life Course Theory), the impact of life change on personal continuity (Continuity Theory), the fit between the person and their postretirement environment (Theory of Work Adjustment), and variation in adjustment experiences as a function of the resources (e.g., financial, physical, motivational, social) at one's disposal (Resource-based Dynamic Model; for reviews on these approaches, see Wang & Shi, 2014; Wang et al., 2011). Importantly, a few models recognize that social factors make a contribution to adjustment (e.g., Theory of Work Adjustment, Resource-based Dynamic Model). However, these do not capture fully (i) the nature, breadth, and impact of social relationships, (ii) whether (and how) these function as resources to support adjustment, and (iii) whether some are more beneficial than others in supporting a person's transition into retirement. In addressing these points, *SIMIC* (Haslam et al., 2008; Jetten, Haslam, Haslam, & Branscombe, 2009) extends on existing theory to provide an analysis of the particular role that group memberships, and the social identifications that underpin them, play in life change in general and in retirement specifically.

SIMIC is a model of responses to life change derived from social identity theorizing (after Tajfel & Turner, 1979; Turner, Hogg, Oakes, Reicher, & Wetherell, 1987; Turner, Oakes, Haslam, & McGarty, 1994). Its distinct contribution is to recognize that successful adjustment to any life transition involves a process of *social identity change* in which existing group memberships are likely to be altered in some way—by becoming more or less important, or by being lost—while new group memberships are potentially gained. Specific to the context of retirement, people are typically faced with managing a significant transition from seeing themselves (and behaving) as an employee and identifying with other workers in an organization or profession, to seeing themselves (and behaving) in other ways through their identification either with existing groups in their social network (e.g., as a member of a family, a local community, a particular interest group) or with new group memberships that may develop (e.g., with groups of retirees, volunteers, older people). As noted earlier, these changes in group membership will be perceived positively by some people—particularly if these provide opportunities for personal growth (e.g., resulting from spending more time with family, engaging in leisure, volunteering, or continuing work in a capacity of one's choosing). However, they are likely to be perceived more negatively if changes in group membership are in some way threatening to the self (e.g., where group membership signals old age or physical decline).

SIMIC recognizes that any life change, whether positive or negative, tends to create uncertainty and instability and as a result can pose a threat to adjustment. This is true, for example, when a person transitions to university (Iyer et al., 2009; Praharso, Tear, & Cruwys, 2017), becomes a mother (Seymour-Smith, Cruwys, Haslam, & Brodribb, 2017), experiences trauma or illness (Haslam et al., 2008), or moves into care (e.g., Haslam et al., 2010). Regardless of how desirable or undesirable they are in the abstract, each of these changes requires people to reorient themselves in the world—changing both the way they self-define (e.g., as a student, a mother, as a person with brain injury, or as a retiree) and the way that they relate to others. Such reorientation requires adjustment, and the uncertainty surrounding this experience is a source of potential stress and threat. In Figure 1, this is reflected in the negative relationship between the life-changing context (in this case, the process of retirement) and adjustment. Here, the shading around the dotted line marking the transition also reflects the fact that the process of retirement typically unfolds over time, rather than being restricted to a specific point in time.

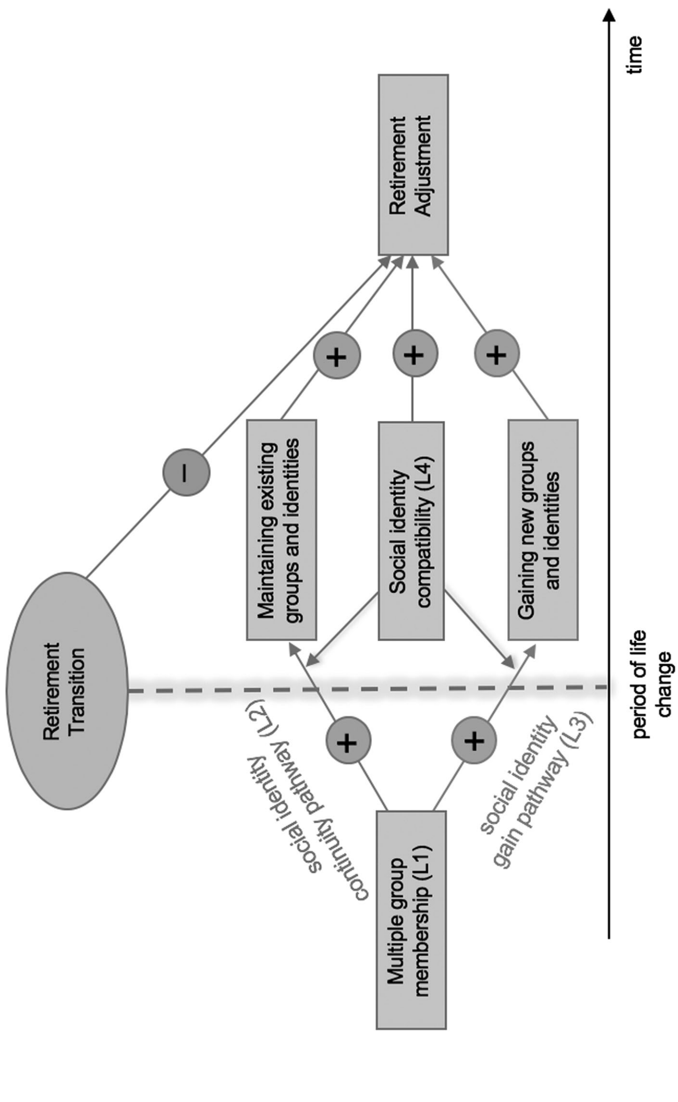

Fig. 1. The social identity model of identity change applied to the retirement transition.
Note: L1 to L4 = Lesson 1 to Lesson 4.

However, at the same time that it points to the problematic implications of life transitions for a person's sense of self, SIMIC also identifies several group processes that help people manage the experience of uncertainty and adapt to life change. In particular, it suggests that belonging to *multiple social groups* is a key protective factor that helps people negotiate life change. These groups can take many forms. They might be ones that engage people in leisure (e.g., a book club, a gardening group), with family (a sibling or immediate family group), religion or faith (a church group), culture (an Indigenous group, a national association), sport (a football team, a tennis club), employment (a professional group, a work team), politics (an activist group, a political party), or in some other form of shared activity. From a social identity perspective, it is not so much the type of group, as the psychological significance of the group that matters. What is important, then, is that the group in question is meaningful, valued, and has emotional significance for the person who is a member of it.

In SIMIC, these group memberships are understood to function as psychological *resources* (Jetten et al., 2014; Jetten, Haslam, & Haslam, 2012). Accordingly, the more groups a person belongs to, the more likely it is that he or she will have access to resources that support and promote adjustment to life change. Importantly, though, as Sani, Herrera, Wakefield, Baroch, and Gulyas (2012) have shown, it is not only the quantity of group memberships and amount of group contact that matters for health and well-being, but also the quality of group life (i.e., the level of a person's social identification with those groups). Thus, in much the same way that only high-quality marital relationships enhance life satisfaction in retirement (J. E. Kim & Moen, 2001), only those groups that provide a meaningful source of social identification have the capacity to support positive adjustment to this transition.

The protective effects of group membership and social identification during periods of life change are represented in SIMIC's two pathways via which multiple important group memberships exert their effects. The first is a *social identity continuity* pathway. According to this pathway, multiple group memberships prior to retirement are a source of social identity capital that increases the likelihood that at least some of those groups will be retained in the retirement transition, thereby providing people with a sense of self-continuity in the face of change (Haslam et al., 2008; Sani, 2010). Here, SIMIC predicts that adjustment will be enhanced to the extent that people are able to maintain group memberships that they value—and that they believe will continue to have value for them—in the transition.

Clearly though, it is not always possible to hang on to existing groups in the face of life change, and indeed retirement is one context in which losing group memberships is inevitable. In particular, this is because all retirees will experience a loss (through formal retirement) or change (if pursuing bridge employment) of one or more work-related groups (e.g., as a member of a team, organization, or profession; Haslam, 2004; Haslam & Ellemers, 2005; van Knippenberg & van Schie, 2000). In this context, SIMIC argues that adjustment can be supported through a second, *social identity gain,* pathway in which new social groups and identities are developed. Here, multiple group membership acts as a scaffold that provides an experiential basis for engaging with others—for example, by giving people the opportunity to develop attitudes and social skills that make them more willing and able to join new groups. Members of existing groups can also function as a source of bridging capital (Putnam & Feldstein, 2004) that helps people to meet and connect with new groups directly. Where these new group memberships are meaningful, positive, and valued, they add to a person's resource base in ways that support adjustment and protect well-being.

Furthermore, having multiple important group memberships when transitioning to retirement facilitates processes of social identity continuity and gain. Here, SIMIC proposes that successful adjustment varies as a function of the extent to which existing and new groups are perceived to be *compatible*. Joining and identifying with a new retiree group whose primary goal is to pursue leisure, for example, might be incompatible with maintaining some part-time work in transitioning to retirement. Incompatibility arises in this context not only because it can be difficult to see oneself as both a retiree and an employee at the same time, but also because the existing work group can affect how open one is to taking on a new retiree group that has different goals and interests (see Iyer et al., 2009). Where such conflict emerges, it will tend to compromise well-being. However, where there is greater compatibility between people's old and new group ties that support a greater sense of continuity in their sense of self, well-being is likely to be enhanced (Iyer, Jetten, & Tsivrikos, 2008). The general point here, then, is that SIMIC suggests that adjustment will be enhanced to the extent that one's multiple identities—both maintained from preretirement and gained after retirement—are experienced as being compatible.

Notably, SIMIC shares with other models the importance of self-continuity (as argued in Continuity Theory) and social resources (Theory of Work Adjustment, Resource-based Dynamic Model) during periods of life change. However, its distinctive contribution is to articulate more clearly the particular role that social groups and identification play in supporting personal integrity during retirement and to explain when these are likely to contribute in positive or negative ways to retirement adjustment.

Lessons for Retirement Derived from the Social Identity Model of Identity Change

In what follows, we examine key lessons from SIMIC and the empirical support for these as they apply to retirement. There is already an established evidence base that confirms the relevance of the group processes that the model specifies to a wide range of life changes—including those associated with educational, health, and aging transitions (e.g., Gleibs et al., 2011; Haslam et al., 2008; Iyer et al., 2009; Ng, Haslam, Haslam, & Cruwys, 2018; Praharso et al., 2017). However, this evidence base has recently been expanded to understand how processes of multiple, new, and maintained group memberships alongside group compatibility affect people's experiences of retirement (e.g., Steffens, Cruwys, Haslam, Jetten, & Haslam, 2016a; Steffens, Jetten, Haslam, Cruwys, & Haslam, 2016b). Our analysis in this review focuses on practical *lessons* pertaining to (1) the role of multiple group memberships and the psychological resources they provide, (2) the maintenance of valued existing social groups, (3) the development of meaningful new social group ties, and (4) the compatibility of new and existing group memberships with one another. We then translate these lessons into practice by introducing a newly developed program informed by SIMIC—GROUPS 4 HEALTH—which targets the building and maintenance of social group life to help people through transitions such as retirement.

Lesson 1: Multiple valued social group memberships provide people with a range of psychological resources that support retirement adjustment

A core idea in social identity theorizing—and in the social identity approach to health in particular—is that social groups give people access to tangible psychological resources (Haslam et al., 2018b; Jetten et al., 2012). In particular, the more groups a person belongs to, and the more important these groups are to them, the more likely it is that they will have access to resources that help to deal with life challenges (see Jetten et al., 2015). These psychological resources are numerous and come in a variety of forms. These include a sense of belonging (Cruwys et al., 2014b), social, emotional, and financial support (Cohen & Wills, 1985; Haslam, Reicher, & Levine, 2012; Viswesveran, Sanchez, & Fisher, 1999), enhanced personal self-esteem (e.g., Iyer et al., 2009; Jetten et al., 2015), increased personal control (Greenaway et al., 2015), positive effect (Brook, Garcia, & Fleming, 2008), trust (Platow, Foddy, Yamagishi, Lim & Chow, 2012), and competence (Norris, Stevens, Pfefferbaum, Wyche, & Pfefferbaum, 2008).

Among these various resources, social support has tended to receive the most attention given the central role that it plays in supporting health and well-being (e.g., Cohen, 2004). Nevertheless, research shows that it is only one of a suite of mechanisms through which social groups enhance health and well-being (for a discussion, see Greenaway, Cruwys, Haslam, & Jetten, 2016; Haslam et al., 2018b). As this work suggests, there are multiple ways in which social groups can help to protect people in periods of life change. The particular mechanism(s) that prove important may differ as a function of the group from which the resources are drawn and the particular situation that a person confronts. For instance, a family group may be an important source of emotional support and a retiree group may help to provide a person with sense of commonality with others in addition to enhancing their sense of control over their life when transitioning to retirement. The general point, however, is that belonging to multiple important groups increases the likelihood that a person will have access to the particular resources they need in any given context.

Some evidence relevant to this first lesson comes from research that points to the protective effects of social support, both in workplace contexts and in the retirement transition. Notable here is evidence that social support, irrespective of whether this comes from coworkers or from other people, can mitigate workplace stress (Viswesveran et al., 1999), burnout and turnover (Ducharme, Knudson, & Roman, 2007), reduce emotional exhaustion, and enhance job satisfaction (Kinman, Wray, & Strange, 2011).

Direct support for the proposition that multiple group memberships are a platform for support mobilization in the retirement transition comes from a study conducted by Steffens et al. (2016b). Drawing on previous social identity work (e.g., Haslam et al., 2012), the researchers reasoned that multiple group memberships provide the basis for accessing social support, and that this is an important mechanism through which health and well-being are protected over the course of this life change. The researchers tested this hypothesis in a study with 171 recently retired Australians—exploring the role not only of receiving social support but also of providing it to others. Results showed that retirees' multiple group memberships were an important predictor of their perceived health, quality of life, and adjustment outcomes. Critically, though, the results showed that while the two forms of social support were correlated, it was *provided* social support that played a stronger role in explaining why multiple group memberships were positively associated with successful adjustment to retirement. That is, it appeared that multiple group memberships enhanced retirement outcomes because they were a vehicle for retirees to continue to make a contribution to the lives of others by providing them with support. More generally, this suggests that one reason why group memberships contribute to successful adjustment in retirement is that they help retirees to feel more efficacious and useful (for a broader discussion of the psychological benefits of prosocial behavior, see Aknin et al., 2013).

Evidence relevant to the capacity for multiple group memberships to unlock other resources—notably, self-esteem and perceived control—is growing, and some of this relates directly to retirement adjustment (see Abel & Hayslip, 1987; Reitzes, Mutran, & Fernandez, 1996). Importantly, this research points to the clear implications of multiple group membership for the successful management of the retirement transition. When planning for retirement, it is therefore essential to appreciate the importance of social identity capital and not only financial capital. Accordingly, in much the same way that structured processes exist to support people to engage in financial planning, parallel processes are needed to engage people in social planning. This needs to prioritize efforts to understand the social groups in a person's life, their importance and meaning, and the ways that people engage with them in order to ensure that retirees have access to the resources needed to optimize the retirement transition. This also raises the question of what to do if a person does not feel connected to multiple groups (e.g., because they are either defined solely by their professional or work groups or feel only superficially connected to other groups in their lives). These are questions that we will return to shortly, when addressing the translation of this lesson into practice.

Lesson 2: Maintaining multiple valued social group memberships generally supports retirement adjustment

One reason why having multiple group memberships before a life change facilitates adjustment is because belonging to more groups increases the likelihood that a person will hang on to at least some of their preexisting group ties after the transition. This facilitates a sense of social identity continuity that is reflected in SIMIC's *identity continuity pathway* (see Figure 1). In line with this point, where group memberships have a positive influence on a person's life, these have been found to be an important driver of adjustment to life changes other than retirement, including recovery from stroke (Haslam et al., 2008) and migration (Smeekes, Verkuyten, Celebi, Acartürk, & Oncun, 2017).

This point resonates with Continuity Theory (Atchley, 1971) and with work on Role Theory (Linton, 1936), which shows that maintaining positive roles (e.g., in one's family, friendships, or religion) can provide stability, support, and a sense of personal continuity in the face of the major changes that retirement brings (Moen et al., 2001; Reitzes & Mutran, 2004). However, SIMIC extends on this work by focusing specifically on the conditions under which relationships with social groups are likely be most beneficial—namely, when they are the basis for meaningful and positive social identification. These conditions, in turn, provide important direction for interventions to optimize adjustment to retirement.

Evidence that speaks to the importance of social identity continuity for retirement adjustment comes from studies that have investigated the effects that bridge employment and voluntary work have on retirees. When these activities engage people in meaningful and purposeful work, it seems likely that they might serve to strengthen a person's sense of continuity with their work identity, despite their having formally retired. In this context, there is extensive evidence of the value of voluntary work for older adults in general (e.g., Greenfield & Marks, 2004) and for retirees in particular (e.g., Beehr & Bennett, 2015; Schwinger, Niti, Tang, & Ng, 2009). There is also evidence that engaging in bridge employment can facilitate a gradual and positive transition into retirement (e.g., S. Kim & Feldman, 2000; Wang, 2007). For example, Wang, Adam, Beehr, and Shultz (2009) found that phased retirement of this form helps people adapt to the lifestyle changes that this transition brings at the same time that it helps organizations facing labor shortages (see also Wang & Shultz, 2010).

Direct evidence in support of SIMIC's continuity pathway in the retirement context comes from a study by Steffens et al. (2016a). This study used archival data from the English Longitudinal Study of Aging to track the health and well-being of 424 English employees, aged 50 and over, in the 6-year period following retirement. The researchers' particular focus was on the effects of group membership on postretirement well-being and mortality. What they found was that people who belonged to more social groups before retirement had a higher quality of life and a lower risk of mortality 6 years into retirement, but only if they *maintained* group memberships during the transition period. Indeed, in the case of mortality, when income, education, and health prior to retirement were controlled for, retirees who belonged to two groups before retirement and maintained two group memberships postretirement had only a 2% risk of mortality in the 6 years after retirement. This risk increased to 5% if retirees lost one social group membership, and it increased to 12% if they lost both. Tellingly, these protective effects of social group memberships were comparable in size to the protective effects of physical activity over the same period. Furthermore, retirees reported a 10% drop in quality of life for every group membership that they lost in the transition. These findings highlight the role played by multiple group memberships in transitioning to retirement (in line with Lesson 1), but, speaking directly to Lesson 2, they highlight the critical role that *group membership continuity* plays in keeping people alive for longer in retirement.

Importantly, the above study's focus on multiple group membership points to the importance of wider groups (e.g., family, community, sporting, religious) and not just those that might support the continuity of work or professional identity. SIMIC suggests that all these potential sources of social self-continuity should support adjustment outcomes, providing that they are a basis for positive self-definition and identification.

But is continuity always good for us? It is not hard to think of work situations and contexts where continuity is undesirable, and there are certainly groups that people are happy to leave behind when they retire (e.g., oppressive organizations that impose unreasonable demands, or toxic work teams that undermine self-worth and confidence). Contexts such as these highlight the importance of qualifying group continuity as having potential for enhancement only to the extent that it provides the basis for positive influence and esteem. In such cases, and also those where continuity is desired but not possible, a better route to successful adjustment may be found elsewhere—notably in SIMIC's gain pathway that we turn to next.

Lesson 3: Developing new valued social group memberships generally enhances retirement adjustment

In the transition to retirement, it is not unusual for people to lose or let go of old identities (e.g., as a nurse, teacher, or builder) because retirement requires them to relinquish particular social group memberships associated with those identities. As noted above, this might be a positive change for those who did not find work rewarding, but threatening to those who were highly invested in their work roles and relationships and hence feel that they have a lot to lose (Wang, 2007). Consistent with the latter experience, data show that it is social contact that people report missing the most in the retirement process—although this concern tends to decrease the longer people are retired (Damman, Henkens, & Kalmijn, 2015).

In this context, the capacity for multiple group memberships to act as a scaffold for developing new group memberships when experiencing life change is another important contributor to retirement adjustment (*the social identity gain pathway* in Figure 1). Here, SIMIC argues that negative adjustment and well-being consequences associated with the loss of valued work groups and identities can be attenuated if people acquire new social identities by joining new groups. This is because those new group memberships can provide a sense of meaning and purpose in the face of life change, and, through this, provide a basis for reestablishing a positive sense of self (Cruwys et al., 2014a).

Evidence supporting this lesson comes from a recent two-wave study that investigated the influence of new group memberships on people's transition into retirement (Haslam et al., 2018c; Study 3). This study surveyed 121 U.S. participants who were transitioning to retirement (Time 1) and then 3 months later (Time 2). At each time point, participants indicated the strength of their identification with multiple groups and with new groups and also reported their life satisfaction. As a test of SIMIC's social identity gain pathway, the research investigated whether multiple group memberships at Time 1 predicted belonging to *new* groups at Time 2, and through this, well-being at Time 2. In line with predictions, results showed that belonging to multiple groups at the point of retiring from work was a basis for people to develop new social group memberships early in the retirement transition, and that this, in turn, improved well-being 3 months later. Thus, consistent with Lesson 3, the sense of belonging that retirees gained from joining new groups was important in protecting their well-being in the retirement transition.

While the above study focused on new groups in general, it can be argued that some life transitions increase the likelihood of connecting and identifying with particular new groups that might be especially beneficial in helping people cope with change. Research has addressed this question in contexts other than retirement, showing, for instance, that developing a strong sense of identification as a mother reduces the risk of postnatal depression (Seymour-Smith et al., 2017), and that developing a new recovery identity increases abstinence from substance misuse (Best et al., 2016; Buckingham, Frings, & Albery, 2013). The question this raises is whether particular new social identities (e.g., as a bridge employee or as a retiree) might be especially valuable in supporting retirement adjustment.

Data relevant to this question are provided by studies that examine the development and impact of a retiree identity. Michinov, Fouquereau, and Fernandez

(2008) were the first researchers to demonstrate that the category of "retiree" provided a distinctive basis for self-definition among those who had transitioned to retirement. Relevant to Lesson 3, they also found that participants had greater life satisfaction to the extent that they saw themselves as emotionally connected to the group of retirees. Adjustment was therefore greater when retirees had a stronger sense of affective identification with this new group.

A study conducted by Haslam et al. (2018c, Study 1) extended this line of enquiry to examine the contribution that the retiree identity makes to retirement adjustment relative to established predictors in the literature (i.e., financial status, health, marital status, exit conditions, retirement aspirational hopes and fears) and other significant life changes (e.g., illness, relocation). This was examined in 302 participants who had been retired for an average of 6 years. Here, retirement adjustment was modeled as an outcome of participants' sex, age, length of retirement, education level, as well as the established predictors described above and other life changes. Only four variables contributed to prediction of retirement adjustment: the person's social identification with retirees, retirement fears (i.e., their concerns about being bored in retirement, missing people from work, becoming ill or disabled), and, to a lesser extent, their engagement in health and leisure planning and retirement hopes.

Interrogating these data further, there was a significant interaction between retirement fears and respondents' positive identification as retirees. When identification as a retiree was low (-1 *SD*), retirement fears were associated with poorer adjustment, but when identification was high ($+1$ *SD*), the impact of retirement fears on adjustment was significantly attenuated. In other words, it appears that the negative effect of retirement fears on adjustment is significantly reduced when respondents feel strongly connected with other retirees. Interesting too was the fact that in this study, marital status and financial planning—which, as noted above, have previously been found to be strong predictors in retirement—were not key predictors of adjustment when retiree identification was included in the model. This may reflect the fact that these participants had been retired for some time (up to 10 years for some in the sample) and that financial planning in particular might be less important at this later stage of the transition. Be that as it may, this study provides support for Lesson 3 in demonstrating that gaining a new social identity, in this case as a retiree, has a positive impact on adjustment to this life transition.

The above findings suggest that there is considerable value in developing a positive retiree identity when people are planning for their retirement. But there are two further issues relevant to SIMIC that this recommendation raises. First, the model's social identity gain pathway highlights the importance of new group memberships (and the gain in social identities this often entails) in general. Thus, while the retiree identity is important, SIMIC suggests that it is only one of many new social groups and identities that people may acquire postretirement, and that it is their combination that best predicts the extent to which a person adjusts to life change. Accordingly, as well as identifying with retirees, it is just as important to invest in efforts to join other new groups when retiring from a life of work.

Second, the retiree identity is one that might not be viewed positively by all. This might be particularly true for those whose work has been central to their identity. As the Catalonian cellist Pablo Casals observed, for these people, it may be the case that "to retire is to die." There are also other contexts in which the retiree identity might have negative connotations—for example, where retirement is imposed or involuntary (e.g., through redundancy or ill-health), as is the case for about 20–30% of retirees (Isaksson & Johansson, 2000), or when it signifies becoming older and promotes negative attitudes toward aging (see Teuscher, 2010). All these examples are likely to affect a person's willingness to identify as a retiree and hence the extent to which this particular identity can function as a useful and positive psychological resource. In this context, pursuing other new group memberships and identities may offer a more effective path to a positive sense of self in retirement. The lesson here, then, is that joining new groups that contribute positively to people's lives is a key component of adjustment.

Lesson 4: Social group compatibility generally enhances retirement adjustment

As highlighted in our overview of SIMIC, an important caveat to Lessons 2 and 3 relates to the fact that for multiple groups (whether preexisting or new) to provide a basis for adjustment, these need to be not only positive but also compatible (Iyer et al., 2009). Such compatibility might be reflected, for example, in common or shared interests, activities, motivations, or goals between a person's groups. Compatibility is important because relationships will typically be strained if groups—and the demands with which they are associated—are at odds with each other and create conflict (Brook et al., 2008; Jetten et al., 2014).

Issues of compatibility arise in the context of life transitions because previously established group memberships are likely to influence whether or not people are open to taking on a new group membership. They also arise after the transition because there is potential for this to create conflict between groups that have become part of a person's social identity network. When notions of compatibility were first investigated, the focus was on understanding how existing identity networks influenced people's adoption of new groups and identities in the context of life change. Here, it was argued that if a new group membership was incompatible with a person's established social network (e.g., with their family and friendship networks), this would create conflict that would impact negatively on well-being and increase resistance to joining the new group and adopting the new social identity (Iyer et al., 2009). An example of such conflict is seen in the social group networks of people recovering from addiction. Here, a particular challenge for many people who enter treatment is to establish a new identity as a person in recovery, which is likely to be at odds with an existing social identity network consisting primarily of group memberships that encourage substance misuse. In this context, SIMIC suggests that because the old established networks are incompatible with groups supporting abstinence, this undermines development of a new recovery identity that is typically important for positive health outcomes. Indeed, consistent with this proposition, the addiction literature shows that identity conflict of this form affects both a person's well-being and their capacity for recovery (e.g., Best et al., 2016).

Although there is, to our knowledge, no evidence in the retirement literature that supports (or even tests) this notion, relevant data are provided in several studies focusing on university student populations. Research conducted by Ethier and Deaux (1994) investigated how students from a Hispanic background negotiated their ethnic identity when transitioning to a predominantly White college. The researchers found that those students who were more strongly identified with their ethnic culture sought to embed this identity in the new context by joining Hispanic groups on campus. This process of remooring—a change in the way that people supported their Hispanic identity (from living it out with family to living it out with others on campus)—had positive effects on student well-being in the transition. However, students with a weaker Hispanic identity felt more conflicted about their ethnicity, and reported a reduction in their strength of ethnic identification and in well-being as a result. Consistent with Lesson 4, this suggests that when a person experiences identity incompatibility and cannot negotiate it successfully, this is likely to compromise their well-being.

Research by Iyer et al. (2009) has also examined this issue by considering the influence of multiple groups and identities on students' transition from high school to university. The researchers were interested in the extent to which conflict between a student's existing social group network and their new university student identity would affect their well-being. Students were assessed 1 month before starting university and then 2 months into their studies. Despite this transition being both positive and planned, it resulted in a general reduction in well-being. However, this effect was attenuated among those students (i) who belonged to more groups before the transition, (ii) who identified strongly as a student during the transition, and (iii) who, most importantly for our present purposes, perceived there to be greater compatibility between their prior (i.e., preuniversity) and new (i.e., postuniversity entry) social groups and identities.

While these data clearly relate to transitions that typically occur much earlier in life and in other contexts, similar identity dynamics are likely to have a bearing upon a person's ability to adjust successfully to life after work. Adoption of a new retiree identity, for example, may be incompatible with a person's existing identity network if their preretirement network was dominated by work or professional groups. This might occur in contexts where a person is closely tied to their colleagues at work or to their professional identity because of the positive contribution these make to their self-esteem and sense of self-worth. In this situation, conflict can clearly arise between preexisting and new social identities. It is also conceivable that incompatibility between postretirement identity networks can adversely affect adjustment for bridge workers. For example, this might be the case where a person acquires a new sense of social identity from bridge employment, but this conflicts with other postretirement identities related to leisure pursuits that they embrace (or want to embrace). In this regard, a question that has yet to be answered is whether postretirement employment of this form might sometimes conflict with development of new identities, such as that of retiree. The more hours that a person works, for instance, the more they may self-define as employed in ways that are incompatible with their sense that they are retired (as suggested by Desmette & Gaillard, 2008). This might leave them in a state of limbo, in which they see themselves neither as formally employed nor as retired. Clearly too, this state of identity conflict can also have an adverse impact on adjustment that needs to be managed. It is to the issue of supporting people to practically negotiate and manage these issues of group compatibility, together with those of group maintenance and gain, which we turn to next.

A Program to Manage Social Identity Change: GROUPS 4 HEALTH

In light of all the evidence demonstrating the integral role that social identity processes play in health, well-being, longevity, and adjustment to retirement, one might reasonably ask why these have yet to gain traction in policy and practice. Although difficult to identify a single cause, several factors are likely to be at play. Notable among these is the underspecification of social process in existing models that aim to account for adjustment outcomes. While there is growing recognition of the role of social factors, few models articulate *which* social processes are key and in *what* contexts, and even fewer specify *how* they come to influence outcomes in positive or negative ways. Given this, it is perhaps unsurprising that people tend to seriously underestimate the contribution of social factors to health. The fact that they do was recently demonstrated in a study conducted by S.A. Haslam et al. (2017), which asked members of the public to rank the importance of 11 factors in predicting mortality. The 11 factors were taken from a meta-analysis by Holt-Lunstad et al. (2010), which compared the effects that social support and social integration had on mortality with that of established physical and health risks. While meta-analytic evidence shows that social factors are, in fact, the best predictors of mortality risk, respondents believed that they were the weakest. This suggests that for SIMIC's lessons about retirement to be taken on board, there is a need first to raise awareness of the importance of social group processes for health more generally. This is fundamental to any attempt to encourage people to engage in social planning.

Once people are receptive to the idea that social group life has a central role in supporting health and well-being in retirement, then this is the point to offer people

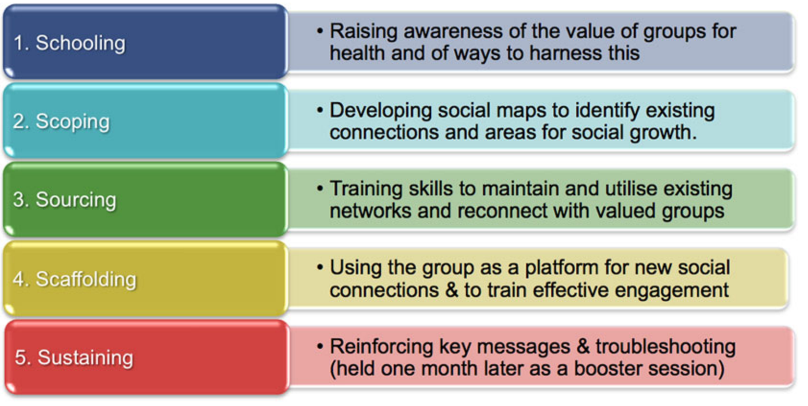

Fig. 2. Summary of the Groups 4 Health program content (from Haslam et al., 2018b).

the means to engage in such planning. One way to do this is through Groups 4 Health (G4H)—a recently developed program that translates the lessons of SIMIC into practice. Supporting Lewin's (1952) assertion that "there is nothing so practical as a good theory" (p. 169), SIMIC provides very clear direction about what to target in social planning in order to optimize life in retirement. In this, the key message is that successful adjustment to retirement is, to a large extent, a question of effective social identity management.

G4H supports people in this endeavor through a structured program of activities and tasks that aim to build people's group-based social identities. Specifically, G4H (i) raises awareness among participants of the way in which groups function as resources, (ii) helps participants build new and maintain valued existing group memberships that are compatible in the context of life change, and (iii) works with participants to sustain these group memberships so that they continue to function as resources over time. Essentially, the program gives people the knowledge and skills that they need to engage in effective social identity management, and to do so in ways that protect their health and well-being. This is particularly important when people are feeling vulnerable or challenged, as is common in periods of life change. For not only are these the times when our groups are at greatest risk, but they are also the times when we need to draw on them most.

The G4H program comprises five modules that are summarized in Figure 2. The first module, *Schooling*, is psychoeducational. Its purpose is to raise awareness of the contribution that groups make to health and of the value of being connected to multiple groups, whilst engaging people in activities and discussion about which groups are part of their lives. An important component of this is to help people differentiate those groups that are helpful from those that are harmful to health and well-being and to highlight that the former are tangible resources that people can draw on in times of need.

Module 2, *Scoping*, focuses on the groups that people currently belong to in ways that raise awareness of their existing group memberships and the resources that they can provide. Doing so is difficult without a concrete illustration of the groups in people's lives, how a person relates to those groups, and how the groups relate to each other. This is addressed through use of a Social Identity Mapping (SIM) tool that allows people to construct a visual representation of the social groups in their lives (Cruwys et al., 2016). Examples are provided in Figure 3 where two versions of social identity maps (paper-and-pencil and electronically generated) are shown. As these figures illustrate, the activity captures the number of groups, their importance as indicated through group size (where larger squares represent those groups that are more important for a person), and people's experiences with those groups as indexed through various ratings (e.g., how positive a person feels about their groups and how much support they provide). The maps also provide an indication of the compatibility and interrelationships between groups that is reflected in the positioning of groups and the lines between them (with similar groups being placed close together, and straight/green lines indicating greater compatibility than jagged/red lines, respectively in Figures 3A and 3B). This process not only helps people gain a better understanding of the groups in their lives, but also provides a snapshot of a person's social group world. The tool assesses people's social worlds at a given time point, but can be used to capture group memberships before and after life change to help illustrate the dynamic nature of those groups in the context of life transitions such as retirement.

Modules 3 and 4 of the G4H program use the outcome of the mapping process to work on SIMIC's social identity continuity and gain pathways, respectively. First, *Sourcing* helps people to identify ways to strengthen existing group ties when they are a positive resource that contributes to their sense of belonging, self-esteem, control, and confidence. This involves activities that help them (i) to understand and overcome barriers to getting the most out of their existing groups, (ii) to identify and manage group incompatibility, (iii) to be open to receiving support as well as give support to their groups, and (iv) to reconnect with those valued groups that might have recently dropped out of their social identity network due to recent life changes.

Following this, *Scaffolding* focuses on strategies that help people to join new groups, particularly ones that are more likely to become self-defining and thereby an integral part of their social identity network. Identifying new groups to join can be challenging, especially for those people who might be solely identified with a particular work or professional group. This issue is addressed directly in the module by engaging people in the task of creating a "self-aspect pie." Here, people are asked first to identify the roles, activities, and traits that are important to them. For each of these, people then indicate their degree of importance and enter

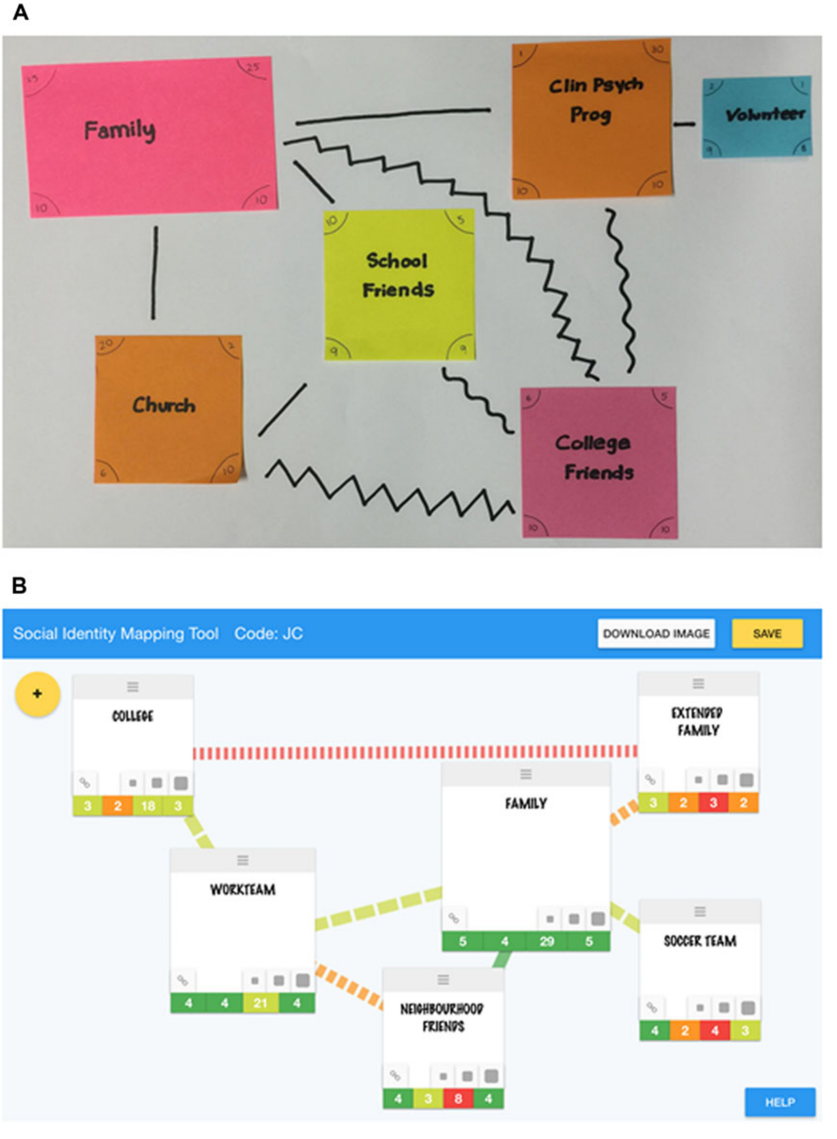

Fig. 3. Examples of social identity maps (A) paper and pencil and (B) electronic (from Haslam et al., 2018b).

them into a circle or pie (which is intended to represent the person) so that the more important self-aspects take up a larger chunk of their pie. Finally, people are asked to consider how these aspects of self are lived out in their existing social groups.

Some may be clearly linked to a person's existing group memberships, while others may have no group outlet at all and thus can provide a focus for prospective social identity gain. A person's professional self as a teacher, for example, is likely to be lived out through work teams before they retire, but may have no group outlet after retirement. So, if this professional identity remains important to a person after retirement, then pursing volunteer work that engages the person in teaching may provide an opportunity to keep that identity alive. In doing so, the person may achieve both social identity continuity (by maintaining their teacher identity) and gain (by acquiring a new group and identity as volunteer). This exercise is used as a platform to another key activity in the module that involves participants in developing social plans that seek to strengthen existing ties or develop new ones.

Between the fourth and fifth modules, people taking part in the program trial their social plans over a period of a month or longer, before returning for the final module of *Sustaining*. This focuses on troubleshooting the challenges that people may have encountered when putting their social plans into action and revisiting people's social identity maps in the context of the social identity work they have done in the course of the program.

Thus far, the program has been trialed with people experiencing social isolation in association with mental health challenges and psychological distress (Haslam et al., 2018a; Haslam, Cruwys, Haslam, Dingle, & Chang, 2016). Findings from this research show that the program increases people's sense of connectedness with multiple groups and that this is associated with a reduction in mental health and loneliness symptoms ($d_{depression} = 0.29$, $d_{loneliness} = 0.86$ in Haslam et al., 2016; and $d_{depression} = 0.59$, $d_{loneliness} = 0.97$ in Haslam et al., 2018a). There is also evidence that identity compatibility is a key mechanism of change in reducing depression and increasing life satisfaction following G4H in ways highlighted by Lesson 4 (Cruwys et al., 2016; Study 3). In other words, one reason why G4H improves mental health and well-being is that it enhances the perceived compatibility of the groups that define participants' sense of self.

Several adaptations of G4H are currently being trialed. One addresses the challenges of students adjusting to life in university (GROUPS 4 EDUCATION); another helps people to transition back home after a period of intensive hospital rehabilitation (GROUPS 4 HEALTH: GOING HOME). Importantly, in the present context, a third adaptation helps people to adjust to a life after work (G4H: RETIREMENT). Clearly, the retirement transition represents another important unique life change and in much the same way that people engage in financial planning to prepare for retirement. G4H: RETIREMENT has the potential to help prospective retirees better prepare for and manage their social group resources in ways that facilitate their adjustment and protect their health and well-being when transitioning to life after work. This new program has been developed on the basis of growing evidence supporting SIMIC's predictions in the transition to retirement and it is currently being piloted with people in the lead up to their retirement. The program involves

Table 1. Lessons and Recommendations for Retirement Derived from the Social Identity Model of Identity Change

Lesson	Recommendations
1. Multiple-valued social group memberships provide people with a range of psychological resources that support retirement adjustment	Review the groups you are part of in the lead up to retirement. The transition to retirement is likely to be facilitated if you belong to more positive and important groups that you value.
2. Maintaining existing valued social group memberships generally supports retirement adjustment	Where possible, try to hold on to positive group memberships as you transition to retirement.
3. Developing new valued social group memberships generally enhances retirement adjustment	Join new groups that help you feel positive about yourself, to make up for any loss of meaningful groups in the process of retiring.
4. Social group compatibility generally enhances retirement adjustment	When joining a new group consider how compatible it will be with those you already belong to and with others you might join. Where necessary, identify ways to negotiate any incompatibility between groups.

delivery of an online one-session program that incorporates key activities from the five modules of G4H relevant to the retirement transition. This not only increases program reach, but it also offers greater flexibility for people to engage with it at a time that works best for them.

For those who are already in good health and well connected socially, a full program of the form that G4H: RETIREMENT offers, may not be necessary. In this context, raising awareness of the nature and importance of social group processes, particularly in light of the evidence that their value is seriously underestimated, may be all that is required. This might simply involve alerting people to the tangible recommendations that SIMIC's lessons offer as summarized in Table 1. People could also be encouraged to engage in social identity mapping in planning and transitioning to retirement to help visualize their groups, the interrelationships between them, and ways of drawing on them for support.

However, for those who are more vulnerable, less well connected, or who find it hard to "let go" of work-based identities (despite wanting to), the full G4H: RETIREMENT program may be more useful in helping them transition into retirement. Ideally, this program would be delivered in the lead-up to retirement in much the same way that people are typically encouraged to engage in financial planning. However, in light of the fact that retirement is a process that takes place over time, it is also likely to be useful to engage in such social identity planning in the early postretirement period. Evidence speaking to the benefits of G4H: RETIREMENT is pending, but the fact that it is derived from established theory with a strong evidence-based auger well for its capacity to produce tangible benefits for retirees.

Conclusion

Aside from various specific implications that can be derived from social identity theorizing, if there is one overarching message that the foregoing review highlights for policy it is this: that when it comes to preparing for, and going through, retirement, it is as important to attend to the state of social group relationships as it is to address financial matters. As things stand, the policies and practices of relevant stakeholder groups (e.g., human resource management departments, pension, and superannuation funds) are focused firmly on the latter. To date these stakeholders have had minimal regard for the importance of social (identity) planning, far less for a well-evidenced set of recommendations and products that might deliver this. The work we have presented above suggests that this is a gap in service provision that needs to be filled as a matter of priority.

The four specific lessons derived from SIMIC serve to extend our understanding of how people manage the retirement transition by specifying more clearly the particular social group and identity processes that underpin successful adjustment. These highlight the fact that multiple group memberships are important psychological resources for adjustment to retirement (Lesson 1) because they increase the likelihood of maintaining existing groups to support a sense of self-continuity during life change (Lesson 2) and provide a platform from which to extend one's networks and join new meaningful groups (Lesson 3), providing these groups and the identities that they inform are compatible (Lesson 4).

As we have seen, evidence that supports these lessons is growing and speaks to the utility and power of SIMIC as an integrative framework in this area. Importantly, SIMIC also provides a clear roadmap for the development of social resources in the retirement transition. It explains not only why it is important to invest in the development and strengthening of social identity capital, but it also provides the basis for a theoretically derived intervention—GROUPS 4 HEALTH and its adaptation in G4H: RETIREMENT—that does precisely this with a view to providing people with practical support as they transition into retirement. Having demonstrated the importance of the social group processes specified in SIMIC for retirement adjustment, this program holds promise as an intervention that can help to unlock the power of social identities to support health and well-being during this transition. While the value of such an intervention awaits demonstration in the retirement context, it is a program that stands on solid foundations in being informed by a wealth of theory and evidence. Our hope is that as this body of work develops, it will help practitioners, policy makers, and retirees themselves better harness the power of group-based social resources during the process of adjusting to life after work.

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