

## REVIEW ARTICLE

# The Concept of Occupational Balance Following Retirement: a Scoping Review

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## ABSTRACT

Occupational balance is vital to health and well-being in reducing the stereotypical negative impacts of retirement. A scoping review was done in seven databases (CINAHL, MEDLINE, Informit, Scopus, EBSCO Open Dissertations, Cochrane Library and PsycINFO) that included English, full-text published article, review, thesis or concept analysis that used “work-life balance” or “occupational balance” or “life balance” and “occupational therapy” or “retirement” in the abstract, keywords or title, which provide relevant highlight on occupational balance in occupational therapy or following retirement, published between 2000 and 2020. Fourteen articles met the inclusion criteria establishing five themes: occupational balance as an evolving concept; defining occupational balance; measures of occupational balance; perspectives in occupational balance; the paradigm of balance following retirement. This scoping review highlights the need to explain occupational balance complex nature emphasised the gap for a specific occupational balance concept and its impacts on retirees.

**Keywords:** : Work-life balance, Retirement, Occupational therapy, Scoping review

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as non-communicable diseases (NCDs) are common among retired persons, including obesity, diabetes, cardiovascular disease, chronic obstructive respiratory disease, and mental health illness; these are attributed to modern lifestyles and the imbalance of activity choices by individuals (15,16).

## INTRODUCTION

Retirement gives a major shift in the context of an individual's life that has typically defined as a period in which a person physically and mentally withdraws from the workforce at a certain age (1). Retirement affects individuals' cognition, loneliness, personality, and time use (2-6), but may promote healthy behaviour and a temporary increase in physical activity (7-10). An individual's cognitive functions are positively affected when retiring from a physically demanding job when including occupational experiences as the moderator (11).

Following retirement, individuals have limited access or deprived of occupational activities, affecting their physical and psychological well-being (12), consequently increasing healthcare utilisation (13). Furthermore, the lack of life's purpose is attributed to the reduced engagement in activities and meaningful social relationship (14). Health-related conditions such

Retirement preparation is essential to reduce these stereotypical impacts (17). American Occupational Therapy Association (18 p. 34) depicted retirement preparation and adjustment to “determine aptitudes, develop interests and skills, select vocational pursuits, secure required resources, and adjust lifestyle in the absence of worker role”. Pre-retirement planning is emphasised for better-perceived health and well-being (19) associated with life balance (20).

Occupation refers to daily life activities to occupy time and enhance life purposes that people do individually, with families and communities (18). Occupational activities include self-care, instrumental activities, play, leisure, sleep and rest, work, health management, education and social participation (18). Occupational balance is one of the common concerns in occupational science. Occupational balance can be characterised as a sense of having sufficient occupations and the right diversity between occupations (21). In short,

occupational balance is the balance between activities that people do in everyday life. It is an important determinant of health, well-being and satisfaction (12). Numerous studies have been done to identify the association of occupational balance with health and well-being in the general population (20-25).

Occupational balance also has a significant association with improved sleep quality (27) and was used to overcome sleep issues (28). Occupational balance can also predict stress-related disorders (29). Recent preliminary biological evidence suggested that occupational balance was related to functioning, cytokines and C-reactive protein (30). Thus, achieving occupational balance may lead to active ageing, increased life satisfaction and quality of life (26,30-32).

From an occupational therapy perspective, a fundamental belief is that a healthy lifestyle reflects the balance between productive, unproductive and restorative activities, promoting daily life function (21). Maintaining a balance of these components is the foundation for a healthy lifestyle, but this balance does not necessarily have to be related to equal time spent in occupations. Anecdotal, recent studies also reported that occupational balance is associated with a few constructs/concepts such as satisfaction with activity, meaningful activity, social functioning, type of activities and subjective well-being (33-35). However, no empirical study has been carried out to explain the concepts and constructs of occupational balance after retirement using a recent modelling technique such as Structural Equation Modelling or Path Analysis. Hence, the relationship between the latent and observed variables of occupational balance was underexplored.

Matuska and Christiansen (37) proposed the Model of Lifestyle Balance to conceptualise life balance based on human occupations' daily pattern in meeting their essential needs. The model consists of five primary dimensions: health and physical protection; fulfilling and self-affirming relationships with others; feeling involved, committed, challenged and capable; creating meaningful identity and organising time; and resources to achieve significant personal goals and personal renewal (37). This model had been studied in working adult and women with multiple sclerosis (38,39). The model optimally represented life balance in working adult and women with multiple sclerosis except for financial security that is not included in the model (38,39).

An alternative theoretical framework of life balance explored among older people was constructed using two conceptual models: The Life Balance Triangle and Multidimensional Life Balance (MLB) (20). Social structure and expectation were found as the most influential factor of life balance with a significant gap among different gender (20). Besides, self-assessed health

was associated with MLB. The theoretical framework explored warrant further testing considering older people's heterogeneous nature and multidimensional variables involved in occupational balance.

There are similarities and variations in the previously proposed model when tested with different populations. Given the importance of occupational balance, it is essential to explore occupational balance following retirement to achieve healthy and successful ageing. However, the depth and coverage are scarce on the occupational balance among retirees. Hence, a scoping review on occupational balance following retirement was done to identify and analyse the knowledge gaps.

## MATERIALS AND METHODS

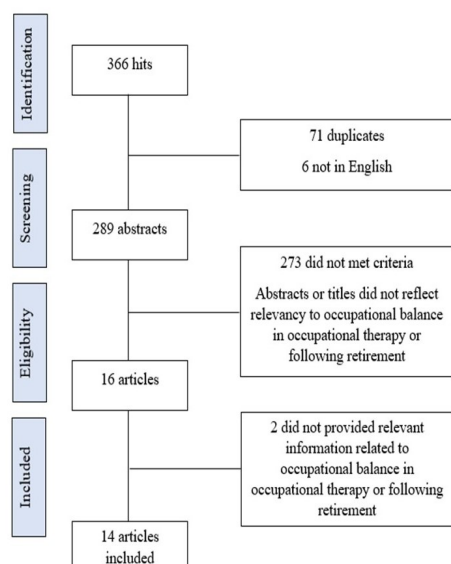
A scoping review was done in accord with the guideline by Arksey and O'Malley (40). Scoping review is suitable for identifying and analysing knowledge gaps and exploring the concepts or constructs related to occupational balance following retirement (41). There are five stages to conduct a scoping review, including "identifying the research questions, identifying relevant studies, selection of studies, charting the data and finally collating, summarising and reporting the results" (40 p. 8).

### Identifying the Research Questions

Occupational balance is one of the focuses of occupational therapy's practise. Occupational therapist emphasised balance across populations, and this includes retired persons. Concurrent with the increasing life expectancy worldwide, including in Malaysia, incorporating occupational balance to the retired persons may enhance their physical and mental health. Hence, what is the concept of occupational balance in occupational therapy and what is the knowledge gaps on occupational balance following retirement?

### Identifying Relevant Studies

Scoping the field required holistic and extensive identification of primary studies to answer this scoping study's research questions (40). Appropriate databases and keywords were discussed and finalised between the first and last author. The CINAHL, MEDLINE (Ovid), Informit, Scopus, EBSCO Open Dissertations, Cochrane Library and PsycINFO (ProQuest) databases were searched from 13<sup>th</sup> to 19<sup>th</sup> of September 2020 using the terms "occupational balance" or "work-life balance" or "life balance" and "occupational therapy" or "retirement". Potential articles were also identified from the reference in the articles read. The process was elucidated in Fig.1. No page limit was set for every search due to limited search results following the screening and eligibility process. Articles found from cross-reference and hand searching were similar to the studies identified in previous databases. Duplicates were removed manually by the first author.



**Fig 1: The search processes**

### Selection of Studies

The inclusion criteria in this scoping review were: (i) published between 2000 and 2020; (ii) full-text published articles, thesis, review, or concept analysis published in English; and (iii) use “work-life balance” or “occupational balance” or “life balance” and “occupational therapy” or “retirement” in the abstract, keywords or title, which provide relevant highlight on occupational balance in either occupational therapy or retired persons. Articles that elaborate besides occupational balance concept in occupational therapy or following retirement were excluded from this study, including articles with specific populations besides retirees and articles related to occupational balance instrument development, translation, or validation. Articles were identified, screened, and reviewed by the first author and the last author to achieve consensus with the articles included.

### Charting the Data

The articles were summarised by author, year, design, type of publication, sample size, country, age, gender, summary, and contribution to occupational balance in Table I.

### Collating, Summarising and Reporting the Results

The scoping results were summarised, and themes were established using thematic analysis. The first and the last author analysed the eligible articles to identify the context that frequently appears prior to the theme development.

## RESULTS

Fourteen articles met the inclusion criteria and labelled with an asterisk in the reference section. The included articles are presented in Table I. The findings were presented based on knowledge contribution related

to occupational balance in occupational therapy or retirement populations. There were five qualitative studies, two quantitative studies, five concept/content analysis, and two scoping reviews. The previous scoping reviews explored occupational balance from the interpersonal perspective and current occupational balance scope and its’ relationship with health and well-being. The participants ranged from 8 to 9228 participants. In the paper reviews, 9 to 43 articles were analysed. Three of the studies were conducted in Europe, while three other studies were conducted in Asia. Ten articles were mainly related to occupational therapy’s occupational balance concept, while four articles were related to the occupational balance following retirement.

Five themes were derived from the articles reviewed in this scoping study, with four themes related to occupational balance in occupational therapy, while one theme related to occupational balance following retirement.

### Theme 1: Occupational Balance as an Evolving Concept (n=5)

Concepts of occupational balance in occupational therapy were explored in various ways (12,21,26,42,43). The occupational balance concept was elucidated as an evolving concept that was complex and varied across the literature (12,21,26,42). The occupational balance was mostly explained with time (temporal aspect) (42). Similarly, Wagman, Hekansson and Bjurklund (21) found that occupational balance can be conceptualised with the influence of time but with the appropriate amount and variation of occupations.

While occupational imbalance was conventionally the opposite of occupational balance, both concepts can co-exist, emphasising the need to consider both dimensions when identifying occupational balance (43). The occupational balance was not associated with life satisfaction, while occupational imbalance was negatively associated with life satisfaction (43). Besides, enjoyable occupations were emphasised in the conceptualisation of occupational balance in different populations (12). Alternative terms to occupational balance were explored to enhance the concept’s clarity, including “integrity, equilibrium, contentedness and harmony” (26).

### Theme 2: Defining Occupational Balance (n=3)

Occupational balance has been defined in various ways (42–44). Backman (42) presented definitions of occupational balance across populations and time. Defining occupational balance was challenging as the nature of occupations differed individually (42). Anaby et al. (43) found that balance and imbalance in occupations were different states; thus, the definition of occupational balance will be defined contrarily to the conventional definition that signifies both imbalance and balance in occupations are opposite of each other.

**Table I. The summary of the texts included in the scoping review**

Author, Year	Design/ Type of Publication	Participants (n; Country) / Articles (n)	Age (years), Gender	Summary	Contribution to Occupational Balance (Theme)
(Jonsson et al., 2000)	Qualitative	29; Sweden	65-66, 15 (male), 14 (female)	Retirees experienced new temporal structure, changes in meaning of occupations and shift of pattern of occupational imbalance.	5
(Backman, 2004)	Concept Analysis	-	-	Occupational balance was conceptualised differently with different definitions and measures and was associated with well-being.	1,2,3
(Pentland & McColl, 2008)	Concept Analysis	-	-	Life balance was proposed in the view of occupational integrity as it directly linked with well-being and values, instead of life balance.	4
(Anaby et al., 2010)	Quantitative	122, 24; Israel	26-60, 53 (male), 69 (female) & 12 (male), 12 (female)	Occupational balance was not associated with well-being while occupational imbalance was associated with well-being.	1,2,3
(Jonsson, 2011)	Qualitative	32; Sweden	63, 16 (male), 16 (female)	Retirees experienced paradox of freedom as their occupational demand shifted.	5
(Pettican & Prior, 2011)	Qualitative	8; England	48-64, 4 (male), 4 (female)	Retirees perceived retirement as shift in purpose, doing (including occupational balance) and well-being.	5
	Concept analysis	43	-	Occupational balance was defined as the sense of right amount and variations of occupations.	1
(Dör et al., 2015)	Mixed-method, Content Analysis	47	-	Occupational balance was defined and measured differently with variation in occupational patterns and areas.	2,3
(Wagman et al., 2015)	Scoping Review	22	-	Occupational balance concept was mostly centralised in western societies. Occupational balance is important to health and well-being hence emphasised the importance in determining occupational balance level and how to enhance it.	1,4
(Yazdani et al., 2016)	Qualitative	10; Iran	NS, 5 (male), 5 (female)	Occupational balance concept was perceived differently including the integrity in being, balance between action, contentment, and harmony.	1
(Eklund et al., 2017)	Comparative Concept Analysis	51	-	Patterns of daily occupations was associated with occupational balance, but both were found to be conceptually different from each other and did not affect one another.	4
(Yazdani et al., 2018)	Qualitative	14	28-55, 2 (male), 12 (female)	Occupational balance should be viewed in both objective and subjective experience.	4
(Cha, 2019)	Quantitative	9228; South Korea	>65, -	There are variations of time use between elderly with and without occupational balance including in activities of daily living, instrumental activities of daily living, rest, sleep, leisure, work, play, and social participation except education.	3,5
(Wagman & Hekansson, 2019)	Scoping Review	9	-	Occupational balance from interpersonal perspective was mainly relative to one's partners or families. In mothers, occupational balance was affected positively by support and negatively by fulfilling other's needs. Occupational balance related to workplace attitudes and organizations explored in parents with young children.	4

Theme: 1- Occupational Balance as an Evolving Concept, 2- Defining Occupational Balance, 3- Measures of Occupational Balance, 4- Perspectives in Occupational Balance, 5- The Paradigm of Balance Following Retirement

Dür et al. (44) systematically explored the definitions of occupational and life balance found 19 categories of definitions. "Balance of various occupational patterns and areas" was the most frequent definitions (44 p. 4).

### **Theme 3: Measures of Occupational Balance (n=4)**

Occupational balance has been measured differently across the literature (42–45). Reviews were done on the instrument used to measure occupational balance (42,44). The occupational balance was mostly measured concerning the balance between activities participated and the patterns of activities (44). Other occupational balance measures include the measure of time use, occupational engagement and goal-directed activities (42,44). Cross-Impact Measure (CIM) and Inter-goal Relations Questionnaire (IRQ) were used to measure the level of occupational balance through the impact of each occupation on each other (43). The occupational balance was also measured through a national survey by comparing the number of activities participated with the daily activities' average participation (45).

### **Theme 4: Perspectives in Occupational Balance (n=5)**

Occupational balance has been explained from different perspectives (12,35,46–48). The occupational balance perspective was emphasised through occupational integrity, where individuals explored their lives according to values, strength, and meaning (47). Personal values were emphasised in understanding occupational balance, and it was necessary to consider both objective and subjective experiences (48). Wagman and Hekansson (46) reported the importance of occupational balance from the interpersonal perspectives, especially on their causal relationship with other people.

Eklund et al. (35) found that occupational balance differed from patterns of daily occupations. Patterns of daily occupations were more objective, while the occupational balance was more subjective as it intertwined with personal preference and environment (35). Wagman, Hekansson and Jonsson (12) found that literature on occupational balance mostly centralised on western societies. Research in occupational balance for the retired population, young people and immigrants were also scarce and received less attention (12).

### **Theme 5: The Paradigm of Balance Following Retirement (n=4)**

Jonsson, Borell and Sadlo (49) explored retirement as an occupational transition. Before retirement, the common imbalance pattern in daily activities was dominated by work. However, retired person transitioned from this imbalance to another imbalance pattern in daily activities where undemanding and unproductive activities dominated daily activities. Retired persons experienced a new temporal structure with a slower rhythm of daily life and a shift in the meaning of their daily activities (49,50). The absence of demands and expectations in daily activities is stressful and impede the

retired persons' inner motivation to achieve a balance in daily activities (51).

Furthermore, the retired persons' growth and well-being depend on their ability to acquire a balance between engagement and deprivation in activities (51). The work to retirement transition was explored from an occupational perspective with occupational balance as one of the focus areas found that the retired persons are concerned about their ability to achieve a balance and a dynamic state that needed conscious control. Additionally, the time use between a group of people with and without occupational balance found variations of activities involved (45). Several factors were found to affect life satisfaction in the groups with occupational balance including age, gender, level of education, caring need, income and living environment.

## **DISCUSSION**

This scoping study aimed to identify occupational balance concepts in occupational therapy and identify and analyse occupational balance knowledge gaps following retirement. The results depicted a scarcity of study in this subject, especially in predicting occupational balance following retirement. Occupational balance is important for health and well-being (12). Hence, with retirement accompanied by many negative impacts on health and well-being (2-6), it is essential to enhance the retired persons' occupational balance to reduce retirement's stereotypical effects.

Occupations are the pillars of occupational science. Occupational balance is one of the important concepts that warrant further exploration despite numerous literature exploring the concept itself. The complexity of occupational balance leads to the divergence of concept; hence there is still no standardised and mutual understanding across the literature. Despite that, the generally accepted concept of occupational balance is relative to time use (12,21,26,42,43). The paradox of balance and imbalance in occupations itself is unresolved, where both can co-exist (43). These conflicting and nonuniformity concepts of occupational balance emphasised the need to deepen the concept itself instead of exploring its breadth. Exploration of each segment of the populations might facilitate expanding the concept of occupational balance.

Defining occupational balance is proven challenging. However, the American Journal of Occupational Therapy (18 p. 12) summarised that occupational balance is "the proportion of time spent in productive, restorative and leisure occupations and are shaped by the context and cultural norms." This is similar to this study finding that occupational balance is diverse across occupations and settings. These definitions are the basis of occupational science to explore the occupational balance further. Contrarily, a study found out that balance and imbalance

in occupations had no causal-effect relationship but can co-exist, hence challenging the current occupational balance definitions (43). The imbalance of occupations is not the effects of disproportionate time spent in each occupation, but the lack of meaning and values in each occupation leads to this conflict (34,42,46).

Occupational balance can be viewed from different perspectives. From the individual to the community level, the occupational balance view will differ depending on the individual or societal, personal values and meaning. Hence, a proposed occupational balance shall be viewed and explicitly expressed to the targeted individual or society (12,34,45-47).

Occupational balance can be measured by identifying the individual's time use and the impact of each occupation on other occupations. The impact can benefit or interfere with other occupations and identify the degree of their occupational balance (43). While all occupational balance measures were concurrent with the existing concept and definitions of occupational balance, a limited study examined and compare all measure's psychometric properties. Hence, there is a need to identify the best measure of occupational balance that is psychometrically adequate to be used in practice.

The occupational balance was studied in other population, including stroke, mental illness, rheumatoid arthritis and normal adults (24,25,51-53). These studies entailed that occupational balance is a complex multidimensional concept (54) where the disparity between the concept of occupational balance among the different population is prevalent. The scoping review emphasised that there was concern on occupational balance following retirement. As work is now absent from their life routine, their daily activities' balance is now distorted. Hence, they need to actively establish a balance that was affected following retirement in their occupational participation (52) through an optimal variation between activities (12). Besides the variation of activities, enjoyable, meaningful and demanding can positively influence occupational balance (54-58). Life satisfaction in the occupational balance group indicated that it could be predicted by age, gender, level of education, caring need, income and residence environment (45). However, this study did not explore the prediction of life satisfaction towards occupational balance. These can then support previous findings that life satisfaction is a relevant factor to achieve occupational balance (60,61).

This scoping review warrants future study on the impacts of occupational balance following retirement since it brought positive impacts on other populations. This review supplements the previous scoping review on occupational balance and its relation to health and well-being from an interpersonal perspective (12,46). While

the previous review approached occupational balance from a general perspective(12), this review focused to explore the occupational balance concept itself and established the basis for exploring occupational balance following retirement. Additionally, this review highlights limited exploration of occupational balance following retirement; whereas if available, conceptualised occupational balance differently. However, this review does not include all studies, especially articles that are not written in English or using other keywords other than occupational balance, work-life balance, and life balance. Hence, the generalisation of the result should be made carefully, and future studies are needed to verify the issues arising from this study.

## CONCLUSION

This scoping review identified a broad gap of knowledge about occupational balance in occupational therapy and the retired population. The divergence of concepts, definitions, and occupational balance perspectives emphasised the need for a specific approach to elucidate the complex nature of occupational balance following retirement. There are rooms for exploration, particularly defining the construct and concept of occupational balance following retirement using a mixed-methods approach since most studies explored it subjectively alone. Furthermore, occupational balance measures are nonuniform across literature; hence a gold standard measure of occupational balance is needed. Then, it can be utilised in the elderly's health and well-being maintenance post-retirement as the occupational balance is prevalently beneficial to health and well-being.

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